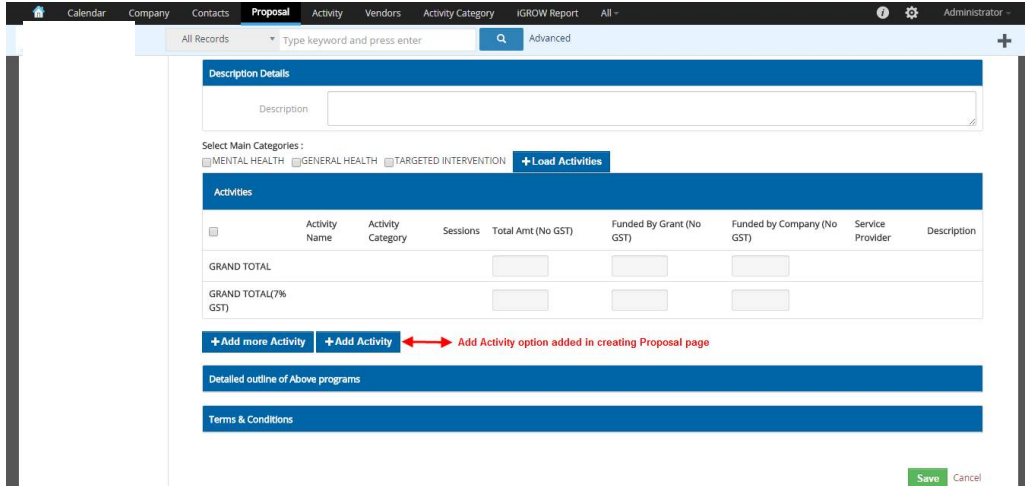


Client Profile: Company provide solutions in Workplace Health Promotion and Mental Wellness initiative.

Project Screenshot



The screenshot shows a web application interface for creating a proposal. The navigation menu includes: Calendar, Company, Contacts, Proposal, Activity, Vendors, Activity Category, IGROW Report, and All. The main content area is titled 'All Records' and includes a search bar and a '+Advanced' button. Below the search bar is a 'Description Details' section with a text input field. Underneath, there are 'Select Main Categories' with checkboxes for 'MENTAL HEALTH', 'GENERAL HEALTH', and 'TARGETED INTERVENTION', along with a '+Load Activities' button. A table titled 'Activities' is displayed with columns: Activity Name, Activity Category, Sessions, Total Amt (No GST), Funded By Grant (No GST), Funded by Company (No GST), Service Provider, and Description. The table shows 'GRAND TOTAL' and 'GRAND TOTAL(7% GST)' rows. Below the table are buttons for '+Add more Activity' and '+Add Activity', with a red arrow pointing to the '+Add Activity' button and a note: 'Add Activity option added in creating Proposal page'. At the bottom, there are sections for 'Detailed outline of Above programs' and 'Terms & Conditions', and 'Save' and 'Cancel' buttons.

Business Needs:

- Company has consultant to provide a training to the employee of many corporate companies. so the availability of the consultant and the schedule of training is required to setup.
- Company send proposal to the customer before initiating the training so company needs to implement proposal approval process
- Company sell session and package so there is requirement of the manage multiple session in the proposal.
- Each proposal confirmation needs to attached with the calendar activity and also the integration with Google calendar is required.

Implementation: Variance InfoTech Implement process using vTiger CRM to create following different modules in vTiger.

- Customize CRM for activity session
- Module level customization
- Proposal customization with the option on selection of the selected activity.
- Multiple activity selection option with session selection
- extensive Reporting module
- Google sync for single and multiple activity event

