



囍宴大師

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徵求客戶關係管理系統程式報價

本單位誠徵貴公司提供客戶關係管理系統程式報價，想邀請貴公司就以下項目作書面報價：

編號	項目內容	金額(HK\$)
1	創意設計服務 a. 網站設計 - 桌面版 - 手機版 b. APP 設計 安卓版本 - 支援尺寸 2560x1440 , 1920 x 1080, 1280x720 IOS 版本 - 支援 Iphone 5,5s, 5 Plus 6, 6s, 6 Plus 7, 7s, 7 Plus, 8, 8 Plus	
2	開發服務 a. 網站版開發 - 需求功能請看附件 Web and APP CRM System Specification V1.0 b. APP 版開發 - 需求功能請看附件 Web and APP CRM System Specification V1.0	
3	測試, 發佈及文檔 a. 系統發佈 - 網站發佈 - Android 發佈 - IOS 發佈 c. 設定用戶接受測試 (User Acceptance Test) 環境以及協助用戶測試網站及 APP	
4	項目管理服務 a. 項目管理	
總額：		

請於 8/11/2017 下午 6 時或之前，連同 貴公司之正式報價單或填妥以下資料以電郵方式回覆。如有任何查詢請與 楊先生聯絡。

如以往有類似經驗，歡迎在報價提供附件給我們。

公司名稱：_____ 公司蓋章：_____

負責人：_____ 日期：_____

聯絡電話：_____ 電郵：_____

回覆：

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Web and APP CRM System Specification V1.0

2017 年 1 月 1 日

Change Log

Version	Description	Section	By	Date
1.0	Document Created			

Requirement

Objective

Managing customers is important and CRM system helps in several ways:

1. Manage and invoice projects with the powerful Project Management Feature.
2. Link tasks to many CRM features and stay organized.
3. Build professional, great looking estimates and invoices.
4. Powerful support system with ability to auto import tickets.
5. Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
6. Add task followers even if the staff is not project member. The staff member will be able to track the task progress without accessing the project.
7. Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.
8. Create good looking proposals for leads or customers and increase sales.
9. Records your company/project expenses and have the ability to bill to your customers and auto convert to invoice.
10. Know more about your customers with powerful CRM.
11. Increase customer retention via built-in Surveys.
12. Use the Goals Tracking feature to keep sales goals in mind.
13. Create announcements for your staff members and customers.
14. Use Contracts feature to lock in current and future sales.
15. Custom fields can store extra information for customers, leads and more.
16. Receive payments from Paypal and Stripe in different currencies.
17. Tons of configurable options.
18. Style the CRM to your company branding with the powerful theme styling feature.
19. Separated media folder for non-admin staff members to work inside the CRM and organize their uploads and files.
20. Great looking calendar for each staff member based on staff permissions.
21. Follow ups, reports, notes, files and many more features.
22. CRMs need to focus on customers and CRM does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and in-app notification system. These features and more can take customer satisfaction to the next level

Require Function

- 1 General
 - 1.1 Multi Language support
 - 1.2 Multi Currency
 - 1.3 Desktop web and Mobile web (Responsive)

- 1.4 Mobile Apps
 - 1.4.1 IOS - Iphone 5,5s, 5 Plus 6, 6s, 6 Plus 7, 7s, 7 Plus, 8, 8 Plus
 - 1.4.2 IOS Version Support – 9.x – 10.x
 - 1.4.3 Android - 2560x1440 , 1920 x 1080, 1280x720
 - 1.4.4 Android Version - 4.4-5
 - 1.4.5 Help to submit to Apple Store and Android Market
- 2 Company Admin Area
 - 2.1 Login Page
 - 2.1.1 Email
 - 2.2.2 Password
 - 2.1.3 Forget Password
 - 2.2 Landing Page (Dashboard)
 - 2.2.1 Menu (Shortcut to those functions)
 - 2.2.1.1 Dashboard
 - 2.2.1.2 Customer
 - 2.2.1.3 Projects
 - 2.2.1.4 Sales
 - 2.2.1.4.1 Proposal
 - 2.2.1.4.2 Estimates (Quotation)
 - 2.2.1.4.3 Invoices
 - 2.2.1.4.4 Payments
 - 2.2.1.4.5 Items
 - 2.2.1.5 Expenses
 - 2.2.1.6 Support
 - 2.2.1.7 Contracts
 - 2.2.1.8 Leads
 - 2.2.1.9 Tasks
 - 2.2.1.10 Knowledge
 - 2.2.1.10.1 Articles
 - 2.2.1.10.2 Groups
 - 2.2.1.11 Report
 - 2.2.1.11.1 Sales
 - 2.2.1.11.2 Expenses
 - 2.2.1.11.3 Expenses vs Income
 - 2.2.1.11.4 Leads
 - 2.2.1.11.5 Timesheet Overview
 - 2.2.1.11.6 KB Articles
 - 2.2.1.12 Utilities
 - 2.2.1.12.1 Media
 - 2.2.1.12.2 Bulk PDF Export
 - 2.2.1.12.3 Calendar
 - 2.2.1.12.4 Goals Tracking
 - 2.2.1.12.5 Surveys

- 2.2.1.12.6 Announcement
 - 2.2.1.12.7 Databask Backup
 - 2.2.1.12.8 Activity Log
 - 2.2.1.12.9 Ticket Pipe Log
 - 2.2.1.13 Setup
 - 2.2.1.13.1 Staff
 - 2.2.1.12.2 Customer
 - 2.2.1.12.3 Support
 - 2.2.1.12.4 Leads
 - 2.2.1.12.5 Surveys
 - 2.2.1.12.6 Finance
 - 2.2.1.12.7 Contracts
 - 2.2.1.12.8 Email Template
 - 2.2.1.12.9 Custom Fields
 - 2.2.1.12.10 Roles
 - 2.2.1.12.11 Menu Setup
 - 2.2.1.12.12 Theme style
 - 2.2.1.12.13 Settings
 - 2.2.2 My profile
 - 2.2.2.1 My Profile
 - 2.2.2.2 My Time Sheet
 - 2.2.2.3 Edit Profile
 - 2.2.2.4 Language (Change Language)
 - Logout
 - 2.2.3 Search
 - 2.2.4 Business News
 - 2.2.5 Message
 - 2.2.6 ToDo Items
 - 2.2.7 Time Sheet Reminder
 - 2.2.8 Reminderl
- 3 Customer Area
- 3.1 Login
 - 3.1.1 Email
 - 3.1.2 Password
 - 3.1.3 Login create by project admin
 - 3.2 Function (According to the right open by admin)
 - 3.2.1 Project for that customer\
 - 3.2.2 Mile Stone
 - 3.2.3 Media Library
 - 3.2.4 Report
 - 3.2.5 Invoice

- 3.2.6 Estimate
 - 3.2.7 Knowledge Base
 - 3.2.8 Support Ticket
- 4 Function
 - 4.1 Customers
 - 4.1.1 Manage customers and their contacts,
 - 4.1.2 Create multiple contacts and set permissions.
 - 4.1.3 Customers area is fully separated from the admin area.
 - 4.1.4 Clients have their own client portal with all financial data from your company presented in clear view.
 - 4.2 Invoices
 - 4.2.1 Add/Edit/Delete
 - 4.2.2 Keep in track invoices
 - 4.2.3 Keep in track items
 - 4.2.4 Generate reports
 - 4.2.5 Add new currencies using multiple currencies is allowed by previously setup customer currency.
 - 4.2.6 Invoice with different tax based on item.
 - 4.2.7 Recurring Invoices
 - 4.2.7.1 Add/Edit/Delete
 - 4.2.7.2 Create recurring invoices that will be re-created automatically
 - 4.2.7.3 Based on the specified period for the recurring invoice.
 - 4.2.7.3.1 The period time could be days, weeks, months or years.
 - 4.3 Expenses
 - 4.3.1 Add/Edit/Delete
 - 4.3.2 Recurring Expenses
 - 4.3.2.1 Creating recurring expenses.
 - 4.3.2.2 Set up a recurring expense and the expense will automatically be re-created after the specified period.
 - 4.3.2.3 The period time could be days, weeks, months or years
 - 4.4 Estimates
 - 4.4.1 Add/Edit/Delete
 - 4.4.2 Can auto email sent to customers and wait to accept
 - 4.4.3 Add notes
 - 4.4.4 Reminders.
 - 4.4.5 Ability to auto convert the estimate to invoice after customer accept
 - 4.5 Proposals
 - 4.5.1 Add/Edit/Delete
 - 4.5.2 Create for leads
 - 4.5.3 Create for customers.
 - 4.5.4 Receive notification when proposal is accepted/declined and auto send thank you email to customer after accepting the proposal.
 - 4.5.5 Proposal overdue notice before X days available
 - 4.6 Online Payments

- 4.6.1 Support Receive payments from Paypal
- 4.6.2 Projects
 - 4.6.2.1 Add/Edit/Delete
 - 4.6.2.1.1 Manage projects and track time spent on project for each staff member.
 - 4.6.2.1.2 Record project expenses and invoices
 - 4.6.2.1.3 Bill clients faster.
 - 4.6.2.1.4 Gantt Chart for each project and staff member
 - 4.6.2.2 Milestones
 - 4.6.2.2.1 Add/Edit/Delete
 - 4.6.2.2.2 Create milestones for projects and track time spend based on milestone.
 - 4.6.2.2.3 Ability to Drag and Drop tasks between milestones
- 4.6.3 Leads
 - 4.6.3.1 Add/Edit/Delete
 - 4.6.3.2 Ability to auto import leads from email
 - 4.6.3.3 Add notes
 - 4.6.3.4 Create proposals.
 - 4.6.3.5 Change stages with drag and drop.
 - 4.6.3.6 Ability to auto import leads from emails and web to lead forms
 - 4.6.3.7 Import leads from .CSV file
 - 4.6.3.8 Web to Lead Forms
 - 4.6.3.8.1 Add/Edit/Delete
 - 4.6.3.8.2 Create unlimited web to lead forms and inject in your landing page or website.
 - 4.6.3.8.3 Use web to lead forms to gather potential clients information, allow them to request quotes directly from your website
- 4.6.4 Contracts
 - 4.6.4.1 Add/Edit/Delete
 - 4.6.4.2 Add new contracts based on your clients.
 - 4.6.4.3 Set start date and end date and have clear view of all your company contracts in one place.
 - 4.6.4.4 Create PDF contracts and send to customers
 - 4.6.4.5 Contract overdue reminders available
- 4.6.5 Tickets
 - 4.6.5.1 Add/Edit/Delete
 - 4.6.5.2 Support ticket system with autoresponse
 - 4.6.5.3 Private ticket staff notes
 - 4.6.5.4 Ticket assignments
 - 4.6.5.5 Ticket attachments
 - 4.6.5.6 Ticket predefined ticket replies
 - 4.6.5.7 Insert knowledge base link, ticket priorities, ticket statuses.
 - 4.6.5.8 Auto importing tickets via Email Forwarder/IMAP method included.
 - 4.6.5.9 Customer reply and create new tickets via email, without accesing the client portal
- 4.6.6 Departments

- 4.6.6.1 Add/Edit/Delete
 - 4.6.6.2 Assign your staff to specific departments and ability to auto import tickets by department email.
- 4.6.7 Custom Fields
 - 4.6.7.1 Add/Edit/Delete
 - 4.6.7.2 Custom fields can store extra information for customers, leads, tickets, invoices, company, estimates and more
- 4.6.8 Staff Reminders
 - 4.6.8.1 Add/Edit/Delete
 - 4.6.8.2 Setup staff reminders for staff member with ability to notify by email
- 4.6.9 Theme
 - 4.6.9.1 Edit
 - 4.6.9.2 Styling without coding
 - 4.6.9.3 Select Style
- 4.6.10 Events
 - 4.6.10.1 Add/Edit/Delete
 - 4.6.10.2 Create private or public events.
 - 4.6.10.3 Receive notification when an event is coming built-in and email
- 4.6.11 Re-organize admin menu
 - 4.6.11.1 Add/Remove icons to fit for your needs and re-organize admin main menu
- 4.6.12 Email Templates
 - 4.6.12.1 Setup predefined email templates from text editor.
 - 4.6.12.2 Merge fields available and multi language
- 4.6.13 Staff Roles & Permissions
 - 4.6.13.1 Add/Edit/Delete
 - 4.6.13.2 You can give staff a specific permissions what can do or can't do.
 - 4.6.13.3 Role permissions can be overided for each staff
- 4.6.14 Goals Tracking
 - 4.6.14.1 Setup goals
 - 4.6.14.2 Tracking achievements.
- 4.6.15 Personal Todo
 - 4.6.15.1 Add/Edit/Delete
 - 4.6.15.2 Every staff member can have their own personal todo dashboard
- 4.6.16 Staff
 - 4.6.16.1 Add/Edit/Delete
 - 4.6.16.2 Manage all your staff members
- 4.6.17 Company Newsfeed
 - 4.6.17.1 Add/Edit/Delete
 - 4.6.17.2 Share great company events,
 - 4.6.17.3 Upload documents
 - 4.6.17.4 Support employees communications
- 4.6.18 Staff Tasks
 - 4.6.18.1 Add/Edit/Delete

- 4.6.18.2 Assign task to multiple employees,
- 4.6.18.3 Add task followers
- 4.6.18.4 Task comments allowed
- 4.6.18.5 Task attachments.
- 4.6.19 Recurring Tasks
 - 4.6.19.1 Add/Edit/Delete
 - 4.6.19.2 Create tasks that will be auto created for a given period.
- 4.6.20 Surveys
 - 4.6.20.1 Add/Edit/Delete
 - 4.6.20.2 Create surveys with one click.
 - 4.6.20.3 Send to staff, leads, clients or manually created mail lists.
- 4.6.21 Reports
 - 4.6.21.1 Reports
 - 4.6.21.2 Sales
 - 4.6.21.3 Expenses Report
 - 4.6.21.4 Reports by customer
 - 4.6.21.5 Custom date picker
 - 4.6.21.6 Leads Conversions
 - 4.6.21.7 Knowledge base articles (Track if your article is usefull to clients, improve text based on votes)
- 4.6.22 Knowledge Base
 - 4.6.22.1 Add/Edit/Delete
 - 4.6.22.2 Add knowledge base articles from text editor.
 - 4.6.22.3 Search
- 4.6.23 Media Library
 - 4.6.23.1 Upload files in media library.
 - 4.6.23.2 Each staff member that is not admin have their own folder for uploading files.
- 4.6.24 Auto Backup Database
 - 4.6.24.1 Setup auto backup database each X days
- 4.6.25 Encrypt Sensitive data
 - 4.6.25.1 Encrypts all sensitive data in the database with unique encryption key.
 - 4.6.25.2 Encryption performed on email passwords, api keys, api passwords
- 4.6.26 Google reCaptcha
 - 4.6.26.1 Use Google reCaptcha in admin login, customer login and customer register area