PROPOSAL FOR LEGAL PRACTICE MANAGEMENT & CRM WEB APPLICATION – 21st April 2022

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Global EyeT
Software Solutions Pvt Ltd.

Dash Boards

- Main Dashboard
- System Analytics
- Banking Dashboard
- KPI Dashboard

Dash Board - Main

- All Calendar items

  - Bring ups, court dates, Hearings, Mentions, Rulings, Judgments, CRM Bring Ups, Events, To-do, Leave Schedule
- Notifications

Notices: Pass word expiry, Fee targets, Total invoices, Fees billed, Fees earned/collected, Payroll awaiting approval, Files responsible for Approval items: Instructions, Files, Fee notes, Supplier invoice, Leave, advance, Loans

Bring Ups: Last one week, Today, This week, Next one week, Next two weeks

Dash Board –Main

Statistics: Clients, Other Contacts, Total files, Open files, Closed files, Files pending for approval, Files pending closure, Logged in users
Accounts: Income, Expenses, Gross profit, Outstanding debtors, Outstanding Creditors, Budget Analysis
Staff Leave: Today, This week, Next week, Next two weeks

Dash Board –System Analytics

Client Registered: Based on year and Q1/Q2/Q3/Q4 Comparison: Based on Client Type

Client Registration Trend : Count Vs Quarter

Prospective customers Quarter wise: Comparison and Customer registration trend

Follow ups registered Quarter wise: Comparison and Customer follow up trend

Files opened Quarter wise: File types comparison and trend Files closed Quarter wise: File types and trend

Dash Board –System Analytics

Bring ups done Quarter wise: Comparison based on file types and file actions/progress trend
Documents uploaded Quarter wise: Comparison based on file types and documents uploaded trend
Fee notes Quarter wise: Comparison based on File types & Fee owners and trend
Receipts issued Quarter wise: Comparison based on File types & client type and trend

Dash Board –System Analytics

Payments on expenses Quarter wise: Comparison and trend Leave Approved Quarter wise: Comparison based on Leave types & trend based on leave approved

Financials:

Income/Expenses/P&L Vs months Amount Earned Vs months

Partner’s drawings Vs months

Dash Board –Banking

Income last year, Income this year, Quarter wise Income, Income this month
Expense last year, Expense this year, Quarter wise Expense, Expense this month
Profit last year, Profit this year, Quarter wise Profit, Profit this month
Total Debtors, Total Debtors this year, Quarter wise Total Debtors, Total Debtors this month
Total Creditors, Total Creditors this year, Quarter wise Total Creditors, Total Creditors this month
Monthly income & Expenses Trend

Dash Board –KPI

Accounts KPIs Vs months Operational KPIs Vs months

Modules

- Calendar Items & Conflict Management
- Notifications
- Client Management
- Client invoicing
- Client Support Management
- File Management
- Practice Area Management
- Office Administration- Supplies & Transactions
- Report Generation
- Accounting & Finances

Modules

- Petty Cash Management
- HR & Payroll Management
- Performance Management
- Recruitment
- Store, Inventory
- Fixed Asset Management
- User Accounts Management
- LPO Management
- System Settings
- E- Library
- Precedence Register
- Task Allocation & Scheduling Management
- Clock in & Out

Modules

- Workflow Documentation Management & Document Automation
- Leads Tracking Process(CRM)
- Marketing Schedule
- Tender Management
- Revenue Management Module
- Bulk SMS
- Bulk Email
- Time Sheets
- Quick Links
- Internal Memos
- Search tab (File No/File Name)

Client Management

- Client List
- Add/Edit/Delete Client Details
- Add/Edit/Delete New Matter
- Assign Lawyer
- Client Handling at Reception
- Compliant Register
- Client Communication
- Client Follow Up
- Client Documents upload

Client Management

- Client List
  Client no:, Client name, E-mail, Client type, Service offered, Status, Action, Register Client
- Client Service at Reception
- Client Pickup at Reception
  Date, Client, File ref, Visitor, Phone, Time in and out, Person picking
- Compliant Register
  New Complaint, Date , Client, Customer, Complaint description, Action plan, Client Handling advocate, Status.
- Client Communication
- Client Follow Up
- Assign Lawyer

Client Support Management

- Customer Registration
- Add/Edit/Delete Customer
- Client Follow Up

  Follow up date, Follow up time, Customer name, Responsible Staff.
- Client Follow Up Report

  Today’s Report, This week, Previous week, This month, Previous month, This Q, Last Q, This year, Previous Year, View Report, Reset Report,
- Client Quotation

  Issue date, Doc. no.: Customer, Amount
- Client Documents Upload

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File Management

- Add/Edit/Delete Files
- File Status Report

  File progress report, Bring up report, File status report summary, Monthly file status report, Monthly staff status report
- File Archive
- File Reports

  File report, Opened report, Closed report, Files pending closure, Files pending approval, Instructions Past TAT.
- File Notes
- File Instructions :Add new instruction

File Management

- Outgoing/Incoming Letters
- Document Templates
- Manage Documents
- Appointment
- Update
- Bring Up
- Client Meeting
- Notes
- Workflow Management

Client Invoicing

Billable items:

- Capture billable items
- View Billable items

Receipts:

- Issue Client receipts
- Receipt reprint
- Reverse Receipts
- Receipt Reports

Fee Notes/Credit Notes:

- Fee notes/DRN/Interim Fee notes
- Credit Notes
- Quotations/Proforma fee notes

Client Invoicing

Reports:

- Debtors Ageing Reports
- Debtors List
- Fee note items billed
- Fee note items received
- Outstanding fee note reports
- Receipt Reports
- Other reports
- Quotation items report
- Fees expected per advocate

Practice Area Management

- Add/Edit/Delete/View Billable Item
- Issue Client Receipts/Invoices, Record payments
- Add/Delete/Edit Billing method – Hourly, Flat Rate, Contingency Fee, Custom Rate
- View/Print Receipts
- Reverse Receipts
- Fee Notes
- Credit Notes
- Quotations
- Proforma Invoice, Invoice Templates
- Reports: Debtors List, Debtors Aging Report, Fee Note Item billed/Received
- Outstanding Fee Note Items
- Quotation Items Report
- Fees expected per Advocate

Office Administration- Suppliers

- Add/Edit/Delete/View Suppliers
- Add/Edit/Delete/View Supplier Invoices
- Supplier Credit Notes
- Supplier Payment Details
- Creditors List
- Creditors Aging report
- Quotations from Suppliers
- Supplier wise Expense Report
- Supplier Monthly Reports

Office Administration- Transactions

- File Payments/Transfers

  Date, Type of transaction, Item type client, File, Account type, Currency, Exchange rate, Description, Authorised amount
- Office Payments/Transfers
- Cheque Cancellation
- Petty Cash Payments

  Voucher no., Invoice no.,

  Client, Petty cash a/c, Expense a/c, Currency, Exchange rate
- Creditors List

Office Administration

- Creditors Aging report
- Quotations from Suppliers
- Supplier wise Expense Report
- Supplier Monthly Reports
- Monthly Budget Planner
- Balance on client trust
- Offline Transactions
  Transaction analysis
  Reverse transaction

Reports Generation

- Performance Reports - Advocate
- Performance Report - Department
- Performance Report - Administration
- Debtors List
- Creditors List
- Fee Collection/Earning Report
- Drawing Account Details
- Supplier wise Expense Report
- Supplier Monthly Reports
- Petty Cash Report
- Payments Report
- Settlement Report

Reports Generation

- Undeposited funds Report
- Client Balance Report
- Files with debit balances
- Earning per client/file type
- Client ledger details
- Earning per client
- Reconciled Transaction Report
- Un-Reconciled Transaction Report

Reports Generation

- Undeposited funds Report
- Client Balance Report
- Files with debit balances
- Earning per client/file type
- Client ledger details
- Earning per client
- Reconciled Transaction Report
- Un-Reconciled Transaction Report

Accounting & Finance

- Add/Edit/Delete Ledger Accounts
- List Ledger Accounts
- Journal Transactions
- Gain & Loss Account
- Income & Expenses Statement
- Trial Balance
- Balance Sheet
- Budget Forecast

  A/c no:, A/c name, Actual income and expense, Total projections
- Budget Analysis
- Add/Edit/Delete Taxes
- Bank Reconciliation
- Cash flow Statement

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Petty Cash Management

- Petty cash management
- Requisition for petty cash top up
- Disbursement of petty cash
- File requisition for petty cash
- Request for petty cash
- Request for payment
- Request for Cheque

HR & Payroll Management

STAFF MANAGEMENT

- Add/Delete/Manage Staff A/Cs
- Add Leave Types
- Add overtime settings
- Add Deductions and Allowances
- Leave Management
- Leave Balance Report
- Staff Advance/Loan/OT Application
- Process Staff Advance/Loan/OT
- Approve Advance/Loan/OT
- Approved Holiday List
- Employee Competency Report
- Trainings
- Announcements

HR & Payroll Management

STAFF PAYROLL

- Calculate Gross & Net Salary
- Process Pay Roll for the period
- Generate/View pay slips of all staff
- Payroll report for the period
- Post Payment
- Payment Report
- Time sheets
- Manage payroll codes

Performance Management

- Add/Delete/Edit KPIs
- Self appraisal
- Appraisal by reporting Authority
- Appraisal by Reviewing Authority
- Appraisal by Accepting Authority
- Personal Development Plans
- Reward and Recognition Programmes

Recruitment

- Post vacancies and qualifications
- Candidates log in
- Apply and upload documents by candidates
- Screening and filters
- Connecting for interview
- Assessment and evaluation
- Data backed hiring decision
- Offer letter
- On boarding

HR & Payroll Management

STAFF PAYROLL

- Calculate Gross & Net Salary
- Process Pay Roll for the period
- Generate/View pay slips of all staff
- Payroll report for the period
- Post Payment
- Payment Report
- Time sheets

Store & Inventory

Manage Categories
Manage product types
Manage Items
Stock List Report
Item Movement Report
Re-order Advice Report
Item Request

Fixed Asset Management

Manage Asset Categories
Manage Asset Types
Manage Asset Allocation
Asset Allocation Report
Unallocated Assets Report
Fixed Asset Register
Asset Insurance Coverage
Fixed Asset Depreciation Report

Local Purchase Order Management

Local Purchase Orders (LPOs)
Purchase Order Reports
Item Arrival Report
Vendor Performance Report
Cost Variation Report

User Accounts

Manage User Accounts
Change User Password
Manage User Groups
View Roles per User
Manage User Roles
Manage User Departments
Advocate Targets

System Settings

- Company Details
- Company Logo
- Set Weekends and Holidays
- Choose currency
- Add/Edit/Delete Invoice Items
- Add/Edit/Delete File Types
- Database Back up
- Billable Activities
- Bank Account Details
- Add/Edit Delete Leave Types
- Add/Delete/Edit Leave days per annum
- Hourly rates

System Settings

Company Details
Weekends and Holidays
Other Configurations
Paired Accounts
File Types
Invoice Items
Currency List
Database Backup
Transport Zones
Billable Activities
Bank Account Details
Leave Days per Year
Hourly Rates
Partner Revenue Share

E- Library

- Add new practice area
- Add new subject
- Upload file -
- Links to legal sites and libraries
- Precedence Register Repository

Calendar & conflict checking

- Add new task
- Add new event
- Event Details
- Agenda
- Day
- Week
- Work week
- Month

Task Allocation & Scheduling Management

- Add new task
- Add new event
- Add new Note
- Add new call
- Add new work flow
- Add new time entry
- Add new expense
- Manage categories
- Allocate task
- Schedule tasks

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Clock in & Out

- Add new time entry
- Add multiple time e-
  ntry
- Multiple Invoice
- Give refund
- Give a credit
- Import a CSV file
- Import Templates

Work flow Documentation Management& Documents Automation

- Document Templates
- Workflows
- Intake forms
- Give refund
- Give a credit
- Import a CSV file
- Import Templates
- Invoice Templates

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Lead Tracking process (CRM)

- Leads funnel
- Opportunities -
- Leads dash board
- Opportunity dash board

Marketing Management

-FB link
-WhatsApp link
-LinkedIn link
-Link to Google My Business

Revenue Management/Cmmunication Centre (Notifications and Alert Module)

- Alert– Unpaid and overdue bills
- Automatic Appointm⁻ ent reminder (Text and email)
- Bulk SMS /email to client (APIs to be provided by client)

Time Estimation

The project deliverables will be as per the clauses of terms and conditions elsewhere in this proposal within 240 working days. If you need any additional pages/service, not included in the proposal that will be at extra cost and time.

Technologies Proposed

Application Platform /Technology	:HTML,, PHP CodeIgniter/Laraval, JavaScript, Ajax, JQuery, Bootstrap
Database	:PHP -MyAdmin

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TERMS AND CONDITIONS

- The work would commence on endorsement of contract and on receipt of advance payment of 40% of cost
- The price proposed include only that for the web portal development for admin and included no cost for domain, SSL, SMS, Cloud/Server charges, SEO, Promotions, AMC or any other cost not specifically mentioned in this document
- Any API or software or cost for payment gateways or any other third party software requirements that bears a cost, shall be borne by the client. Also content of pages and images shall be provided by client.
- The budget does not include any major modifications that affect the entire structure. Minor modification will be done without any extra cost.
- Additional scope of work which require extra time/cost shall be charged separately.
- Client should appoint or authorize one person to contact who should be responsible for coordinating with Global EyeT Software Solutions (P) Ltd.
- Global EyeT Software Solutions (P) Ltd. will not be responsible for the content of the documents/data supplied by the client.
- The ETA is delivered expecting quick reviews from client side at various stages of the project. Any extra time and cost due to the delay from the client side in timely reviewing and giving feedback shall give Global EyeT Software Solutions the right to claim extra time in project schedule.

TERMS AND CONDITIONS

- During phases of development of the application/project Global EyeT Software Solutions (P) Ltd would install/upload the application on a temporary machine/server, so that the client can review the work.
- The final upload of the application over to client's machine/server would be done on final payment for the assignment.
- Any new additions or changes other than what is mentioned in the initial requirement list would be charged extra after discussing with the client about the additional task and mutually agreeing upon the budget for the task(s).
- Coordinators would communicate with the client through phone, emails, chat, voice chat, whatsapp, Skype etc.
- In case staff of Global EyeT is required to physically present for discussions, in stallions or any other task, the entire cost of VISA, processing charges, travelling documents, to and fro travelling expenses , food, daily expenses, accommodations etc. should be entirely borne by the client.
- The proposal includes only responsive web portal and no mobile apps

- No compromise in on time delivery
- Get your works done through a faster approach by the dedicated resources allocated exclusively for your project
- Avail the services as if you are receiving from your own firm.
- Our support team will assist you like your team member
- No matter where you are, we are available for you at anytime

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Conclusion

This report describes and analyses proposed product and related processes and lay a pathway to achieve the LEGAL PRACTICE MANAGEMENT WEB APPLICATION. This report can be used as a basic reference material for detailed review and discussions on every section included. We hope this effort and documentation will serve you in systematically planning for their conceptualized project.

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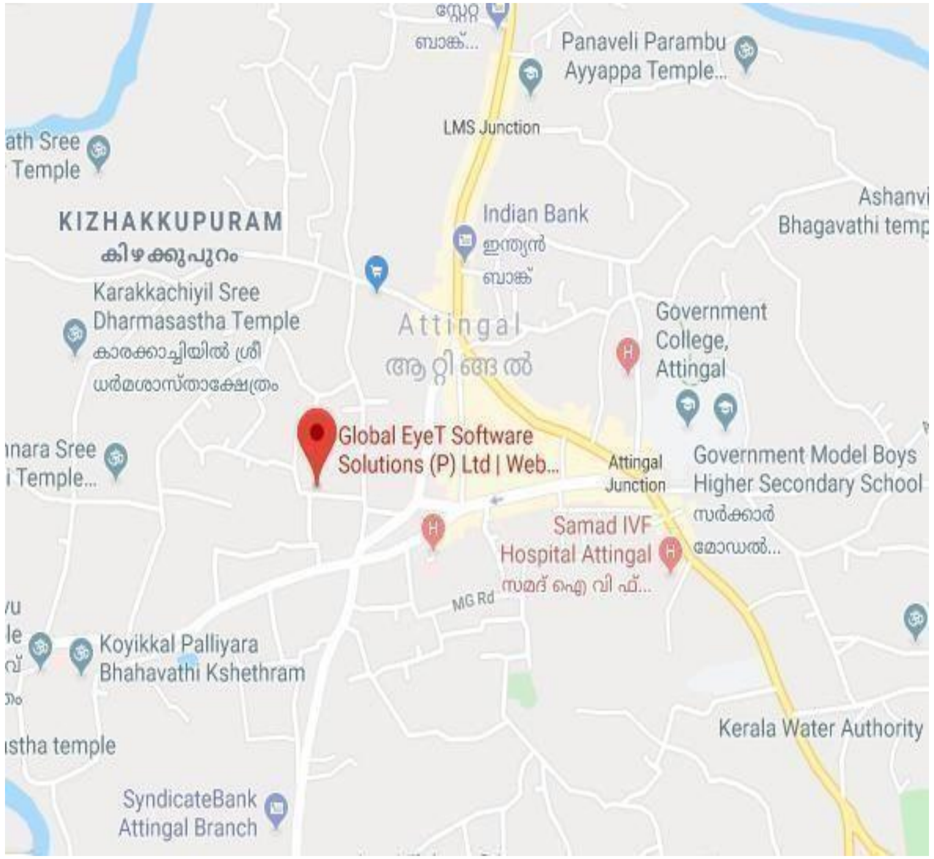

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Thank You

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