



# SUCCESS INNOVATIVE TECHNOLOGIES PRIVATE LIMITED

**Multi Dreams Enterprise**

---

## Table of Contents

<b>1. Proposal .....</b>	<b>3</b>
<b>2. Software Modules.....</b>	<b>5</b>
<b>3. Server Configuration.....</b>	<b>15</b>
<b>4. Annual Maintenance.....</b>	<b>16</b>
<b>5. Payment Condition.....</b>	<b>17</b>
<b>6. API Integration.....</b>	<b>18</b>
<b>7. Costing.....</b>	<b>19</b>

# 1. Proposal of Website

---

We appreciate the opportunity to collaborate with you on enhancing your digital presence and optimizing your customer relationship management processes. As discussed, we have prepared a comprehensive proposal outlining the implementation of a robust **Front Website** strategies tailored to meet your specific business needs and objectives.

## 1. **Purpose**:

The primary objective of this proposal is to streamline your customer relationship management processes while concurrently boosting your online visibility. By implementing a customized Front Website strategies, we aim to enhance your overall business efficiency and digital marketing effectiveness.

## 2. **Scope**:

- Development and customization of a Front Website tailored to your business requirements, including customer data management and customer interaction analysis.

## 3. **Target Audience**:

Your target audience includes existing customers, potential leads, and online users interested in your products or services. Our strategies will be designed to effectively engage and nurture relationships with these key stakeholders across various digital touch points.

## 4. **Constraints**:

While we aim to deliver optimal results within your budget and timeline constraints, please note that the effectiveness of the strategies may be influenced by factors such as market competition, algorithm changes, and content quality.

## 5. **Benefits**:

- Improved customer relationship management leading to enhanced customer satisfaction and retention.
- Increased online visibility and brand exposure through higher search engine rankings and active social media presence.

## 6. **Implementation Plan**:

- Phase 1: Requirements Gathering (4 Days)
- Phase 2: Audit and strategy development for Website Design (4 Days)
- Phase 3: Implementation of Website Development (6 Days)
- Phase 4: Implementation of Software Development (10 Days)

It will Consider Only Working Days of Company.

7. **\*\*Resources\*\***:

Our team of experienced developers, Designers, and social media marketers will be dedicated to the successful implementation of this project. Additionally, we may require access to your existing Website data, website analytics, and social media accounts for seamless integration and optimization.

We believe that the propose Website strategies will not only streamline your business operations but also elevate your digital presence and customer engagement to new heights. We are committed to delivering measurable results and exceeding your expectations throughout the project lifecycle.

Please let us know if you have any questions or require further clarification regarding the proposal. We look forward to the opportunity to collaborate with you and drive your business towards greater success.

**For Any Query Contact To**

**Mr.Shubham Singh**

sales@successinfotech.co.in

+91 9913723476

## 2. Website Modules

---

### 2.1 General Overview

In today's competitive business landscape, maintaining strong and lasting relationships with customers is essential for sustainable growth and success. Business Website serves as a centralized platform to effectively manage interactions with customers, streamline business processes, and drive profitability. Our Website solution is designed to empower businesses across various industries to optimize customer engagement, improve operational efficiency, and achieve their strategic objectives.

#### 2.1.1 Front Website Module

- Responsive Design
- Home
- About us
- Our Vision
- Our Mission
- Our Services / Courses
- Blog
- Latest Events / News
- Our Partners Details
- Gallery of Events
  - Photos
  - Videos
  - Achievements Gallery
  - Daily Activity Gallery
- Testimonials
- Contact Us
- News Letters
- FAQ (Frequently Asked Questions)
- Inquiry Forms
- Brochure Download
- Application of Loan
- Country Search
- University Search

## 2.2.2 Website Module (WebApp)

### SEO Metadata Management

- Add/Edit Meta Titles for Each Page
- Add/Edit Meta Descriptions for Each Page
- Manage Meta Keywords for Specific Loan Categories or Blog Posts
- Generate SEO-friendly Slugs for Dynamic Pages (e.g., Country, Lender, University)
- Preview Google Snippet (Title + Description + URL)
- Assign Custom Open Graph Tags for Social Media Previews
- Configure Canonical URLs to Avoid Duplicate Content Issues
- Manage Schema Markup for FAQs, Blogs, and Loan Comparison Pages

### Loan Partner Management

- Add New Loan Partners with Logo, Contact & Description
- Edit Existing Partner Details (Rates, Tenure, Processing Fees)
- Assign Country/Course-Specific Eligibility Criteria to Each Partner
- Upload Partner Documents (MoUs, Rate Sheets, Agreement Files)
- Configure Dynamic Interest Rate Slabs by Loan Amount or Tenure
- Set Partner Priority/Ranking for Recommendation Engine
- Tag Partners as “Featured”, “Popular”, “Private”, “Govt.” etc.
- Define Custom Application Form Fields per Partner
- Link Partner Offers to Student Loan Application Form
- Track Partner Conversion Rate via Admin Dashboard
- Generate Partner-specific Reports (Applications, Sanctions, Rejections)
- Enable/Disable Partners Temporarily from Frontend View
- View Partner Performance Summary (CTR, Application Rate, Approval %)
- Partner-wise Document Checklist Configuration

## **Track Progress of Applications**

- View Application Timeline with Each Stage (Submitted → Approved)
- Define Custom Statuses (e.g., “Bank Query Raised”, “Awaiting Docs”, “Sanctioned”)
- Assign Color Codes and Icons to Each Status for Visual Clarity
- Real-time Status Update by Admin or Assigned Staff
- Auto-update Status Based on Document Upload or Field Completion
- Notify Students via Email/SMS/Portal Notification on Status Change
- Allow Students to Track Progress from Their Dashboard
- Filter Applications by Status, Country, or Loan Partner

## **Automated Notifications to Applicants**

- Trigger Notifications Based on Loan Application Status Changes
- Send Email, SMS Alerts Automatically
- Configure Custom Notification Templates for Each Status
- Set Notification Rules for Events (e.g., “Document Uploaded”, “Loan Sanctioned”)
- Personalize Messages with Dynamic Tags (e.g., Name, Application ID)
- Schedule Reminder Alerts for Pending Actions (e.g., KYC Upload, Missing Docs)
- View Notification History in Admin and User Dashboard
- Enable Notification Logs with Timestamps and Delivery Status

## **Blog Posts Management**

- Create New Blog Posts with Title, Content, Images, and Tag
- Edit or Delete Existing Blog Posts
- Categorize Blogs by Topic (e.g., Loan Tips, Country Guide, Visa Process)
- Enable/Disable Comments on Blog Posts
- Display Featured Blogs on Homepage or Blog Page

- Add Banner Image and Alt Tags for Accessibility
- View Blog Engagement Metrics (Views, Likes, Shares)
- Support Rich Text Formatting (Headings, Quotes, Lists, Links)

## **FAQs Management**

- Create New FAQ Entries with Question and Answer
- Organize FAQs into Categories (e.g., Eligibility, Documents, Interest Rates)
- Edit or Delete Existing FAQ Entries
- Assign Display Priority for Each FAQ
- Enable Rich Text Formatting in Answers (Links, Bold Text, Lists)
- Show/Hide Specific FAQs from Public View
- Group FAQs by Page Context (e.g., Student Portal, Partner Page)
- FAQ Feedback Option (Was this helpful? Yes/No)

## **Students Review Management**

- Add New Student Reviews with Name, Country Flag, and Partner Logo
- Upload Student Photo and Rating (1–5 Stars)
- Assign Country, University, and Loan Partner to Review
- Approve or Reject Submitted Reviews Before Publishing
- Edit or Delete Existing Student Testimonials
- Group Reviews by Country or Loan Partner
- Highlight Featured Reviews on Home or Partner Pages
- Filter Reviews by Rating, Date, or Country
- Enable/Disable Review Visibility in Real-Time
- Sort Reviews by Most Helpful or Most Recent



## **Referral and Reward Program Management**

- Generate Unique Referral Codes for Each Registered User
- Track Referrals by Code, Name, Email, or Mobile Number
- View Referral Status (Registered, Applied, Sanctioned)
- Set Reward Rules Based on Referral Milestones
- Apply Referral Code at Registration or Loan Application
- View Reward History and Payout Status
- Admin Approval Workflow for Reward Disbursal
- Set Referral Expiry and Validity Period
- Send Referral Notifications via Email/SMS
- Download Referral Reports for Finance or Marketing Teams
- Role-based Access to Referral Settings and Reports

## **2.2.3 Loan Management Software Module (WebApp)**

### **Dashboard**

- Total Registered Users
- Total Applications Submitted
- Total Loan Applied Users
- Total Sanctioned Applications
- Total Leads

### **User Management**

- Manage Users (Admin, Staff Roles)
- Add/Edit/Remove Staff Accounts
- Assign Permissions (Loan Officer, Support)

### **Loan Application Management**

- Review Applications
- Application Status Updates
- Send and Receive Query to User
- Documents Management
- Loan Details Management
- Track Processing Time

### **AI-Powered Recommendation Engine**

- Profile-based Loan Suggestion
- Suggest Best-fit Lender Based on Profile
- Show Eligibility Probability for Each Loan
- Auto-update Recommendations Based on Profile Changes
- History of Suggested Loans & Applied Status

## **Loan Comparison Module**

- Select Multiple Lenders for Comparison
- EMI, Interest Rate, Processing Time Comparison
- Comparison Based on Country or Course
- Save & Share Comparison Reports
- Export to PDF

## **Co-Applicant Evaluation System**

- Add Multiple Co-applicants
- Score Based on Income & CIBIL
- Risk Assessment by Co-Applicant Profile
- Upload Co-applicant KYC & Financials
- Eligibility Indicator for Each Co-applicant

## **Financial Planning Tool**

- Pre-admission Expense Estimator
- Course-wise Tuition + Living Cost Calculator
- Currency Converter by Country
- Add/Remove Custom Expenses
- Generate Financial Summary Report

## **Advanced Document Management**

- Country-wise Document Requirement Templates
- Downloadable SOP, Affidavit Formats
- Version Control of Uploaded Documents
- Auto-validation (Name, DOB match, etc.)
- Document Expiry Reminder System

## **Visit Management System**

- Schedule Education Loan Counseling Visits
- Assign Country-specific Experts for Visit
- Collect Visit Feedback (Student/Agent)
- Reassign Missed Visits to Backup Staff
- View Calendar View of Visit History

## **Support & Ticketing System**

- Raise Ticket from Student Portal
- Assign Tickets to Support Staff
- Set Priority and SLA Timers
- Auto Reminders on Pending Tickets
- Chat Log & Resolution History

## **Notification & Reminder Management**

- Custom Notification Templates (SMS/Email)
- Scheduled Campaigns (Deadline Alerts)
- Stage-wise Auto Reminders for Applicants
- Admin-triggered Manual Notifications

## **Multilingual & Regional Settings**

- Add/Edit Language Packs
- Region-specific Loan Info Visibility
- RTL Language Support
- Currency Display Based on Locale

## **Education University Explorer**

- Browse by Country, Stream, Budget
- Show Estimated Loan Needed
- Link University to Partner Lender

- Filter by GRE/IELTS Score

## **Reports and Analytics**

- View Loan Application Data
- Lead Conversion Analytics
- Loan Partner Performance Metrics

## **2.2.4 CRM Module**

### **Lead Management (Web App)**

- Capture Leads
- Single Lead Upload
- Bulk Lead Upload
- Track Leads
- Lead Single Entry
- Lead Bulk entry
- Lead Conversion
- Different Status for Followup
- Followup status wise List
- Assign Task to Sales Representative
- Facilitates Seamless Communication for Timely Followups
- Today's Followup List
- Pending Followup List
- Status wise Lead List
- Converted Lead List

### **Allocation Management (Web App)**

- List Of Staff
- Manage Staff Details
- Maintain Allocated Leads and Followups
- Allocation of Visit

## **Customer Management (Web App)**

- List Of Customers
- Profiles of Customer
- Directly Generate Links for Customer Data Upload

## **User Management (Web App)**

- Create User
- List of Users
- Maintain All Information of Active Roles
  - Super Admin
  - Admin
  - Sales Person
  - Visiting Person (Site Manager)
  - Telecaller

## **Telecaller Modules (Android App)**

- Single Lead Entry
- Followup Update
- Status Update
- Quotation Update
- Capture Daily work as per given Allocation
- Working Time Measurement on Leads
- Today Followup List
- Pending Followup List
- Daily Visit Entry Maintenance
- Lead Conversion

### **3. Server Configuration (If Required)**

---

#### **3.1 Server Configuration**

- 1 Domain
- 10 GB Space
- 05 GB Bandwidth
- 1 GB Dedicated RAM
- Imunify 360 Antivirus
- Cloud Linux Based Server
- 10 Email ID
- 1 Database
- 1 GB RAM
- UI Interface Panel
- SSL Certificate
- 24 \* 7 On Call Support

## **4. Annual Maintenance**

---

Server and AMC will be Optional If Customer required so Costing list given below

### **4.1 Annual Maintenance**

1. If site will Crashes or Shutdown. It will have repaired by our End free of cost.
2. Annual Maintenance Charges will be 22% of total Bill Amount
3. Annual Maintenance Charges will not include in Development Cost
4. Server Costing will be Rs.18,000 + GST Per Year
5. Server Costing will change as per Dollar Price



## **5. Payment Condition**

---

### **5.1 Payment Condition for Website**

1. First 50% of Amount will be payable Advance Payment.
2. Remaining 25% of Amount will be payable at the time of Design finalization
3. Remaining 25% of Amount will be payable at the Time Of Project Delivery.

## **6. API Integration (if Required)**

---

In this Module we List out Third Party API which will Purchased by Customer.If any Other Third Party API will required that will Purchased by Customer at time Company Consider Integration Charges Separately.

### **6.1 Required API**

1. API for SMS
2. API for Whatsapp
- 3.Bulk Emails

## Appendix A: Costing

Serial Number	Modules	Type	Costing	GST (18%)	Total
1	Customized Software	1) Front Website 2) Admin Panel 3) Customized Software 4) Android Application (Telecaller)	Rs.2,38,000	Rs.42,840	Rs.2,80,840
2	Server	1 Year	Rs.18,000	Rs.3,240	Rs.21,240

For Terms and Conditions

Visit Our Site : <https://www.successinnovativetechnologiespvtltd.com/>