Softel Technologies Inc
26 Feb 2022

Proposal for

Change request for Umbrella PS

Rev 1.0

DOCUMENT UPDATE HISTORY

Sr No	Rev No	Date	Author	Description
1	1.0	26 Feb 2022	Prashant Shetye	Initial revision

Summary

Umbrell PS is a society Management company who are looking for White label society management and accounting software.

The project needs some enhancements to the W2S portal to provide white labeling customized solution as per requirement of Umbrells PS.

I. Needs/Problems

Umbrella PS is a Society management company who need to provide services to society, and society's members and also need to collect leads from external members.

UmbrellPS came across society namanement and accoutiung portal of Way2Socety, which has most of the features required by Umbrella PS. There would be need to impelemnt few more features required by Umbrella PS as mentioned in the Scope section below.

II. Goals/Objectives

The goal of this project is to enhance the Way2Society portal to provide White labeling solution to Umbrells PS as per their requirements. The workflow ppt is shared by Nitesh Jadhav.

III. Procedures/Scope of Work

Follwing are the requirement listed as per the requirement work flow ppt shared by Nitesh Jadhav

Task and their scope is listed in below table

Sr No	Feature	Status	Iteration
1	Standard accounting	Already exists	NA
2	Standard Admin service	Need details	?
3	Notice board, poll, survey	Notice board and poll exist. Survey can be done using Poll.	NA
4	KB	Needs to be done	Iteration 2
5	Classified	Exist, and need small changes	Iteration 1

6	Extenal use	Needs to be implemented. Mostly be added new DB table to collect leads.	Iteration 1
7	Central service request dashboard	Needs to be developed	Iteration 2
8	In-App notification	Exist	NA
9	Bulk email integration	Needs to be developed	Iteration 2
10	WhatsApp messaging	Needs to be developed	Iteration 2
11	Society bulk import	Single society data can be imported using templates or Tally Ledger and DayBook exported files. (email is the userid) and activation link is sent to user to set their own password	NA
12	SMS to new members of new account password	Needs to be developed (email solution exist)	Iteration 2
12	AMC and service request tracker	Reminder functionality can be used.	NA
13	Classified	Edit but need to add "I am interested" button	Iteration 1
15	Service Request Process	Need to add SLA time. Add colorcode as per SLA time.	Iteration 1
16	Facility Booking	Needs to developed	Iteration 2
17	Invoicing client and creating invoice in Main company database	Needs to developed	Iteration 2

Iteration 1 will have following

1. New single page landing page for your company. This will have a login sub window to login into W2S system.

2. Enhancement to Classified

3. Enhacment to Service request

4. External user request lead collection database

Iteration 2 functionality

1. Knowledge Base

2. Central service request Dashboard

3. Bulk email

4. Whats App messaging

5. SMS to new members

6. Facility booking

7. Client invoicing

IV. Out of Scope

Anything not mentioned in scope of work is out of scope.

Technical support is not part of this agreement and it will be provided under the separate agreement.

If any Third party component and library required it will be purchased by client

V. Time Estimates

Iteration 1 to be completed by March 31 2022. Iteration 2 will be take another 3 months.

VI. Estimate

This is a rough estimate to develop a configurable CMS framework as per the Scope of Work mentioned above.

Cost : _____ + GST

Payment term:

50% advance payment with Work Order to start the project

30% payment after the demonstration of Web Application required to deliver the project to the client.

20% (remaining) payment after the one month of customer experience period which starts with the project delivery.

During customer experience period of one month, the bugs list would be provided on weekly basis in writing and those bugs would be resolved by Softel team as per the priority mentioned by the Client.

Technical support will be provided under the separate agreement.

VII. Appendix