

Date: 17th February 2024

Presented to: Siby

Dear Siby,

Thank you for your recent enquiry.

Proposal for Lead Management Website

Project Brief

The scope of this projects includes the design and development of employee website for managing the leads listing and preventing duplicity of lead. The admin will provide users with their login credentials to login on the platform with the help of admin panel, creating their profile on the platform.

The deliverable will include

- 1. Design and Development of Lead Management Website**
- 2. API integration and Development of Admin Panel**

User Flow for Employee User

❑ Login Page (Authentication)

- Employee enters username and password.
- Clicks on the "Login" button.
- Login Credentials will be provided by Admin i.e., employees won't be able to sign up on the website.
- Employee Users can reset their password using forgot password button

❑ Dashboard

- Upon successful login, the employee is directed to their dashboard.
- The dashboard shows basic information and navigation options.

❑ Work Area/Sheet

- Employee navigates to their specific work area or sheet.
- Here, they can manage the data of leads they've gathered.
- Each employee can only access their own work area.
- To enter any data entry they have to enter the below details

- **Client Name** (Can be multiple)
 - **Client Number** (System check for duplicity)
 - **Client Email** (System check for duplicity)
 - **LinkedIn Profile** (System check for duplicity)
 - **Additional details** (Which will be setup by admin)
- Once users tap on save button, the system will highlight if there are any duplicate entry found in the database.
 - The employee is prompted to confirm whether it's a duplicate or not.

Settings

- From this section employee can manage their profile details such as
 - **Name**
 - **Email**
 - **Number**
 - **Employee ID**
 - **Role**
 - **Logout**

Note: Users activity Monitoring of employee will be tracked on the platform. If Employee is idle for 20 min, the system will auto generate a pop up message highlighting no activity message.

Note: In Every 10 mins system will auto capturing employee screen image and saving the same over admin panel under employee folder.

Note: Based on the employee activity admin can which view how many employees are online.

Admin Panel Flow

? Admin Login

- Admins log in to the admin panel securely.
- Admin enters username and password.
- Clicks on the "Login" button.

? Dashboard

- Upon successful login, the admin is directed to the dashboard.
- Admin can view the total number of employee, total number of leads count and total online employee (count only- on tapping can view further details)
- The dashboard displays the below pointers
 - **Employee Management**
 - **Monitoring Analytics**
 - **Lead Management (Lead Data)**
 - **Admin Profile**

? Employee Management

- Admin can manage user accounts, including adding, editing, or removing employee accounts.
- To create an employee account, admin will have to fill the employee details such as **name, email, contact number, employee Id (auto generated)** & additional details if required.
- Admin can edit employee previous details or remove them from the platform using this section.

? Monitoring Analytics

- Admin can track employee activities, including:
 - **Total Screen time (Daily/Weekly)**
 - **Websites visited today** (along with graph comparing other visited site based on time spent on website)
 - **Screen activity captured every 10 minutes** (Employee wise screen short of activities performing by employees)

- Inactivity Popup, admin can setup the message for pop up box triggered to user upon showing inactivity for 20 mins.
 - System automatically detects inactivity.
 - Admin can set a threshold (e.g., 20 minutes of inactivity).
 - If an employee is inactive for more than the set time, a popup appears reminding them to get back to work.

Lead Management

- Admin can access analytics related to lead data
- **Number of leads.**
- **Duplicity rates found.**
- **List of all the leads** available in the system.
- **New leads** (followed by filters- day/week/month, employee name to find specific results)
- **Lead Status** (Highlighted by employee such as active/dead/closed)
- **Manage Leads** (admin can perform CRUD operation on the leads)

Admin Profile

- **Profile**
- **Contact Details**
- **Contact Developer**
- **Logout**

Project Estimation

The proposed quote is INR 3,36,000 only and the estimated delivery timeline would be of 21 days.

On your approval and confirmation, we will be working on a project delivery schedule based on our resources' allocation plan.

Commercial and Payment Terms

S. No.	Milestones	Amount (INR)
1	Initial Deposit - Prior to kick off the Project	1,12,000
2	On 50% Completion of Project	1,12,000
3	On Final Delivery- Project Completion (Before LIVE)	1,12,000
	Total	3,36,000

Payment Terms and Conditions

1. This quote is valid for 2 weeks from the proposal date.
2. In case the payment is done via PayPal then 4.5% of the PayPal fee will be applicable.
3. Additional payment processing fee will be applied as per the policy of your respective bank (if payments are processed through Bank Wire Transfer).
4. Project Plan to be defined at the beginning of the project and the invoice shall be raised accordingly.
5. All the invoices have to be cleared within five business days post which it will attract penalty at 2% per month of the total Project Cost.

Terms & Conditions

All work is subject to our standard Agency Terms and Conditions of Business.

For: Siby

For: WebMobril Inc.

Signature:

Signature:
