

Work Statement – API event management, CRM, X3 integration

Prepared by:



Excellence through Innovation

Contents

Background..... 3

Problem statement 3

User Requirements 3

wCyber solution 4

Work Description 4

Project timelines 4

Financial proposal 5

Background

API Events' conferences provide an essential networking venue for the African real estate investment and development industry and have achieved a reputation for attracting large property investors, major developers, leading financiers, and C-level real estate focused executives.

The process of ensuring well attended conferences is the primary responsibility of sales representatives across the continent. This is achieved by working contact/ prospecting lists. Sales representatives follow a short sales process: contacting the prospect inviting them to register for the event online. Once registered the delegate needs to pay for selected services and on the day of the conference confirm their attendance.

Presently 3 systems are used to run this process, with considerable manual intervention of the sales representative. Sage CRM is the main system through which prospects are converted into leads and potential delegates contacted. An events management system (PocketRSVP) handles the registration of delegates online. Once a delegate has registered the sales representative needs to again contact the prospect sending an invoice for payment. The invoice is generated in Sage X3 and once payment received a corresponding receipt generated. On the day of the event delegates need to be verified for attendance.

Problem statement

The 3 systems forming the sales process are poorly integrated resulting in a series of challenges, namely:

- 1) It is difficult to trace leads and registrations to track conversion;
- 2) At registration a significant amount of effort is required to process the billing, i.e. generating invoices and payment leading to lost sales and opportunities;
- 3) On the day of the events tracking delegate attendance is also problematic
- 4) Overall the sales process becomes opaque; potentially leading to losses and unpredictable operations.

User Requirements

API requires a solution that will:

- Integrate Sage CRM with an events management system that has RSVP capabilities. Delegate registration to be referencing existing leads and prospect details where possible, such that the conversion from lead to sale is automated
- Integrate the registration process with automated billing directly linked to Sage X3 accounting system, for both invoicing and receipting, as appropriate

wCyber solution – inVyted Event Management System

wCyber has developed an events management solution **inVyted** using the latest in technology for SaaS solutions. Apart from having all the key features expected of an event management system, we have developed it with integration in mind. Thus we expect and offer our clients the ability to customise the deployment of our product. We work in conjunction with our customers to ensure that the development and solution deployment meets the needs of business as anticipated.

Work Description

The proposed solution will entail the following activities:

- Integration of registration form to Sage CRM – draw CRM leads data into the registration form, prefilling content if prospect is found and simultaneously converting lead into sale upon completion of the registration process
- Integration of registration form to Sage X3 accounting – billing a delegate according to their selection raising invoice in Sage X3 automatically for required products and services. This will be automated at completion of registration
- Determining delegate status in terms of customer detail in Sage X3 for effective accounting purposes. Retrieving, creating, updating client record as necessary to generate invoice.
- Integrating payment gateway into the registration form, customised to API events general requirements
- Minimal enhancements to inVyted platform to cater for specific needs of API events such as adding skins.
- Deploying inVyted into API environment – as inVyted is primarily an online platform, that can also be customised for client deployment some configuration and installation effort is required
- Development of system reports according to requirements of API, taking into account integrated data feeds. Standard event management reporting already available.

wCyber will offer **free support** for the first year; the license fee will include basic support i.e. patches, bug fixes and free version upgrades. Any work regarding customization, feature additions, Sage work, and training, outside the current scope will be billable separately.

Project timelines

- 2-3 weeks development timeline
- 3 days deployment + 1 day training
- 1 week testing

Financial proposal

Cost Component	Unit Cost ZAR (R)	Quantity	Total ZAR (R)
inVyted event Management system –			
Annual License fee			
- annual subscription	24,500.00	1 year	24,500.00
- support & free updates			
Professional Fees			
- Sage CRM integration			
- Sage X3 integration	1,500.00	70 hrs	105,000.00
- Report development			
- System deployment			
Training			
- 5 users (1 day)	800.00	5	4,000.00
SUB TOTAL			133,500.00
Discounts			
- Loyalty (prof fees)	10%	1	(10,500.00)
GRAND TOTAL			R122,000.00

* All prices exclusive of VAT.

Yours Sincerely,



D. Makoni
Principal Technical Advisor.