



**System Upgrade Proposal**

**Client: Premier Safaris**

**Submission Date: 25th/March/2023**



## **Requested Features.**

## **Tours Module.**

This platform aims to streamline and automate the tracking of activities in the tours department, including the ability to track services offered to clients, compare them against the initial budget, and calculate the profit gained.

Additionally, the platform will facilitate the creation and sending of tour quotations to clients. By implementing this system, the tours department will benefit from increased efficiency, accuracy, and improved client satisfaction.

The platform will provide a centralized database to record all tour-related activities, including services offered, expenses incurred, and client details. It will allow staff to easily update and access information related to each tour. This feature will ensure accurate tracking of services provided to clients.

The proposed tour management and quotation platform will enhance the efficiency and effectiveness of the tours department by automating tracking activities, managing budgets, calculating profits, and simplifying the quotation process.

By implementing this system, the department will be able to provide accurate and timely information to clients, improve financial management.

## **Administration Department**

The platform aims to streamline and automate tasks such as taking meeting minutes, capturing visitor data, and recording and approving petty cash expenses.

By implementing this system, the administration department will experience improved efficiency, accuracy, and productivity.

*Meeting Minutes Management:*

The platform will provide a user-friendly interface to facilitate the capturing and management of meeting minutes. It will allow administrators to create meeting agendas, record discussions, and document action items. It will also offer features like tagging attendees, attaching relevant documents, and generating summary reports.

*Visitor Management:*

The platform will include a visitor management module to capture and store data related to office visitors. Administrators will be able to register visitors, record their contact details, purpose of visit, and check-in/check-out times. This feature will enhance security, facilitate visitor tracking, and provide valuable insights into visitor patterns.

*Petty Cash Recording and Approval:*

The platform will incorporate a petty cash management feature to record and manage petty cash expenses. Administrators will be able to log petty cash transactions, including the amount, date, and purpose. The system will automatically generate requests for approval and route them to the designated accounts department personnel. Once approved, the system will update the petty cash balance and maintain an audit trail of transactions.

**Marketing department**

The platform aims to streamline and automate tasks such as recording tender information, managing received cheques, and handling invoices.

By implementing this system, the marketing department will benefit from increased efficiency, improved data management, and enhanced financial tracking.

*Tender Information Management:*

The platform will provide a centralized database to record and manage tender information. It will allow marketing staff to enter and track details of upcoming tenders, including deadlines, requirements, and submission dates. This feature will enable efficient tender management and improve the department's success rate in securing contracts.

*Cheque and Payment Tracking:*

The platform will include a module to track received cheques and payments. Marketing staff can input cheque details, such as cheque number, date received, and associated project or client. This functionality will streamline payment tracking, reduce manual effort, and improve cash flow management.

*Invoice Handling:*

The platform will facilitate the creation, management, and tracking of invoices. Marketing staff can generate professional invoices with customizable templates, including relevant details such as client information, project description, and payment terms. Additionally, it will maintain an audit trail of all invoice-related activities for easy reference and accountability.

**Duration**

Based on the requested features we propose a duration of three weeks to be able to complete and develop the requested features.

**Budget**

Based on the requested enhancements to be done on the system we are proposing a budget of Kes 96,000 /=.

The proposed amount will allow us to work and be able to implement the requested features.