



EZ - SOLUTIONS

PROJECT PROPOSAL

CPG Portal Development For EZ-Solutions

Overview

We propose to develop a robust, scalable, and feature-rich **CPG Portal Development** tailored to your business requirements. This portal will streamline the procurement processes, provide comprehensive management of sales orders, purchase orders, vendors, payments, quotations, and inventory. It will also incorporate a user-friendly Content Management System (CMS) for efficient control of portal content. This portal will incorporate an IMS, warehouse management, and end-to-end supply chain functionalities. It will serve diverse industries, including hospital management, food and beverage, and procurement management.

Reference Website:

<https://advanced.team/>

<https://eastpole.fave.kr/>

Key Features

The portal will include the following modules to ensure seamless integration and functionality:

1. Dashboard Module

Admin Dashboard

- Current vendors and customers.
- Ongoing projects.
- Financial insights (current revenue, last quarter, and last year revenue).
- Best-selling and vendor top-selling products.

Customer Dashboard

- Ongoing customer projects (procurement, sourcing, production).
- Open orders and open quotes window (categorized as new, in-process, or completed).
- Financial statuses (current month, quarterly revenues).
- Completed projects by EZ-Solutions and procurement insights.

2. Control Panel

Orders Management

- **Order Creation (main module):** Customers can raise orders directly or through EZ Solutions. Vendors can only respond.
- **In-Process Orders:** Will contain in-line items eg., 1 order broken down into different products included in that order.
- **Status Management:** Order statuses include New, Accepted, In-Process, Completed, and Cancelled.
- **Detailed Line Items:** Includes estimated shipping dates (ETS), arrival times (ETA), and payment tracking.
- **Vendor Updates:** Vendors provide ETS and ETA; notifications sent to all parties upon update.

Order Fields

- Auto-generated order number, reference number, PO details.
- Billing and shipping information (addresses, points of contact, emails).
- Raw material details: SKU, quantity, and units (kilos, pounds).

Quote Management

- Quote statuses: New, In-Process, Completed, Cancelled.
- Raised by the company or customers only.
- Auto-generated quote numbers and delivery timelines.
- Chat option for secure communication between customers, vendors, and operations.

3. Vendor and Customer Management

- **Vendor Management:** Onboarding process with detailed company and tax information.
- **Customer Management:** Profile linking to respective vendors for personalized pricing and procurement tracking.

4. Warehouse and Transportation Management

- **Inventory Transfers:** Manage items between warehouses or facilities.
- **Delivery Tracking:** Expected ship date and actual delivery status updates.

5. Product and Catalogue Management

Core Features:

- **Products:** Manage all items with details like SKU, name, multiple images of the products, description, pricing, availability, and variants.
- **Brands:** Organize products by brands, maintaining brand logos, descriptions, and associated attributes.
- **Categories:** Group products into categories (e.g., Electronics > Mobile Phones > Smartphones).
- **Customized Catalogues:** Tailored catalogues for each customer with their specific products and prices.
- **Contract-Based Catalogues:** Automatically reflect terms from customer contracts, including agreed-upon discounts or pricing.

6. Communication System

- **Built-In Chat:** Secure communication channels between customers, vendors, and the EZ Solutions team.
- **Notification System:** Updates for all order and quote statuses.

7. Financial and Invoice Management

- **Invoice Tracking:** Open invoices displayed for finance team review.
- **Payment Management:** Supports vendor payment terms (e.g., Net 35-45 days).

8. Reporting Module

- Generate comprehensive reports for orders, invoices, and financials

9. Additional Features

- **CRM Integration:** Seamlessly manage customer relationships and sourcing processes.
- **Sales Order Module:** Manage sales orders for customers and vendors.
- **User Authentication:** Role-based access for security and functionality control.

Benefits

- Centralized portal for efficient management of supply chain operations.
- Customizable features to cater to diverse industries.
- Enhanced communication with built-in chat and notifications.
- Streamlined financial tracking and reporting.

Project Deliverables

- Fully functional Customer Order Management, Order Management, Invoice Management, Inventory Management Portal, Vendor Management, Catalogue Management, Payment Management, and Quote Management integrated in one system (One Window Solution)

- User manual and training materials.
- Comprehensive testing and quality assurance reports.
- A responsive system for all kinds of devices.