

Customer relationship management and purchase history

Automatically captures customer interactions and purchases to build comprehensive relationship profiles and trigger personalized follow-up communications. This workflow increases customer retention and enables targeted marketing based on purchase history and preferences.

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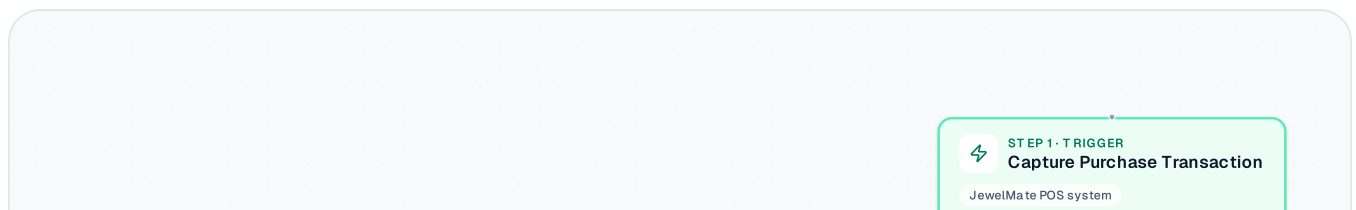


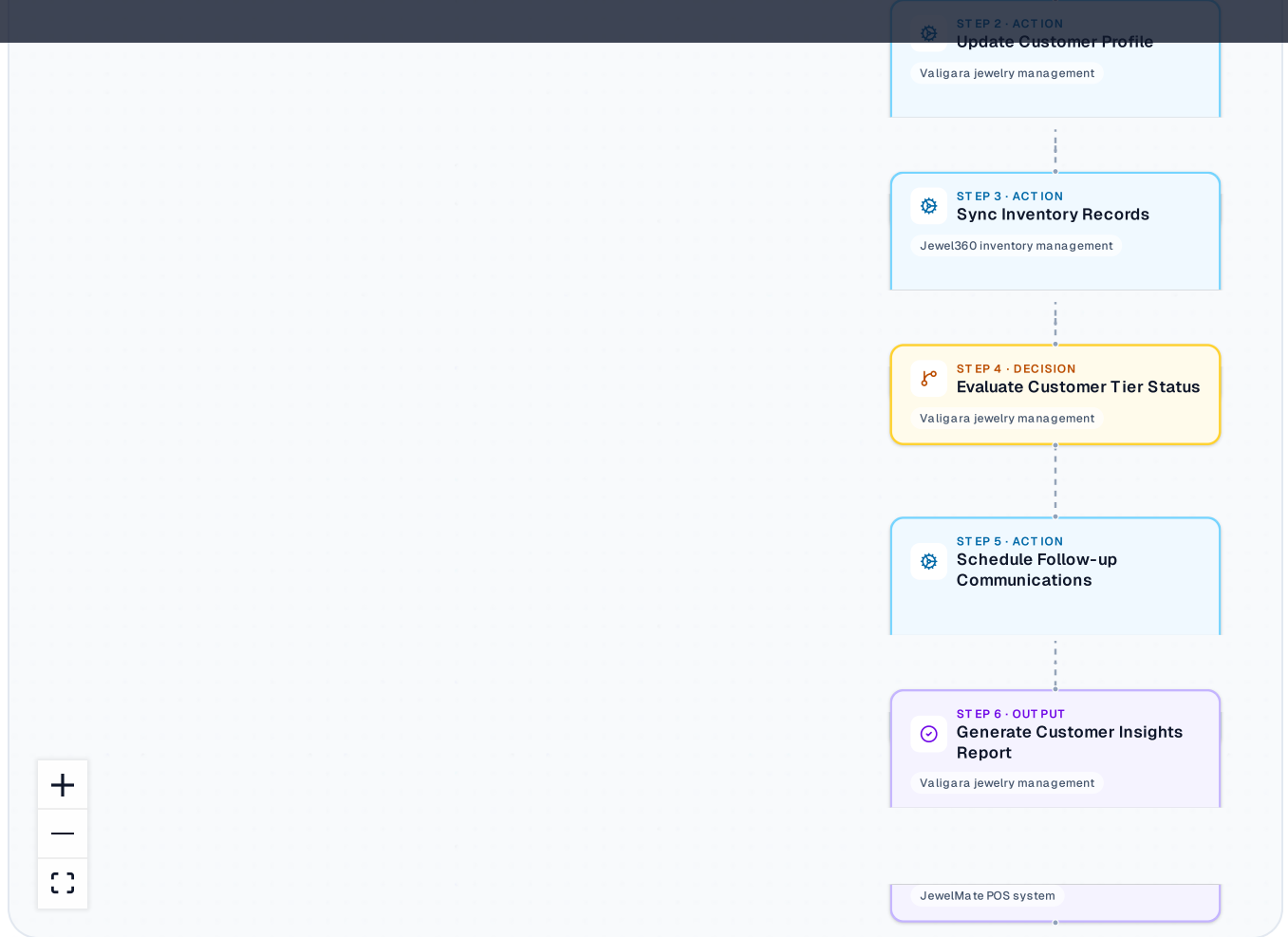
WORKFLOW TRIGGER

Customer completes a purchase transaction at the jewelry store

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Capture Purchase Transaction

Customer completes a jewelry purchase and transaction data is recorded in the point-of-sale system. System captures item details, pricing,

customer information, and payment method.

AI Business OS

JewelMate POS system

2

 ACTION

Update Customer Profile

Customer purchase history and preferences are automatically updated in the jewelry management system. Profile includes metal preferences, gemstone choices, price ranges, and special occasions.

Valigara jewelry management

JewelMate POS system

3

 ACTION

Sync Inventory Records

Purchased item is marked as sold in inventory management and product specifications are linked to customer profile. System tracks which specific pieces were purchased for warranty and service purposes.

Jewel360 inventory management

Valigara jewelry management

4

 DECISION

Evaluate Customer Tier Status

System analyzes total purchase history and spending patterns to determine if customer qualifies for VIP status or loyalty program upgrades. Decision branches based on lifetime value thresholds.

Valigara jewelry management

5

 ACTION

Schedule Follow-up Communications

Automated reminders are created for jewelry maintenance, warranty notifications, and personalized marketing based on purchase anniversary dates. Care instructions and certificates are prepared for delivery.

Valigara jewelry management

6

OUT PUT

Generate Customer Insights Report

Comprehensive customer relationship summary is created with purchase patterns, preferences, and recommended next actions for sales staff. Report includes suggested products and optimal contact timing.

Valigara jewelry management

JewelMate POS system



Outputs

- Updated customer profile with purchase history
- Automated follow-up communication schedule
- Customer tier status and loyalty benefits
- Personalized product recommendations report



Key Metrics

- Customer lifetime value increase

AI Business OS

Repeat purchase rate

- Average time between purchases
- Customer retention rate



Tools & Integrations

- JewelMate POS system
- Valigara jewelry management
- Jewel360 inventory management

Actionable AI implementation strategies for
AI Business OS ready to transform their
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