**Request for Proposal Document** **Version 1.0**

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# Requirement

Asia Research Partners LLP (ARP) requires a technical platform/portal. The platform will be used to have smooth operations / function between the internal departments. The basic requirement has been mentioned below and need to the software company to understand the requirement and give us a better solution based on its experience.

MIN PAGE TO HAVE O5 MODULES LIKE

* MODULE 1 - SALES
* MODULE 2 - OPERATIONS
* MODULE 2.1 – FIELD TEAM
* MODULE 3 - ACCOUNTS
* MODULE 4 - ADMIN
* MODULE 5 – SUPPLIER MANAGEMENT
* MODULE 6 – DATA CENTER

**ALL for modules should have independent login links – IDs and Passwords and Admin should have all the modules and can open all.**

MODULE 1 - SALES

USER ID –

PASSWORD -

Login

Once entered, User should get a tab following Tabs

1. ADD CLIENT NAME
2. ADD VENDOR NAME
3. BID RFQ
4. EDIT / VIEW RFQ
5. ADD WON PROJECTS
6. VIEW WON PROJECTS / LOST PROJECTS
7. RFQ FOLLOW UP
8. VIEW SALES FIGURES
9. OVERVIEW

1. ADD CLIENT NAME

Client Name

Client Country

Client Manager Name

Client Email Address

Client Phone no

Client WhatsAPP number

**Submit**

PS : We should also have an option to import the list using excel file.

1. ADD VENDOR NAME

Vendor Name

Vendor Country

Vendor Manager Name

Vendor Email Address

Vendor Phone no

Vendor WhatsAPP number

**Submit**

PS : We should also have an option to import the list using excel file.

1. BID RFQ

Add New RFQ - System should auto generate RFQ no serial wise.

CLIENT NAME – Pick from Drop down list. This list should be fetched from the data added in tab “ADD CLIENT”

DATE OF RFQ – Pick from calendar

INDUSTRY – ADD A DROP DOWN FOR LIST OF ALL INDUSTRIES

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Vendor / Client Name** | Vendor | Client | Vendor | Client | Vendor | Client | Vendor | Client |
|  | **Countries Name** | Insert self | | Insert self | | Insert self | | Insert self | |
|  | Sample Size |  |  |  |  |  |  |  |  |
| Setup Cost | Insert self |  |  |  |  |  |  |  |  |
| Recruitment | Insert self |  |  |  |  |  |  |  |  |
| Incentives | Insert self |  |  |  |  |  |  |  |  |
| Moderation | Insert self |  |  |  |  |  |  |  |  |
| Transcript | Insert self |  |  |  |  |  |  |  |  |
| Others | Insert self |  |  |  |  |  |  |  |  |
| Total Cost |  | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Please note that the table should get us Vendor and client list drop down menu option. The list should be fetched from the data added in tab “ADD Client” and “Add vendor”

FOLLOW UP DATE – Pick from calendar

**Submit**

1. EDIT / VIEW RFQ

* Insert RFQ no – Click on **Search** (we should get the table of the respective RFQ with edit option for all the content)

* View by Start Date and End Date – If view by date then all the RFQs should come in list view mode and we get an option to open any RFQ. Once we open any RFQ, it should show all content of the RFQ including the table.
* View by Client name – If view by Client name then all the RFQs should come in list view mode for that client and we get an option to open any RFQ. Once we open any RFQ, it should show all content of the RFQ including the table.
* View by RFQ no – Once relevant number is inserted, it should show RFQ content including tables.
* View by Industry – If view by INDUSTRY then all the RFQs should come in list view mode for that client and we get an option to open any RFQ. Once we open any RFQ, it should show all content of the RFQ including the table.

1. ADD WON PROJECTS

INSERT RFQ No -Click on **Search** (we should get the table of the respective RFQ along with Client name and RFQ no)

Search by Date – Show Calendar

**Click on respective RFQ and Click Next – Show the following Tabs**

Project Type – Quant / Qual

Project Name – Open Box

Project Execution Method – (Drop down – Inhouse or Outsource)

Project Start Date – (Calendar Option)

Project End Date – (Calendar Option)

Client Total Project Invoice Value –

Vendor Total Project Invoice Value –

Total Margins -

Client Invoicing Terms

Advance Payment –

Balance Payment -

Vendor Invoicing Terms

Advance Payment –

Balance Payment -

Attach Client Contract / Email

Attach Vendor Contract/ Email

PRESS SUBMIT BUTTON AND CLICK NEXT (PLEASE NOTE ONCE SUBMIT BUTTOM IS PRESSED, DATA SHOULD BE SAVED)

1. VIEW WON PROJECTS / LOST PROJECTS

* View by Start Date and End Date – If view by date then all the won projects should come in list view mode and we get an option to open any project. Once we open any Project, it should show all content of the Project including the table.
* View by Client name – If view by Client name then all the Won projects should come in list view mode for that client and we get an option to open any Project. Once we open any Project, it should show all content of the Project including the table.

1. RFQ FOLLOW UP (here we also get a number (digit)of RFQs that are due as a notification)

As Per Bid RFQ, a follow up date is required to be made. Based on those dates all the RFQ that are due for follow up should be highlighted here. We should get the list of RFQs that are due for follow ups and next to each RFQ, we must get following options

**Won**

**Lost**

**Next follow up date**

**WON** - If we click on Won, it should take us to ADD WON Project Page.

**LOST -** If we click on lost then we get a comment box, user will insert comments and click Submit. the respective RFQ should be removed from the list and move to lost project basket.

**Next follow up date -** If we click on next Follow up date then it should give us Calendar and we select next follow up date and RFQ should here assigned for the date. We should also get a open box to write our comments.

1. VIEW SALES FIGURES

Total Project Invoice Value – Select dates from Calendar. Show data from Won Projects

Total Margins – Select dates from Calendar. Show data from Won Projects

1. **Overview -** Should see the data for every month or change the data using calendar in graph mode and absolute numbers for 1) Total RFQs Bid 2)Total Won Projects 3) Total Invoice Value , 4) Total Margin Value, 5) Total No of projects in the field 6) Total Projects Lost 7) Pending Follow Ups

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MODULE 2 - Operations Page

USER ID –

PASSWORD -

Login

* **NEW PROJECT**
* **EXISTING PROJECTS**
* **CLOSED PROJECTS**
* **ADD FIELD TEAM**
* **VIEW PROJECT**
* **OVERVIEW**
* **Data Center (Module 6)**

1. **New Project** (here we also get a notification of number of New Projects submitted)

Under new project tab, once clicked, user should get projects that are submitted on SOP Page (ADD WON Projects). Once projects are submitted, all details including excel format should be displayed.

User needs to click on accept the project and click on next. Once clicked on Next, user should get the following tabs

Project No – Open Box

PO number – Open Box

Respondent Incentives – Open Box

Assign Team Leader– Drop Down List

Project Manager Name – Drop Down List

Quality Analyst Name – Drop Down List

Project Deliverables – Open Box

Attach Questionnaire

Attach Other Documents

Attach Survey Link

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Target Group 1 | | Target Group 2 | | Target Group 3 | | Target Group 4 | | Target Group 5 | |
|  | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved |
| Country 1 |  |  |  |  |  |  |  |  |  |  |
| Country 2 |  |  |  |  |  |  |  |  |  |  |
| Country 3 |  |  |  |  |  |  |  |  |  |  |
| Country 4 |  |  |  |  |  |  |  |  |  |  |
| Country 5 |  |  |  |  |  |  |  |  |  |  |
| Country 6 |  |  |  |  |  |  |  |  |  |  |
| Country 7 |  |  |  |  |  |  |  |  |  |  |
| Country 8 |  |  |  |  |  |  |  |  |  |  |

User should be able to insert numbers / text here.

**Submit**

Once Submit the project should move from New Project to Existing Project Basket and all information should also go to Module 2.1 New Projects.

1. **Existing Projects**

Here a list of all projects should come that came from New Project tab with a option to open any project. Please note that here user can make changes in the excel sheet created by SOP team.

Once a project is opened, it should get the updated information for the respective opened project from Module 2.1 Existing project and have the following tabs

**Open Comments BOX Project stopped in the middle Client Invoice Request**

**Vendor Invoice Request Project Completed**

**Open Comments BOX –** Comments can be written, edited and saved for respective opened project

**Project stopped in the middle –** Project moved to a different basket

**Client Invoice Request**

* **Advance Invoice** - Once this tab is clicked, Client Name, Project excel sheet, Client Invoicing Terms, Client Contract should move to ACCOUNTS MODULE.
* **Balance Invoice** - Once this tab is clicked, Client Name, Project excel sheet, Client Invoicing Terms, Client Contract should move to ACCOUNTS MODULE.

**(Data to be picked from ADD Won Project)**

**Vendor Invoice Request**

* **Advance Invoice** - Once this tab is clicked, Vendor Name, Project excel sheet, Vendor Invoicing Terms, Vendor Contract should move to ACCOUNTS MODULE.
* **Balance Invoice** - Once this tab is clicked, Vendor Name, Project excel sheet, Vendor Invoicing Terms, Vendor Contract should move to ACCOUNTS MODULE.

**(Data to be picked from ADD Won Project)**

**Project Completed**

**Client Advance Invoice Raised – Yes / No**

**Client Balance Invoice Raised – Yes / No**

**Vendor Advance Invoice Raised – Yes / No**

**Vendor Balance Invoice Raised – Yes / No**

**Attach Respondent incentive file**

**Attach Client invoice file**

**Attach Vendor invoice file**

**Attach Client project Confirmation Email**

**Attach Vendor Confirmation Email**

**Click on the Following**

**Project Ongoing /Hold –** If this tab is clicked then updated information will be saved and project will stay in this basket.

**Project Completed –** If this Tab is clicked, it should give a warning message that are you sure that you want to close the project. If the person click yes, then project will be closed and will move to **CLOSED PROJECT** tab. Also note that this can only be clicked once above tabs highlighted in RED are updated and files are uploaded for every tab.

1. **CLOSED PROJECTS**

All Projects that are closed in Existing projects should come here with an option to view any details or documents.

We should also get option to search projects by Client name, Industry or Project number

1. **PROJECT STATUS** – User to be able to view project status from Existing projects module 2.1. Here we will select the assigned team leader from drop down menu and should be able to view all projects from his existing project list. Here we should also see a graph representing all existing projects status from all users.
2. **OVERVIEW -** Should see the data for every month or change the data using calendar in graph mode and absolute numbers for 1) Total New Projects 2)Total Existing Projects 3) Total closed projects , 4) Total No of projects in the field 5) Project Status All (all open projects from existing projects modules 2.1-all users)
3. **Data Center (Module 6)-** Show data of total registrations by country, country and speciality. Registrations by Date, Active membership registration notification.

MODULE 2.1 – FIELD TEAM

USER ID –

PASSWORD -

Login

* **NEW PROJECT**
* **EXISTING PROJECTS**
* **CLOSED PROJECTS**
* **VIEW PROJECT**
* **PROJECT STATUS**
* **OVERVIEW**

1. **New Project** (here we also get a notification of number of New Projects assigned by Module 2 – Operations Page (New Project)

Under new project tab, once clicked, user should get projects that are assigned by Operation. Once projects are clicked, user should get all the information submitted from Operations Page (New Project).

User needs to click on accept the project and click on next. Once clicked on Next, user should get the following Details

Project No

PO number

Respondent Incentives

Project Manager Name

Quality Analyst Name

Project Deliverables

Questionnaire – Open / Download Option

Other Documents - Open / Download Option

Survey Link - Open / Download Option

**Next – Once Click on Next Tab, User should get a new page related to this project only where they can insert/ update the following information.**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Target Group 1 | | Target Group 2 | | Target Group 3 | | Target Group 4 | | Target Group 5 | |
|  | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved |
| Country 1 |  |  |  |  |  |  |  |  |  |  |
| Country 2 |  |  |  |  |  |  |  |  |  |  |
| Country 3 |  |  |  |  |  |  |  |  |  |  |
| Country 4 |  |  |  |  |  |  |  |  |  |  |
| Country 5 |  |  |  |  |  |  |  |  |  |  |
| Country 6 |  |  |  |  |  |  |  |  |  |  |
| Country 7 |  |  |  |  |  |  |  |  |  |  |
| Country 8 |  |  |  |  |  |  |  |  |  |  |

**User should get the above table from** New Projects assigned by Module 2 – Operations Page (New Project).

User should be able to add / edit text in the table.

Attach Files – User should have an option to attach files here.

**Submit – Once clicked on Submit all information to be saved.**

1. **Existing Projects** (Please note all info saved here should be updated in module 2 – Existing projects)

Here a list of all projects should come that came from New Project tab with an option to open any project. Please note that once clicked on any project here user can make changes in the excel sheet.

Once a project is opened, it should have the following table and tabs. Table to come from above (New Projects – Module 2.1 only.)

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Target Group 1 | | Target Group 2 | | Target Group 3 | | Target Group 4 | | Target Group 5 | |
|  | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved | Sample Target | Sample Achieved |
| Country 1 |  |  |  |  |  |  |  |  |  |  |
| Country 2 |  |  |  |  |  |  |  |  |  |  |
| Country 3 |  |  |  |  |  |  |  |  |  |  |
| Country 4 |  |  |  |  |  |  |  |  |  |  |
| Country 5 |  |  |  |  |  |  |  |  |  |  |
| Country 6 |  |  |  |  |  |  |  |  |  |  |
| Country 7 |  |  |  |  |  |  |  |  |  |  |
| Country 8 |  |  |  |  |  |  |  |  |  |  |

User should be able to edit / add text/numbers.

**Open Comments BOX - Project Completed – Ongoing Project – Project Stopped in Middle**

**Project Closed** – Data Saved and move to closed project Basket.

**Open Comments BOX –** Comments can be written, edited and saved

**Project stopped in the middle –** – Data Saved and move to closed project Basket

**Ongoing Project – Project to save information and stay in the same basket**

**Attach Respondent incentive file**

**Attach Client project Confirmation Email**

**Attach Vendor Confirmation Email**

**Click on the Following**

**Project Ongoing /Hold –** If this tab is clicked then updated information will be saved and project will stay in this basket.

**Project Completed –** If this Tab is clicked, it should give a warning message that are you sure that you want to close the project. If the person click yes, then project will be closed and will move to **CLOSED PROJECT** tab. Also note that this can only be clicked once above tabs highlighted in RED are updated and files are uploaded for every tab.

1. **CLOSED PROJECTS**

All Projects that are closed in Existing projects should come here with an option to view any details or documents.

We should also get option to search projects by Client name, Industry or Project number

1. **OVERVIEW -** Should see the data for every month or change the data using calendar in graph mode and absolute numbers for 1) Total New Projects 2)Total Existing Projects 3) Total closed projects , 4) Total No of projects in the field

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**MODULE 3** **- ACCOUNTS**

**Overview Client Invoice Request Payment Awaited**

**Vendor Invoice Request Search Client Invoice Search Vendor Invoices**

USER ID –

PASSWORD -

Login

**Overview** – Should see the data for every month or change the data using calendar in graph mode and absolute numbers for Total Client invoices pending, Vendor invoices pending, Payments awaited and since how many number of days..

**Client Invoice Request**

Can view a list of all pending invoices and since how long is it pending (hours/ Day). Data to be picked from “Client Invoice Request – Existing Project” Module -2 -

Once Clicked on any invoice, user should get an option to view details and further click on tab “Invoice Sent”. Once clicked on Invoice sent it should move to Payment awaited basket.

**Payment Awaited**

Can view a list of all “invoices Sent” and since how long is it pending (Days) – (Data to be picked from client invoice request – Existing Projects)

Once Clicked on any invoice sent, user should get an option to view details and further click on tab “Payment Received”. Once clicked on Payment received it should give a box to insert transaction number, date of payment received and Bank name and further it should move to Out of this basket and data to be saved at the backend and can be searched anytime.

**Vendor Invoice Request**

Can view a list of all “Vendor invoices Request” and since how long is it pending (Days)

Once Clicked on any invoice request, user should get an option to view details and further click on tab “Payment Made” and it should give a box to insert transaction number, date of payment received and Bank name. Once clicked on Payment Made it should, it should move to Out of this basket and data to be saved at the backend and can be searched anytime.

**Search Client Invoice**

**Using Date / Project number / Client Name user can search the data**

**Search Vendor Invoice**

**Using Date / PO number / Vendor Name user can search the data**

ADMIN

Login ID

Password

Forget Password option

* **Overview**
* **Create User Group**
* **View Sales**
* **View Operations**
* **View Field Team**
* **Client Invoices Pending**
* **Vendor Invoices Pending**
* **Data Center**

1. **Overview -** Should see the data for every month or change the data using calendar in graph mode and absolute numbers for 1) Total RFQs Bid 2)Total Won Projects 3) Total Invoice Value , 4) Total Margin Value, 5) Total No of projects in the field 6) Total Existing Projects 7) Total closed projects 8) Total Client invoices pending, 9)Vendor invoices pending, 10)Payments awaited and since how many number of days. 11) View Field Team Projects 12) Total Suppliers by country and overall 13) Total Cost request sent by date, country and supplier 14) Total respondents by country and speciality from Module 6)
2. **Create User Group** – Admin should be able to create users both for SOP and Operation, Field Team and Accounts, Supplier Management and Data Center with an option to change password. (All Modules)
3. **View SOP Reports**

* Should be able to delete client / Vendors
* Can view and download list of clients & Vendors along with all details
* Can view list of bid RFQs as per date, USERS, industry - Select dates from Calendar
* Can view list of won projects as per date, USERS. - Select dates from Calendar
* Can view the RFQ follow up page or user. How many follow ups are pending? Select dates from Calendar
* Show total project invoice value by user type (Select dates from Calendar. Show data from Won Projects
* Show total margins by user type (Select dates from Calendar. Show data from Won Projects)
* Total Invoice value by all users – (Select date from Calendar)
* Total Margins value by all users – (Select date from Calendar)
* View Client Invoices – Pending / paid – Select by Calendar
* View Client Invoices – Pending / paid – Select by Calendar

1. **View Operations**

* View List of all new projects that are not accepted
* View List of all existing projects by user. All information to be displayed
* View list of all closed projects by user. Select date from Calendar.
* View Projects by Client Name, Project number or Industry

1. **Client Invoices Pending –** Show data of all client pending invoices
2. **Vendor Invoices Pending -** Show data of all Vendor pending invoices
3. **Data Center (Module 6)-** Show data of total registrations by country, country and speciality. Registrations by Date, Download data of registrations by country or Country and speciality with a choice of download any attached file or not, Active membership registration notification. Delete any record

**MODULE 5 – SUPPLIER MANAGEMENT**

Login ID

Password

Forget Password option

* **Overview**
* **Add Supplier**
* **Edit Supplier**
* **Cost Request to supplier (RFQ) -**
* **View total Cost Requests sent to supplier (RFQ) -**
* **View Supplier – by Country, Name**
* **View RFQs Sent**

Overview – Should see the data for every month or change the data using calendar in graph mode and absolute numbers for 1) Total RFQs sent 2)Total Suppliers by country and overall 3) Total Cost request sent by date, country and supplier

**Add Supplier –** User to able add Supplier and get following box

Supplier Company Name

Supplier Manager Name –

Supplier Email Address

Supplier Phone Number

Supplier Whatsapp No

Other details

Submit

**Edit Supplier –** Here user can search by suppler company name or country and edit any details from the above.

* **Cost Request to supplier (RFQ) -** Once user click on this tab, user should be able to search supplier by country or by supplier name.

Search by – Country – list of suppliers will be displayed with multiple selecting option. Further user can client on another country and select and multiple supplier and so on. User can send single RFQ Email to multiple suppliers in multiple countries.

Once a list is displayed, user will be selecting multiple countries and suppliers. After selecting suppliers, user will get an open Box where user can type or paste the email content and further click on send. User should also get an option of attaching files to the email,

Once clicked on send, all the suppliers selected, will be sent an email. Here the email should go from Our company account only.

* **View total Cost Requests sent to supplier (RFQ) -**

Here user should be able to get a list of RFQ sent by selecting calendar Dates. Once a list is displayed, user should be able to see entire content of the email along with attachments.

* **View Supplier – by Country, Name , all countries**

Here user should be able to get all details of suppliers once viewed by either name of any particular country or all countries.

* MODULE 6 – DATA CENTER

Login ID

Password

Forget Password option

Once Login, User should get following options

Country – List of countries (Drop Down)

Click **Next**

New Registrations

* First Name
* Last Name
* City Name
* City Code & Phone Number
* Email Address
* Whatsapp Number
* Doctor Speciality – Dropdown from the list
* Total Years of Experience
* Type of Practice – Private / Public / both
* Practice Licence Number
* Average no of Patients that you see a month

Submit – Once submit an email should go to the person with following content. The person has to click on the link to activate his membership. Once he clicks on link, person should get message that you membership is active now and Admin should a confirmation message.

Dear Sir/Madam,   
  
We are an international market research organisation with offices in India, Dubai, New Zealand and London and we conduct market research surveys to understand the behaviour and perception of consumers towards different products and services.  
  
We invite and ask people like yourself to participate in our phone / online surveys and we people who participate in our surveys get paid for their time.  
  
So today we would like to invite you to register yourself and become our panel member for online or Phone surveys. Once you register with us, we will start sending you surveys that matches to your profile.  
  
To register yourself you just need to click on the following link and we will get back to you accordingly. **Kindly note that this is a free registration and you do not have to pay anything for the same.**

Please attach your medical registration certificate / document to verify that you are a medical profession and click **submit** .  “Not for Developer – Please note that once clicked on submit, person should get message that you membership is active now and Admin should a confirmation message.  
  
Thank you and Regards   
Operations Team