# FINFO: Request For Quotation (RFQ)

by: Wiz Werx Pte Ltd

# General Information

| | |
|---|---|
| Document Type: | Solicitation of Quotation Notice |
| Solicitation Type: | Request for Quotation (RFQ) |
| Deadline for Quote Submission: | 23 April 2015 |

## Background

Wiz Werx is seeking to hire a developer create a financial portal called FINFO.

FINFO will be a one-stop financial information source for websites in Australia to create their own investor relations microsite. It will allow companies to sign up, create various pages for their investor relations needs. It is fuss free and customisable to each company's unique needs.

Companies will be able choose from the available packages according their needs.

Reference for FINFO (with investor relations focus):
Shopify: http://www.shopify.com.sg

## Purpose of the RFQ

The purpose of this RFQ is to identify and select a qualified vendor to develop and execute FINFO. The vendor is required to submit a detailed quotation for the development and execution of the app including any associated costs from the project inception to completion.

## Intended Product Use

FINFO will be used to allow companies to set up a prominent Investor Relations website, which will allow it to promote its business partnerships aside from that with its customers. It will be based largely in Australia, with Melbourne as the starting point. Following that, FINFO will be opened to markets like, Singapore, New Zealand and Malaysia.

FINFO will not own any intellectual property and confidential information hosted on these sites as we value the integrity of the sites.

## Technical Specifications

This is to be developed on PHP MVC Framework (eg. CakePHP, CodeIgniter, Laravel) and MySQL database. It will run on HTTPS protocol (SSL). System has to be **s**table, flexible, extensible, maintainable and scalable**.**

Vendor must provide for adequate security levels and audit trails to protect the integrity of the content.

We are open to any proposed solution, as long as it meets our requirements, and the vendor is expected to provide appropriate suggestions.

Since there will be broadcasting service, vendor needs to advice and incorporate the necessary implementation so as to not blacklist the SMTP server due to heavy traffic of mass sending of blasts.

The appointed agency is required to carry out the development, implementation, installing, maintenance and support (retainer) for the websites.

Agency to propose the basic hosting requirements and the recommended hosting requirements. Agency also to indicate if any 3rd party software to be used for the development of this project.

## Requirements

- Easily navigable
- Internally searchable
- Compatible across all browsers (at least the latest two versions of Firefox, Chrome, Internet Explorer and Safari as of the development date)
- Search-engine optimization
- Mobile-friendly (Responsive) for FINFO Public Website, Client Public Website, FINFO Back-End and Client Back-End
- Support and/or facilitate multiple currencies
- Friendly URLs

**Deliverables**

a) **Design (Front End) – FINFO Public Website**
All mock-ups, psd files and web style guides will be provided by Wiz Werx.

b) **Design (Front End) – Client Public Website**
All mock-ups, psd files and web style guides will be provided by Wiz Werx.

c) **FINFO (CMS - Back-End)**
Mock-ups, psd files and web style guides will be provided by Wiz Werx.

d) **Client (CMS - Back-End)**
Mock-ups, psd files and web style guides will be provided by

e) **Database Diagram**

f) **Functional Specifications**

g) **UAT Documents**

## Modules

The following lists out the modules required as well as their functions.

FINFO Front-End

1. Website
2. Registration
3. Payment Gateway

FINFO back-end

1. Dashboard
2. Account Management
3. Website Updates
4. List of clients & company information
5. Services subscribed by each client
6. Billing (Orders and Invoices. Please section under reference, E.g. Pending orders, active orders, cancelled orders etc.)
7. Automated Invoice generation function
8. Revenue/Profit (Monthly/Yearly)

Reference for FINFO Admin back-end:
http://demo.whmcs.com/admin/
Username: Admin -or- Sales
Password: demo

Administrator Set-up

1. Dashboard
2. User Profile / Account Information
3. Settings
4. User Manager
5. List of Modules subscribed to/ Package information
6. My Invoices
7. Payment Gateway option
8. Ability to upgrade package
9. Ability to unsubscribe to package
10. View past orders (invoices)
11. Ability to select customized template for their website

Reference for Client back-end:
http://demo.whmcs.com/
Username: demo@whmcs.com
Password: demo

## FINFO Front-End

### 1. Website

Description

This website is to be CMS driven. FINFO is able to edit the content via the CMS. This website will contain the necessary information needed by the public to subscribe to FINFO services.

### 2. Registration

Description

This is the registration page for clients to signup for the available packages. Account name (eg. company1.finfo.com) will be automatically generated. Account name is unique. Any change to the account name will be done manually. Documentation to be provided on how to manually configure this change.

### 3. Payment Gateway

Description

There will be a few payment gateway available.

## FINFO Back-End

### 1. Dashboard

Description

This section will allow FINFO to have an overall overview of their website. Important notices such as upcoming invoice, sales related reports.

### 2. Account Management

Description

This section will allow FINFO to view all the accounts that have been created. The packages that they are currently subscribed to. FINFO able to manage the settings on the website (eg. Currency, Overwrite default settings).

### 3. Website Updates

Description

This section will allow FINFO to update their website. Able to create pages.

## 4. List of clients & company information

Description
This section will allow FINFO to view the clients but not edit the information.

## 5. Services subscribed by each client

Description
This section will list all the services subscribed by each client.

## 6. Billing

Description
This section will list the orders and invoices by each client.

## 7. Automated Invoice generation function

Description
This function will auto-generate invoices and send email alerts to client to inform about the invoice. Auto-reminder emails to be sent out to clients regarding outstanding invoices, when the due date is nearing.

## 8. Revenue/Profit (Monthly/Yearly)

Description
This section will list the sales earned during a period of time. Able to filter by month and year.

## Client Back-End

### 1. Dashboard

Description
This section will allow client to have an overall overview of their account. Important notices such as upcoming invoice, broadcast scheduled.

### 2. User Profile / Account Information

Description
This section will allow client to update their profile. Account name cannot be changed.

### 3. Settings

Description
This section contains the various setting such as customized templates for look and feel of their website.

### 4. User Manager

Description
This module allows clients to manage the users to manage the content of the website.

There will be 2 user type, admin/approver type and editor type.

- The admin/approver has access to all the modules
- The editor has access to all modules except user

Roles for Admin/Approver user type:

- To add/edit/delete user details
- To reset user's password
- To approve content

Roles for Editor user type:

- To edit own user details
- To reset own user's password
- To add/edit content

Functions

- Back End for Client
  - Add/Edit/Delete/List User
    - Fields:
      - Name
      - Email
      - Password
      - Confirm Password
      - Type/Access Level
      - Deleted
      - Last Login
      - Last Accessed IP
      - Created Date
      - Modified Date
      - Created By
      - Modified By

- Front End for Public
  - Login Form
    - Fields:
      - Account
      - Email
      - Password
  - Forget Password Form
    - Fields:
      - Account
      - Email

## 5. List of Modules subscribed to/ Package information

Description

This section will list the modules subscribed to/package information. It is able to keep a history of the previous package that it was subscribed to, in the event that there was an upgrade.

## 6. My Invoices

Description

This section will list the past and upcoming invoices.

## 7. Payment Gateway option

Description
This section will allow the client to select the preferred payment gateway.

## 8. Ability to upgrade package

Description
This allows user to upgrade their existing package.

## 9. Ability to unsubscribe to package

Description
This allows user to upgrade their existing package.

# Packages

| Modules | Bronze | Silver | Gold |
|---|---|---|---|
| Latest Financial Results Highlights | √ | √ | √ |
| Financial Results (Archived) | √ | √ | √ |
| Presentations | √ | √ | √ |
| Announcements | √ | √ | √ |
| Real-time Stock pricing & charts | √ | √ | √ |
| Financial Annual reports | √ | √ | √ |
| Press Releases | | √ | √ |
| Investor Relations Calendar | | √ | √ |
| Subscription Tool | | √ | √ |
| Page Manager | | √ | √ |
| Newsletter & Broadcast | | | √ |
| Media Access | | | √ |
| URL Manager - Webcast | | | √ |

# Modules breakdown

**Financial Highlights**

Description

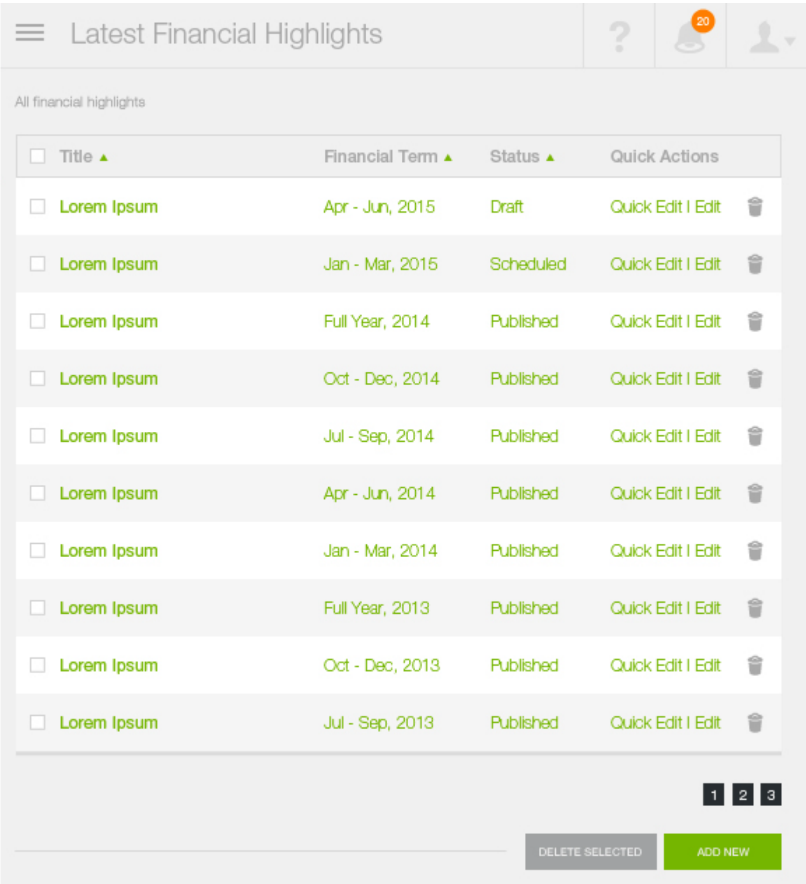
This module allows user to set the quarter and year prior to adding in the related content.

- **Latest Financial Highlights**

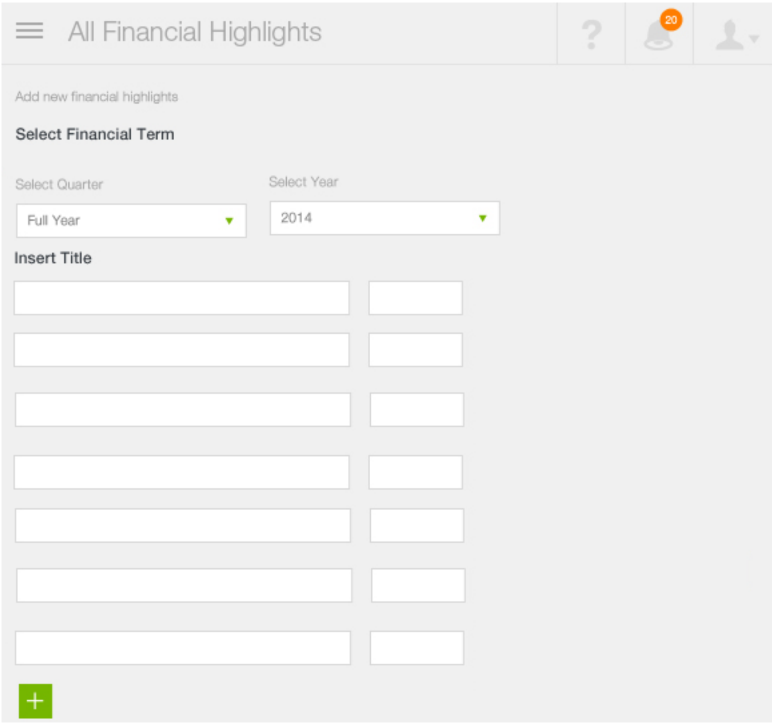
  Description

  This module allows user to set the quarter and year prior to adding in the related content. User is able to add rows and columns and label them accordingly. Content will be displayed in a table layout (automatically generated by the CMS). Previous year's financial results will automatically be retrieved from the archived data (entered in the previous quarter) and displayed on the website. See below for sample representation on the Front End.

  Back End




| Title | Financial Term | Status | Quick Actions |
|---|---|---|---|
| Lorem Ipsum | Apr - Jun, 2015 | Draft | Quick Edit I Edit |
| Lorem Ipsum | Jan - Mar, 2015 | Scheduled | Quick Edit I Edit |
| Lorem Ipsum | Full Year, 2014 | Published | Quick Edit I Edit |
| Lorem Ipsum | Oct - Dec, 2014 | Published | Quick Edit I Edit |
| Lorem Ipsum | Jul - Sep, 2014 | Published | Quick Edit I Edit |
| Lorem Ipsum | Apr - Jun, 2014 | Published | Quick Edit I Edit |
| Lorem Ipsum | Jan - Mar, 2014 | Published | Quick Edit I Edit |
| Lorem Ipsum | Full Year, 2013 | Published | Quick Edit I Edit |
| Lorem Ipsum | Oct - Dec, 2013 | Published | Quick Edit I Edit |
| Lorem Ipsum | Jul - Sep, 2013 | Published | Quick Edit I Edit |




Front End

Webcast | Presentation Slides | SGX Announcement | Press Release | Results of Business Sectors

| For the third quarter ended 30 September 2014 | 3Q14 | 3Q13 | Growth % |
|---|---|---|---|
| Revenue ($m) | 1,553 | 1,550 | - |
| Earnings before interest and tax (EBIT) ($m) | 142.9 | 157.9 | (10) |
| Other income, net ($m) | 4.7 | 4.7 | - |
| Finance costs, net ($m) | (7.6) | (3.8) | (99) |
| Profit before tax (PBT) ($m) | 151.7 | 168.0 | (10) |
| Profit attributable to shareholders ($m) | 121.3 | 131.4 | (8) |
| Earnings per share (cents) | 3.89 | 4.24 | (8) |

Features

- Initial setup of financial year is required
- If this is the initial setup, allow user to enter the previous quarters financial results and its labels (eg. 3Q13). Optional
- If this is the subsequent quarter, allow user to enter the quarter's financial results
- 1st to 3rd quarter financial result will use the predefined rows and labels setup in the initial setup. 4th quarter financial result may have a different setup

- The algorithm for the growth calculation will be provided

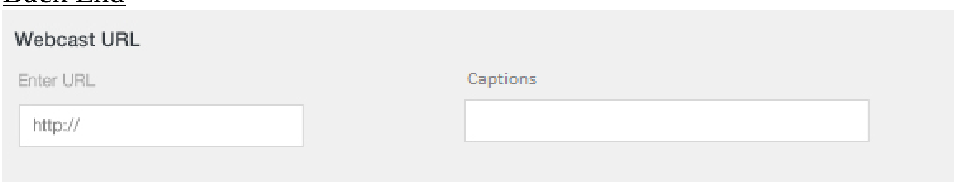
- **Financial Results (Archived)**

  Description
  This page will automatically display archived financial highlights. If a new quarter is entered in the Latest Financial Highlights, the previous quarter will automatically be archived. Updates to the page will be done under the Financial Highlights module.

- **Webcast**

  Description
  This function allows user to tie a webcast to a financial result of a particular quarter and year.

  Back End

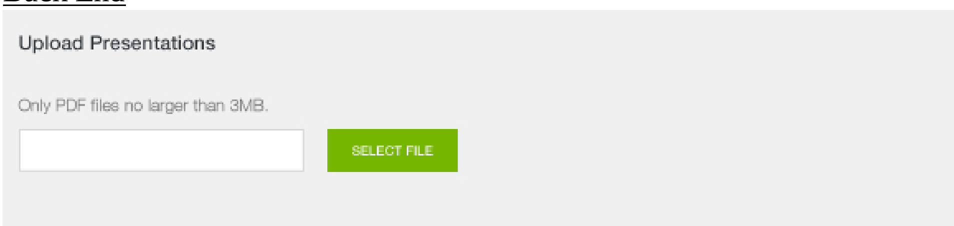



  Features
  - Optional. Allows user to insert a hyperlink to the webcast of the particular quarter and year

- **Presentations**

  Features
  This function allows user to display a presentation of the particular quarter and year.

  Back End



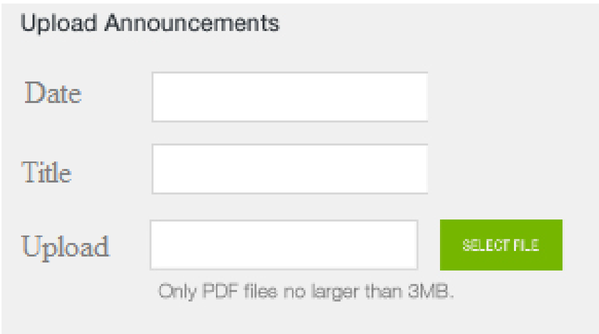

  Features

- Optional. Allows user to upload a document containing the presentation of the particular quarter and year

- **Announcements**

  Description
  This function allows user to display an announcement of the particular quarter and year.

  Back End




  Front End

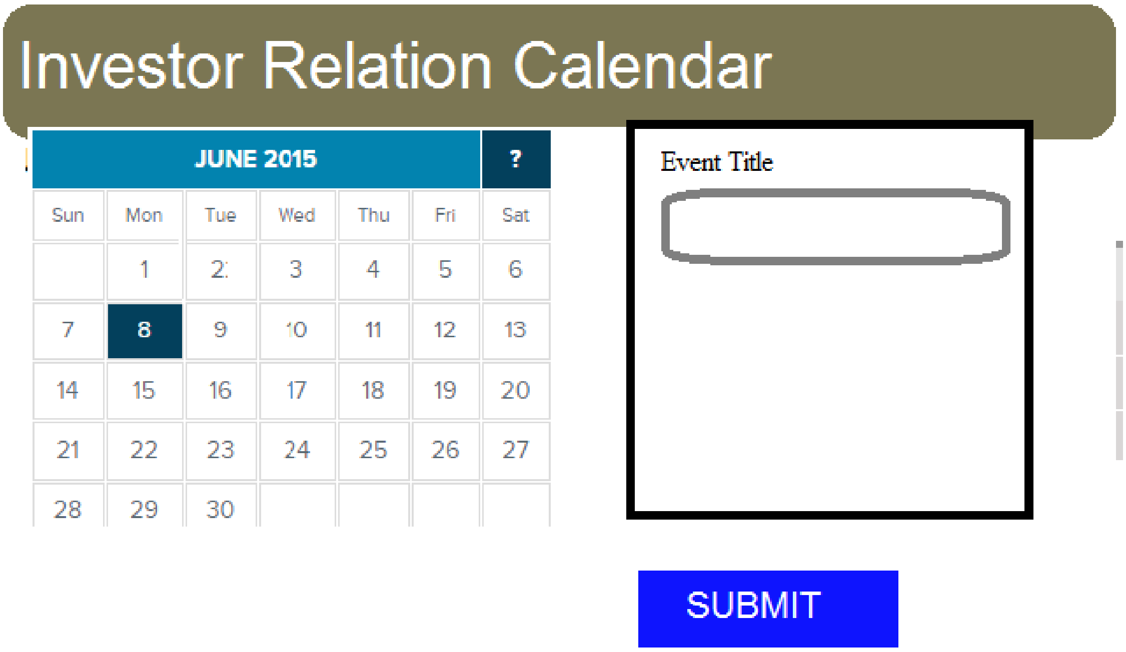

  Features
  - Optional. Allows user to upload a document containing the announcement of the particular quarter and year

## Investor Relations calendar

Description

This module allows user to enter a past and future investor relations events.

Back End




Front End

2015 Investor Relations Calendar

| Date* | Event |
| --- | --- |
| 27 February | Live webcast of FY2014 results briefing |
| 2 March | Post results investor lunch |
| 23 April | Eighteenth Annual General Meeting |

Features

- Allows user to enter the date and title of the investor relations events
- Allows user to manage the investor relations events

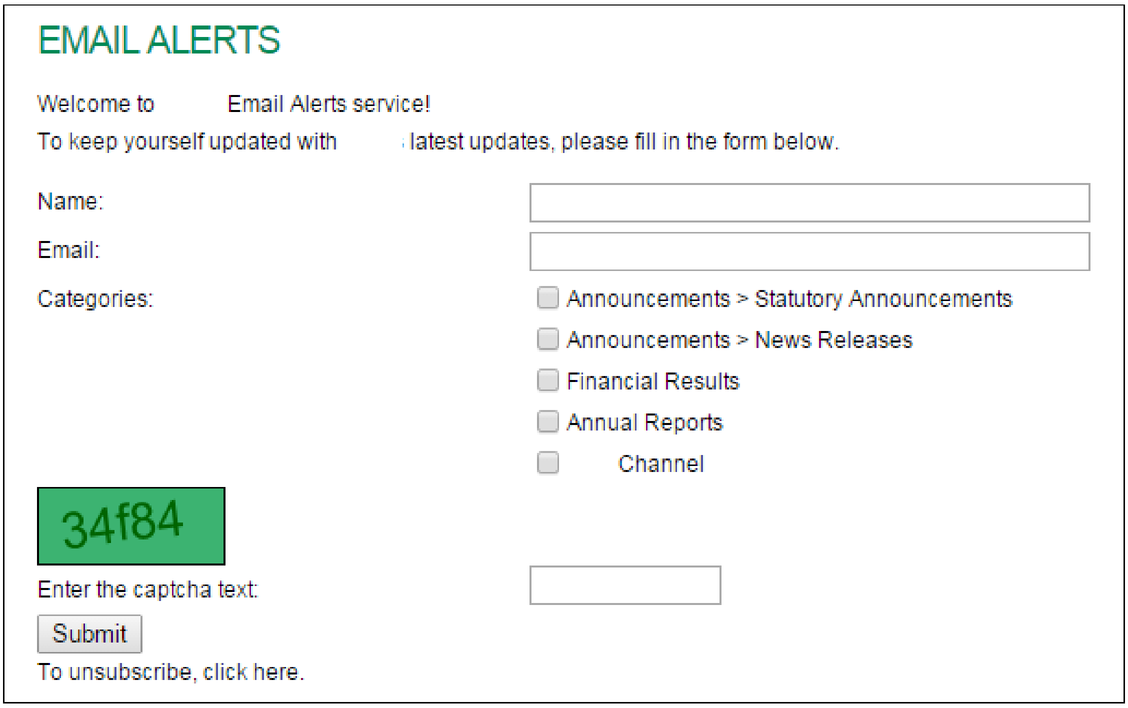
## Subscription

Description

This module is for the public to be updated with the company's latest updates via email alerts. Public has to be subscribed to this service by signing up and selecting the pages of interest. An auto-generated email will be sent out according to the interests the subscribers have selected during the sign up. Subscribers can edit their profile and unsubscribe from this service. There is no login function for the subscribers. See below for sample representation on the Front End.

This module is also for the public to subscribe and receive newsletter. This subscriber list will be automatically linked to the broadcast module. Public can subscribe and unsubscribe from this service.

Clients will be able to manage the list of subscribers.


EMAIL ALERTS

Welcome to Email Alerts service!

To keep yourself updated with latest updates, please fill in the form below.

Name:

Email:

Categories:

- Announcements > Statutory Announcements
- Announcements > News Releases
- Financial Results
- Annual Reports
- Channel

34f84

Enter the captcha text:

Submit

To unsubscribe, click here.

Features

- Allows public to sign up
- Allows public to unsubscribe
- Allows user to manage the list of subscribers
- Allows user to export the list of subscribers into excel format

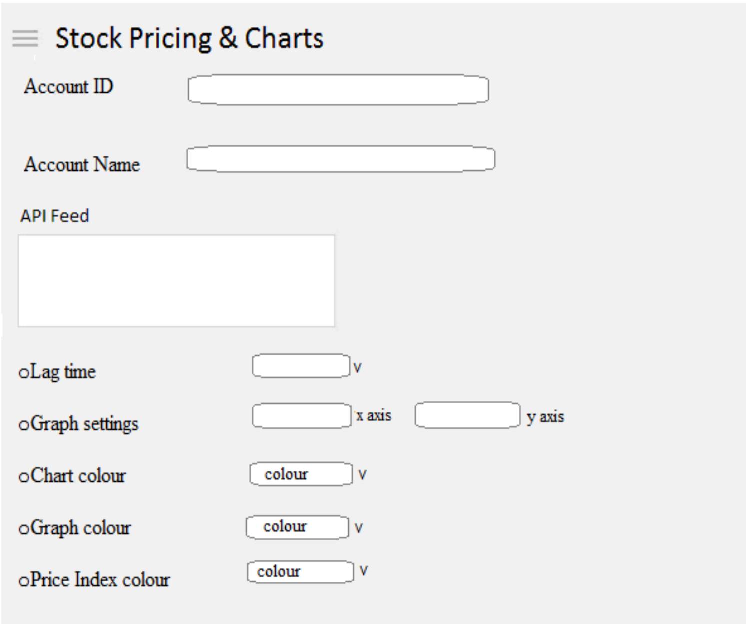
- Task scheduler/Batch process to consolidate new content related to pages of interests list (eg. Press Releases, Newsletter, Annual Report). Client is able to select the frequency of updates
- Email blast will be sent out to those subscribed to the respective email alert

## Real-time Stock Pricing and Charts

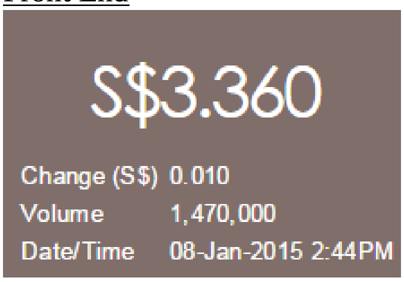
Description

This is a live feed that is connected via the API (application programming interface) to the Australian Securities Exchange (ASX - http://www.asx.com.au/). Client will be subscribed to the ASX service and provide the respective information to connect to the API (eg. Account ID). It will need to connect to the ASX resellers and their respective API to get the content.

Back End




Front End




Stock Chart display the actual stock activity in a chart. This can be represented in different graphs and filtered in different time/quarter/months/year. The system will obtain live feed from the ASX, so it is auto-generated.

It can be in summary view where you can see share price (Change, Volume, Date/Time) or the full view to see the stock chart.

Clients can change the display settings to determine what it will look like to their users; be it the colour of the chart, graphs or arrows, or the axes of the graphs. Clients can also determine the default view of these functions and set their own calendar filter (yearly or quarterly or monthly).

<u>Features</u>

- Task scheduler/Batch process to retrieve the stock price
- Allow client to change settings, subject to ASX's guidelines. See below for settings:
    - Lag time (5 mins / 1 hour)

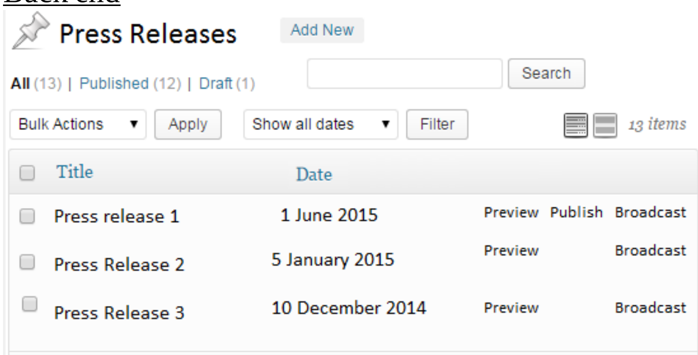
- Graph settings (axes)
- Chart colour (red, blue, green, yellow)
- Graph colour (red, blue, green, yellow)
- Price Index colour (red, blue, green, yellow)

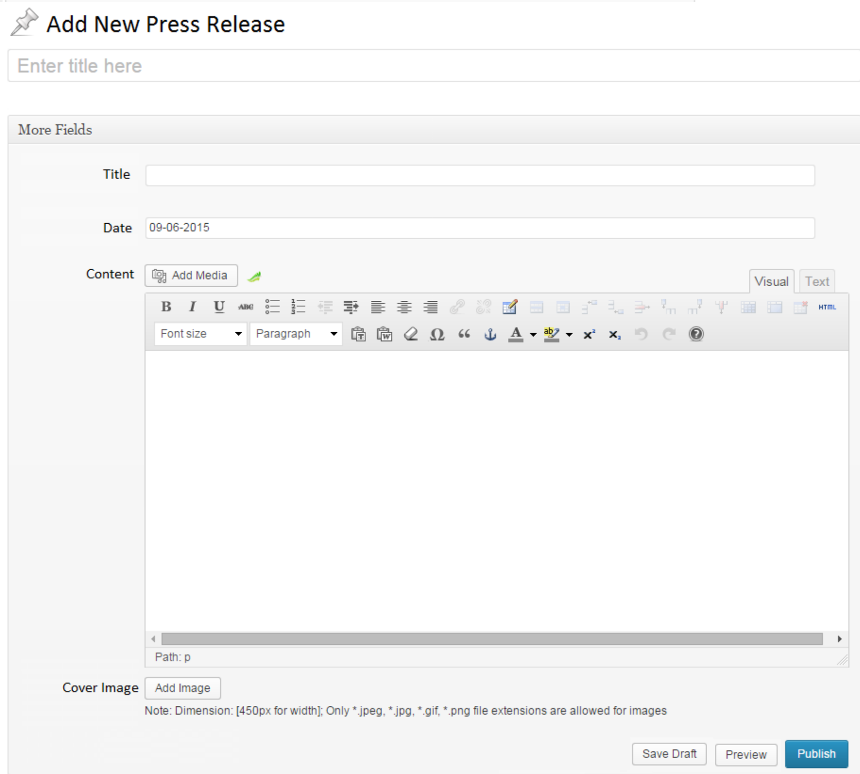
# Press Release

Description
This module allows clients to upload their press releases to inform their users of their press activities.

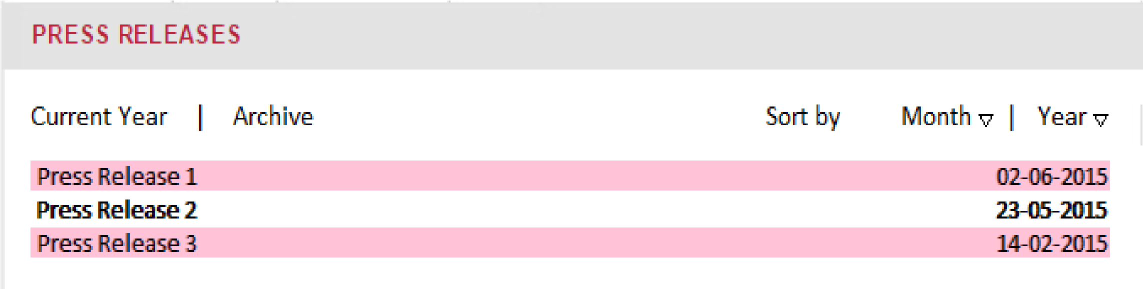
Clients can upload a document. They will have to provide the title and date of the release. This also facilitates in the filtering option for the users; clients can choose to enable the filter function in Month/Year.

Back end



<u>Front End</u>




<u>Features</u>

- Allows user to manage the press releases
- Allows user to be able to enable filter function (Month & Year) for Front End
- Allows user to set the pagination settings (Number of press releases to be displayed on the Front End page)

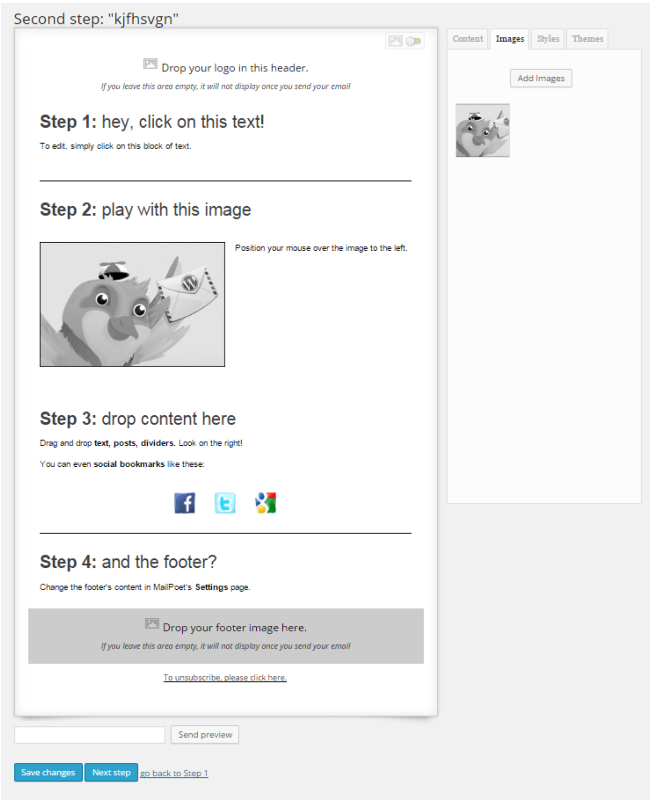
## Newsletter

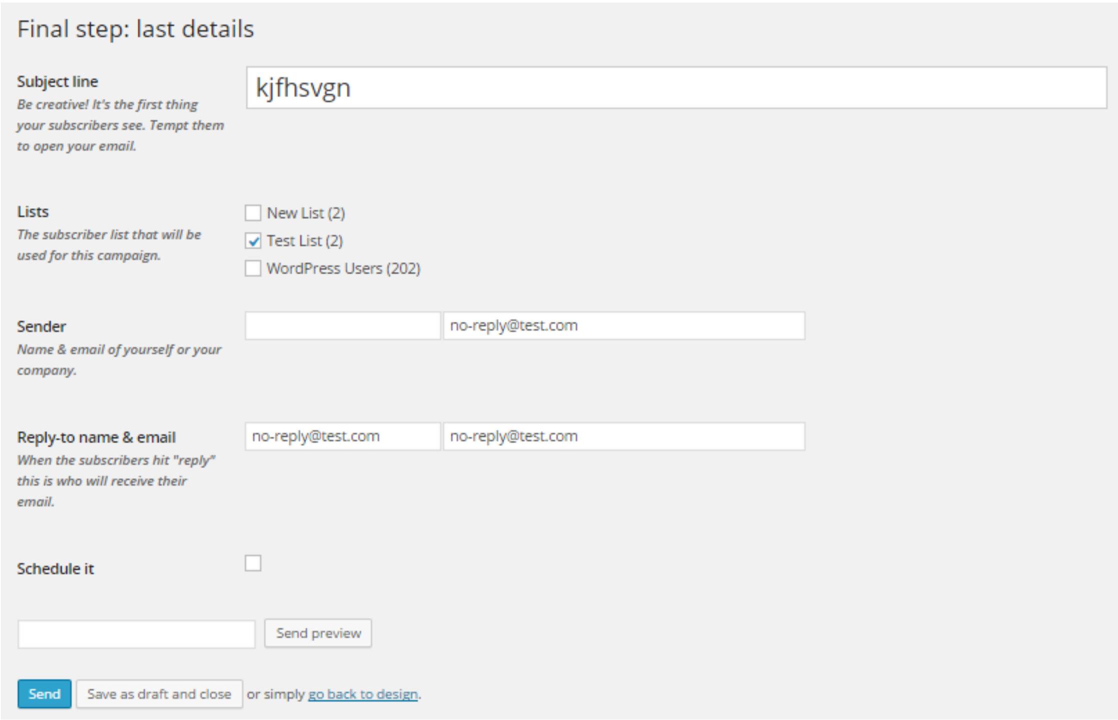
Description
This module will collate the clients' newsletters. Clients can decide on the frequency of their newsletter releases.

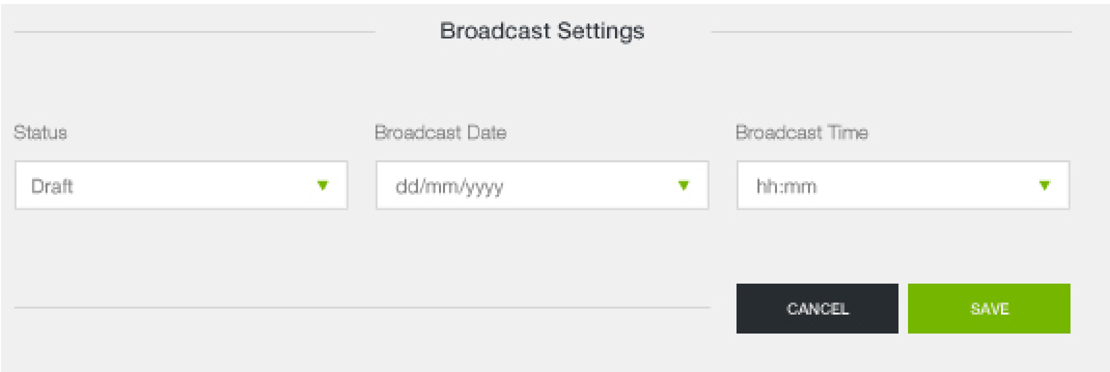
Clients can choose to create their newsletters using a predefined template or upload a pdf. This will determine if the users will view it in a page or in a separate pdf page respectively. The newsletters can be broadcasted to notify those on their mailing list that a new edition has been released.

This module will facilitate clients' broadcasting (for newsletter). The pool of emails will be gotten from the Subscription Tool (Mailing List) module, where users will register their emails to the system and who selects Newsletter under the category. The broadcast module will use this pool to broadcast the newsletter to.

Back End






<u>Features</u>

- Allows user to manage the newsletter
- Allows user to upload pdf or fill up a form
- Allows user to manage the broadcast
- Allows user to prepare and schedule the broadcast in advance
- Allows user to send out a test broadcast to the seed list to preview the blast
- Allows user to view report. Follow similar to 3rd Party Broadcast Engine (e.g. Read, Unread, Bounce)
- Task scheduler/Batch process to pick up scheduled broadcasts to be sent out

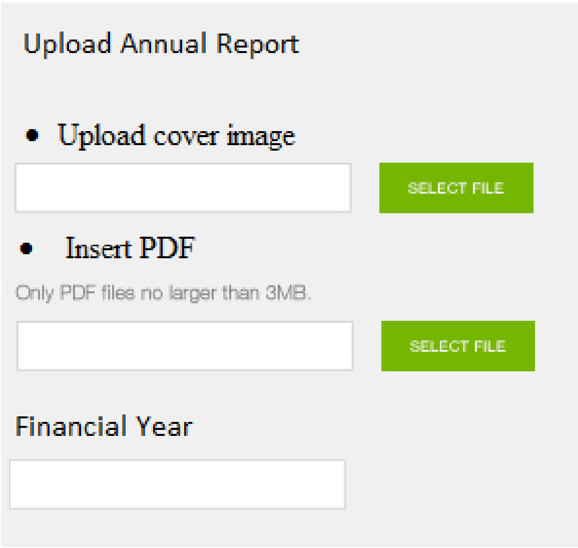
## Financial Annual Reports

Description

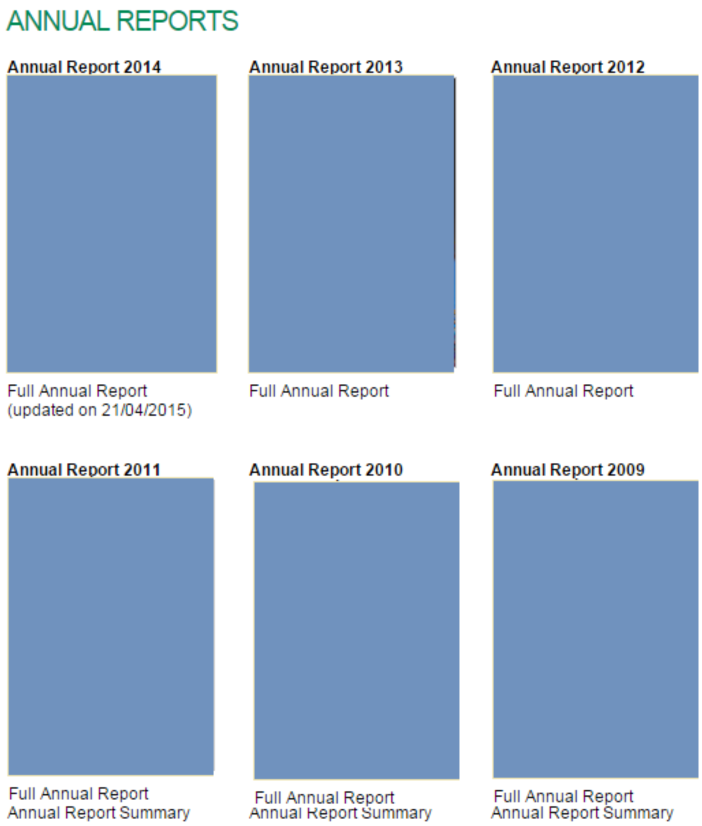
This module allows clients to upload their annual reports as a pdf and allow users to view/download it.

Email alert subscribers may receive notifications on the release of the annual report.

Back End



<u>Front End</u>




<u>Features</u>

- Allow users to manage the annual report
- User needs to enter the financial year in which this financial annual report is for
- Allow user to upload only 1 pdf per financial year

**Media Access**

Description
This module is designed for clients to communicate with the press. It is a library to host various media related files (e.g. high resolution images, logos, etc) for the media people to download.

Media people will have to register and sign in to this media page to access this library. There will be a sign in page for the media people. This page will have the "Forgot Password" option. The system will reset their password and send them the new password to their email. This way, clients do not have to manage the passwords of the media people.

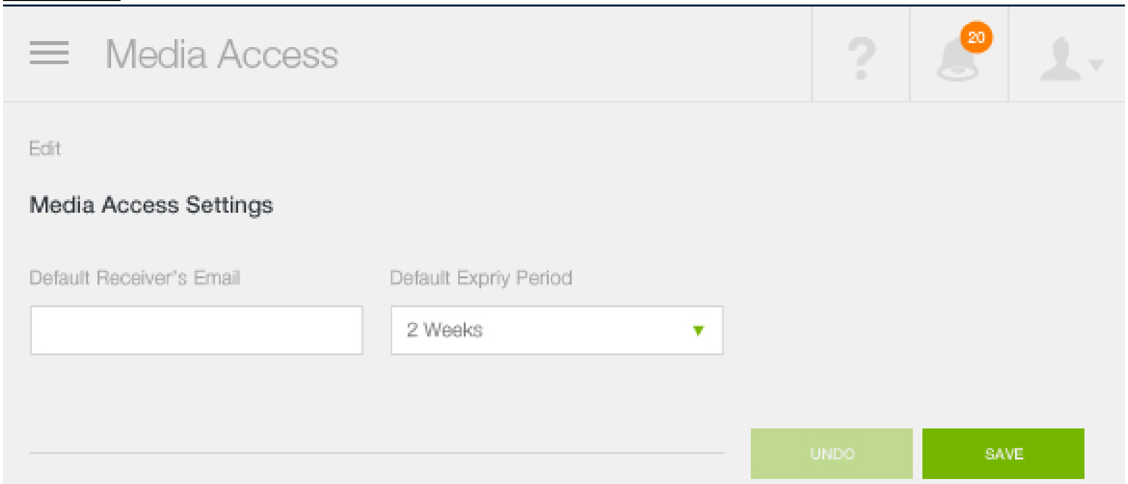
Clients will be able to manage the registered user accounts of these media people (they can add/delete media access requests). Clients are also able to create categories to filter on front end. Clients will have to upload and manage their files on this page. They have to put titles and dates and sometimes descriptions on these files.

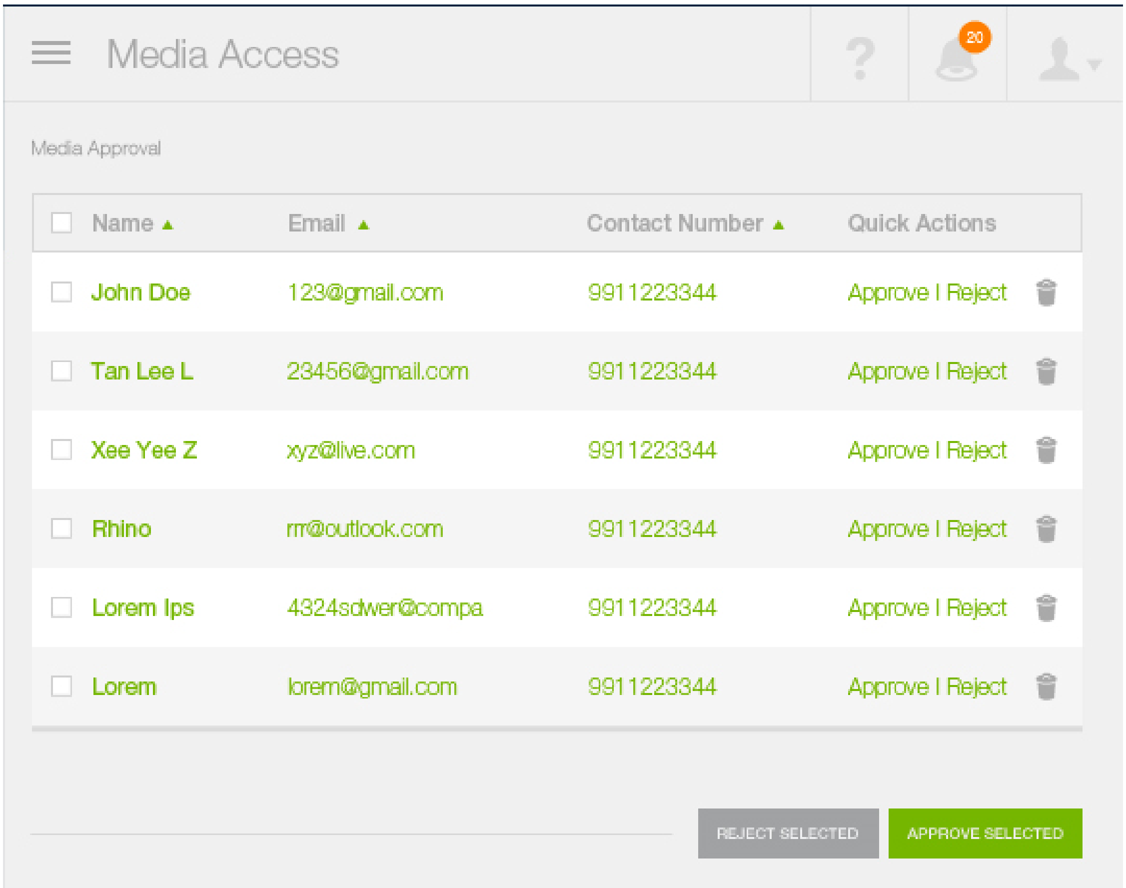
Features
- Allows user to manage media categories
- Allows user to manage media files
- Allows user to manage media access requests
  - Client can set expiry date to media access request or use the default settings for expiry date
  - Client can select the specific media that media company can have access to or the entire list
  - Upon approval, an email will automatically be sent to the registered email address containing the media access link, email, password and its expiry date
- Allows user to access the media access report
  - Client can view which media was downloaded by a media company
  - Client can view when the media was downloaded by a media company
  - Client can view how many times the media was downloaded by a media company
  - Consolidated report by media. Filter by date range. Eg. Media A was downloaded 3 times from 5-May-2014 till 10-Jun-2014
  - Client can export the reports in excel format
    - Settings
      - Client can enable auto-approve media access requests
      - Client can set the default expiry access (Duration of the media access). For eg. 5 days

- Allows public to register to access the media
- Client will be notified of new registrations

- Password will be auto-generated by system
- Approved registered user will need to login to access the media list

Back end




Media Access
20
Media Approval
Name
Email
Contact Number
Quick Actions
John Doe
123@gmail.com
9911223344
Approve I Reject
Tan Lee L
23456@gmail.com
9911223344
Approve I Reject
Xee Yee Z
xyz@live.com
9911223344
Approve I Reject
Rhino
rrr@outlook.com
9911223344
Approve I Reject
Lorem Ips
4324sdwer@compa
9911223344
Approve I Reject
Lorem
lorem@gmail.com
9911223344
Approve I Reject
REJECT SELECTED
APPROVE SELECTED

# Media Access

20

List of Media Acces

| | Name ▲ | Email ▲ | Items ▲ | Expiry ▲ | Quick Actions |
|---|---|---|---|---|---|
| ☐ | John Doe | 123@gmail.com | 13 Items | 03/03/15 | View Report I Edit |
| ☐ | Tan Lee L | 23456@gmail.com | 24 Items | 03/03/15 | View Report I Edit |
| ☐ | Xee Yee Z | xyz@live.com | 40 Items | 03/03/15 | View Report I Edit |
| ☐ | Rhino | rrr@outlook.com | 10 Items | 03/03/15 | View Report I Edit |
| ☐ | Lorem Ips | 4324sdwer@compa | 40 Items | 03/03/15 | View Report I Edit |
| ☐ | Lorem | lorem@gmail.com | 20 Items | 03/03/15 | View Report I Edit |
| ☐ | Dinesh | fish@fishy.com | 40 Items | 03/03/15 | View Report I Edit |
| ☐ | Mila | 123@wizwerx.com | 13 Items | 03/03/15 | View Report I Edit |
| ☐ | Konchesky | xlhlspda@hotma | 13 Items | 03/03/15 | View Report I Edit |
| ☐ | Ipsum | vee@studio.com | 13 Items | 03/03/15 | View Report I Edit |

1 2 3

DELETE SELECTED | EXPORT SELECTED

**Page Manager**

Description
This module is designed for clients to create new pages such as Dividend History.

Features
- Allows user to create new pages
- Allows user to add and edit content of those pages
- Allows user to delete the pages