

Dynamic Labz

Proposal for Accounting portal

Prepared for:

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Dynamic Labz

This Proposal is made on 25th March, 2025 for **Anmol & Ayush** ("you/your") and **Dynamic Labz** ("Dynamic Labz/we"), collectively referred to as "Parties."

Introduction

Dynamic Labz is pleased to present this proposal for the development of a custom dashboard for your accounting firm. This dashboard will streamline client interactions, improve financial tracking, and optimize internal processes through automation and data management.

Project Overview

The dashboard will allow users to log in and access the services they have availed, upload financial documents, track invoice processing progress, and generate detailed financial reports. Additionally, the client's internal team will have a dedicated login to manage clients, process invoices, and input data from various platforms such as Zoho, Tally, and SAP.

Key Features & Functionalities

1. User Roles & Access Control

- **Admin:** Full control over the system, managing users, services, and reports.
- **Manager:** Oversee client accounts, review data, and generate reports.
- **Team:** Process invoices, input client data from external platforms, and manage financial entries.
- **User (Client):** Upload invoices/bank statements, view service details, track processing progress, and download reports.

2. Client Dashboard Features

- Secure login for clients.
- View availed services and status updates.
- Upload invoices, bank statements, and other financial documents.
- Track invoice processing progress (e.g., 50 invoices uploaded, 20 processed = 40% completion).
- Generate and download financial reports (Revenue, Sales, Profit, Taxation, etc.).

3. Client's Team Dashboard Features

- Secure login for internal team members.
- View and manage a list of clients and their uploaded invoices.
- Fill out client data retrieved from platforms like Zoho, Tally, SAP.
- Track processing status of client invoices.
- Generate insights and reports for managerial review.

4. Reporting & KPI Insights

- Automated report generation for revenue, sales, profit, and tax analytics.
- Progress tracking of invoice processing.
- Downloadable reports in multiple formats (PDF, Excel, etc.).
- Graphical insights and dashboards for data visualization.

5. Security & Compliance

- Role-based access control ensuring data privacy.
- Secure document storage and retrieval.

6. MIS Reports

- Development of an advanced MIS reporting system to analyse financial performance.
- Revenue & Profitability Metrics: Monthly/yearly revenue trends, profit ratios, and expense breakdowns.
- Comparative & Historical Analysis: Year-over-year and month-over-month financial trends.
- Invoice & Payment Reports: Processed vs. pending invoices, payment cycles, and overdue tracking.
- Data Visualization & Custom Reports: Interactive dashboards, charts, and downloadable financial reports.

Technology Stack

- **Backend:** Django (Python) for robust and scalable architecture.
- **Frontend:** React.js / Bootstrap / HTML / CSS / JS for an interactive and responsive UI.
- **Database:** Sqlite3 for secure and efficient data management.
- **Cloud Storage:** AWS S3 for document storage.

Proposed Timeline

Phase 1: Requirement Analysis (Week 1)

- Collaborate to finalize features and workflows.

Phase 2: Design & Prototyping (Weeks 2-3)

- Develop designs.
- Build responsive interfaces for all pages.

Phase 3: Backend Development (Weeks 4-5)

- Build backend for optimized use-case.

Phase 4: Testing & Debugging (Weeks 5-6)

- Ensure all the functionality works seamlessly for all triggers.

Phase 5: Deployment & Handover (Week 6)

- Launch the portal and provide admin training.

Investment & Pricing

- Total project Cost: **₹1,50,000**
 - o 40% advance before starting the project (i.e. **₹60,000**).
 - o Balance payment upon completion of the project.
 - o Domain and hosting costs are not included and will be borne by the client.
- Hosting Cost:
 - o 5\$ per month from PythonAnyWhere – (Hacker subscription plan) we might upgrade if needed as per the traffic.
 - o <https://www.pythonanywhere.com/pricing>
- Annual Maintenance Contract (AMC)
 - o **₹20,000/year** for updates, maintenance, and support.
 - o The AMC will begin from the date of project deployment, and the first year's AMC payment will be due along with the remaining cost of the website
 - o **Inclusions:** The AMC covers regular system maintenance, bug fixes, performance optimization, and minor frontend updates.
 - o **Exclusions:** Any major feature additions or new developments outside the scope of the original project will not be included in the AMC. A separate Change Request (CR) will be raised for any new developments, and pricing will be determined based on the specific changes requested.

*This includes development & deployment for portal.

*Other cost (Hosting, Domian, APIs) related to the website will be borne by client.

*Any costs beyond development & deployment will be borne by the client.

*All API details for integration will be provided to us by the client.

Next Steps:

We would be happy to discuss further details and refine the scope based on your requirements. Please let us know a convenient time for a discussion.

Looking forward to collaborating with you.

Divyam Shah

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