1 SCOPE OF WORK (SoW)

Project: Web Application for Quotation & Order Management

Client: **KVM Engineers** (Authorized Stockist of Elecon Engineering & Radicon Power Build)

Prepared By: **DM IT Solutions Pvt. Limited**

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1.1 PROJECT OVERVIEW

The objective of this project is to design and develop a web application using React.js and Next.js that streamlines the quotation, order management, and payment tracking process for KVM Engineers. The application will enhance business efficiency by digitizing workflows, integrating with Tally for invoice management, and providing meaningful MIS (Management Information System) reports for data-driven decision-making.

1.2 PROJECT SCOPE

1.2.1 Core Features

- Quotation Management - Create quotations with product details, rates, and quantities. Include terms & conditions and payment conditions in the quotation. Option to generate and export quotations in PDF format for clients.
- Quotation Tracking - Track the status of quotations: Executed in Our Favour, Rejected, or Pending. Dashboard for quick overview of quotation statuses.
- Order Confirmation & Proforma Invoice - Update Purchase Order (PO) number and date once a quotation is confirmed. Upload Proforma Invoice generated in Tally into the application. Share/upload proforma invoices with customers for payment. Payment Tracking - Update payment received details (date, amount, mode). Track part-payments with proforma invoice generation for each installment. Status updates until full amount is received.
- Dispatch & Completion Tracking - Update dispatch completion date. Option to mark orders as Completed/Delivered.

1.2.2   MIS (Management Information System) Reports

- Quotation Conversion Rate (%) - Overall % of quotations converted into orders. Breakdown by industry verticals, clients, and products.

- Quotation Status Report - List of all pending, executed, and rejected quotations with filters.

- Payment Tracking Report - Payments received vs pending, including overdue invoices.

- Order Fulfillment & Dispatch Report - Orders delivered on time vs delayed. Pending dispatch details.

- Client-wise Business Report - Revenue generated by each client over time.

- Product/Industry Trend Report - Sales trends by product categories and industry sectors.

- Aging Report - Outstanding payments categorized by time buckets (0–30 days, 31–60 days, 61–90 days, etc.).

- Top Performing Products/Clients Report - Identify highest revenue-generating products and clients.

1.3   TECHNOLOGY STACK

- Frontend: React.js, Next.js, Tailwind CSS
- Backend: Node.js / Express.js (or Next.js API routes)
- Database: MS SQL
- Hosting/Deployment: Cloud VPS

1.4   DELIVERABLES

- Fully functional web application (responsive design).
- Admin dashboard for quotation, order, and payment management.
- MIS reports module with export (Word/Excel/PDF) options.
- Training for client team (if required).

1.5   PROJECT TIMELINE (TENTATIVE)

Phase	Deliverable	Timeline
Requirement Gathering &	BRD & Wireframes	1-2 weeks

Finalization

UI/UX Design	High-fidelity screens	1 weeks
Development Phase 1	Quotation & Tracking module	2-3 weeks
Development Phase 2	Payment, Dispatch & MIS modules	2-3 weeks
Testing & QA	End-to-end testing	1 weeks
Deployment & Training	Final handover	1 week

Estimated Duration: ~8–10 weeks

1.6 ASSUMPTIONS & DEPENDENCIES

- Client will provide access to product details, rates, and industry classification.
- Tally integration will be through invoice uploads unless Tally API access is provided.
- Hosting and domain will be provided by client.
- Any third-party API costs (if required) will be borne by client.

1.7 ACCEPTANCE CRITERIA

- Application must support quotation creation, tracking, and MIS reporting.
- Users should be able to update order, payment, and dispatch status seamlessly.
- MIS reports must be accurate and exportable.