

Project: ERP for Dummy XYZ

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Below Client Company Logo

SANSKAR
TECHNOLAB

Proposal for Dummy XYZ

Submitted by

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CIN: U72900GJ2016PTC093437

Statement of Confidentiality

We, Sanskar Technolab Pvt. Ltd., Ahmedabad, Gujarat, India (referred to as **Sanskar Technolab** henceforth) now respond to the Request for Quotation of Dummy XYZ, Rajasthan (referred to as **Dummy XYZ** henceforth). This document is having confidential data hence, the Information contained in this proposal should not be shared with anyone except Sanskar Technolab and Dummy XYZ officials.

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1. Scope of Work

Below is the general scope of work for reference

Module	Form	Task Description
Gate Entry	Gate Entry	Gate Entry with locking system and approval flow
		Other Weight Specification
		- Stage Wise locking.
		- Link it with GRN
		- Link It with asset repair
		- Gate Pass Workspace
		- Dashboard
		- Outward Flow(Purchase return And Delivery Note)
		Gatepass for Employees and visitors,with approval workflow and role permissions,
		Create required notification
Purchase	Supplier Master	Setup Supplier Master
	Material Request	Configuration and Minor customize as per specific Need
	Request For Quotation (RFQ)	Establishing Email Configuration for Supplier Correspondence
	Supplier Quotation	Configuration and Minor customize as per specific Need
	Purchase Order	Minor customize as per specific Need Custom print format as per need
	Purchase Receipt (GRN)	Configuration and Customize to address specific requirements - Integrating Quality Control with GRN Entry Form
	Purchase Invoice	Configuration and Minor customize as per specific Need Custom print format as per need Debit Note Configuration
	Purchase Custom Reports	Purchase FMS Report and other reports as per requirements
	Notifications	Create required Notification

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	Dashboard	Custom Dashboard for buying
Q.C	Quality Inspection	Quality Inspection
		Sample Quality inspection
		Customize Quality Inspection to Map mesh QC as per requirements
		QC for sampling customization
		Sample Quality Inspection and approval flow with role permissions.
		QC Print format
Inventory	Pit Master (Warehouse Master)	Setup Warehouse Master as per requirement and map with stock account
	Item Master	Configuration and small customization as per specific need specific product define batch wise Inventory Manage based on Block No. and UOM = "Ton"
	Block Master (Batch Master)	Configuration and Minor customize as per specific Need Dispatch and Deffects wise status maintained in Block master
	Stock Entry	Configuration as per specific Need
	Custom reports	Custom reports as per requirements
Manufacturing	Production Plan	Daily Phada and Block Basis Planning Weekly planning sheet report creation Customize and Validation as per planning
	Production entry	Customize as per requirement Thekedar and Worker wise tracking Phada No. and Block No. Creation while submitting Production Entry
	Reports	Weekly Production Planning sheet for Phada and Block Production Wise Sheet
CRM	Lead -> Connect Sales Pipeline	Create, update and delete leads Assign them to different sales representatives Track their progress Update the status

	Enquiry -> Order Sales Pipeline	Create, update and delete Sales Order Track and Update the status Add sales taxes and charges Print Format
	Existing Customer -> Order Sales Pipeline	Create, update and delete Sales Order of existing customers Track and Update the status Add sales taxes and charges
	Order -> Dispatch Sales Pipeline	Create, update and delete Delivery Note from Sales Order Track and Update the status Add sales taxes and charges Print Format
	Sales Targets	Create, update and delete sales team hierarchical level wise Assign the targets of calls, meetings and sales Manage the work and commission
	Address and Contact Management	Manage the addresses and contacts of the leads, customers, and users
	Reports & Analytics	Range of reports and analytics tools, which allow to track key metrics, identify trends, and make data-driven decisions This includes sales reports, customer reports, and team performance reports
	Sales Pipeline Management	To visualize sales pipeline and track the progress of each deal
Sales	Customer	Setup Customer Master
	Sales Order	Configuration and Minor Customize Form as per specific need
	Sales Invoice	Configuration of E-way Bill and E-invoice taxation setup Custom print format as per need Credit Note Configuration
	Delivery Note	Configure and Minor Customization as per need Design Print Format As per Requirement
Accounting	Company	Multi-Company Setup Creating Company or companies as per requirements and add all details about company like Company name, Date of establishment, country, currency, Holiday

		list, Letter head and other relevant information.
	Chart of accounts	Add accounting ledger as per requirements
	Fiscal Year	Add fiscal years and setup default fiscal year setup
	Payment Terms	Understanding and setting payment terms as per requirements
	Opening Entry	Make Opening Entry
	Opening Invoice entry	Make Opening invoice Entry for sales and purchase
	Taxes And Charges template	Setup Taxes And Charges template as per country wise
	Item Tax Template	Setup Item Tax Template
	Bank	Adding Bank master like name, Swift code and etc details
	Bank Accounts	Adding Bank accounts for Company and Party both
	Address and contact master	Adding/Import Address and contact master
	Party-ledger map	Map ledgers with party
	Party-Bank account map	Map bank account with party.
	Multi-currency Setup	Setup Multicurrency flow and Exchange gain loss Calculation as per required
	MIgration	MIgrate the Data from Existing System depending on their current software
	Custom reports	Create Custom Reports as per requirements
Asset	Asset Request	Configuration and Minor Customize as per specific need Setup Opening Assets Design Procurement Print Format Configure Asset Location Wise Activity
	Asset Purchase	
	Asset Category	
	Asset Creation	
	Asset Depreciation	
	Asset Maintenances	
	Asset Value	

	Adjustment	
	Asset Capitalization	
	Asset Activity	
Machine Maintenance	Machine Maintenance	- Connection of Machine maintenance to GRN and PI for tracking of return
		- Connection of machine maintenance to outward gate entry for tracking
		- Add machine list to the items
		- Auto fetch data from multi-select list to Purchase receipt and update status for returned items to main machine maintenance doc.
	Machine Maintenance Schedule	- Created Machine Maintenance schedule and its workflow
	Machine Maintenance Log	- Created Machine maintenance log and its workflow
		- Notification for machine maintenance and via todo list and email
		- Created Custom workspace for machine maintenance
		- Machine Maintenance returned report
HR	Employee Setup	Customize Employee Master as per requirements
		Address Customization
		Check List for Joining (As per Employment)
		Print Format for ESI form
		Gratuity Form nomination
		- Create a print format for Gratuity Form nomination
	Create a print format for Form11Revised (Auto Transfer of EPF)	
Shift Management	Create Shifts	
	Create Shift Assignment	
	OD Format: - Create a new Form for 'Out Door Duty'	
Leave Management	Create Leave Type	
	Create Leave Policy	
	Create Leave Policy Assignment	
		Privilege Leave Allocation

		- Created Auto allocation process for privilege leave allocation
	Email Account Setup	Create Email Accounts
	Recruitment	Interview Rating Form - Customize Job Applicant and interview form as per requirements.
		- Create Print format 'APPOINTMENT LETTER FOR TRAINEE'
		- Create Print format 'APPOINTMENT LETTER FOR MANAGER'
		- Create Print format 'APPOINTMENT LETTER FOR OPERATOR'
		- Create Print format 'CONFIRMATION LETTER'
	Employee Life Cycle	Exit Interview: - Exit Interview form - Create a new doctype for 'Exit Interview Questionnaire'
		FULL & FINAL SETTLEMENT STATEMENT: - Customize Form
		Increment Letter: - Create a doctype of 'Employee Increment' - Create Print format 'Increment Letter'
		Training need Identification - Create a new doctype for 'Training need Identification'
Payroll	Salary Component	Create Salary components and apply formulas based on configuration in employee master
	Taxation	Income tax slabs Tax Exemption Catagory Tax Exemption Sub Catagory
	Bio-Metric Integration	Integration
	Salary Structure	Employee wise salary structures
	Salary Reports:	PF ECR Report
		Salary Register Report
		ESI Return
Integration	Social Media	Integration of the Social Media(Facebook and Instagram) for the receiving the enquiries

	Email	Integrate the Email Services for communicating with the clients through the system
	WhatsApp	Integrate WhatsApp Business platform for the smooth communication with the client through the system Send automated messages for follow-up, reminders and feedback
	Calling System	Integrate Cloud Telephony platform to call with the client through the system and keep track of recordings, call duration and performance
	Telegram	Integrate Telegram platform for the smooth communication with the client through the system
Admin	User Management	Manage a list of all the users who can access the system
	Role & Permission Management	Manage roles and permissions of the users hierarchical level wise

2. Development Methodology

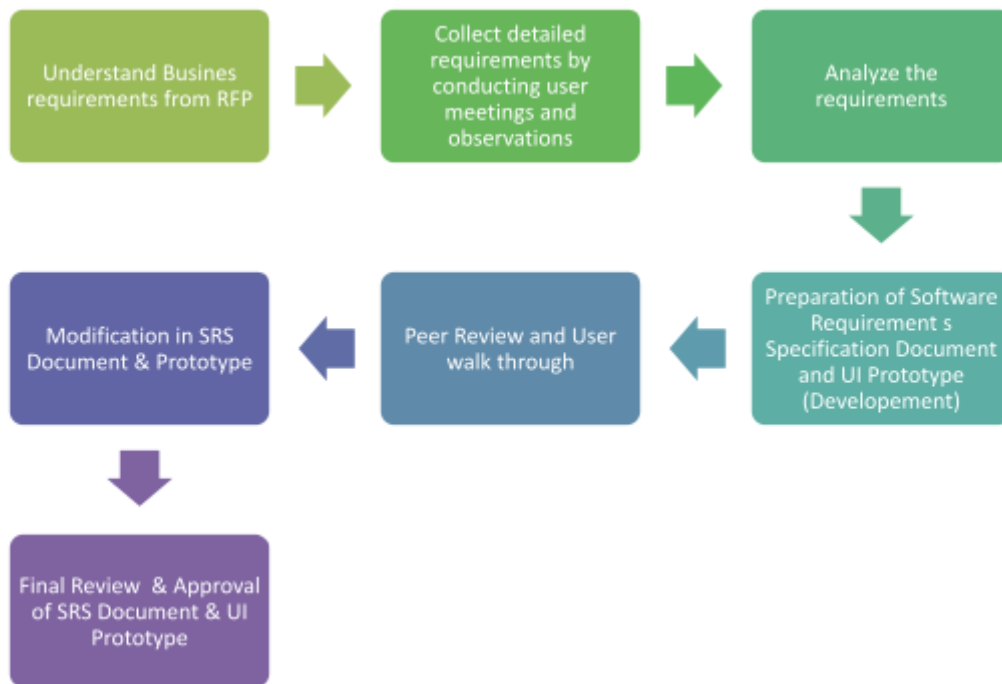
2.1 System Study, Business Process Mapping, System Design, and Review Plan

System Requirement/ Customization Study (SRS), and Process Study phase is the most important phase in the complete project life cycle. We adopt a multi-stage approach towards systems requirements study as given below:

- Process Study
- Customization Requirements
- Preparation of Software Requirement/Customization Specifications (SRS)
- Review
- Sign Off

We recognise the importance of first understanding the vision and objectives of the customer and then proceeding for collecting the needs of the end users. To ensure this, a team of business analysts and domain experts who are functionally and technically experts would carry out the following tasks:

- Planning and Scheduling the requirement review and analysis
- Demonstration of an existing application to the users
- Conducting meetings, and discussions, with senior-level officers and end-users
- Analysis of the collected requirements
- Use case diagrams and diagrammatic representations of the workflow and processes
- Business Process Re-engineering
- Approach toward the integration



2.2 System Development, Customization, and Configuration Plan

- Production and Development Environment Configurations
- ERPNext Setup Configuration
- Custom Module Development
- Data Import
- Reporting Dashboard Development

2.3 System Testing and User Acceptance Testing Plan

The objective of system testing is to ensure that the system meets the user's functional and non-functional requirements.

The scope of the system testing includes the following activities for all modules as per the requirement:

- Test Plan Preparation
- Unit Testing
- Functional & Usability Testing
- Load and Performance Testing

3. Cost Summary

Please find the below estimation for the ERP project:

Project: ERP for Dummy XYZ

Timeline: 4 Months (Development, Training, Support for 3 Months after deployment)

Cost: INR 50,00,000 + Tax

Please find the payment milestones as follows

Sr. No.	Milestone	Description	Amount
1.	Milestone 1	To allocate the team and initiate the project development	INR 20,00,000 + Tax
2.	Milestone 2	After 1 Month of the project	INR 10,00,000 + Tax
3.	Milestone 3	After 2 Months of the project	INR 10,00,000 + Tax
4.	Milestone 4	After Deployment / User Acceptance	INR 10,00,000 + Tax

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4. Introduction To ERPNext

ERPNext is a full-featured business management solution that helps the company to record all its business transactions in a single system. With ERPNext, companies can make informed, fact-based, timely decisions to remain ahead of the competition. It serves as the backbone of a business adding strength, transparency, and control to your growing enterprise.

Key Features:

1) Open Source

It provides freedom to use the software for any purpose, to change the software to suit your needs, to share the software with anyone, and to share the changes you make.

2) Highly scalable according to the organization's needs.

It can handle a large increase in users, workload, or transactions without any strain. Many giant organizations like Zerodha, Wallbox, Neolync, etc. have adopted this ERP system.

3) Highly customizable.

It can be modified and customized to suit a particular requirement of any organization. Also, it provides complete isolation to the core structure of the ERPNext.

4) Multiple integrations.

ERPNext could be integrated with built-in apps like PayPal, Dropbox, Razor pay, Slack, Google, Stripe, Shopify, WooCommerce, Exotel, Plaid, AWS, etc.

5) Great Efficiency / Performance.

In spite of providing a wide range of orchestration, management, and reports ERPNext provides a smooth transition for its performance and efficiency.

6) One for all model

ERPNext has provided completeness in terms of providing multi-country, multi-company, multi-currency, and global businesses into a single platform for lots of enterprises. Also, it provides lots of modules to comprise your organization's needs.

5. About Sanskar Technolab

“6 Years Of Accomplishments And Growth.”

Sanskar Technolab Private Limited is a Software Development Company based in Ahmedabad, India offering Information Technology Services to customers globally. We provide a qualified and experienced, skilled workforce Off-site as well as On-site. We have been providing our services worldwide and majorly in India, UAE, the US & European regions. As a result, we consistently adhere to high-quality standards and strict deadlines.

We provide bespoke software development services like Customized Software Development, Web Application Development, Open-source Customization, Portal Development, E-commerce Site Development, Legacy Application Migration, and Re-engineering. We also offer dedicated Resources/Staff Augmentation services to enterprises globally. Our technology focuses on Python, ERPNext, ServiceNow, Microsoft, and Front-end Technologies.

Our Website: <https://sanskartechnolab.com/>

Our Commitment to our valuable clients:

We take great pride in supplying our services with the goal of providing the highest level of accuracy and satisfaction. Our solutions and services are cost-effective, viable, and lasting. We strive to deliver on time and with the highest level of quality.

In addition, we use state-of-the-art infrastructure facilities and the latest hardware and software with quality control and project management techniques to ensure we are always on par with your expectations. Our brand value rests on our consistent performance and unmatched team commitment. At Sanskar, we invest in research and development, training, team-building activities, and interpersonal skill development to ensure a motivated and talented team.

Our Service Basket

- ☐ ERPNext Development
- ☐ ServiceNow Development

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Service Approach

Consulting



We understand the business problem/requirements and give proper consulting on using the right software to minimize the customization efforts, which in turn will ease the business process since choosing the right software is very crucial for success of Digitalization in any organization.



Implementation & Customization

We start implementation and customization based on the results and conclusions of our initial consulting.



Support

This is very crucial part for the success of any software. Hence our support play important role in the services. We offer to make sure that all your problems are resolved on priority. Thus your team enjoys the new productive tool without waiting much.



Upgrade and Enhance

Continues and upgrade and enhancement is part of SDLC and we provide full solutions upgrade the application versions, security features, and also helping to enhancement of new features, performance, etc.

6. General Terms

- The price is exclusive of all applicable taxes.
- The above-mentioned price does not include the cost of on-site development.
- Any site visit, if required, to visit the customer upon a request would mean that all the costs including travel, visa, stay, internal travel and all other things will have to be borne by the customer.
- The above-mentioned price does not include the cost of RDBMS, Operating System, Server, other software, and/or any kind of specific hardware or third-party licenses.
- The team will be assigned after the receipt of one-month advanced payment in Time and material engagement. For a fixed cost, we will provide payment milestones that will be aligned with deliverables.

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