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**CRM (web based) Phase-I Requirements**

The Provider will deliver the following items during or at the conclusion of the web & mobile application development:

**Client Side:**

1. Client Registration (Name, Cell #, Email ID, SA ID # and Company Registration #/Trust Registration #) – From Activ8 website
2. Client Validation and Approve from CRM
3. After Approved login credentials auto send to Client’s email ID. Activ8 staff also can Register on behalf of Client and share the login credentials to client.
4. Client Unique Identification Number Generation (Auto) (SA ID # will be client unique identification number)
5. Client Login
6. Complete Profile

6.1. Personnel Info

6.1.1. Client him/her self (facility to upload a photo and ID Docs) [Name (pull through from registration), SA ID # (pull through from registration), TAX reference # and Bank Account Details (Bank Name, Branch Number, Account Number, Account Type, Currency, IBAN/SWIFT #), Residential Address (House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country)]

6.1.2. Spouse (facility to upload a photo and ID Docs) [Name (add or pull through from registration), SA ID # (add or pull through from registration), TAX reference # and Bank Account Details (Bank Name, Branch Number, Account Number, Account Type, Currency, IBAN/SWIFT #), Residential Address (“Same as Primary Client” (or) House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country)]

6.1.3. Children (facility to upload a photo and ID Docs) [Name (add or pull through from registration), SA ID # (add or pull through from registration), TAX reference # and Bank Account Details (Bank Name, Branch Number, Account Number, Account Type, Currency, IBAN/SWIFT #), Residential Address (“Same as Primary Client” (or) House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country)]

6.2. Add Trust (N # of) (facility to upload relevant documents) [Trust Registration #(keep it as Trust UIC), Trust Name, Year of Trust Foundation, Trust Address (Plot #, Building Name,

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Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country), Telephone #, Fax #, Email ID, Website]

6.2.1. Uploading Documents: Trust Deed, Letter of Authority, Trust Tax Details, Trust bank account details.

Add Trust Settler

6.2.2. rust Settler UIC: His/Her SA ID #

6.2.3. Name, House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country. (The CRM should pull all the Trust settler details through, if the Trust settler is already a client. UIC for Trust settler should be the same is his/her UIC).

6.2.4. TAX Reference #

6.2.5. Bank Account Details (Bank Name, Branch Number, Account Number, Account Type, Currency, IBAN/SWIFT #)

6.3. Add Trustees (N # of) (facility to upload relevant documents)

6.3.1. Each Trustee need Unique identification code (Trustee Code) Trustee SA ID is UIC.

6.3.2. Name, House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country. (The CRM should pull all the trustee details through, if the trustee is already a client. UIC for Trustee should be the same is his UIC).

6.4. Add Beneficiaries (N # of) (facility to upload relevant documents)

6.4.1. Each Beneficiary need Unique code (Beneficiary Code) Beneficiary SA ID is UIC.

6.4.2. Beneficiary Details: Name, House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country. (The CRM should pull all the beneficiary details through, if the beneficiary is already a client. UIC for beneficiary should be the same is his/her UIC).

6.5. Add Companies (N # of) (facility to upload relevant documents) [Trust Registration #(keep it as Trust UIC), Company Name, Year of Company Establishment, Trust Address (Plot #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country), Telephone #, Fax #, Email ID, Website]

6.5.1. A facility to add director(s): Director SA ID is UIC

6.5.2. Director(s) Details: Name, House #, Building Name, Floor, Flat #, Road Name, Road #, Suburb Name, City, Postal Code, Province, Country. (The CRM should pull all the

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director details through, if the director is already a client. UIC for Director should be the same is his/her UIC).

6.5.3. A facility to define shareholding % of each director (facility to upload relevant documents)

6.5.4. Uploading Documents: CIPRO company registration docs, Memorandum of Understanding, Share holders load agreements, Share holders buy/sell agreements.

6.6. System should prepare a Client wealth flow chart Based on the hierarchy of Trust, Trustees, Beneficiaries and Companies. And it will be downloadable on PDF format.

1. Service Request (Lead/Query) Generation

7.1. Client can select from list of services from below services:

7.1.1. I need to discuss my will.

7.1.2. I would like to have a Trustee meeting.

7.1.3. I would like to discuss the investment portfolio.

7.1.4. I have TAX related issue that I want to discuss.

7.1.5. I need to make contact

7.2. A Text Box is required to provide the detail information (requirement in detail)

7.3. Then click on “Submit”

7.4. A facility to upload & download relevant documents

1. After “Service Request Generation”

8.1. Unique Service Request Number have to generate. (Exp: SR1800001)

8.2. client will get an auto acknowledgement by email *(Exp: Thank for making contact, Mr. Tony* *(depends on who linked to the client) will reply to your query) Copy of this acknowledgement email must sent to linked advisor)*

1. All Service Request(s) will go to Activ8 CRM.

**Activ8 Side:**

1. CRM Login page
2. User Profile
3. Dashboard: (How many outstanding service requests and How many proposals outstanding)

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1. User Management (Create user, Activate/De-Activate user and List of Users)
2. List of Clients (Location wise)
3. List of Service Request(s)

6.1. A facility to accept/take ownership of the Service Request

6.2. A facility to Allocation a ownership of the Service Request to the other staff

6.3. A facility to Add follow-up date and time

6.4. A facility to Add Clients conversation/feedback and update next follow-up date and time…….

6.5. All accepted request(s) will move in to separate list as “Work in Process”

6.6. All un-accepted request(s) will remain in “Red” color tag as open Service Request(s).

6.7. A facility to view the client profile and his/her wealth flow chart.

6.8. A facility to upload documents (client need to provide the information and signature(s) on the uploaded documents).

1. Facility to store all email communication with the client in separate tab (Share-point)
2. A facility to interlink the Trust(s), Trustee(s), Beneficiaries and Companies with other clients.
3. A facility to store all documentation/correspondence pertaining to a client:

9.1. Proposals

9.2. Financial Needs Analysis

9.3. Broker appointment forms

9.4. Mandates

9.5. Client report packs

1. A facility to Generate Invoice (with unique serial number Ex: INV1800001)

10.1.Send to the Client

10.2.Store under the client account in CRM

1. Payment gateway integration (Activ8 group will provide contact, we will integrate)
2. A facility to update Invoice payment received confirmation.
3. Reports

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13.1. Service wise report (Sl. No., SR Date, SR Number, Advisor Name, SR Status) BETWEEN DATES

13.2. Open Items report (Sl. No., SR Date, SR Number, Advisor Name, SR Status) BETWEEN DATES

13.3. Invoice(s) report (hyperlink on INV #) [Sl. No., Invoice Number, Invoice Generated Date, Advisor Name, Invoice Amount, SR Status(Amount Received/ Not Yet Received)]

BETWEEN DATES

13.4. Amount received report (must show against invoice #) [Sl. No., Invoice Number, Invoice Generated Date, Advisor Name, Invoice Amount, Amount Received, Amount Received Date] BETWEEN DATES

1. Logout.

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