

My CRM updated version details are here: <https://migrationmate-crm.lovable.app>

(This is prototype only this is not working CRM) (some extra items added below)

My CRM will have two Log-in

One Client portal / agent portal (log in)

Client portal

Agent sign in

Agent Sign-in/Log in will have to part (two company)

When admin logs in he will get OTP in his/her phone he will select from two phone number to log in (when the agent logs in with log in id and password and OTP she should see two screens log in in Easy get Visa or East west Migration & education expert)

1. **Easy Get Visa** – Which will have following (most of the entry are manual)
Client number - Client Name – date of birth - dependent name – date of birth – Email – visa subclass – and manual entry of file note with chose the colour of file note – end of service agreement automatic entry in file note also option to select file note colour to identify few special requests if not selected normal black colour (no invoice & receipts section – no agreement section no birthday wishes – no staff access) for easy get visa we have different company email and we also need download option of end of service agreement
2. **East West Migration & Education Expert (Fully automated, connected with each steps (action) and connected with email reply)**
 - Email integrated & fully automated
 - lead management with option to update, edit – remove anytime by admin
 - Client management with option to update edit, delete anytime by admin
 - Agreement generated with option to update edit anytime by admin with auto payment and scope of service which is pre-added
 - Automatic invoice generated and Automatic receipt generated with option to update edit anytime by admin.
 - End of service agreement generated with option to update edit anytime by admin so draft should be in master portal in settings
 - File note generation any action in portal will trigger file note automatically also option to select file note colour to identify few special requests if not selected normal black colour also file note will be shorted date wise most recent will come on top (in file note option to save all file note of client in one pdf) with option to update edit anytime by admin
 - Completed file option after we send client end of service agreement client will go to completed file (only admin can reopen and edit)
 - End of service agreement - for east west migration we have different company email (then easy get visa) and we also need download option for end of service agreement and automatic file log after we submit this entry
 - Automatic birthday wish & Anniversary wish (in GIF format copy pest in future we should be able to add new draft without any code)
 - University list management and course management (you can add manually any time without any help)
 - Scope of Service management (if we select particular visa subclass in agreement full disbarment/payment then scope of service should come up automatic will show you before project start (Also option to add combinations our self so it will save our time (like we show you in university and course section)

- Staff access with log in generation with access level (admin can remove access anytime)
- **Review pending option** after any entry by staff it will go in review and only admin will approve or edit and delete that entry (staff is not allowed to delete & edit or send email until approved by admin or special access granted)

Master portal (settings) will have following option that admin can add or remove extra service

- College/ university name
- Course name
- Birthday wish draft GIF format
- Anniversary wish draft GIF format
- File note action pre-set
- Scope of service for particular visa pre set
- Add of visa subclass
- Add visa service pre-set
- Custom search option
- Client resources link add
- Client resources document in pdf
- Service & fees pre-set with visa subclass this can merge with visa service pre-set that will be easy

All agreement – invoice – receipt will have option to look – download - send & edit options which will log entry in file note every time we do action

Client log in option/portal

In this log in option client can only log in from his email which is in our file with OTP every time he logs in we will get entry in file note also this access is available until file is open (once we send him end of service agreement this access will finish)

In this option we like to put

You will create Form 80 – web- from which he can send and save option (when client use send button it will automatically email us and one copy will email him) also file log will generated (form will come in form 80 format in PDF) will provide form 80 to make from

You will create this form - one form with address history as per current portal same send option come in pdf We will provide these details

You will create this Notification of Incorrect Answer form

In this form on top client's name and date of birth (each adult will submit this information)

Each adult dependent can fill this form too same email they can use or after sending this he can select like to fill new form for dependent

Also, we like to create resource section where we will upload few drafts our self and remove our self (like draft work reference – document checklist – affidavit – medical link –AFP link –

Indian PCC link – change of circumstance form – adding dependent form - few more documents this will have option to download only and they can download (admin can add or delete document anytime) – visa fees calculator

Condition of contract/work

- You will provide us different them to choose from
- We don't wish to buy any outside platform that we have to pay so this CRM is bully build for us
- Minimum 6-month support after CRM is in operation for error or bugs
- Including VPN hosting and providing working project (VPN charges will be paid by client which is around 35-40K with everyday back up)
- Email integration / auto email / complete automation
- If wish to add any extra feature in system integration with extra nominal charge
- NDA will be signed and full agreement you have to share before start of work oar payment
- All Codes of this CRM will be property of East West Migration you can't share or use this for other agent without our written permission or agreed royalty.

Most importantly: if we both agree with all condition and move forward with CRM you also agreed that during the building process we may add or remove some item which will be minor changes or entry and you will accommodate that request without any extra charge.

Agreed Payment and payment milestone

- Agreed payment as per portal offer we have given you
- Proposed Milestone Structure (Development-Based)
- Time – 4-6 weeks maximum **(no extra time given as this is deadline form us)**

Stage-1 – UI/UX Design + System Architecture - Complete UI/UX design in Figma (all screens) • User flow & system architecture planning • Database design • Backend project setup • Authentication & RBAC foundation

Disbursement only after stage One – 15% completed

Stage-2 – Lead + Agreement Modules (15%) • Lead management system • Admin-controlled stage transitions • Agreement module with GST calculation

Disbursement only after stage Two – 15% completed

Stage -3 – Automation + Task Engine (15%) • Fully automated task system (no manual edits) • Workflow triggers • Activity logs system

Disbursement only after stage Three – 15% completed

Stage - 4 – Payment + Email System • Invoice generation • Payment tracking (Paid / Pending / Partial) • Email automation (status updates + payment reminders)

Disbursement only after stage Four – 20% completed

Stage- 5 – Testing, Deployment & Handover (35%) • Full QA testing • Bug fixing • Server deployment • Final delivery and walkthrough – with complete integration with VPN and email

Disbursement only after stage Five – 35% completed

