

Requirements in the CRM/Accounting Software	
Nature of Business	Service
Services	Business setup services Ejari and land department services Visa, insurance services Banking services Travel & tourism services Tax related services Attestation & Notarization services Migration services Court, legal & lawyers services Police clearance certificate Government approvals All PRO related services
Services Levels	Main Category & 2 Sub-Categories
Customer Categories	Group Customer - under Individual Customer
Supplier Categories	Multiple
Work Assignment	Multiple PROs
Lead Management	Multiple Employees
Transaction Flow	Lead - Quotes-Invoices (able to convert)
<u>CRM Requirements</u>	
01. To monitor each work in different stages and able to mark the comments with attachments 02. The above with a single work and with group 03. Category/sub category-wise reports 04. PRO wise reports 05. Summary in Dash Board	
<u>Accounts Requirements</u>	
01. All Financial Reports 02. AR/AP 03. Customer/Supplier Reports with individual & group 04. Lead - Quotes - Invoice - Receipt 05. Profitability Reports with multiple options - category/job-wise etc. Others	