

BUSINESS PROPOSAL FOR VARAM AUTOMATIONS



April 2024



ONLINE BUSINESS PROPOSAL

CRM Data Analytic

LLP 141/1b
Doddakannahalli
Village, Bengaluru
560035 India.

Varam Automations Pvt. Ltd.,

257,9th A Main 3rd block,
Jayanagar, Bengaluru,
Karnataka, India

April 24, 2024

Dear Team,

We are pleased to present this proposal for the development of a CRM. This proposal outlines our vision for creating a seamless platform that revolutionizes interactions and operations.

Objectives:

- ❖ **Automated Data Collection:** The system should be capable of automatically pulling enquiries from various B2B portals or websites periodically. This will ensure that all potential leads are captured without any manual intervention.
- ❖ **Data Segregation:** The system should be able to segregate the enquiries based on the division and product. This will help in directing the enquiries to the appropriate teams for further action.
- ❖ **Automated Communication:** The system should have the capability to send automatic emails to clients. This can include initial responses, follow-ups, and other communication as required.
- ❖ **Quotation Tracking:** The system should keep track of quotations at every stage. This includes the creation, sending, follow-up, and closure of quotations. This will provide a clear view of the sales pipeline.
- ❖ **Data Analysis:** The system should be able to analyze data based on various parameters such as Product, Division, State, City, etc. This will provide valuable insights that can be used for decision making and strategy planning.
- ❖ **Monitoring:** The system should provide real-time monitoring capabilities. This includes tracking the status of enquiries, quotations, and other key metrics. This will help in identifying any issues or bottlenecks in the process and take corrective action promptly.

Key Features and Functionalities:

- ❖ **Automated Data Collection:**
 - Integration with various B2B portals and websites for data collection.
 - Scheduled tasks for periodic data collection.



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❖ Data Segregation:

- Automated sorting and categorization of enquiries based on division and product.
- Routing of enquiries to appropriate teams.

❖ Automated Communication:

- Email automation for initial responses, follow-ups, and other communication.
- Customizable email templates for different scenarios.

❖ Quotation Tracking:

- Creation and management of quotations.
- Tracking of quotation status (sent, viewed, accepted, rejected).
- Alerts and reminders for follow-ups.

❖ Data Analysis:

- Reporting and analytics tools for data analysis.
- Filters for analysis based on Product, Division, State, City, etc.
- Visualization of data for better understanding and decision making.

❖ Monitoring:

- Real-time monitoring of enquiries, quotations, and other key metrics.
- Alerts and notifications for any issues or bottlenecks.
- Dashboard for a quick overview of the process.

Sir,

Please tell us if these issues align with your concerns. After you go through the proposal, let us know where you would like to go from here.

Warmest Regards,
Team CRM-Doctor

PROJECT SCOPE OF WORK & DELIVERABLES:

S. No.	Feature/Module	Description
1	Automated Data Collection	The system will be integrated with various B2B portals and websites for data collection. It will also have scheduled tasks for periodic data collection.
2	Data Segregation	The system will automatically sort and categorize enquiries based on division and product. It will also route enquiries to the appropriate teams.
3	Automated Communication	The system will have email automation for initial responses, follow-ups, and other communication. It will also have customizable email templates for different scenarios.
4	Quotation Tracking	The system will allow for the creation and management of quotations. It will track the status of quotations (sent, viewed, accepted, rejected) and provide alerts and reminders for follow-ups.
5	Data Analysis	The system will have reporting and analytics tools for data analysis. It will also have filters for analysis based on Product, Division, State, City, etc. Data visualization will be provided for better understanding and decision making
6	Monitoring	The system will provide real-time monitoring of enquiries, quotations, and other key metrics. It will also provide alerts and notifications for any issues or bottlenecks. A dashboard will be provided for a quick overview of the process.

Project Schedule:

Sl. No.	Activity Name	Timeframe
1	CRM Setup, Configuration, and Data Migration	4 Weeks
2	Testing & Bug Fixing - Deployment	1 Weeks
3	Training	8 hours
	TOTAL	5 Weeks 8 Hours

Pricing:

Cost type	Cost (INR)	Details
Onetime setup cost	15,000	This is a onetime cost for setting up the system
Annual cost	15,000	This covers 10 users for 1 year
Total	30,000 INR + 18% GST	

Note: The cost associated with the customization of the product will be **15,000 INR.**

Notes – Any third-party integration will be charged as per the analysis.

TERMS & CONDITIONS:

1. There will be unlimited training
2. Filed executive app will track the field employees
3. Payments should be made in the Favor of " CRM Data Analytic LLP"
4. Implementation and configuration time for the software will be 1 Week. To start the installation, process the following conditions must be fulfilled.
 - a. Formal Purchase Order/ Work Order in the name of CRM Data Analytic LLP with information about items to be procured and payment terms. It should be duly signed by the competent authority.
 - b. Advance amount as agreed should reach CRM Data Analytic LLP Account.
 - c. Communication links (Internet Connection) need to be up and running.

GENERAL TERMS:

1. Order once placed cannot be cancelled.
2. Use of given software licenses is subject to your agreement with CRM Data Analytic LLP, software license agreement. Please read it carefully before agreeing to purchase the given solution.

Bank Account Information:

A/c Holder name - CRM Data Analytic LLP

A/c Number - 921020048852634

Branch - Mico Layout BNGR KT, Bangalore - 560078

IFSC - UTIB0004216

Pan Card - AAPFC9048K

GST No. - 29AAPFC9048K1ZO

ADDITIONAL BILLABLE:

Any unplanned components, ideas, revisions, and project scope happen - when there is an unexpected event that will incur a cost, we will notify you ahead of time and will not produce unless we receive clear approval for increased budget and timeline.

OUR TEAM & ABOUT US:

CRM-Doctor is a global digital solution provider specializing in Sitecore, CRM & ERP, Website development, Mobile Application, etc. CRM-Doctor is a Business Leader in the field of IT Services and Enterprise Business Structures around the globe. Being IT specialists, we have built, upgraded, migrated, and maintained well over 100+ projects for industries like Healthcare, Real-Estate, Education, E-Commerce, Finance, Marketing, Automotive, etc. with a 99.2% success rate.

METHODOLOGY:

How it Works

Let's start off by looking at the steps we'll be taking to get your project from start to finish.

1. **Discovery** - through a process of surveys and meetings we'll gather all the information we need to have the best understanding of your business and goals.
2. **Architecture** - just like a building, Mobile Application needs a solid blueprint. Together we'll determine the best way to organize your billing software and sketch out a rough outline.
3. **Content** - with a solid blueprint in place it will be your job to collect, organize, edit, and deliver content to us for each page.
4. **Design** - at the same time as you are working on the content our team will be creating non-functioning comprehensive layouts showing possible design directions.
5. **Development** - with all the necessary architecture, content, and design elements in hand we'll create the first working version of your application.
6. **Test & Trial** - Trial and error is a method of solving the problem, recorrecting, fine-tuning, or obtaining knowledge to give us an opportunity to analyze that failure, make those changes, and then try again to provide the appropriate solution.

7. **Launch** - To get your Mobile Application “going live” ready will inevitably require several rounds of revisions and polish. Once it is ready, we'll go through the final launch checklist.
8. **Warranty** - Once your Mobile Application is now live! Over the next several weeks, our team will train you on how to manage and use the solution and help you solve any issues during the usage. Thereafter as per the Support Package, our team will help you remotely through emails, calls, or any other feasible mode of communication.

Communicating Effectively:

During your project communication will be non-stop with emails, phone calls, and online meetings. Here is how we make it happen.

- Email - [support@crm-doctor.com] is the only email you need to remember. The person concerned regularly checks this account and the person best suited to reply will always do so quickly.
- Phone - +91 87927 60328 is the direct line of your project manager, [Lokesh S]. Your calls are always welcome between 10 am and 7 pm IST, Monday through Friday.
- Meetings - we use Google Meet, Zoom Meeting, Skype or any other feasible tool for online meetings to review milestones and deliverables. Make sure you have the software installed before our first meeting.

TECHNOLOGY & HOSTING PLATFORM:

With the CRM-Doctor solution you can spend much less and get many more features to streamline your business process. We offer an integrated system that runs all of your Online Business in one place while growing your database automatically.

Management Tools	CRM-Doctor
Server Platform	Linux
Admin Portal Development Language	PHP
Database	MySQL

HELPDESK & EDUCATION:

We want you to get the most out of your proposed solution for this to happen, you must be asking questions and continually learning. We offer an assortment of different training, education, support, & helpdesk products and agreements.



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[OPTIONAL] PHONE HELPDESK:

TERMS	We will provide one (1) user with unlimited helpdesk support. The helpdesk allows for Direct email and phone support for our Platform. The helpdesk does not include design or development labor.
	Helpdesk services are offered Monday through Friday from 10 AM to 7 PM Indian Standard Time.

PROJECT AGREEMENT:

<p>We,</p> <p>CRM Data Analytic LLP</p> <p>Address: 141/1b Doddakannahalli Village, Bengaluru 560035 India</p> <p>Contact Person: Lokesh S Phone: +91 87927 60328 Email: support@crm-doctor.com</p>	<p>You,</p> <p>Varam Automation Pvt. Ltd</p> <p>Address: Jayanagar, Bengaluru, Karnataka</p> <p>Contact Person: Vardachari Ramesh Phone: +91 9448388218 Email: ramesh@varamautomations.com</p>
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INVOICES:

Payment is due upon receipt of the invoice. You may not withhold any amounts due, and we reserve the right to cease work without prejudice if amounts are not paid when due.

ENTIRE AGREEMENT:

This document together with any attachments, as well as any new, different, or additional terms, conditions, or policies which we may establish from time to time, and any agreement that we are currently bound by or will be bound by in the future, constitutes the complete and exclusive agreement between you and us concerning your engagement of us on this project, and supersede and govern all prior written and verbal communications.



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SIGNATURE:

By signing this document, you represent to us that you are a duly authorized representative of your organization and on its behalf agree to be legally bound by its terms and conditions. You hereby accept and authorize the commencement and payment for the project described above.

NAME: _____

DATE: _____

SIGN: _____