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PRO-000062

CA Firm management system

Date: 2020-10-28
Open Till: 2020-11-04

Customer Relationship Management (CRM)-For CA FIRM

Scope of Document

The scope of this document is to define the functional specifications and provide a time and cost estimate for the development of this project

Overview

This document is a preliminary proposal to provide a high-level definition of the scope of work to the client. It shows our understanding based on the initial requirements documents and guidelines shared by the client. It is also intended to be used as a basis for a price quotation from the interested parties. The completed website will be evaluated according to the guidelines, functional specifications, and requirements described herein.

Key Features

manager and admin can create the assignment and assign it to staff and get reports automatically on completion. This CA Firm CRM incorporates a lot of features that get away with the usage of multiple software for the same task. It enables collaborative work in a team with its thorough reporting and communication features.

1. Multiple users
2. Workflow Dashboard
3. Real-Time Tracking
4. Organized Resource Manager
5. File Management
6. Data Security
7. Data Backup
8. Assignment create/manage
9. Document upload
10. Profile manage
11. Create client

MULTIPLE USER

1. Admin
2. Manager
3. Staff
4. Client

Admin Panel

- Secure Login

  Login with username password with secure login and validation

- Forget Password

- Admin Dashboard:

  Last 5 Client Added, Latest close assignment, Notification

- Add Client

Client name, kind attention, email id, Communication Address, Scope of work, State(Dropdown), Mobile No, Associated from, Lead Partner(Dropdown), Pan no. pan Upload, Legal Status(Dropdown), Tan No, Tan Upload, Gst no, Gst upload, Date of incorporation, another partner (Dropdown), Company GROUP, Engagement partner, client dob

- Client List /Edit

  Show list of the client by latest created date and also option to edit client data

- Create an Assignment

Select client(Dropdown), Select Assignment, Select Service (Checked Option), Due Date, Billing Amount

- Assignment Mapping

  In assignment mapping, we add staff, TL, Project Incharge

- Assignment List/View

Option to view all active assignment according to date, client and also option to view particular assignment data (including task, Documents, etc)

- Assignment Close List

  Option to view all close assignment according to date, client and also option to view

  particular assignment data (including task, Documents, etc)

- Assignment Configuration

- Add Assignment Name

- Add Services

- Add Group

- Add Tab (Name,Color,Seq)

- **Add Step**

 1. Field required :-Assignment name (DD), services(DD), grouping(DD), Name of step(DD),

 under tab (DD) then give option to add sub step (sno,Task perform,active)

 2.Option to add sub-step through excel sheet

 3. Substep (List /Delete)

- Add Team Member (Add/ Edit/Delete/ List)

   Title(DD),Name of team member, Mobile no ,Email Id, Pan no, father no ,PAN UPLOAD,Profile pic, Address proof, address upload, opening leave balance,date of birth, teams(dd),features(dd),Team lead,Qualification(DD),address,Date of resign,Status
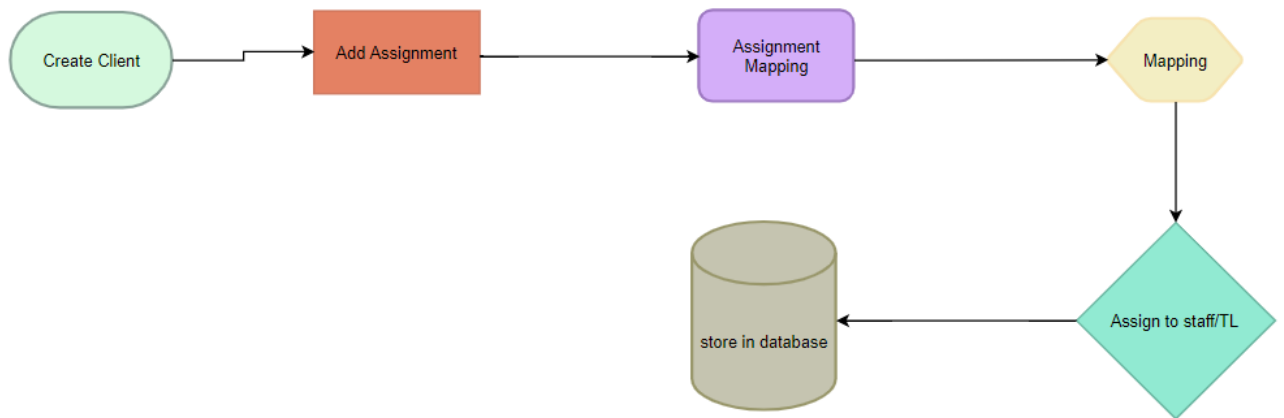
- Create Team Login

     Create login password for a team member

- Team Level

- Notification

- Manage Admin Profile

- Database Backup feature

   Admin has the option to download all Database

- manage client panel
- View and download client document
- mail integration
- User activity log
- Client-side and server-side form validation.
- Mailbox System allows admin on your system to send messages to each other.
- Here is possible to reply to each mail.
- Get notifications when you receive new mail.
- admin can delete the mail

Admin flowchart

Staff/Manager/Partner panel

- Secure Login
- Supports password hashing/ encryption
- Remember Me" feature on login.
- Forget Password
- Staff Dashboard

    Assign assignment count, Task reminder, Notification

- Assignment List which assigned to staff/manager

- Assignment Dashboard

  Client info, Team members list, tab list, task status,open/close/ submitted Task list,

  Assignment detail

- Add Task Assignment

  Assignment detail, task status,all tab, and step list, option to assign review task,

 Set step assignment start date and end date

- Task page

  Option to add task status, desc, upload document, download document, option to add a task, Mark as closed,

- Manage own profile

- update and close task

- Supports password hashing/ encryption
- "Remember Me" feature on login.
- Login with email or username.
- ClientDashboard
- Notification
- option to upload a document
- mail integration
- User activity log
- Client-side and server-side form validation.
- Mailbox System allows users on your system to send messages to each other.
- Here is possible to reply to each mail.
- Get notifications when you receive new mail.
- Users can delete the mail.

Project Features

Staff Management

Every staff in the firm is provided a staff portal with data access rights based on their designation.

Resource Planning & Scheduling

This panel optimizes the productivity of the organization by tracking of resource usage and enhanced allocation.

Task Tracking

Managers can track numerous tasks and overview in real-time.

Data Management

Organizations can use this software to manage their data with confidentiality. It processes data with industry-grade security requirements.

Custom Fields

Custom fields can store extra information for staff, managers, clients, assignments, and more.

Staff Roles assign

You can give staff specific permissions on what can do or can't do. Role permissions can be overridden for each staff.

Staff

Manage all your staff members from one place.

Database Backup

About the Technologies

PHP – LARAVEL

Laravel is a PHP framework with an expressive, elegant syntax. We've already laid the foundation — freeing you to create without sweating the small things.
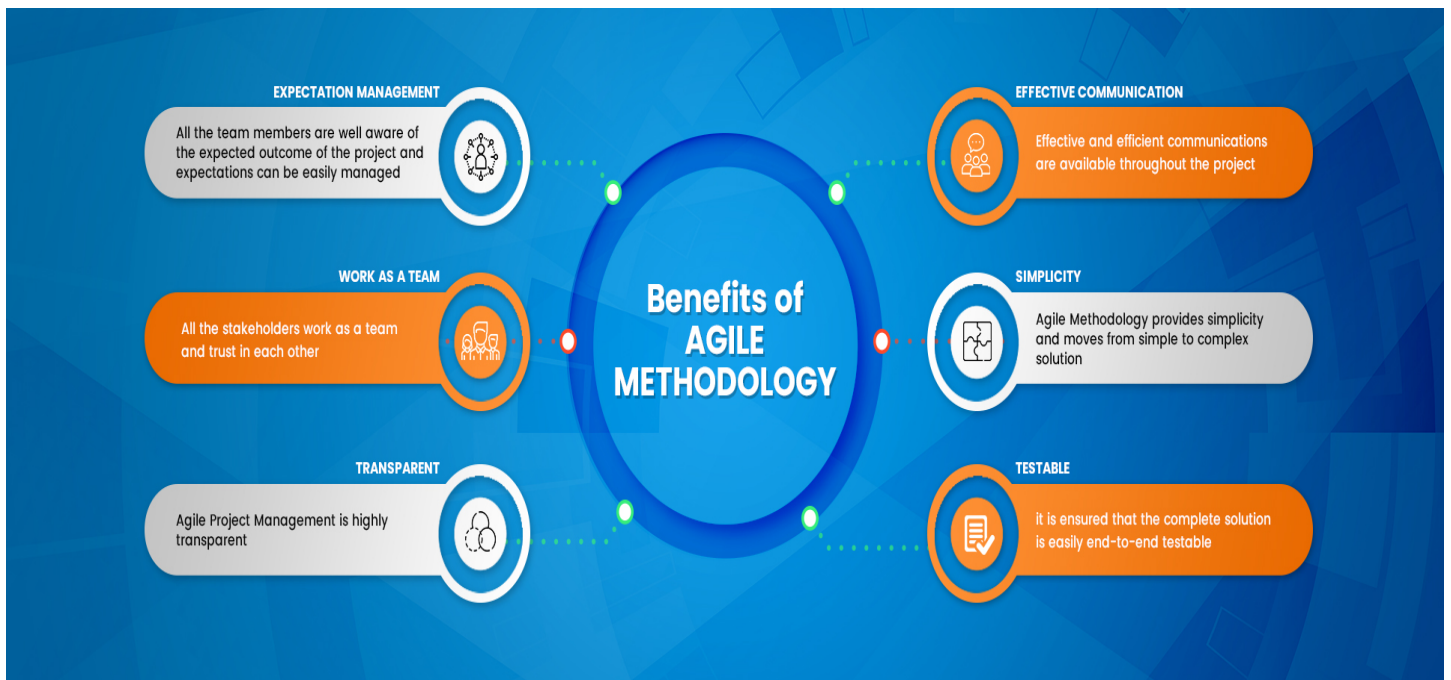
Features of PHP Laravel Framework

1. MVC Architecture Support
2. Routing

3.Authentication

4.Caching

5.Migration system for databases

Project Methodology (Agile)

We follow Agile – Scrum methodology for project management.

Project Phases:

Project phases include design, development & deployment of the complete website. It encompasses significant phases below:

- Brainstorming Sessions/Analysis & Documentation
- Project Planning & Management
- Development/Coding
- QA &Testing
- Live Deployment and support.

Technology Specifications

Design	Photoshop, Illustration

Development	Laravel 6.x
Database	MySQL5.7
QA Validation	-
Cashing	Redis
Domain	
Production Hosting Server	

Other information

- Weekly project update

- The entire source code is your property, shall be delivered on completion of milestones and
- Project collaboration and management tools available for
- Infrastructure available with 99.99% uptime & 100% power backup

Deliverables from Client

Below is the list of initial requirements/deliverables from the client:

- Detailed information about the current project.
- Colortheme/template.
- Company Logo (In PSD/PNGFormat).
- Banners & Images.
- Preferred Fonts (If any).
- Third-Party APIs (If Required and mentioned above under website specification section).
- Ideal Payment gateway login details.
- Web Hosting

Terms & Conditions

- The client will release the payment after milestones have been completely tested deployment server.

- All the deliverables listed in the proposal are only subject to the consideration during the development of

- the No extra features will be entertained later which are out of scope. For additional tasks and features, a separate quote will be submitted to the client.
- The construction phase will start once the UI DESIGNING PHASE (Mockups) will be completed and approved by the client. The company will not be responsible for any delay in the project if UI phase approval is pending from the client end. Maximum two nos. of design revisions will be entertained post additional cost will be
- Project details will be kept confidential and cannot be used by any other third party once delivered to the client on life
- All the contents and images will be provided by the If unavailable we will be charging an additional cost for contents and images post discussion with the concerned project manager.
- Our quote does not include the licensing cost of any third-party application, domain and
- This quote is valid for 1 week from the proposal

Legal & License Details

WEB LOOP INFOTECH LLP warrants that the functions contained in this project will meet client requirements and that the operations will be reasonably error-free.

If any provision of this agreement shall be unlawful, void, or for any reason is unenforceable, then that provision shall be deemed severable from this agreement and shall not affect the validity and enforceability of any remaining provisions.

Timeline/ Duration of the Project: 70 Working Days

#	Item	Qty	Rate	Tax	Amount
1	**Multiple panel for CA FIRM management system**	1	185,000.00	IGST 18.00%	185,000.00
				Sub Total	**₹185,000.00**
				IGST (18.00%)	**₹33,300.00**
				Total	**₹218,300.00**

Maintenance support for 3 months

further maintenance & services include? (*Additional Charges)

Whether you're partnering with Web loop Infotech LLP for Software maintenance we customize your strategy and deliverables to your business.

As a part of our Software maintenance services, your company receives access to the following:

- Regular updates
- Tech support
- Stack Support

- Promised turnaround time

Regular updates

With regular updates, which happen during business hours, our team of developers keeps your Software functional and secure for users. Whether you're looking to add new images, delete page copy, or modify a link, our maintenance services offer what you need.

For a quick summary, here are some examples of updates included in our packages:

1. **Text:** Additions or deletions.
2. **Photos:** Additions, deletions, and basic retouching.
3. **Pages:** Additions or deletions using existing page design.
4. **Navigation:** Basic navigational changes (add, move, or delete an item in the navigation).
5. **File downloads:** Additions or deletions of PDFs and other documents.
6. **Videos:** Insertion or deletion of a pre-edited video.
7. **Links:** Additions or deletions.
8. **Color and background images:** Changes or replacements.

If you have questions about regular updates, feel free to contact us for more information.

This is an example of services included in the Software maintenance plans and is not a complete list.

Tech support

As a part of our maintenance plans, your company also receives access to our stellar tech support. With the expertise of our development team, your business can get help with a variety of challenges, like setting up email.

In addition to tech support, your company can also submit a consulting request as a part of your website maintenance services. Whether you have questions about creating a new contact form or adding a new page to your navigation, our talented team can provide your business with a helpful perspective.

Stack Support.

Many businesses use different stacks as their CMS, which is why our website maintenance plans include Project Stack Support. As a part of your package, our team takes care of upgrades and security patches for your company.

Keep in mind that only our "Progressive" and "Enterprise & Ecommerce" website maintenance packages include maintenance. If you select "Up & Coming," you will not have access to these critical quarterly upgrades.

Promised turnaround time

We recognize the essential role of your website, which is why our website maintenance services include promised turnaround times. Our turnaround times vary by your package, like monthly or hourly, and your plan, like "Progressive" or "Up & Coming."

As an example, "Progressive" plans include a max turnaround time of three business days. In comparison, "Up & Coming" plans have a turnaround time of five business days. Meanwhile, our hourly support plans include a full one-month refund if our partner can't resolve the issue in 24 hours.

Price & Plan:

Features	Full Software Maintenance Plan
Website Updates M-F 8a-5p IST	Included
Design or Development Hours	Up to 8 hours of design or development time included

	per month
Quarterly CMS Security patches	Included
Annual CMS Version Upgrades	Included
Daily Security Scan	Included
Urgent CMS support/restore if the website is hacked	Included
Monthly full-site backup and storage at 3rd party location (for easy restore)	TBD by client-side
Turnaround Time	Priority
Discount	
Monthly	5K +GST
Yearly	55K + GST

Payment Milestones

Milestone of the payment schedule	Item	Amount
Milestone 1	Initial Before Design Project	20%
Milestone 2	After UI and database work	20%
Milestone 3	After Version 1 Launch	20%
Milestone 4	After Version 2 Launch	20%
Milestone 5	After Deployment of final project	20%

We are also doing: (*Additional Charges Apply)

- Complete Branding Solution
- Promotional Creative for Ads & Social Media
- SEO, SMM & SMO
- Content Writing for App & Website

General terms and conditions

The effort estimation and planning is based on high-level Business. Any reduction/addition to this will be considered during requirement analysis and knowledge transition phase and re-estimation will be carried out. Any change in scope during the project execution of the project will be handled through the Change Management process.

Webloop Infotech assumes that the Client would provide one project manager and functional expert(s) during the Requirement analysis and Knowledge Acquisition phase.

Cost of infrastructure, hardware, software and network required at Client "sufficient included in this proposal.

Cost (in both the option) will not include the cost of domain registration, hosting, payment gateway charges, data migration from old/existing site to new site and server management charges, etc.

Cost Estimation is valid for 30 days from the date of the proposal has been sent. Then after the cost is subject to be varied as per the change of the company policy & other terms.

Once you have made the token amount it shall not be refunded.

Webloop Infotech expects that the Client will provide timely input/feedback for all reviews and queries raised during the project execution. It is expected that the Client will resolve queries in a reasonable time frame. Any delay can result in slippage of the schedule

Webloop Infotech assumes that all sign-offs from Client will be provided within the agreed and specified timeframe. Such a time frame can be decided at the beginning of each key milestone/activity

All the documentation will be provided in English

It is requested to the clients provide confirmation/approval as & when required within 2 business days.

Estimation does not include any data entry or templates work as a part of this contract.

Webloop Infotech is not responsible for any faulty software provided by any of the vendors supplying software for the development of applications and consequences arising out of such usage.

This proposal is valid for 30 days unless extended by Webloop Infotech.

Webloop Infotech may display the project on its portfolio after completion of a successful project and may get credit for the work as developed and designed for the site as a part of this contract unless it has been provided in writing.

In case if there is a delay from a client with regards to the response of queries or feedback longer than a week additional 10% cost of the entire project will be imposed on the final payment or delivery of the project.

For any circumstances, if the project needs to be put on Hold / Stop it requires a minimum request notice period of 1- 2 weeks along with the duration for which request will be addressed by management and final decision on the request will be based on that.

Source code will only be delivered or uploaded on the live server once the due payment is made.

*Note: *All disputes are subject to Delhi jurisdiction only.*

Acceptance

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WEBLOOP INFOTECH LLP   K. G. SOMANI AND COMPANY

(First Party)   (Second Party)