



QUOTATION FOR CUSTOM CRM DEVELOPMENT

Project Title: Custom CRM System for Driver & Fleet Management

Quotation Date: 16.06.2025

Project Duration: 1 Month

Total Cost: ₹70,000

Introduction

This proposal outlines the development of a customized CRM system tailored for managing driver operations, trip records, salary calculations, customer transactions, fuel tracking, and company performance insights. The system is designed to streamline operations, increase transparency, and improve operational efficiency.

Project Overview

The CRM system will serve as a centralized platform for tracking driver activities, managing customer trips, monitoring fuel usage, calculating salaries (including advances and deductions), and reporting income. It will also automate email notifications and generate comprehensive monthly reports.

Scope of Work

- Design and development of a web-based CRM system
- Admin panel for owners/managers
- Driver and customer management modules
- Salary, trip, and fuel tracking integration
- Automated email reporting and alerts
- 1-day online training via Google Meet
- Deployment and support during initial setup

Detailed Feature List

Driver Management

- Driver registration and profile management
- Assignment of vehicles and tracking of pickup & drop details
- Daily trip reports (driver – vehicle – customer – route)
- Monthly working days report

Trip & Customer Tracking

- Logging of each ride with location (from-to), date, and customer details
- Option to mark whether the customer paid the driver or the company

Salary & Payroll Management

- Monthly salary generation for each driver
- Advance payment tracking and automatic deduction from salary if paid by customer to driver
- Gross salary calculation with breakdown
- Email notification to each driver with salary details
- Admin view of all driver salaries and adjustments

Customer & Income Reporting

- Monthly report on total customers served
- Monthly income report for the company based on completed trips

Fuel Management

- Vehicle-wise fuel log (date, quantity, amount)
- Fuel source tracking:
 - Whether cash was given to driver
 - Or fuel was directly filled at petrol pump
- Fuel expense reports

Email Notifications

- Monthly email summary to drivers regarding salary and deductions
- Admin receives notification for salary and expense summaries

Payment Terms

- 20% Advance Payment – Before project initiation
- 50% Payment – Upon 50% project completion
- 30% Final Payment – Upon project handover and successful testing

Training & Support

- Training: 1-day training session via Google Meet for the client's team
- Support: Assistance with initial setup and usage (up to [X] days post-deployment)

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