

Proposal for Self-Hosted Healthcare Workforce & Client Service Management System – ERPNext

Date : 2025-12-08

To:

Karun Karthikeyan NJ
CodeAce IT Solution LLT
8667237642

From:

CodeAce IT Solutions LLP
Govt Cyberpark, Kozhikode
Email:
Phone:

Dear Sir,

We appreciate the opportunity to partner with you in digitizing and streamlining Medical Care operations.

Based on the detailed requirements, please find below our comprehensive proposal.

Scope Of Work

Implementation of a fully functional Medical Care ERP, CRM & HRMS tailored for Medca Health

Care, featuring:

- Client & Customer Management:

Setup of a structured client database with personal

details, service requirements, medical notes and requirement history. Attachments,

agreements, and ID proofs can be stored inside each client profile.

- Employee Management:

Creation of detailed employee profiles capturing personal

data, qualifications, certificates, verification documents, and internal notes. The system

supports uploading multiple documents per employee for HR use.

- Auto-Generated Employee Profile PDF:

A formatted PDF template that compiles

selected employee details and attached files into a single consolidated profile. This can

be shared with clients when staff are assigned for caregiving services.

- Task Assignment & Daily Status Tracking:

Task allocation workflows that assign

employees to clients or duties. Employees can update daily status (completed, pending,

issues) through the system. Supervisors get a consolidated day-end summary for

performance monitoring.

- Recruitment & Candidate Data Collection:

A public form link for candidates to

submit personal details, documents, and agreements digitally. Submitted applications

flow into ERPNext for screening, document verification, and onboarding.

- Attendance & Punch In–Punch Out System:

Setup of a mobile-enabled attendance

workflow, allowing staff to punch in/out using location-captured entries. Includes

custom attendance marking for a full period at once, leave marking, and monthly

summary reports.

- Client & Staff Agreement Management:

Templates for client agreements and staff

agreements that can be generated, stored, and digitally signed. Supports sending

agreements via email and tracking who has signed.

- Flutter Lead Capture App + ERPNext CRM Integration:

Development of a Flutter

mobile app to capture selected incoming call numbers as leads and push them to

ERPNext via API. Complete CRM setup in ERPNext including lead creation, source

tracking (mobile app, website, Meta), assignment, follow-ups, opportunity tracking, and

conversion workflows.

- RBAC, Dashboards & Reports:

Implementation of structured user roles (Admin, HR,

Care Coordinator, Sales, Recruiter, Field Staff) with module-level and record-level access

control, sensitive data protection, and full audit logs. Custom dashboards for leads,

employee performance, attendance, client onboarding, and workload distribution,

along with exportable analytical reports for management and audit use.

Scope Of Work (Continued)

Pricing Summary

1. ERP Developement	Rs. 20,000
2. Hosting charge	Rs. 4,000
3. Post developement and testing	Rs. 100

Total: Rs. 24,100

Payment Terms (3 Milestone-Based Installments)

- Phase 1 - Rs. 20,000
- 50% completion - Rs. 50,000
- dsadsdwd - Rs. 120

Project Timeline

Total Duration: 12 Weeks ("H 3 Months)

1. Week week 1: sadsadadads
2. Week week 2: wddwxxcscdsc
3. Week week 3: dasdsaxsacscsda

Software Requirement Specification (SRS)

Additional Notes

The quotation is valid for 15 days from the date of issue.

- 2) Annual hosting and technical support charges for Year 2 will be quoted separately.
- 3) 6 months of post-implementation service support (bug fixes and minor updates) is included in this package

Remaining timeline details will be shared after project confirmation.

We look forward to delivering a high-performing ERP, CRM & HRMS that aligns with

Warm Regards,

Karun Karthikeyan NJ
Business Development Executive