

Marketing Approval Note

Subject		Approval Note for Salesforce Implementation & Licensing			
<p>Seeking approval for the implementation of Salesforce CRM to streamline Lead Management, Visitor Management and Channel Management Systems. The scope includes integration with property portals, social media platforms, landing pages and the website for seamless lead capture. It also covers third-party integrations like cloud telephony, WhatsApp, SMS and Krisumi ERP, along with admin/user training and automation of the sales process for enhanced efficiency and conversion.</p>					
Date	26/05/25				
Document Ref No.	HO/MKT/FY25-26/032				
S.No.	Description of item	Vendor	Cost	Taxes	Total
1	Salesforce User Licenses (for 1 year) Users - 50 Nos. @ ₹4500/user/month	Salesforce India	₹27,00,000	-	₹27,00,000
2	Salesforce Implementation Cost Details as per attached annexure	CCC Infotech	₹10,00,000	₹1,80,000	₹11,80,000
					₹38,80,000
Remarks:	<ul style="list-style-type: none"> 100% advance payment required along with the applicable taxes (if any) against the tax invoice for S. No. 1. For S. No. 2, 40% advance on SOW Signoff, 40% before UAT Kick-off and 20% before Go-live. S. No. 1 are recurring in nature and will be billed annually along with their respective yearly cost escalations. 				
Total Marketing Budget		Total Till Now		Balance	
₹51,65,03,800		₹5,15,33,043		₹46,53,70,757	
<p><i>[Signature]</i> Kunal Yadav Prepared By</p>		<p><i>[Signature]</i> Shalini Jha Verified By</p>		<p><i>[Signature]</i> Vineet Nanda Approved By</p>	
<p><i>[Signature]</i> Kunal Irishi Approved By</p>		<p><i>[Signature]</i> Yuji Kato Approved By</p>		<p><i>[Signature]</i> Akash Khurana Approved By</p>	

COST COMPARITIVE ANALYSIS SHEET

Location: Krisumi Sales Lounge, Gurgaon

Goods/Services: Services

Goods/Services Name and Code: Commercial Proposal for Salesforce Implementation

Sl. No.	Service Description	Code	UOM	Technical Evaluation of Vendor				Rate/ UOM	Total Qty	Manras	Cloud Ingenious	Girikon Solutions Pvt. Ltd.
				Approved by Marketing	Score (1-5)	MOQ	Quoted Price-1					
1	Salesforce Implementation for 50 users which includes the following modules: Lead Management System (LMS), Visitor Management System (VMS), Broker Management (Part of LMS)		Number	Yes	5		14,50,000	10,00,000	10,50,000	17,00,000	19,00,000	
	GRAND TOTAL											
	Other Remarks											
	Terms & Conditions											
	Delivery/Lead Time											
	Taxes (GST)											
	Payment terms :											
	Advance Payment Terms :											
	Other Comments on Performance, Quality etc											
RECOMMENDATION & CONCLUSION :												
<ul style="list-style-type: none"> • CCCInfotech is L1. • They will be providing relevant support along with the Salesforce team for a quick implementation of the technology. • Salesforce Solution Engineer has tested and verified this product. • They are the preferred partner for Salesforce. 												

AMC & Sales force user licenses charges will be additional

45 days

Taxes as applicable

Payment will be done in phases as per the implementation plan

As mentioned on the logic note

Abhishek Kumar Singh

From: Vineet Nanda
Sent: Saturday, June 7, 2025 12:30 PM
To: Abhishek Kumar Singh
Cc: Shalini Jha; Krisumi Marketing
Subject: RE: Approval - Salesforce Implementation - CCC Infotech

Ok jee.

Warm Regards,



Vineet Nanda
Director Sales and Marketing



Email: nanda@krisumi.com
Sector 36A, Gurugram



Website: www.krisumi.com | Take a walkthrough from home: www.krisumixperience.com



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From: Abhishek Kumar Singh <abhishek.singh@krisumi.com>
Sent: Friday, June 6, 2025 1:05 PM
To: Vineet Nanda <nanda@krisumi.com>
Cc: Shalini Jha <shalini.jha@krisumi.com>; Krisumi Marketing <marketing@krisumi.com>
Subject: Approval - Salesforce Implementation - CCC Infotech

Dear Sir,

Appended is the Approval Note for CCC Infotech for Salesforce Implementation and Licensing .I've attached the PDF for your reference .

Kindly accord your approval.

Salesforce Platform Implementation

Statement of Work

Submitted to


K R I S U M I

Krisumi Corporation PVT. LTD.

Submitted by

Account Manager: Fateh Bahadur Singh

Title: **Salesforce Consultant**

Date: 4th June 2025

CloudCentric Infotech Private Limited

 CCCINFOTECH™

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Email -sales@cccinfotech.com

Validity

This proposal and all information contained within, is valid for a period of 7 days from the date of Submission viz., 4th June 2025

Release Date: 4th June 2025

Submitted to:	Mr. Vineet Nanda KRISUMI CORPORATION PVT LTD Waterfall Residences, Dwarka Expressway, Sector 36A, Gurugram-122004, Haryana
Submitted by:	Mr. Fateh Bahadur Singh CloudCentric Infotech Pvt. Ltd. H-146 & 147, Ground Floor Sec-63 NOIDA, UP (India) - 201301
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Version Number	Version 1.0

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Definition

This document outlines all the areas of the Statement of Work which need to be done within the certain budget and the project timelines on Salesforce.com.

Client Overview:

This blend – Krisumi Corporation – is an enterprising collaboration between Japanese Infrastructure giants Sumitomo Corporation, with a 400-Year Legacy of excellence and trust. And Krishna Group, the modern behemoths in Indian Real Estate with a commitment to deploying cutting-edge design and technology. The word Krisumi is derived from a combination of the Sanskrit word Kriyā meaning ‘creation’ and the Japanese word Sumi meaning ‘fine living’, perfectly expressing the very spirit of the enterprise in its name itself.

Email -sales@cccinfotech.com

Functional Scope:

Module	User Management
Functional Requirement	<p>User management in Salesforce involves creating and managing user accounts, assigning profiles and permissions, and controlling access to data and functionality within the system.</p> <p>Here are some key aspects of user management in Salesforce:</p> <ol style="list-style-type: none"> User accounts: User accounts are the primary way to manage user access in Salesforce. Each user account includes a username and password, as well as personal and contact information. User accounts can be created manually or imported from an external system. Profiles: Profiles define the level of access and permissions for each user. Profiles control which objects, fields, and tabs a user can access, as well as which Visualforce pages and Apex classes they can execute. Permission sets: Permission sets can be used to grant additional permissions to users beyond what is defined in their profile. Permission sets can be assigned to individual users or groups of users. Roles: Roles are used to control access to data within Salesforce. Roles define the hierarchy of data access, with users at higher levels having access to all data within lower levels.
Assumption	<ul style="list-style-type: none"> Users would be configured for all the Salesforce license holders of KRISUMI CORPORATION PVT LTD.

Module	Lead Management System (LMS)
Functional Requirement	<p>Lead management in Salesforce involves creating and managing customer enquiries from different sources.</p> <ul style="list-style-type: none"> Leads Capturing: Lead capturing can be done through various channels like Google Ads, Meta Ads, Property Portals, Website. Nurturing: Once the lead is generated/created, sales users can follow them and manage their activities like Call-Logs, Tasks, Events and Emails. Qualification: Once the customer is ready to proceed with the appointment, sales team should be able to convert them into a potential business opportunity manually. Conversion: Upon Conversion system should be able to create the Person account of the customer and an opportunity.
Assumption	<ul style="list-style-type: none"> Leads Sources are Google Ads, Meta Ads, Property Portals, Website Web2Lead form to connect Website with Salesforce to capture any potential Lead/Enquiry Apart from Web2Lead form All lead will be Created Manually, however lead Source can be selected from Dropdown while filling the lead form



Module	Opportunity Management
Functional Requirement	<p>Opportunity Management in Salesforce is the process of tracking proposals opportunities, managing the proposals pipeline, and improving revenue forecasting. Here are some key features of which will be implemented for KRISUMI CORPORATION PVT LTD Salesforce Opportunity Management:</p> <ol style="list-style-type: none"> Opportunity Creation: Create a new opportunity record in Salesforce for each potential customer. The record includes information such as the opportunity name, account, contact, and other relevant details. Pipeline Management: You can use Salesforce to manage your lead pipeline, including the stage of each opportunity, and the expected close date. Sales Collaboration: You can use Salesforce to collaborate with other sales team members, including sharing information about opportunities and assigning tasks. Automated Sales Processes: Salesforce offers automation tools that can help streamline sales processes, such as automated emails, task reminders, and other sales workflows.
Assumption	<ul style="list-style-type: none"> Opportunities will be created with potential Customers.

Module	3 rd Party Integrations
Functional Requirement	<p>Below 3rd Party Integrations are being considered here</p> <ul style="list-style-type: none"> CTI – Knowlarity, Exotel (To Be Decided yet) WhatsApp Business WhatsApp Chatbot SMS Infor (Legacy ERP System) – APIs and Developer support will be provided by Krisumi Team
Assumption	<ul style="list-style-type: none"> CTI Team will provide the APIs and any Integration needed at their end will be done by their team. All the transactional cost for APIs and usage cost will be extra and to be paid to the respective vendors as per the actual contract with them by Krisumi Team. APIs will be provided by Krisumi team and their respective vendors.

Module	Activity Management
Functional Requirement	<p>Activity Management in Salesforce refers to the process of managing your sales and marketing activities within the platform. Here are some key features of Salesforce Activity Management:</p>

System Documentation

Software Requirement Specifications (SRS/ BRD) will be provided as part of SOW.

Data Migration

- KRISUMI CORPORATION PVT LTD will provide complete and accurate data using the templates shared by CloudCentric.
- The migration process is restricted to a maximum of 1 attempt in both the UAT and production environments.
- The migration scope includes a maximum of **20,000** records as defined in the SOW.
- Any additional iterations or records beyond the scope will require a separate change request.
- KRISUMI CORPORATION PVT LTD will ensure all necessary access and permissions to source systems are provided.

Post Go Live Support

Support Duration:

- A **15 days Post Go-Live support window** will be provided as part of the Scope of Work (SOW).

Support Coverage:

- Addressing system issues, configuration adjustments, and minor bugs identified during the support period.
- Assisting end-users with queries related to system usage and workflows.
- Monitoring system performance and ensuring stability.
- Guidance on Salesforce best practices for further usage and adoption.

Transition to Regular Support:

- Post the 2-Weeks window, all support requirements will transition to **regular transactional services** under a separate **Annual Maintenance Contract (AMC)**. AMC Charges for the First Year are INR 6,00,000+GST.

Out of Scope

The following items are out of scope.

Functional Changes Beyond SOW or SRS

- Any new functional requirements or changes that are not explicitly documented and approved in the SOW or System Requirements Specification (SRS) will not be entertained.

AppExchange Product Setup

- Installation, configuration, or support for AppExchange products other than those explicitly defined in the SOW is not included.
- Licensing, subscription, or customization of any AppExchange products is beyond the scope.

Dependencies

- A timely response will be required to deliver the project timely, a delay in response may affect the project timelines.
- All the tools or any other system access will be required upfront which is needed to execute the project smoothly.

Collaboration Approach

- **Tools and Technology**
- Teams Meeting tool will be used to have all the meetings.
- All the meeting sessions will be recorded for future references.
- A weekly status report will be sent to project coordinators to review the overall project status.
- **Working Timing** CloudCentric working timing are between 10:30 AM to 7:00 PM from Monday to Friday excluding Indian Public Holidays.
- **Online Meetings**
- Meetings should be scheduled at least 1 day before avoiding a schedule conflict.
- A weekly meeting of 1-2 hours will be scheduled with the project coordinator to provide the projects with updates and discuss any blockers or constraints during the development phase.
- **Number of Visits:**
A maximum of 2 onsite visits are included as part of the project Scope of Work (SOW).
- **Planning and Scheduling:**
Onsite visits will be planned and scheduled in alignment with critical project milestones (e.g., requirement gathering, UAT, go-live, training).
Both parties will mutually agree upon the visit dates and scope of activities.
- **Stakeholder Availability:**
KRISUMI CORPORATION PVT LTD will ensure the availability of all key stakeholders during onsite visits to avoid delays and maximize productivity.
- **Travel and Accommodation:**
All Travel, accommodation, fooding and related expenses for onsite visits are not included in the SOW and will be billed separately.
- **Scope of Activities:**
Onsite visits will cover only the predefined activities (requirement workshops, UAT support, go-live assistance, and training) as agreed in the SOW.
Any additional requirements beyond the defined scope will require a formal change request.
- **Extensions and Additional Visits:**

goods and services transactions. The exact percentage and amount will be reflected on the final invoice.

General Terms

Change Order

During the development if something appears as part of a change request, this will go through the change order management, it will require an end-to-end process from requirement gathering, design, development, QA validations, and all the efforts will be considered billable hours to make sure that there is no system impact due to change request, this process cannot bypass to keep system consistency.

Acceptance

Language constraints are accepted if multilingual projects, CloudCentric do not have tester who knows the different languages other than English.

- This is an initial scope based on the current understanding which CloudCentric if there is a change in scope which unpredictably will impact the fiscals and project timelines.
- The exact project schedule will be finalized at the project Kick-off.

Project Termination

The project will end post 2 Weeks after Go Live date and the Primary stakeholder from KRISUMI CORPORATION PVT LTD will provide the project sign-off, the resources will only be available during these 2 weeks post go-live dates, later 2 weeks if there is any issue appears into production will be treated as regular transactional services, any concern must be discussed within the 2 weeks.

General Assumptions

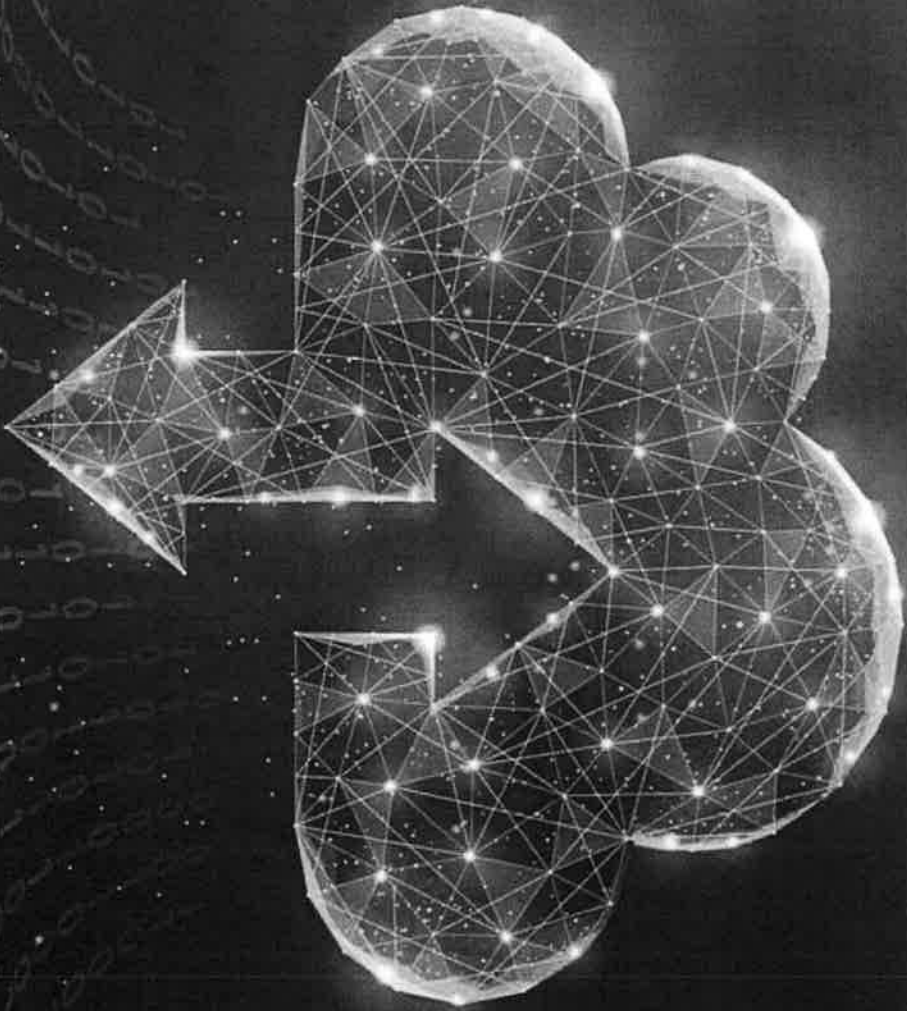
- **Salesforce Licenses**
KRISUMI CORPORATION PVT LTD team is aware of the salesforce license types required to achieve the project deliverables. Salesforce edition wise features & limitations are not limited to listed items only, there are so many others as well which will be obeyed by CloudCentric being a service provider partner company.
- **Dashboard Reporting:** Any complex reporting requirement which is not achievable by Out-of-box functionalities may result in additional costs and require a change order.

KRISUMI



Manras Technologies Pvt. Ltd.

Salesforce Implementation Proposal



A Salesforce Summit(Platinum)Partner

You Can Trust!

Salesforce
Consulting

Salesforce
Implementation

Salesforce
Integration

Managed
Services

Product
Development

10+yrs **500+** **250+** **246+** **5/5**

of experience

projects

clients

certifications

CSAT Score

India | United Kingdom | United States

Awards & Recognition

**Great
Place
To
Work[®]**

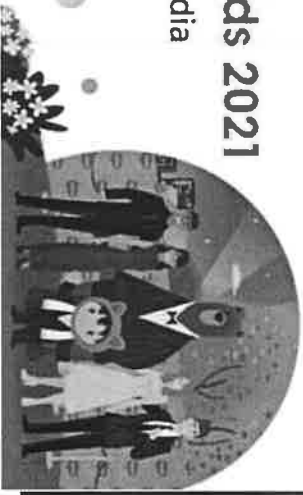


Proud Winners of

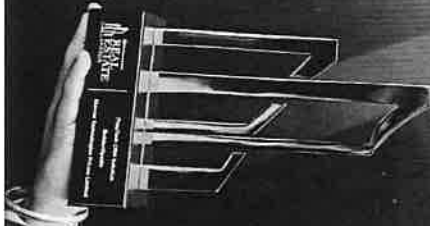


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2025
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Executive Summary

Objective:

KRISUMI CORPORATION is looking to have a CRM to support their presales, Sales practices centrally.

As part of the scope, the following modules will be implemented as per below SOW:

- Enquiry Management
- Account & Contact Management
- Site Visit Management
- Reports & Dashboards

Integrations

- Integrators such as 99 Acres, Magic Bricks, Google Ads, Facebook Ads
- Outlook 360
- CTI (TP, Connector)
- SMS, WhatsApp
- Digital Engagement - Chatbot



Proposed Success Metrics

- 100% visibility into Lead lifecycle
- 100% Lead Follow ups through system
- Improved Lead Turnaround time.
- Focused Customer Delight.



Proposed Tools

- Web to lead
- Salesforce Environment
- CTI TP, Connector
- WhatsApp - DE
- ChatBOT - DE
- SMS - TP, Connector



Scope of Work

Requirement

Enquiry Management

Account & Contact Management

Deliverables

Assumptions

- Lead de-duplication will be done on the parameters specified.
- Lead will be assigned to the sales team either manually or pre-defined business logic. When a lead is assigned to a contact, they will receive an automated email from system regarding the same.
- Enquiry will be created in the system by manual creation, Website to Lead(Landing Pages), Facebook Ads, Google Ads, 99 Acres, Magic Bricks and uploading .csv file).
- Ability to view the status of the leads, how many are prospects, scheduled for site visit etc.
- Ability to get all leads at one place with Lead scoring.
- Ability to see all the leads at one place.
- Ability to manage the lifecycle of the lead.
- Ability to send automated reminders on the lead.
- Ability to map source and sub source.
- Lead escalation notifications to managers can be configured.
- Lead scoring on the project defined parameters.
- Customer Accounts can be created Manually or when an Enquiry is captured.
- Accounts can be Personal or Business entities.
- For Business Account, Account hierarchy can be configured.
- Account 360 to capture all Meetings, Visits, previous Enquiries, Opportunity and closed Bookings can be configured to capture centralized customer detail information
- Standard Salesforce Lead object would be configured.
- No custom UI
- Lead assignment logic will be confirmed by Customer.
- CTI will be procured by customer
- Salesforce standard Object will be configured
- Fields required to be captured will be shared by Business
- Criteria for Account & Contact Deduplication will be shared by Business



Scope of Work

Requirement

Site Visit Management

- Ability to schedule site visits from the system.
- Ability to send automated messages to customer on(Email) from the system.
- Ability to schedule site visits.
- Ability to send reminder email for site visit.
- Ability to validate customer number through OTP

Reports & Dashboards

- Up to 20 Reports and 4 Dashboards can be configured using the Data captured in the system
- Restrict Report export for users.

Data Migration & Onsite Support

- Data Migrator support will be provided as per customer need on T&M basis
- Onsite support will be provided as per customer need on T&M basis

Deliverables

Assumptions

- Salesforce object will be configured.
- OTP validation on Email

- Salesforce Standard Reports and Dashboards will be configured

- 1 week prior notice required

Scope of Work – Integrations

Modules

Integration(s)

Magicbricks & 99 Acres API Based (included in Package)

Ability to get enquiries from Magicbricks to Salesforce

Ability to get enquiries from 99 Acres to Salesforce

Website Out of Box - Salesforce (included in Package)

Ability to integrate the system with customer's website

Ability to capture leads from the website

Fb Ads & Google Ads Salesforce Connectors (included in Package)

Ability to get enquiries from FbAds to Salesforce

Ability to get enquiries from Google Ads to Salesforce

Email Out of Box - Salesforce (included in Package)

Ability to send email from Salesforce.

WhatsApp - TP-Connector - Salesforce (Configuration)

Ability to send WhatsApp from Salesforce.

SMS - TP-Connector - Salesforce (Configuration)

Ability to send transactional & bulk SMS from Salesforce.

CTI - TP-Connector - Salesforce (Customization)

Ability to do inbound/outbound from Salesforce.

Ability to capture the call recording in Salesforce

Chatbot (TP-Connector)

Assumptions

Only 1 account per integration.

API to be provided by SF and consumed by Magicbricks and 99 Acres

Customer will assign a Point of Contact for integration field level clarity, to ensure there is no gap and mismatch in later stages of the implementation.

Any third-party connector required for integration will be procured by the customer.

For WhatsApp integration Salesforce DE will be procured by the customer.

For SMS & CTI integration TP connector will be procured by customer.

WhatsApp, SMS & CTI charges will be taken care by customer.

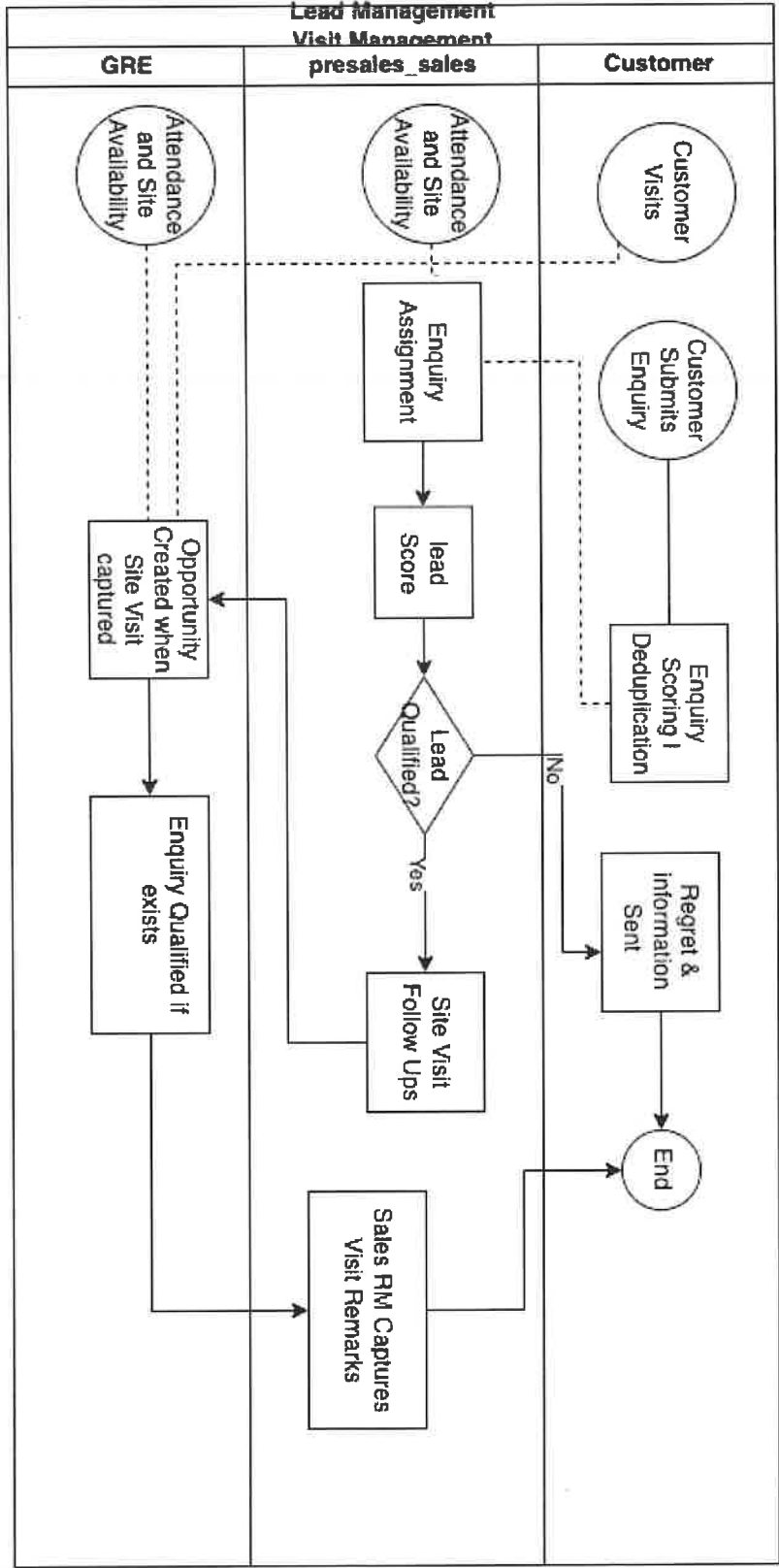
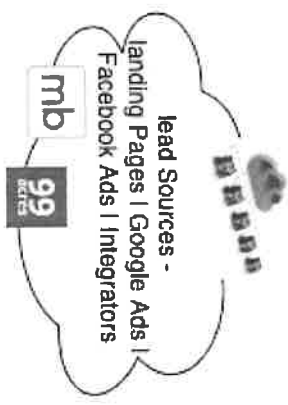
WhatsApp & SMS template approval will be done by customer.

For WhatsApp up to 10 template configuration in scope.

For SMS up to 10 template configuration in scope.

CTI supported features as available as part of connector will be configured, every other API integration will be billed separately.

Process Flow (To Be)



Implementation Timelines

Activities planned	1	2	3	4	5	6	7	8	9
Phase 1 Pre-Sales BRD- Discussion & Sgn-off	LMS+VMS BRD								
Sprint 1 -Solutio Design & Development: PreSales Module with Integrations - Web to Lead API, CTI, Outlook 360, Visit Management			Lead Management + Visit Management Delivery			UAT			
Phase 1 - Hypercare- Go Live							Go Live	Hyper care	
Sprint 2 -Solutio Design & Development: WhatsApp, SMS, ChatBot							Template configuration		

Commercials

Phase 1		Implementation Cost (INR)
Pre-Sales, Sales CRM Implementation (One Time)		8,00,000
CTI -Connector		50,000
DE ChatBot		1,00,000
WhatsApp(Connector)		50,000
SMS (Connector)		50,000
	Total	10,50,000
Salesforce License Cost		Per User per Month Cost (INR)
Salesforce Enterprise License for Emerging Markets Lic Nos-		4500

Milestone	Phase I Description	%age Split
1	Advance (to be released within 7 days of SO Receipt)	60
2	Sprint 1 Sign-off	40

1. Taxes are not included in the pricing.
2. The above commercial does not include cost of any paid App, third party tools, software licenses, hardware etc.
3. Any change in effort and timeliness based on the detailed outcome of the analyze phase will be absorbed to a maximum deviation of +10% after which a revision of cost and effort estimate would be applicable.
4. For any business requirement travel & stay will be additional at actual.
5. The pricing is valid until Jun 15, 2025



Assumptions & Support Required

- Sandbox admin access will be provided by Day 0.
- Identified Signing authority of the module will be identified as Key stakeholder.
- SPOC from Customer End to be identified.
- Any query raised by Manras team needs to be resolved in 24 hours to ensure delivery timeline is not impacted.
- All internal discussions will be completed before giving requirements to Manras team.
- All the identified users of same profile will be present in same location at same time for the user training .

Assumptions:

- Only 1 account per integration is considered.
- Business will assign a Point of Contact for Integration field level clarity, to ensure there is no gap and mismatch in later stages of the implementation.
- Any paid or unpaid third-party connector required for integration will be procured by the business.
- Business will be responsible for all coordination among the Vendor teams .
- Any historic data or features not captured in the given scope will be estimated additionally.

Managed Services

- Problem Tickets
- Service Request
- Change Request
(Minor Enhancement)

Salesforce

- Train internal team on Low Code/No Code Platform
- Share relevant Trailhead links

Support

- L1 L4
- Standard/Gold/Platinum Service Levels
- Salesforce Contract OLA Management
- Platform to raise tickets

Value Added Services

- Adoption Dashboards
- Do more with Salesforce standard feature sessions
- Periodic Maintenance releases, Hot fixes
- Whats new in your industry sessions

**Manras Intelligent
Operations**

Thank You!

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Lead Management System (LMS)

Functional Scope

1. Lead Generation

- Google Ads
- Facebook Ads
- Instagram Ads
- Website
- Landing Pages
- Social Media
- Events
- Property Portals

2. Lead Processing

- Lead Creation
- Lead Notification through Email, SMS, WhatsApp
- Lead De-Duplication
- Lead Assignments
- Lead Scoring
- Lead Qualification
- Lead Nurturing
- Lead Conversion to Deal
- Auto Responses
- Leads Transfer within team
- Leads Allocation for Inactive User to New User
- Integration with Third Party system like Telephony, SMS, WhatsApp

3. Pipeline Management

- Building Pipeline once the lead is converted to Deal
- Prioritizing the Deals Based on Score
- Auto Follow-ups
- Site Visit Planning & Reminders
- Proposal
- Booking
- Deal Closer

Key Features

 Module	 Feature	 Description
Lead Capture	Multi-Channel Intake	Capture leads via website, portals, walk-ins, brokers, WhatsApp, and calls
	API / Web-to-Lead Integration	Auto-create leads with source/campaign tagging
	WhatsApp / CTI Integration	Generate leads from WhatsApp chat, phone calls
Lead Assignment	Auto Assignment Rules	Assign leads based on project, location, team, or round-robin
	Reassignment Logic	Automatically reassign idle/unworked leads after set duration
Lead Quality & Scoring	Lead Scoring	Prioritize based on budget, urgency, preferred project
	Qualification Stages	Stage-wise tracking: New → Working → Visited → Qualified
Advanced Lead Logic	Broker Lock-in (90 Days)	Leads tagged with broker remain assigned for 90 days
	Time-based Auto Actions	Send alerts, reminders, or reassign inactive leads
Visit Planning	Site Visit Scheduler	Schedule, reschedule, and track in-person site visits
	Geo-tagged Mobile Visit Capture	Use mobile to log location, photos, and outcome of visit
Broker Collaboration	Lead Tagging by Broker	Leads can be added or referred by brokers
	Broker Performance Analytics	Measure success, conversions, and payouts broker-wise
Opportunity Conversion	Lead to Opportunity	Convert only qualified leads with captured preferences
	Unit/Project Preference Tracking	Capture tower, floor plan, facing, etc.
	Negotiation & Follow-up Logging	Track every sales call, discussion, and pricing notes
Pipeline Management	Opportunity Funnel Tracking	Monitor pipeline by stage, project, and expected closure date
	Sales Forecasting	Predict revenue potential by opportunity stage
Reports & Analytics	Lead Funnel & Source Analysis	Identify which sources generate the most conversions
	Visit to Conversion Ratio	Track how many visits result in opportunities
	TAT and Follow-up Compliance	Ensure SLAs are met between stages

Visitor Management System (VMS)

Functional Scope

- Auto-Convert Walk-ins to Leads
- QR & OTP-Based Check-in
- Broker-Aware Visitor Logic
- Photo, ID, and Purpose Capturing
- Real-Time Visit Analytics

Key Features




Module	Feature	Description (Real Estate Use Case)
Visitor Check-in	Customer Walk-in (Alone)	Basic info captured at reception or tablet. Auto-tagged as <i>Walk-in Lead</i> .
	Customer Visit with Broker	Visitor and broker both registered. Broker tagged on visit and lead. 90-day lock-in applies.
	Broker Visit (Alone)	Broker checks inventory, drops new leads, or requests project updates.
	QR Code Scan Check-in	Visitors (brokers or customers) scan a QR code at entrance to self-register via mobile
	OTP-Based Authentication	OTP sent to mobile/email to verify broker/customer identity before completing check-in
	Visit Type Classification	Auto-categorized as Walk-in, With Broker, or Broker Only
	Purpose of Visit	Mandatory selection from list: <i>New Enquiry, Unit Selection, Negotiation, Broker Meeting, etc.</i>
Broker Management	Broker RERA/ID Validation	Broker ID (RERA No, PAN, etc.) validated and stored. Used for tagging and commission workflows
	Broker Lock-in (90 Days)	Customer lead remains locked to broker for 90 days from visit for protection & attribution
Lead Conversion	Convert Visitor to Lead	If visitor shows interest, record is converted into a Salesforce Lead with full visit details
	Broker Auto-tagging in Lead	Broker details are auto-attached to converted lead for performance tracking
Assignment Logic	Lead Assignment to RM / TL	Lead assigned using project, budget, or geography rules. Falls back to TL if RM unresponsive
	Assignment SLA & Escalation	Auto-notification if RM does not act within set time. TL or CRM admin alerted for escalation
Document Handling	Photo & ID Upload	Visitor's Aadhar, PAN, or passport and photo are uploaded and stored against their record
	Brochure & Cost Sheet Sharing]	Auto-dispatched to customer via WhatsApp or Email after check-in or during visit
Post-Visit Activities	Visit Outcome Capture	Outcome tagged: <i>Interested, Not Interested, Need Follow-up</i>
	Auto Follow-up Task	Follow-up task assigned to RM with reminder
Analytics & Reports	Visit Type Analysis	Reports visits by category: Alone, With Broker, Broker Only
	Visit-to-Lead Conversion	% of visits resulting in lead creation
	Broker Visit Productivity	No. of visits with brokers and leads/opportunities attributed
	Assignment Effectiveness	RM/TL assignment speed, lead conversion ratio, SLA compliance

Broker Management (Part of LMS)

Functional Scope

- End-to-End Broker Lifecycle Tracking (Without brokerage & Invoicing)
- 90-Day Broker Lock-in Logic
- QR + OTP Check-In
- Broker Performance Dashboards (For visits and Bookings)
- Broker's Legacy Data Import in CRM
- Broker's Category Definition based on Business Logic

Key Features

 Module	 Feature	 Description
Broker Onboarding	Registration & Verification	Capture broker details – Name, Mobile, RERA No., PAN, Email. Verify via OTP/KYC.
	QR-Based Self Registration	Broker can scan QR at site to self-register or check-in via mobile
	KYC Document Upload	Upload PAN, Aadhar, RERA Certificate, visiting card, etc.
	Approval Workflow	Internal review & approval before broker can engage in lead submission
Broker Engagement	Project Access Control	Assign brokers to specific projects or towers for control and performance mapping
	Broadcast Updates	Send pricing sheets, offers, and updates via WhatsApp/Email
Lead/Visit Handling	Lead Tagging	Leads and visitors brought by broker are auto-tagged
	Broker Lock-in (90 Days)	Broker is protected for 90 days from first client visit for booking attribution
	Broker Visit Logging	Log broker visits independently or with client to track activity
Analytics & Reports	Broker Contribution Report	Total leads, visits, bookings, and ROI per broker
	Broker Conversion Ratio	% of referrals resulting in bookings
	Payout Summary	Total commissions paid, in process, and projected per broker
Integration Capabilities	WhatsApp, Email, & SMS Integration	Automate communication of approvals, updates, and payout alerts

Paid Integrations

1. **Cloud Telephony System**- Knowlarity, Exotel, GricCTI (To Be Decided)
2. **WhatsApp Business**- API Integration
3. **WhatsApp Chatbot** – Implementation
4. **Legacy ERP (Infor)** – One Way API Integration
5. **SMS Integration** – API Integration

Note: All the transactional cost for APIs and usage cost will be extra and to be paid to the respective vendors as per the actual contract with them. APIs will be provided by Krisumi team and their respective vendors.

Investment & Timelines

Module	Estimated Cost
Lead Management System (LMS)	
Visitor Management System (VMS)	
Broker Management System (BMS)	INR 17,00,000

- **GST:** Applicable as per Government norms.
- **Timelines:** Will be defined post detailed discovery sessions

Lead Management System (LMS)

Functional Scope

1. Lead Generation

- Google Ads
- Facebook Ads
- Instagram Ads
- Website
- Landing Pages
- Social Media
- Events
- Property Portals

2. Lead Processing

- Lead Creation
- Lead Notification through Email, SMS, WhatsApp
- Lead De-Duplication
- Lead Assignments
- Lead Scoring
- Lead Qualification
- Lead Nurturing
- Lead Conversion to Deal
- Auto Responses
- Leads Transfer within team
- Leads Allocation for Inactive User to New User
- Integration with Third Party system like Telephony, SMS, WhatsApp

3. Pipeline Management

- Building Pipeline once the lead is converted to Deal
- Prioritizing the Deals Based on Score
- Auto Follow-ups
- Site Visit Planning & Reminders
- Proposal
- Booking
- Deal Closer

Key Features

 Module	 Feature	 Description
Lead Capture	Multi-Channel Intake	Capture leads via website, portals, walk-ins, brokers, WhatsApp, and calls
	API / Web-to-Lead Integration	Auto-create leads with source/campaign tagging
	WhatsApp / CTI Integration	Generate leads from WhatsApp chat, phone calls
Lead Assignment	Auto Assignment Rules	Assign leads based on project, location, team, or round-robin
	Reassignment Logic	Automatically reassign idle/unworked leads after set duration
Lead Quality & Scoring	Lead Scoring	Prioritize based on budget, urgency, preferred project
	Qualification Stages	Stage-wise tracking: New → Working → Visited → Qualified
Advanced Lead Logic	Broker Lock-in (90 Days)	Leads tagged with broker remain assigned for 90 days
	Time-based Auto Actions	Send alerts, reminders, or reassign inactive leads
Visit Planning	Site Visit Scheduler	Schedule, reschedule, and track in-person site visits
	Geo-tagged Mobile Visit Capture	Use mobile to log location, photos, and outcome of visit
Broker Collaboration	Lead Tagging by Broker	Leads can be added or referred by brokers
	Broker Performance Analytics	Measure success, conversions, and payouts broker-wise
Opportunity Conversion	Lead to Opportunity	Convert only qualified leads with captured preferences
	Unit/Project Preference Tracking	Capture tower, floor plan, facing, etc.
	Negotiation & Follow-up Logging	Track every sales call, discussion, and pricing notes
Pipeline Management	Opportunity Funnel Tracking	Monitor pipeline by stage, project, and expected closure date
	Sales Forecasting	Predict revenue potential by opportunity stage
Reports & Analytics	Lead Funnel & Source Analysis	Identify which sources generate the most conversions
	Visit to Conversion Ratio	Track how many visits result in opportunities
	TAT and Follow-up Compliance	Ensure SLAs are met between stages

Visitor Management System (VMS)

Functional Scope

- Auto-Convert Walk-ins to Leads
- QR & OTP-Based Check-in
- Broker-Aware Visitor Logic
- Photo, ID, and Purpose Capturing
- Real-Time Visit Analytics

Key Features




Module	Feature	Description (Real Estate Use Case)
Visitor Check-in	Customer Walk-in (Alone)	Basic info captured at reception or tablet. Auto-tagged as <i>Walk-in Lead</i> .
	Customer Visit with Broker	Visitor and broker both registered. Broker tagged on visit and lead. 90-day lock-in applies.
	Broker Visit (Alone)	Broker checks inventory, drops new leads, or requests project updates
	QR Code Scan Check-in	Visitors (brokers or customers) scan a QR code at entrance to self-register via mobile
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Quote

Module Name	Cost Estimate
Lead Management System (LMS), Visitor Management System (VMS), Broker Management (Part of LMS)	INR 19 Lacs + GST

** Timelines will be shared after detailing phase