

Via Email Only:
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Private & Confidential
Joshua Monaghan

Dear Joshua,

Thank you for taking the time to consider developing a CRM website application for my business. I am looking to develop a software solution because I currently use a mix of spreadsheets and various software applications to manage my contacts and the sales process. I want to consolidate them into a single application. If the software works well I also want to consider releasing it as a SaaS product to other businesses to use on a subscription basis. Following are my requirements, but please feel free to provide me with feedback on the feasibility and make suggestions where you think it is appropriate.

Overview

The software to be developed is a Customer Relationship Management (CRM) system. It will be a Software-as-a-Service (SaaS) platform where each business subscriber will have their own data, including Companies, Contacts, Leads, Quotes, Invoices, and Payments. The system must support multi-user access with role-based permissions and require 2-factor authentication for security.

Core Features

Companies (Prospects & Customers)

- Ability to store company details, including business name, address, industry, size, and contact details.
- Each company must have at least one primary contact.
- Categorisation of companies as prospect or customer.
- Ability to assign internal users to manage the relationship of companies.

Contacts

- Ability to store individual contact details, including name, job title, email, phone number, and associated companies.
- A contact can be associated with one or more companies or exist independently without a link to any companies.
- Ability to mark a contact as a primary contact for a specific company.

Leads

- Leads are created when there may be a current or future opportunity to provide a quote to a company.

- Each lead must be associated with a company and may also be linked to a specific contact.
- Status tracking for leads (e.g., In Progress, Won, Lost).
- Ability to assign internal users to manage leads.

Quotes

- Quotes are generated for leads when a pricing estimate is provided.
- Standard fields for quotes, including quote number, date, associated company, contact, and lead etc.
- Ability to add line items to quotes, including description, quantity, price per unit, and tax code. Software needs to calculate and display the total and any tax.
- Ability to amend and resend quotes.
- Status tracking for quotes (e.g., Draft, Sent, Accepted, Rejected).

Invoices

- An invoice is created when a quote is won.
- The invoice will initially contain the same line items as the corresponding quote but must be editable so that it can be different to the quote.
- Standard fields for invoices, including invoice number, issue date, due date, and payment terms.
- Ability to add and edit line items similar to quotes.
- Status tracking for invoices (e.g., Draft, Sent, Partly Paid, Fully Paid).
- If possible, provide a Stripe link on each invoice so that the customer can pay the invoice using their credit card.
- If possible, sync the invoice with the invoicing business's Xero account.

Payments

- Ability to record one or more payments against an invoice.
- Calculation of outstanding balance on each invoice.
- Automatically change the status to paid when payments are equal to the invoice total.

Reporting

- Users must be able to generate reports for Companies, Contacts, Leads, Quotes, and Invoices.
- Reports should be filterable by date, status, company, or other relevant fields.
- Ability to export reports to formats such as CSV or PDF.

User Management & Security

- Each business subscriber will have its own internal users.

- Role-based access control to restrict functionalities based on user roles.
- 2-factor authentication for all users.
- Secure login system with password recovery options.

Additional Considerations

- The CRM will be web-based and must support access from different devices.
- The user interface should be intuitive and easy to navigate.
- The system should be scalable to handle multiple businesses efficiently if we decide to make it a SaaS product.
- Data security and encryption should be implemented for sensitive information.

Should you have any questions in relation to this proposal or any other matter please don't hesitate to contact me on 0401 192 442 at any time.

Yours Sincerely



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