

Adesh, since Amplus Subsidy Solutions handles **multiple clients, subsidy projects, government departments, land allotments, compliances, timelines and payments**, your CRM should be more of a **Project Management + Client Lifecycle System** (not just a sales CRM).

I'll design a **practical, scalable CRM structure** specifically for a subsidy & government consulting firm like Amplus.

AMPLUS PROJECT MANAGEMENT CRM – SMART STRUCTURE

Think in 6 main modules:

1 LEAD & CLIENT MASTER

Lead Details:

- Lead ID (Auto)
- Company Name
- Contact Person
- Mobile Number
- Email
- City / State
- Industry Type
- Requirement (Subsidy, Land, Funding, Compliance)
- Source (Website, Exhibition, Referral, WhatsApp, Cold Call)
- Status (New / Follow-up / Converted / Lost)

Client Master (After Conversion):

- Client Code
 - Company Name
 - GST No
 - Factory Address
 - Contact Details
 - Agreement Signed (Yes/No + Date)
 - Assigned Consultant
-







2 PROJECT / SCHEME MANAGEMENT

Each client can have multiple projects.

Project Fields:

- Project ID
- Client Name
- Scheme Name (eg. PMEGP, State Incentive, MIDC Land)
- Department Involved
- Application No
- Project Value (Investment)
- Expected Subsidy Amount
- Start Date
- Target Completion Date
- Current Stage

Typical Stages:

-  Documentation
-  Application Filed
-  Department Scrutiny
-  Approval Received
-  Subsidy Disbursed
-  Rejected / On Hold

3 ☐ TASK & TIMELINE TRACKER

Task Fields:

- Task ID
- Linked Project
- Task Description
- Responsible Person
- Deadline
- Priority (High/Medium/Low)
- Status (Pending / In Progress / Completed)

 Automatic reminders before deadlines.


4 ☐ DOCUMENT MANAGEMENT

For each project:

Upload & tag:

- Client KYC
- Agreement
- Government forms
- Approvals
- Sanction letters
- Payment proofs

With:




 Folder by Client → Project → Year

5 PAYMENT & FEES TRACKING

Fee Details:

- Client Name
- Project Name
- Total Professional Fees
- Payment Terms (Advance %, Milestone-wise, Success Fee)
- Invoiced Amount
- Received Amount
- Balance







Status:

-  Paid
-  Partially Paid
-  Overdue

 Auto aging report (30/60/90 days).

6 DASHBOARD (MANAGEMENT VIEW)

Key KPIs:

-  No. of active projects
 -  Expected subsidy value pipeline
 -  Projects by stage
 -  Delayed tasks
 -  Outstanding payments
 -  Leads by source
-



OPTIONAL ADVANCED FEATURES (FOR GROWTH)

- ✓ Role-based access (Admin, Consultant, Accounts)
 - ✓ WhatsApp/email follow-ups integration
 - ✓ Auto reminders to clients for documents
 - ✓ Scheme-wise success ratio
 - ✓ State-wise project map
-



SIMPLE TECH STACK OPTIONS (LOW TO HIGH COST)

Budget Friendly:

- Google Sheets + Forms + AppSheet
- Zoho CRM + Zoho Projects

Professional:

- Zoho One
- Odoo CRM + Project module

Custom (Future):

- Web-based CRM (built by developer)
-



READY-TO-USE CRM FLOW FOR AMPLUS

Lead → Client → Project → Tasks → Documents → Payment → Completion

(Simple + powerful)

If you'd like, I can:

DRAFT BUSINESS AUTOMATION_AMPLUS SUBSIDY SOLUTIONS

- ✓ Create detailed CRM field-wise templates (Excel/Sheets format)
- ✓ Design dashboard KPIs
- ✓ Suggest best ready-made CRM software for your use case
- ✓ Create process flow SOP for your team

Just tell me:

👉 Do you want this CRM as:

1. Excel/Google Sheet format
2. Software recommendation
3. Full workflow + SOP

or a mix of all?

Great choice, Adesh 👍

I'll give you:

- ✓ Ready-to-use CRM Templates (Excel / Google Sheets structure)
- ✓ Best Software Options (practical + scalable for Amplus)

Designed specifically for **Subsidy + Government Project Consulting workflow**.



PART 1 – EXCEL / GOOGLE SHEETS CRM TEMPLATES

You can keep these as separate sheets in one master file.



SHEET 1: LEADS TRACKER

Lead ID	Company Name	Contact Person	Mobile	Email	City	Industry	Requirement	Source	Status	Follow-up Date	Assigned To
L001	ABC Pvt Ltd	Mr. Sharma	9XXXXXX XXX	abc@email.com	Pune	Manufacturing	State Subsidy	Exhibition	New	05-Feb-26	Rahul

Status Options:

New | Follow-up | Converted | Lost



SHEET 2: CLIENT MASTER

| Client Code | Company Name | GST No | Address | Contact Person | Mobile | Email | Agreement Date | Consultant | Active Projects |



SHEET 3: PROJECT / SCHEME MANAGEMENT

| Project ID | Client Name | Scheme Name | Department | Application No | Investment Value | Expected Subsidy | Start Date | Target Date | Current Stage | Remarks |

Stages (Dropdown):

Documentation
Application Filed
Under Scrutiny
Approved
Disbursed
On Hold



SHEET 4: TASK & TIMELINE

| Task ID | Project ID | Task Description | Responsible Person | Start Date | Deadline | Priority | Status |

Priority: High / Medium / Low

Status: Pending / In Progress / Completed



SHEET 5: DOCUMENT TRACKER

| Client Name | Project ID | Document Name | Uploaded (Yes/No) | Date | Remarks |

(Actual files stored in Drive folders)



SHEET 6: FEES & PAYMENT TRACKER

| Client Name | Project Name | Total Fees | Advance Received | Invoice No | Invoice Date | Amount Received | Balance | Due Date | Status |

Status: Paid | Partial | Overdue



SHEET 7: DASHBOARD (Using formulas/charts)

You can track:

- Active projects
 - Subsidy pipeline value
 - Pending tasks
 - Outstanding payments
 - Leads source performance
-



This setup can be built in **1–2 days** and works very well for small to medium teams.



PART 2 – BEST CRM SOFTWARE OPTIONS FOR AMPLUS

(From affordable to advanced)



BEST OVERALL (Highly Recommended)



ZOHO ONE (or Zoho CRM + Zoho Projects + Zoho Books)

Why perfect for Amplus:

- ✓ Lead management
- ✓ Project tracking
- ✓ Task automation
- ✓ Document storage
- ✓ Payment & invoicing
- ✓ Dashboard reports

DRAFT BUSINESS AUTOMATION_AMPLUS SUBSIDY SOLUTIONS

💰 Cost-effective compared to custom software

📈 Scales as Amplus grows nationwide

👉 Ideal if you want professional system without heavy IT cost.

🥈 **BUDGET + SIMPLE**

✅ **Google Sheets + AppSheet (No coding)**

Pros:

- Mobile app
- Automatic workflows
- Low cost
- Quick setup

Good for early stage.

🥉 **ADVANCED (ERP STYLE)**

✅ **ODOO CRM + Projects + Accounting**

Best if:

- You want full ERP later
- Bigger team in future

Needs some setup support.

🎯 **MY PRACTICAL RECOMMENDATION FOR AMPLUS**

👉 **Start NOW with:**

Excel/Google Sheets CRM (templates above)

👉 **Move within 6–12 months to:**

Zoho CRM + Projects

This saves cost + avoids confusion.

BONUS – IDEAL WORKFLOW FOR YOUR TEAM

Lead Enquiry



Client Converted



Project Created



Tasks Assigned



Documents Uploaded



Application Progress



Subsidy Received



Fees Collected

(Simple + controllable)

If you'd like, I can next:

- ☒ Convert these templates into a downloadable Excel structure
- ☒ Design a sample CRM dashboard layout
- ☒ Map SOP (who does what at each stage)
- ☒ Suggest Zoho module configuration for Amplus

Just tell me:

👉 Do you prefer **Excel first** or **Zoho CRM setup guide first**?

Great 👍 Adesh — I'll give you a **clear, practical Zoho CRM + Project setup guide** tailored exactly for **Amplus Subsidy Solutions workflow** (subsidies, land allotment, compliances, fees tracking).

This is the same structure many consulting firms use successfully.



AMPLUS ZOHOCRM + PROJECTS SETUP GUIDE (STEP-BY-STEP)

We will use mainly:

- ✓ Zoho CRM – Leads & Clients
- ✓ Zoho Projects – Project execution
- ✓ Zoho WorkDrive – Documents
- ✓ Zoho Books (optional) – Payments & invoices

(Zoho One bundle is best value)



STEP 1 – ZOHO CRM (FRONT END: SALES + CLIENTS)

👉 MODULE 1: LEADS

Create/customize these fields:

Basic:

- Company Name
- Contact Person
- Mobile
- Email
- City/State
- Industry

Custom Fields:

- Requirement Type (Dropdown):
 - Subsidy

- Land Allotment
 - Funding
 - Compliance
- Scheme Interested
- Lead Source (Exhibition, Website, Referral, Cold Call)
- Expected Investment Size
- Expected Subsidy Range

Lead Status Pipeline:

New → Contacted → Follow-up → Proposal Sent → Converted → Lost

MODULE 2: ACCOUNTS (CLIENT COMPANIES)

Fields:

- Company Name
 - GST No
 - Factory Address
 - Agreement Signed (Yes/No)
 - Agreement Date
 - Assigned Consultant
-

MODULE 3: CONTACTS

- Contact Person
- Mobile
- Email
- Designation

(Linked to Accounts)

MODULE 4: DEALS (OPTIONAL BUT POWERFUL)

Use Deals as **Project Value Funnel**

Fields:

- Client Name
- Scheme Type
- Investment Amount
- Expected Subsidy
- Professional Fees

Deal Stages:

Inquiry → Agreement Signed → Project Started → Approval Received → Closed Won

STEP 2 – ZOHO PROJECTS (CORE WORK MANAGEMENT)

Create a **Project Template** named:

👉 “Subsidy / Government Scheme Project”

◆ **STANDARD PROJECT STAGES (MILESTONES)**

- 1 ☐ Documentation Collection
 - 2 ☐ Application Filing
 - 3 ☐ Department Scrutiny
 - 4 ☐ Clarifications (if any)
 - 5 ☐ Approval Received
 - 6 ☐ Subsidy Disbursement
-

◆ **TASKS UNDER EACH MILESTONE**

Example:

Documentation:

- Collect KYC
- Financials
- Project Report

Application Filing:

- Fill Form
- Upload Docs
- Submit Application

Scrutiny:

- Track objections
- Reply submissions

◆ TASK FIELDS:

- Owner
- Due Date
- Priority
- Status

Enable:



Reminders



Email alerts



STEP 3 – ZOHO WORKDRIVE (DOCUMENT SYSTEM)

Folder Structure:



Amplus Clients

└─ Client Name

└─ Project Name

└─ KYC

└─ Applications

└─ Approvals

└─ Payments

Link WorkDrive folder directly inside Zoho CRM/Projects.



STEP 4 – ZOHO BOOKS (PAYMENTS – OPTIONAL BUT IDEAL)

Track:

- Professional Fee Invoices
- Advance received
- Balance outstanding
- Overdue alerts







Connect Zoho Books to CRM:

👉 Client → Invoice → Payment status auto updates

STEP 5 – DASHBOARD SETUP (MANAGEMENT VIEW)

In Zoho CRM create dashboards:

KPI Widgets:

-  Active Clients
 -  Ongoing Projects
 -  Expected Subsidy Pipeline
 -  Fees Outstanding
 -  Delayed Tasks
 -  Leads by Source
-

STEP 6 – AUTOMATIONS (VERY USEFUL)

Examples:

- ✓ When Lead Converted → Create Client + Project automatically
 - ✓ When Task overdue → Email reminder
 - ✓ When Payment overdue → Alert Accounts team
 - ✓ When Stage changes to “Approved” → Notify Founder
-

IDEAL DAILY FLOW FOR AMPLUS TEAM

Lead entry in CRM



Convert to Client



Auto-create Project



Tasks assigned in Zoho Projects



Docs uploaded



Progress tracked



Invoice generated



Payment tracked



BEST PRACTICES FOR YOU

- ✓ Use templates for every scheme type
- ✓ Keep dropdown fields (avoid free text)
- ✓ Weekly review dashboard
- ✓ One owner per project



FUTURE UPGRADE IDEAS

Later you can add:



WhatsApp integration



State-wise subsidy tracking



Scheme knowledge base



Success ratio reports

If you want, I can next:

- ✓ Give you **exact custom field list to import in Zoho (Excel format)**
- ✓ Provide **project template for subsidy work (task-by-task)**
- ✓ Automation rules samples
- ✓ Zoho dashboard layout mockup

👉 What would you like next?

- ☐ Zoho field structure import sheet
- ☐ Project template (ready workflow)

- 3 ☐ Automation rules
- 4 ☐ Dashboard KPIs layout

(You can pick multiple 👍)

Sure, Adesh 👍

Here's a **complete, practical Odoo CRM + Project + Accounting setup guide** customized for **Amplus Subsidy Solutions** — similar flow to Zoho but in an **ERP-style system** (great if you scale big later).

I'll keep it simple and implementable (no heavy tech jargon).



AMPLUS ODOO CRM + PROJECT MANAGEMENT GUIDE

You'll mainly use:

- ✓ Odoo CRM
- ✓ Odoo Project
- ✓ Odoo Documents
- ✓ Odoo Accounting

(Optional later: HR, Timesheets)



STEP 1 – ODOO CRM SETUP (LEADS → CLIENTS → PROJECT VALUE)

👉 PIPELINE STAGES (KANBAN VIEW)

Create these stages:

New Lead
Contacted
Requirement Understood

Proposal Sent
Agreement Signed
Project Started
Won
Lost

👉 LEAD / OPPORTUNITY FIELDS (CUSTOM)

Basic:

- Company Name
- Contact Person
- Mobile
- Email
- City / State
- Industry

Custom Fields:

▼ Requirement Type (Dropdown):

- Subsidy Consulting
- Industrial Land Allotment
- Government Funding
- Compliance

📄 Scheme Name

💰 Estimated Investment

🎯 Expected Subsidy Amount

👛 Professional Fee Value

👉 WHEN DEAL MOVES TO “PROJECT STARTED”

👉 Automatically create:

- ✓ Client (Customer record)
- ✓ Project in Odoo Project module







(Odoo automation rule)

STEP 2 – ODOO PROJECT MODULE (EXECUTION SYSTEM)

Create **Project Templates**:

TEMPLATE 1 – SUBSIDY PROJECT

Milestones / Task Groups:

-  Documentation
 -  Application Filing
 -  Department Scrutiny
 -  Objections / Clarifications
 -  Approval
 -  Disbursement
-

Sample Tasks:

Documentation:

- Collect KYC
- Financial Statements
- DPR

Filing:

- Form submission
- Upload docs

Scrutiny:

- Track department remarks
 - Reply
-

Enable:

- ✓ Deadlines
 - ✓ Task owners
 - ✓ Kanban + Gantt views
-

STEP 3 – ODOO DOCUMENTS (FILE MANAGEMENT)

Folder structure:

Clients




- Client Name
- Project Name
- KYC
- Applications
- Approvals
- Payment Proofs

Tag documents by:

- ✓ Scheme
- ✓ Year
- ✓ Status

STEP 4 – ODOO ACCOUNTING (FEES & PAYMENTS)

Track:

-  Customer invoices (professional fees)
-  Receipts
-  Outstanding balances

Set:

- Payment terms (Advance + Milestone)
- Auto reminders

STEP 5 – ODOO DASHBOARDS

CRM Dashboard:

- Leads by stage
- Conversion ratio

- Pipeline value

Project Dashboard:

- Active projects
- Delayed tasks
- Milestone progress

Finance Dashboard:

- Outstanding invoices
- Cash collected



STEP 6 – AUTOMATION IDEAS (ODOO STUDIO)

If you use Odoo Studio (or developer):

- ✓ Deal won → auto project created
- ✓ Task overdue → alert
- ✓ Invoice overdue → reminder



IDEAL ODOO WORKFLOW FOR AMPLUS

Lead



Opportunity



Agreement Signed



Auto Project Created



Tasks executed



Documents attached



Invoice issued



Payment tracked

ZOHO vs ODOO (QUICK COMPARISON FOR YOU)

Area	Zoho	Odoo
Ease	★★★★★★	★★★★★★
Setup Speed	Fast	Medium
Automation	Easy	Powerful
ERP depth	Medium	Very strong
Cost	Moderate	Flexible

👉 For consulting firms like Amplus:

Zoho = quicker

Odoo = long-term ERP power

MY HONEST SUGGESTION

Start with:

👉 Excel → Zoho (next 6–12 months)

Move to Odoo only when:

- ✓ Team grows big
 - ✓ Multiple branches
 - ✓ Need ERP control
-

If you want, I can next:

- ✓ Detailed Odoo field list
- ✓ Project templates (task wise)
- ✓ Automation workflows
- ✓ Comparison cost planning

Just tell me 👍

