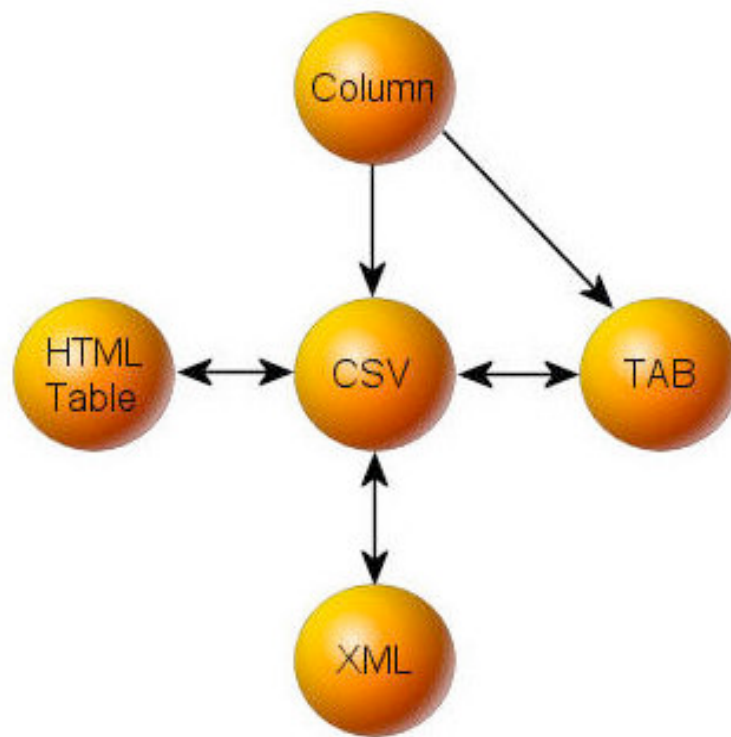


Proposal For:

CSV Tool Support Project

(Web Based/Online Solution)



Prepared By

Doug Thaler
Filocity.com

February 14th, 2013

Dear -----,

Thank you for providing us an opportunity to present you with a proposal for your project. We appreciate for showing interest and giving us the chance to work with you for your **“CSV Tool Support Project”**.

I have gone through your entire Specification & details and discussed that with our expertise development team; please find our analysis & estimation for the Design and Development of your project.

This document consists of detail designing of project including Project Summary, Scope, and Understanding of the Requirements, Proposed Solution, Development Platform, Resources, Pricing, and Timeframe etc.

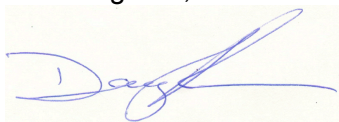
We'd like to draw your attention that:

- We have understood the functionality of your web based business solution from details sent by you.
- We are absolutely comfortable and have proven expertise to designing and developing this web solution. We holds “An Excellent” previous track to develop these solutions.
- We have highly experience team of developers / professionals in PHP, Asp.Net, CMS and Web Technologies.

Most of your questions should be answered within the report / proposal, but don't hesitate to let me know if you need any more information.

Thanks again for the opportunity to work for your esteemed company. I look forward to hearing from you, when you have time please read our report & project development plan.

Kind Regards,



Doug Thaler

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Executive Summary:

It is with great pride and pleasure that Filocity.com submits this in response to your **“CSV Tools Support Integration”**.

Our focus lies in collaborating with clients to provide them with competitive solutions, aiming at increasing their bottom lines. Analyzing business needs, streamlining business process and maximizing competitive advantage is what we provide for each of our clients. We offer a plethora of services in the web design and development arena - customized development all focused around business processes.

We offer our customers a choice of a “white labeled” stand alone system or incorporating their solution into our enterprise back office toolset at Filocity.com.

Project Objectives:

The objective of this document is to provide a study of the system. The document will detail out scope of work for the application and will also cover technical aspects of the application to some extent. The highlighted objectives of the system are:

- To design and develop highly scalable web based System that can be accessed from anytime anywhere.
- To deliver high quality scalable system with low cost.
- To facilitate users, to see & upload the CSV files for managing the data & forms in a proper manner.
- To provide secured access of the system to various defined users with predefined access.
- To provide 24 hrs running web based system to manage documents and uploading of the files according to need.
- To facilitate easy interface for the end user to upload CSV files.
- To facilitate interface for the Admin to manage the files in an easy way.
- To deliver the System within defined timeline after awarding the project.

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- To facilitate an interface for company's users to manage their information to submit back to the company in a fully secure solution.

Project Consist of the Following:

- The scope of the work is detailed on this document.
- Understanding the Business requirements and Map them into software system.
- Requirement Analysis
- Writing scripts for required Integration as per Framework.
- Deploying the system for customer testing

Understanding of the Project:

Detail design & Specification Task:

The objective of the client is to create a tool through which the account owner/Admin (company) can upload CSV files. When CSV will be uploaded then a notification will be sent to all the Company Aggregators, Agents, Sub Agents and Non Agents as required. Auto notifications system can be generated with this tool for sending the notifications to admins of the site or a manual selection notification system or a combination of both can be setup to notify user that a document has arrived for them to update. Notifications will be set per the company's requirements.

Each of the users of this site will have their separate account "Guest Account" and login to access that "guest account" and web based forms.

Users like- Aggregators, Agents, sub agents and/or non agents login into the site from their account and see the CSV files in a visually pleasing form that may be partially filled by the CSV for the user to complete. Users will fill the forms required fields and submit the details. Partially finished forms can have the option of being saved by the user to come back to and complete when time permits. Their can also be an auto reminder email for incomplete forms sent at specific intervals to the users until the form is 100% complete. Sensitive data can be shown as completed but not re-populated for users view.

Once the user submits the CSV form an Admin will be notified. The admin can login at any time and run a report of completed and partially completed forms. The admin can also generate and download specific reports as a CSV file with the updated information. The returned CSV can be fixed in the form of Agency, Location and Agent Data or the company can pull down a custom CSV with their required fields. The CSV files themselves can show sensitive information or

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themselves have encrypted fields. The CSV management can also require an additional password managed by the account owner. All sensitive data will be managed in the tradition of FISMA and HIPAA. All users IPs and access information will be available in the form of visually friendly printable reports.

This system will have mainly two users:

Admin/Account Owner: Manage the site and monitor all the activities of users. Upload the master CSV, Download a new CSV, view any and all data filled out by the users. Print various reports including access reports in the nature of HIPAA compliance, user tracking and tracking of access to sensitive information.

They can also save a copy of the form in the agents folder with the sensitive data blocked out. The social security number and other sensitive info will be included with this sensitive data. Forms can also be locked with an additional password required from the admin to access.

Users/ Agents/Aggregators/Agents: Each user will have their own account which is created by the company owner. Users can login into their account and can view the CSV form or custom user friendly form (To be determined) & fields included in that forms. Users will fill the required information's in these fields and will submit after completing the form.

Operation of the solution will be in Three types of User Role:

➤ **For Admin/Company Owner:**

- Admin manage all the things related to site like- Company profile, User's profile, CSV files uploaded by the users etc...
- Admin have rights to perform various task and monitor all the activities of site users.
- Manage complete system.

➤ **For Company Admin:**

- Can create their profile as a Admin on site
- Aggregator Management
- Agents Management and their Hierarchy

- Sub Agents Management
- Can upload the CSV files on the site and perform various task-
 - See the details filled by the users
 - Store data into folders
 - Manage all the activities performed by the users
 - Download the files
 - Create separate account for each user of company
 - See the various details and report
 - -Assign an additional security layer in the form of a file or folder password
- Can make required changes in their own profile
- On CSV Upload Secured link of the Form would be notified to Aggregators, Agents and sub agents to fill the information's in the form.
- Send URL Notification by Email to respective Agents, Subagents
- Confidential information de-identified in the system by not displaying the complete details.
- See the list of Incomplete/.Pending Forms
- See the status of the Form Completeness (% Completed)
- Sensitive Data Blocked out by XXXX
- Reports
 - By Agent Access Level Other

➤ **For Users/Agents/Aggregators/Non Agent:**

- Manage their own profile
- Secured login to the URL by their Username and Password
- Fill the details on the Form
- Submit the forms after filling the details
- Notification to that Agent filled the form
- List of Incomplete Forms
- Sensitive Data Blocked out on display

Some information will be saved in encrypted format. And then company/admin will be able to download the CSV with the information provided by different Agent and Subagent and Aggregators, etc., of that company.

System will monitor all the activities performed by the users and will show to company that who logged in, from which ID, how much information filled by whom and who did the work with particular ID.

System will have the ability to calculate process in percentage and also will monitor any who haven't filled the designed forms.

All the stored data will be accessible by encrypted links. The forms will be encrypted at the time of uploading and sensitive data will be blocked with front-end.

System will have notification integration that will be sent to all the users of the company at the time of uploading CSV files.

System will be Secure, Fast and support the data collection. System will have browser compatibility and will be accessible from various browsers like- IE7/8/9, Firefox, Chrome etc...

System will manage various information's and data related to agents, Agency, Companies, Sales agent, non-sales etc...

HIPAA Privacy Requirements:

Proposed Hosting Platform:

- SSL Enabled Web Hosting
- Tightly Secured Authentication with proper SQL Injection and Cross Site Scripting checks
- Concurrent Multi User Login with 100 % uptime

Security & Data Protection consideration:

- Password verification with strong Password Policy
- Sensitive Data Blocked out on screen Display and reporting
- Secured https hyperlink sent to target users to complete their forms
- Encrypted Password and confidential Storage in the database
- Role based System function access and authorization

Project Management Task:

The CSV module will be built as a custom interface into Filocity.com's document management portal which contains all of the existing requirements. We will add the custom module into the company owner/admin workspace where they will be able to easily upload and manage the CSV functions and reporting.

Time Frame:

On high level study it will take about **4 – 6 weeks** to take this solution live. Once you award the project, Filocity.com will draft and submit a project plan which identifies the actual calendar dates of all milestones and deliverables.

Reports:

Filocity.com will submit a weekly progress report containing the status of the delivery order with the present status and upcoming task with clear visibility of the project status

Assumption:

The following things are assumed and expected to be made:-

- The success of this project will require collaboration between your Business and Filocity.
- You will assign a point of contact person who will answer all the queries within 2 working days.
- You would be entirely responsible for any Third Party Software Licenses, if any are required.
- Your UAT (User Acceptance Test) Team will do the Acceptance test of the system and will update us with the acceptance of the specific functions.

Items Not Included in this Project:

- This proposal doesn't include cost of any Third Party Software License (If any required)
- Any items not specifically detailed in your requirements.

Proposed Technology to develop the Website:

Programming Language: PHP, JQuery, Java Script, Flash, Adobe Photoshop, and CSS3

Database: MY SQL

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Project Change Control:

Any changes effecting project scope or deliverables after we “Lock” the scope of the work and sign agreement will require signed approval of a Change Request Form. Applicable charges according to the change of scope will be evaluated at that time, should be acceptable to both of us.

Schedule A

Requirements Document for Secure Data Handling

Our requirements are as follows:

- Secure, Fast data collection solution
- Accessible by standard web browsers
- We need a solution to securely capture, transmit and store (i.e. encrypt some database fields) that includes the following:
- Aggregator Information – if any (see Figure 1 below)
 - Need to relate Sub Agencies to Aggregator
 - [Note: Aggregators can have sub-aggregators and sub-agencies]
- Agency Information (see Figure 2 below)
- Sales Agent Information
- Non-Sales Agent Information
- [Note – Since there is a defined relationship between Aggregator, Agency and Sales and Non-Sales agents, that relationship must be captured during the information intake process]

[Note: The attached spreadsheet displays all mandatory (i.e. yellow highlight) and optional fields]

Example Data Collection Scenario:

1. Send web link to target audience via email or communicate via phone
2. Target user supplied with login credentials via web interface or phone
3. Target user logs in and validates data in fields already populated with data
4. Target user:
 - a. Corrects data where necessary
 - b. Fills in data where necessary
 - c. Target users indicates completion of data collection activity by submitting validated and/or corrected data
5. System sends notification that target user completed data collection activity
6. Target user data now retrievable via:
 - a. Web
 - b. SFTP

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Proposal for CSV Tool Project

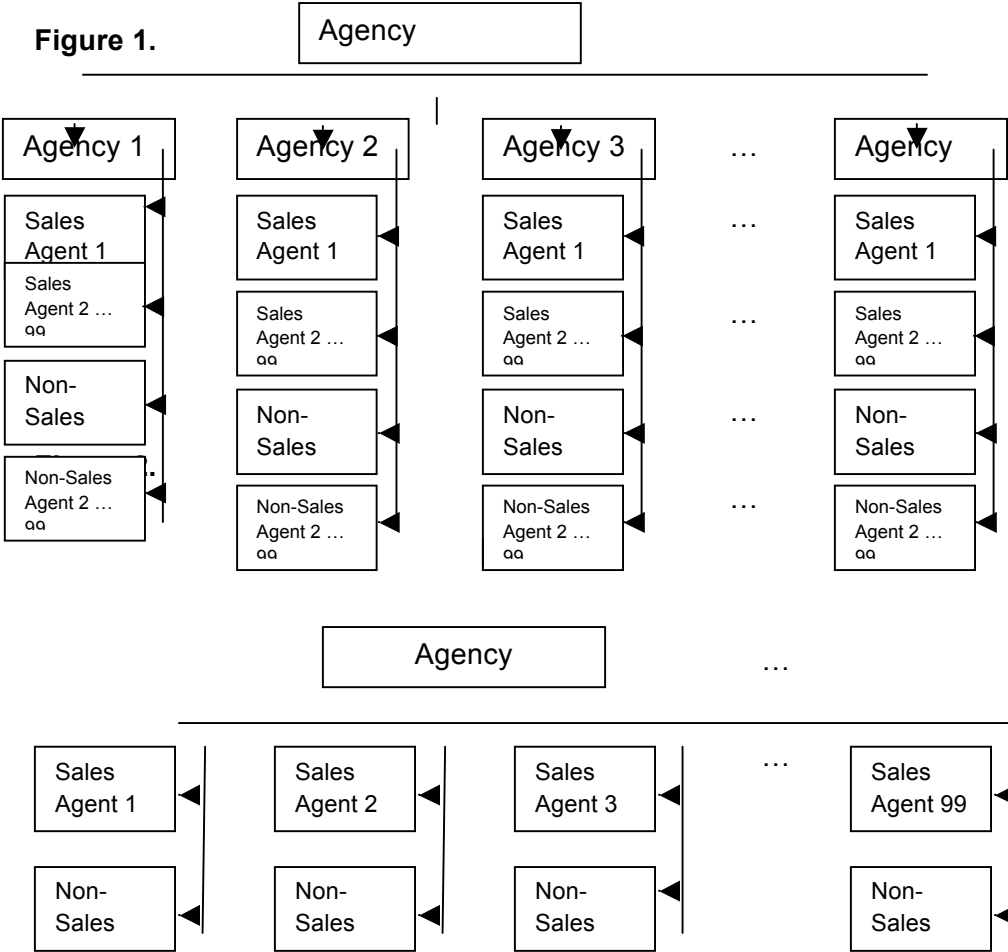


- c. Encrypted Email
- d. Secure Share

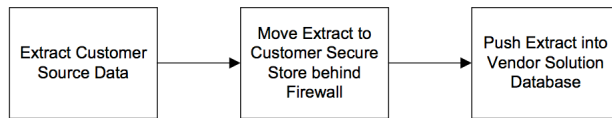
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Schedule B

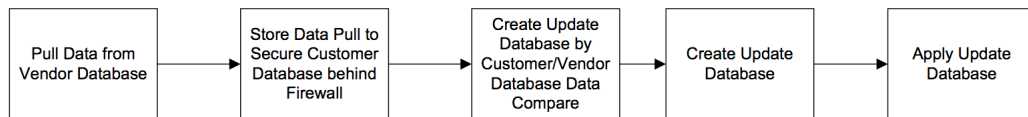
Figure 1.



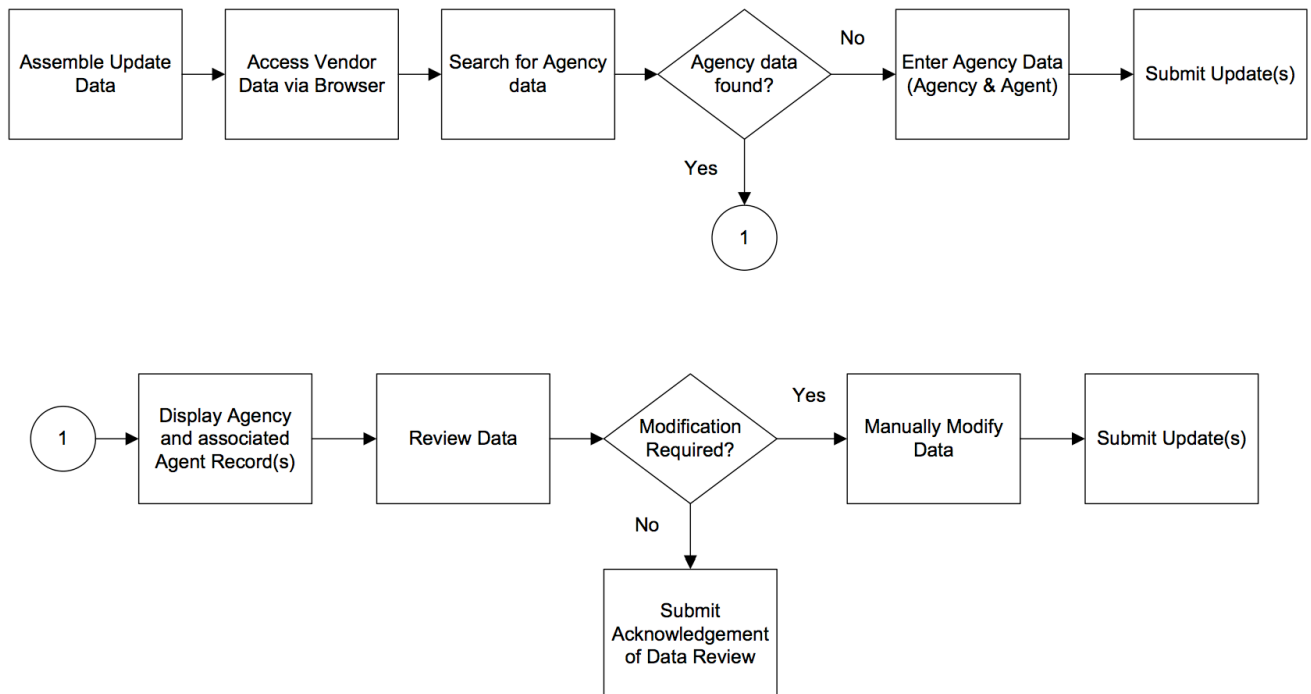
Data Flow at Database Level: Vendor Database Refresh – performed by Customer Employee



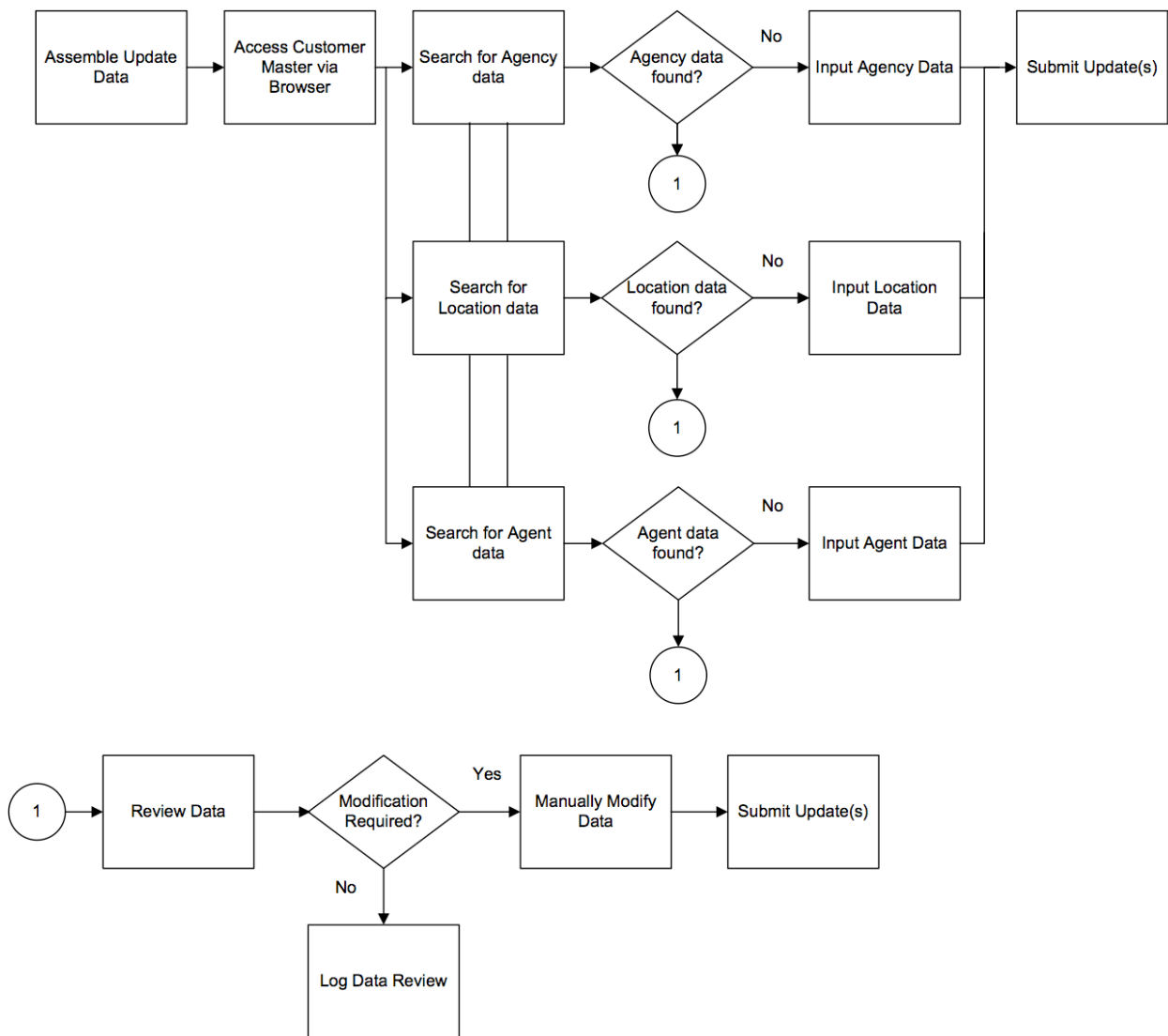
Data Flow at Database Level: Customer Database Update – performed by Customer Employee



Data Maintenance at Individual Field Level: Vendor Database – performed by Agency Representative



Data Maintenance at Individual Field Level: Customer Database – performed by Customer Employee



Payment Terms & Conditions:

- The price for this project will be \$17,900.00. The monthly maintenance including servers, backups and security will be \$479.00 per month paid quarterly.
- Final Payment Milestones will be defined according to the Project Plan acceptable to both of us.
- Initial deposit of \$7,160.00 is due on signing off on the Project Plan.

\$7,000.00 due on the delivery of the Ability to upload CSV with user accounts populated, users being able to fill in required fields and submit and admin being able to re-download CSV file in specified format.

With the balance due 5 days after company sign off on functionality.

Payment is assuming that the application is integrated into Filocity.com's existing portal. A white labeled solution is available as well for \$37,500.00. In the event of a white labeled solution the deposit will change to an initial deposit of \$15,000.00 due on signing of the project plan with \$15,000.00 due on the delivery of the Ability to upload CSV with user accounts populated, users being able to fill in required fields and submit and admin being able to re-download CSV file in specified format.

With the balance due 5 days after company sign off on functionality.

Once you approve the model, we will begin the actual work and deliver the finished product in a timely fashion.

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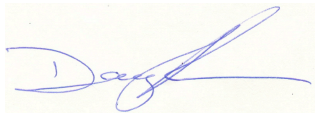
Terms of Agreement/Engagement:

Once we finalize the project scope and both agree with all the Deliverables, Terms & Conditions, Payments etc....we would sign an official agreement mentioning all the details duly signed by both of us.

After signing the agreement we would be liable to work for you from the agreed date and deliver the project as per the agreement and you would be liable to pay us timely as per the agreement.

We look forward to work with you and hope to have long lasting business relations.

Kind Regards,



Doug Thaler

Engagement:

This is notification of our formal engagement to move forward with Filocity.com under the terms and conditions outlined above. I have the authority to order these services on behalf of my company and I or person or persons named below will be the point of contact for Filocity.com for the duration of this project.

☐ Integrated Filocity.com solution

☐ White Labeled Solution

Agreed By:

Name:

Title:

Contact Email:

Contact Phone

Initial Point of contact:

Name:

Title:

Email:

Phone:

Signed: _____ Date: _____

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