

Claims Management System

Unitech Group

**Request for Proposal
Document For selection of
Software Development
Service Provider for Claims
Management Portal
17th July, 2020**

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Reference

Date of Release	17 th July, 2020
Reference Number	IT/2020-21/SDSP/01
Title	Claims Management System
Issuing Agency	Unitech Limited 8 th Floor, Block-B Signature Tower, South City-1, Gurugram -122007
Contact Person Details	Kuldeep Varshney kv@unitechgroup.com
Address of website where all associated information would be published	www.unitechgroup.com
Brief Description	This RFP is for inviting proposals from Software development companies to develop Claims management portal for the Company. High-level requirements are mentioned in the subsequent section. The complete procedure to submit the proposal has been mentioned in this RFP.

Selection Process Schedule

#	Event	Date	Mode
1.	Query on RFP document Submission and Clarification	Submission of Queries 21//07/2020 3:00 PM. Clarifications will be issued by 23/07/2020.	Online - on e-mail kv@unitechgroup.com
3.	Deadline for submission of Technical Proposal & Financial Quote	31/07/2020 by 4:00 PM. Submitted Technical Proposal will be opened same day.	Sealed Envelope, Physical submission at Unitech Limited 8 th Floor, Block-B Signature Tower, South City-1, Gurugram -122007
5.	Technical presentation by Service provider	To be intimated.	Online/Offline

Document Structure

This document is divided into five parts as described below

- Part I: Overview
- Part II: Instructions to Service provider
- Part III: Contractual Clauses
- Part IV: Terms of Reference (Proposed solution and its delivery)
- Part V: Formats for Submission of Proposal

Table of Contents

1.1	About Us.....	7
1.2	Project Objectives and Scope.....	7
1.3	Roles and Responsibilities	8
	Part II: Instructions to Service Provider	11
2.1	Eligibility Criteria	11
2.2	Proposal Processing.....	12
2.2.1	General Information	12
2.2.2	Queries	12
2.2.3	Proposal Submission	13
2.3	Negotiations	14
2.4	Award	14
2.5	Proposal Evaluation.....	16
2.6	Scoring Pattern	19
	Part III: Contractual Clauses	21
	Part IV: Terms of Reference	26
4.1	High Level Functional Requirements.....	27
4.2	Deliverables of Service provider.....	52
4.3	Performance Requirements (SLAs)	53
4.4	Estimated Volumes	55
4.5	Desirable Timelines for Project Implementation	56
4.6	Acceptance, Certification and Roll-out	57
4.7	Payment Milestones	58
	Part V: Formats for Submission of Proposal	60
5.1	Covering Letter (on letter head of Service Provider)	60
5.3	Format for Financial Quote.....	64

Part I: Overview

1.1 About Us

Established in 1971 by a group of technocrats, Unitech Limited is one of India's leading Real Estate players. It started business as a consultancy firm for soil and foundation engineering and has grown to have the most diversified product mix in real estate comprising of world-class commercial complexes, IT/ITes parks, SEZs, integrated residential developments, schools, hotels, malls, golf courses and amusement parks.

So far Unitech has built more than 100 residential projects. Unitech has experience in developing and leasing IT/ITes and commercial office spaces in its Grade 'A' complexes in Gurgaon like Cyber Park, Signature Towers, Global Business Parks, Unitech Business Park, Unitech Trade Centre, Millennium Plaza, Unitech Corporate Park, etc. Some recent launches have been Nirvana Courtyards II, Signature Towers II, Uniworld Towers and Infospace in Gurgaon, Bhubaneshwar 1 in Bhubaneshwar etc.

On the proposal submitted by the Union Government to the Hon'ble Supreme Court for appointment of a new management for Unitech Limited in response to its direction dated 18.12.2019. The Hon'ble Supreme Court approved the proposal of the Ministry of Corporate Affairs, Government of India, vide its subsequent order dated 20.01.2020 in Civil Appeal No. 10856/2016, whereby the erstwhile management was superseded and constitution of the new management was approved. Accordingly, the Ministry of Corporate Affairs appointed an independent Board of Directors of Unitech Limited vide its orders bearing No. Legal-10/01/2020 dated 21.01.2020, dated 22.01.2020 and dated 03.02.2020, which has since taken over the management of Unitech Limited and its affiliates (the subsidiaries, JVs and other associates etc.) with effect from 21.01.2020.

1.2 Project Objectives and Scope

This RFP document is to identify Software Development Service Provider (SDSP) for design, development and management of Claims Management system. The claims management portal shall be available to all stakeholders of Unitech Group. Stakeholders will be able to submit their claims along with supportive documents digitally on this portal. The portal shall be capable of handling all categories of claims like Term deposit, homebuyer, , Loans and advances, vendors payments, authorities claims etc. Stakeholders post submission of claims can also see the status of their submitted claims. The portal will also have back office functionality for processing of claims. Processing of claims will be a workflow

where a claim goes under various desks till it is finally approved or rejected. The portal will also have various Dashboards for internal stakeholders.

In addition, the Homebuyers i.e. Residential or commercial post submission of the claim will be able to view the revised payment schedule, progress of construction, make payment etc. High-level requirements are mentioned in the section 4.1.

1.3 Roles and Responsibilities

1.3.1 Software Development Service provider (SDSP) Responsibilities

1. Nominate a senior person in the capacity of a Project manager, who will serve as the single point of contact for Unitech Group and shall attend all meetings related to the project.
2. Plan and execute the project through a suitably qualified technical team. As part of this requirement, submit a project plan and keep it updated at all times.
3. Finalize the detailed requirements and suggest any improvements to the processes (including defining and conversion of standardized forms for electronic use and standardization of key data items) that would be necessary as a result of the proposed computerization.
4. Design, Develop, Test, Baseline and Release the software solution including website consistent with applicable guidelines.
5. Develop Test Plan (covering test cases and expected results), prepare test data, carry out necessary acceptance tests including certifications (as may be applicable) and report the test results including satisfactory conformance to requirements. All tests should be correlated to the functional requirements.
6. Perform comprehensive testing which shall include functional, performance, usability and security. Reports of all the testing shall be provided to Unitech.
7. Provide details of infrastructure required at Cloud (as IaaS/PaaS model). This infrastructure requirement shall be for hardware and software required for the deployment of the proposed solution for the desired number of users.
8. Develop Comprehensive Technical Documents and User Help guides for portal (for both internal users and external users).
9. Develop Data Migration approach and plan and migrate data.

10. Impart training to the end users (including workshops for the participating external institutions) and also develop Training materials (inclusive of a computer based training kit).
11. Develop Administration Manual along with Backup and Restoration procedures.
12. Provide coordination / facilitation with the Infrastructure suppliers (in Cloud environment) at the time of its procurement, installation/ commissioning and the warranty period. The application is proposed to run on cloud environment. The SDSP shall propose the sizing of the infrastructure required for DC and DR. The cost of DC/DR environment for Production setup and testing environment setup is borne by Unitech.
13. Provide implementation and other support services, as proposed and mutually agreed upon, to ensure that the solution is rolled out to all the participating stakeholders and is smoothly operational as per the work (project) plan that is agreed upon.
14. Provide the said maintenance and support for a period of one year. Such maintenance support period shall commence from the date the system is fully rolled out.
15. During the maintenance and support period, successful service provider shall provide IT operations and administration of the installed solution in conformity with the industry IT practices, fix software defects, enhance the software as per an agreed plan and provide such other technical support and hand-holding necessary for the smooth functioning of the overall solution covered under the scope of the project in conformity with the agreed performance criteria.
16. The selected service provider shall place an agreed minimum number of qualified staff at the Unitech headquarters besides extending back office technical support from their own development centers during the project duration to meet their obligations under this engagement.
17. The selected service provider agrees to make good any defects and shortcomings in the software that is part of the agreed requirements.
18. In the event of a major scope change involving significant time and effort over and above routine maintenance and support, the selected service provider shall facilitate the assessment of impact to technical matters, timelines, cost and also justify the effort involved. Further, the service provider agrees to implement these changes after obtaining approval from Unitech.
19. Facilitate audit and assessments, as and when required.

20. Submit periodic reports and support project reviews as may be agreed and necessary.
21. At the end of Maintenance and Support period, assist in smooth transition of the operations to Unitech designated agency(s).

1.3.2 Unitech Responsibilities

1. Nomination of a nodal officer for this project.
2. Carry out project tasks, which fall under the Unitech responsibility, within reasonable time limits, particularly in matters related to reviews, approvals, acceptance, etc.
3. Make timely payments to the Service provider.
4. Provide the required timely access to personnel, test data, clarifications, decisions and to resolve any issues as may be necessary for the Service provider to carry out their obligations under this contract (including the work plan).
5. Report technical issues to the Service Provider's personnel for resolution.
6. Provide seating space and basic office amenities to the agreed number of service provider personnel who will be involved in the course of the project.
7. Provide all necessary data and facilitate data migration / digitization.
8. Raise formal requests for changes to software and conform to the agreed process in approving and implementing these changes.
9. Facilitate procurement of necessary IT infrastructure as per the specifications provided by the selected service provider. This shall include Testing, Staging and Production environment. The SDSP will provide development environment.
10. Facilitate acceptance testing, certification and rollout of the project including any internal (organizational) issues that needs to be addressed for this purpose.

Part II: Instructions to Service Provider

2.1 Eligibility Criteria

Service provider should be a company incorporated under the Companies Act, 1956 or an LLP, with track record of profitability and an annual turnover of not less than Rs. 3 Crore from IT services such as Software Development and Maintenance, Systems Integration, IT Consultancy, Turnkey Solutions, or such similar activities that are pertinent to the requirements under this RFP, during each of the preceding three financial years ending 31.03.2020; In case of Startups the company shall have at least 30 technical resources (Software development and support related) on rolls of the company. The Startups shall be a registered startup with Department of Promotion of Industry and Internal Trade, Ministry of Commerce and Industry ;

AND

Should have successfully implemented at least one similar portal (preferably of similar nature as required under this RFP), evidenced with necessary documentation.

2.2 Proposal Processing

2.2.1 General Information

- a. The Service provider shall submit only one Proposal (also referred to as ‘Technical responses’ or ‘Technical documents’ herein).
- b. Proposal should be in the specified format.
- c. Proposals should be in English Language.
- d. The proposal should be valid for a period of 180 days from the date of submission .
- e. Service provider should specify the price of their services in Indian Rupee (INR) only.
- f. During this period of the Financial Quote Validity, the service provider is expected to keep available the key team of professionals proposed for the assignment. Unitech will make its best effort to complete negotiations within this period.
- a. Unitech reserves the right to accept or reject any proposal, and to annul the selection process and reject all proposals at any time prior to award of contract, without thereby incurring any liability to the affected Service provider(s) or any obligation to inform the affected Service provider(s) of the grounds for such decision. The decision of the Unitech would be final and binding on the Service providers.
- b. Cost of preparing the proposal, presentations, negotiations, finalization of the contract, including visits to the Unhitch, are not reimbursable.
- c. All communication pertaining to this RFP will be published in the designated website unless it is a direct communication to concerned service providers.

2.2.2 Queries

- a. The service provider can submit any questions in e-mail to reach the concerned.
- b. Responses to Service provider’s questions will be communicated through email.
- c. Other online mechanism like Video conferencing can be used for clarification.

2.2.3 Proposal Submission

- a. One copy of all the Proposal documents sealed in an envelope will need to be submitted.
- b. The envelope should be superscribed on the left hand side top corner with the name of the project.
- c. The proposal must consist of the following documents:
 - i. Technical Proposal with clear indication of qualification of the Software Development service provider.
 - ii. Financial Proposal (sealed separately) super scribed as “Financial Proposal” on the envelope along with the name of project
- d. Electronic copies of Technical Proposal should be submitted in CD-ROM and all documents should be in PDF Format.
- e. Proposals should be comprehensive where necessary and unwanted material, including repetition of the bid document contents should be strictly avoided.

2.2.4 Proposal Opening

- a. The proposal that have been received within the specified deadline would be opened at the specified date and time as indicated.
- b. Representatives of the companies who have submitted their proposal are free to be present at the time of bid opening.
- c. The representatives who are present shall sign a register evidencing their attendance.
- d. Bids that do not contain necessary documents or which has substantive material deficiencies shall be rejected upon opening.

2.2.5 Clarifications & Presentations

- a. During evaluation of the proposal, the service provider may be requested for clarification on their proposal. Such clarifications are to be provided in writing and would need to be substantive. Non-substantive and non-responsiveness on the part of the bidder may lead to disqualification.
- b. On basis of Technical evaluation service providers top five (5) service provider (Based on technical score) will be called for Technical presentation.

- c. Information provided by the service provider through clarifications and/or presentations shall be taken into account for proposal evaluation.

2.2.6 Confidentiality

Information relating to the examination, clarification and comparison of the proposals and recommendations for the award of the project shall not be disclosed to Service providers or any other persons not officially concerned with such process until the award to the successful Service provider has been announced.

2.3 Negotiations

- a. The purpose of the negotiation is to re-validate the Technical Proposal (including work plans) to ensure that the Service provider's proposal adequately the objectives of the proposed engagement. The aim is to reach agreement on all points before signing the contract.
- b. The selected Service provider will work out in consultation with the Unitech the details related to the Terms of Reference, staffing, and work-plan indicating activities, staff, periods in the field and in the home office, staff-months, logistics, and reporting. The agreed work plan and final Terms of Reference will together form part of the contract.
- c. Special attention will be paid to optimizing the required outputs from the selected Service provider and to clearly define the inputs required from the Unitech to ensure that the proposed engagement can be effectively supported.
- d. The negotiations will conclude with the drafting of the contract.
- e. If negotiations fail, the Unitech will be free to invite the Service provider with the second highest score at their quoted rates to contract negotiations.
- f. The final step in the negotiations process is to seek necessary approval from the competent authority or purchase committee, as may be prescribed for such purchases.

2.4 Award

- a. The contract will be awarded after successful negotiations.
- b. Prior to expiration of the period of financial quote validity, Unitech will notify the successful Service provider in writing, that their proposal has been accepted.
- c. Unitech and successful Service provider will formalize the Contract Agreement that has been finalized

- d. After the contract is formalized with the successful Service provider, the Unitech will promptly notify other service providers on the shortlist that they were unsuccessful.
- e. Failure of the successful Service provider to accept the correction of the errors as specified herein OR to sign the contract OR willful violation of the evaluation process shall constitute sufficient grounds for the annulment of the award, in which event Unitech is free to choose any other service provider.

2.5 Proposal Evaluation

2.5.1 Preliminary Scrutiny

- a. This will be conducted in two steps:
 - i. Assessment of the eligibility criteria will be done to determine whether the proposal submitted conforms to all mandatory criteria specified to merit further evaluation. These would include: -
 - (a) Certificate of Incorporation and commencement of the operations of the bidder's company;
 - (b) Copies of audited balance sheet for the required three years (if the accounts are not audited for the most recent period, unaudited balance sheet can be signed and this shall be signed by the authorized signatories and counter signed by the statutory auditors);
 - (c) Certificate from statutory auditors in support of the turnover requirements from IT Services;
 - (d) Copies of statutory registrations such as PAN, Service Tax Number, TIN Number, etc.
 - (e) Copies of documents should be self certified where applicable;
 - ii. Prior to the detailed evaluation, Unitech will determine the substantial responsiveness of each proposal. A substantially responsive proposal is one, which conforms to all the terms and conditions of the RFP document without material deviations. Unitech will not allow any corrections or re-submissions in case of nonconformities.
- b. Bids not conforming to such preliminary requirements will be prima facie rejected.
- c. Should there be any nonconformity or irregularity in a bid, which does not constitute a material deviation, a view will be taken by the Unitech management to provide necessary waivers, if deemed necessary and appropriate. The decision of the Unitech management in this matter shall be final and binding on all bidders.

2.5.2 Evaluation of Technical Proposal

- a. Criteria for evaluation of technical proposal have been specified in Section 2.6 of this document.
- b. It may be observed that parameters used for evaluation of technical bids will *inter alia* be based on the nature and relevance of past experience, project approach, work plan and the professional/expert team deployed in relation to the requirements of this engagement.
- c. Based on the technical scores top five proposals will be selected for technical presentations.
- d. All the service providers who qualified for technical presentation who secure a Technical Score of 65% or more will be declared as technically qualified.
- e. The Financial bids of only the technically qualified service providers will be opened for further processing.

2.5.3 Evaluation of Financial Proposal

- a. The Financial Proposals of the technically qualified Service providers will be opened on the prescribed date in the presence of Service provider representatives.
- b. The bidder with lowest financial Quote (L1) will be awarded 100% financial score.
- c. Financial Scores for other than L1 Service Providers will be evaluated using the following formula:

Financial Score of a Service Provider =

$$\{(Financial\ Quote\ of\ L1 / Financial\ Quote\ of\ the\ Service\ provider) \times 100\} \% \text{ (Adjusted to two decimal places)}$$

- d. Only fixed price financial quotes indicating total price for all the deliverables and services specified in this bid document will be considered.
- e. The quoted price shall include all taxes and levies and shall be in Indian Rupees.
- f. Errors & Rectification: Arithmetical errors will be rectified on the following basis: “If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If there is a discrepancy between words and figures, the amount in words will prevail”.

2.5.4 Combined Evaluation of Technical & Financial Proposals

- a. The technical and financial scores secured by each proposal will be added using weightage of 70% and 30% respectively to compute a Composite Proposal Score.
- b. Financial Quote that is less than 50% of the average quoted price will be disqualified [the average quoted price is computed by adding all Financial Quoted values of ALL the qualified Service providers and dividing the same by the number of Service Providers].
- c. The Proposal securing the highest Composite Score will be adjudicated as the Best Value Service Provider for award of the Project.
- d. In the event the composite proposal scores are 'tied', the Service Provider securing the highest technical score will be adjudicated as the Best Value Service Provider for award of the Project.

2.6 Scoring Pattern

Criteria	Basis	Marks
Turnover Requirements	Companies with turnover above Rs. 5 crores would be given one mark for each Rs. 1 crore additional turnover above Rs. 5 crores with a cap of 5 marks for turnover of Rs 10 crores and above	5
Project Experience	Project experience relevant to this engagement as evidenced in a maximum of 3 projects (5 marks for each project). The nature of the project, relevance to current functional needs, project value and client will determine the extent of marks that would be awarded.	15
Experience Related to this Engagement	Experience relevant to this engagement to be demonstrated in a maximum of three engagements that have either been completed or an ongoing project where deliverable or milestone has been successfully met relevant to criteria below: - a. Software Development / Engineering b. Website design and management c. Project Management d. IT infrastructure planning and sizing e. IT operations & security f. Data Migration g. Helpdesk, issue handling /problem resolution As mentioned in Explanatory Note	30
Portal Development Approach	a. High Level Design of the solution b. Proposed Technology stack c. Additional licenses required to run the solution d. Work plan	15
Team & Resource Profiles	Team Structure and Key Resources to be deployed for this engagement (including project manager) based on resumes of key resources submitted	15
Presentation	Clarity in understanding of requirements as evidenced in proposal or during the presentation and merit of the solution proposed	20

Explanatory Note on Portal Development approach

(a) It is proposed to use Open Source components wherever possible to reduce the total cost of ownership. Open Source would mean the conformance of software to the open source philosophy in development and production that promotes free redistribution and access to an end product's design and implementation details.

(b) In the current context, it would mean that product(s) should be available for unlimited use (in terms of number of users, number of instances, number of distinct projects, etc.), without any restrictions on commercial use. The service provider is free to use commercial open source software stack for support service or premium feature. However, the cost for the commercial open source software stack shall be included as part of total cost of the application. In case of annual subscription cost of two year of subscription shall be included in cost of application development.

(c) The evaluation of the proposed solution would be done on the following parameters: -

- i. Development and production on various Operating system platforms.
- ii. Products should have published interfaces (such as API, Web Services interface, etc.), support JDBC / ODBC interface, etc.
- iii. Solution should be capable of working with multiple RDBMS, Workflow and Document Management Systems
- iv. Open source components if used should be supported either through community or by a suitable service provider
- v. The application should be easily upgraded to higher versions and solution should have the capability to replace only those desired components
- vi. Product should not be tied up with particular vendor (i.e. no vendor lock-in) for hardware components and should be capable of being developed and deployed on generally available commoditized IT infrastructure components from multiple vendors.

Part III: Contractual Clauses

The Contract Agreement for this engagement would contain the following key clauses: -

1. Term of Contract

This will include the period required to deliver the services specified in the terms of reference, including the duration of the support period (as may be applicable to this engagement).

2. Termination

- i. Normal termination of the contract would happen at the end of the tenure.
- ii. Pre-mature termination of the contract would happen in case of insolvency of either party or due to conditions of material breach.

3. Effects of Termination

- i. In the event of a pre-mature termination of this agreement by Unitech, the compensation payable to Service provider will be decided in accordance with the Terms of Payment Schedule for the milestones completed.
- ii. Parties shall mutually agree upon a transition plan and comply with such a plan. The Service provider agrees to extend full cooperation in supporting the transition process.

4. Undertaking against Fraudulent Practices, Corruption and Bribery

SERVICE PROVIDER represents and undertakes that it has not given, offered or promised to give, directly or indirectly any amount, gift, consideration, reward, commission, fees, brokerage or inducement to any person in service of the Unitech in procuring the Contract or forbearing to do or for having done or forborne to do any act in relation to the obtaining or execution of the Contract or obtaining a contract or showing or forbearing to show favor or disfavor to any person in relation to the Contract. Any breach of the aforesaid undertaking by SERVICE PROVIDER or any one employed by it or acting on its behalf or for its benefit (whether with or without its knowledge) or the commission of any offence by SERVICE PROVIDER or anyone employed by it or acting on its behalf, as defined in Chapter IX of the Indian Penal Code, 1860 (45 of 1860) or the Prevention of

Corruption Act, 1988 (Act 49 of 1988) or any other Act enacted for the prevention of corruption shall, without prejudice to any other legal action, entitle the UNITECH to cancel the Contract either wholly or in part, and all or any other contracts with SERVICE PROVIDER and recover from SERVICE PROVIDER such amount or the monetary value thereof and the amount of any loss arising from such cancellation without any entitlement or compensation to SERVICE PROVIDER. The Unitech will also have the right to recover any such amount from any other contracts concluded earlier between SERVICE PROVIDER and the Unitech.

5. Scope of Work and Deliverables

This will be in conformity with the terms of reference specified in the RFP document and shall include the submissions made by the Service provider in their proposal and work plans, further refined during the negotiations. Deliverables and milestones shall be established with a process of formal acceptance or such measurable criteria.

6. Norms Governing Service Delivery

- i. Shall deliver the services in a professional manner commensurate with accepted industry practices and/or technical standards which are generally expected of such an engagement;
- ii. SERVICE PROVIDER shall establish a formal team structure with a named Project Manager who will serve as single point of contact and staff with competent resources to provide effective and expert service delivery, in tune requirements;
- iii. The location of services delivery would generally be limited to Gurugram, unless otherwise specified or arises out of project requirements;
- iv. To ensure knowledge continuity, SERVICE PROVIDER agrees no changes to their key personnel for the duration of the engagement. However in very exceptional circumstances based on genuine constraints, changes would be permitted with prior written concurrence. All substitutions to be made with person with at least equivalent skills and experience;

- v. Provide a roadmap and project plan for this engagement, describing clearly the responsibilities, timelines, dependencies, milestones and risks;
- vi. Establish the structure and frequency of reporting to Unitech on the progress of the engagement;
- vii. Facilitate decisions and proactively support resolution of issues that are pertinent to the scope of this engagement.

7. Fees and Payments

- i. **The total fees** payable to the Service provider including a milestone-based payment as specified in the terms of reference would be specified. Such payments shall be exclusive of all taxes / levies and inclusive of other out of pocket expenses payable on a fixed price basis.
- ii. Payments for **additional services in case of change** in scope will also be specified.
- iii. Payments would be subject to tax withholdings.
- iv. In case of a *bona fide* dispute regarding any invoice, the Unitech shall be entitled to delay or withhold payment of the invoice or part of it, limited to the extent of the disputed amount.

8. Ownership and Audit

- i. All software including source code, licenses, technical documents and services obtained for the express purpose of this engagement shall be in favor of the Unitech and shall be submitted to the Unitech on demand.
- ii. All records pertaining to this engagement shall be made available to the Unitech and its authorized agents upon request for verification and/or audit, on the basis of a written request.

9. Co-operation by the UNITECH

To enable the Service provider carry out its obligations under this agreement, Unitech shall provide timely and convenient access to data, grant or procure necessary consents, approvals, authorizations, clearances related to interaction

and communication with external agencies as may be required from time to time and provide feedback within an agreed timeframe, on all requests and queries submitted to by the Service provider.

10. Confidentiality

Service provider and its agents shall exercise professionally reasonable care to maintain the required confidentiality and privacy with regard to Unitech data, wherever applicable.

Unitech shall retain exclusive intellectual property rights to all artifacts to which Unitech has rights or by virtue of a formalized agreement with another party. Nothing herein shall or will be construed or deemed to grant to the SERVICE PROVIDER any right, title, license, sub-license, proprietary right or other claim against or interest in, to or under (whether by estoppel, by implication or otherwise) to the aforesaid Unitech's rights;

11. Indemnity

The Service provider shall indemnify, defend and hold UNITECH and their officers, employees, successors and assigns harmless from and against any and all losses arising from personal injury or claims by third parties pursuant to this agreement, including but not limited to any equipment, software, information, methods of operation or other intellectual property (or the access, use or other rights thereto) provided by them or its sub-contractors or its associated agencies or any act, default or omission of any of them in relation to this agreement.

12. Force Majeure

Neither Party to this agreement shall be liable to the other for delay or default in performance of its obligations or any loss or damage which may be suffered by the other directly due to a Force Majeure event provided that the affected Party notifies the other Party of such event and its likely effects and duration as soon as possible and takes all reasonable steps to mitigate the losses/disruption.

13. Dispute Resolution

Any dispute or difference, whatsoever, arising between the parties to this agreement arising out of or in relation to this agreement shall be amicably resolved by the Parties through mutual consultation, in good faith and using their best endeavors. Parties, on mutual consent, may refer a dispute to a competent

individual or body or institution or a committee of experts appointed for such purpose and abide by the decisions thereon.

14. Governing Law and Jurisdiction

This agreement and all questions of its interpretation shall be construed in accordance with the Laws of India with the Courts at Gurugram having jurisdiction.

15. Delays and Damages

a) Delays caused entirely due to the acts of the Service provider and if such delays exceed more than four (4) consecutive weeks of agreed timelines / milestone plans for service delivery, Unitech at its discretion, may impose a penalty of up to 1% (one percent) of the project cost per week of delay for a period of up to twelve (4) weeks after which it will constitute a material breach.

b) Recoveries of penalties shall be adjusted against outstanding dues to the Service provider or will be set off against future payments.

16. Scope Changes

Process to manage changes to scope of the engagement and its impact on technical matters, project schedule and costs shall be detailed out.

Part IV: Terms of Reference

Given the limited scope of this document, the requirements would need to be gathered in greater detail by the selected service provider upon the commencement of the project so as to understand and implement the functionalities suitably.

Further, the back office responsibilities may be designated to various individuals/ work teams that may or may not be related to one another. It should be possible to allocate and manage work items at the back office either to the same set of individuals or a different set of individuals. The software should be designed to flexibly allow work allocation and also change them dynamically (at a per office level) through a set of well-designed user configuration options (i.e. without necessitating the change in program code).

It is also recognized that the various category of claims should not involve development of separate set of program codes. From easy future maintenance it is best that the software is optimized into a single unified set of codes that can handle all types of claims. However, it would be necessary to maintain the data separately as per type of claims.

The system is envisaged to further cover homebuyer (Home & Commercial) account management. This includes the capturing of all details of the homebuyers, their validated claims, financial details etc. This system will maintain the details of payments made by the homebuyer and revised payment plan. This revised payment plan will be updated by the organization. The homebuyers will also have functionality to pay through this portal, as it will be linked with payment gateway. The system will also remind the homebuyers through SMS and email on any upcoming payment. This portal will also provide mechanism to Finance team for reconciliation of the payment received. The system will provide various reports and dashboard for Finance team to manage the receivables from the buyers.

Single sign-on for operating on all the requirements, as per a clearly defined role based access control mechanism is a mandatory requirement. The High Level Functional Requirement is provided for Software development agencies to make an assessment for

4.1 High Level Functional Requirements

4.1.1 Claim Submission functions (Claims Submission Portal)

SL No	Functional Area	Description of Requirement
CS.1	Identification Number	<ol style="list-style-type: none"> 1. All claimants must be identified by a permanent identification numbering scheme. 2. The structure of this identification number would need to be assessed after a careful study jointly with the organization and other specialists. 3. Comparative structures also need to be analyzed. 4. Once the scheme is established, there should be a facility in the software to generate this number automatically by the system in a controlled manner. 5. The numbering scheme should also provide clear methodology for harmoniously migrating/mapping of the old data to the new scheme of numbering, while providing facilities for a linkage to the scheme(s) that may currently be in use
CS.2	Web Portal	<ol style="list-style-type: none"> 1. Administration Panel for User Management (CMS based web management console). 2. User Module as applicable to the other functional needs described in this section. 3. Shall support popular desktop browser like Internet Explorer, Google Chrome, and Firefox for Windows desktop. 4. Shall support popular browser like Firefox for Linux and Safari & Chrome for Mac. 5. Shall support at least one of the popular mobile browser for Android, Windows and iOS platform.
CS.3	User Management System	<ol style="list-style-type: none"> 1. Support template based User Registration and Management System. 2. The template shall have capability to define fields used for User registration and validation required for registering the user. 3. The User registration module shall have facility of change password and forgot password functionality.

SL No	Functional Area	Description of Requirement
		<ol style="list-style-type: none"> 4. Capability for having multiple User administrators for user management. 5. Web Administration module for user administration. 6. Shall have inbuilt module for user management including registration, modification of user profile, bulk messaging (Mail & SMS), etc. 7. Shall have inbuilt login module registered users. 8. Shall have an inbuilt functionality for search, print, etc. including option for contents including archived contents.
CS.4	E-Filing (Electronic Filing)	<ol style="list-style-type: none"> 1. Web based electronic forms (form) shall be designed, based on the formats (provided) that is optimized for electronic use. These forms are dependent on type of claim and category of claim (details are provided below). 2. Necessary field validation on the web-form to be performed at the time of uploading of Forms. 3. Attachments should be permitted (Limit and type of attachments will be finalized at time of Requirements gathering). 4. Wizards or online help should be provided to support the process of form submission. 5. It should be possible to complete the form filling in multiple sittings (i.e. ability to save work in progress) and the form filling and submission process should be optimized for use through a typical home Internet connection. 6. A registered user can initiate multiple claim submission at any time. Each such draft claims be shown to user on its dashboard. 7. There shall be functionality of auto save feature of claim form being filled by user. 8. There shall be functionality of Final submission of claim after due verification by the user. 9. Acknowledgement Receipt with required details (Tracking number, Date of Filing etc.), should be automatically generated on Final submission of Claim and the user

SL No	Functional Area	Description of Requirement
		<p>should have the facility to save / print / re-generate the same for any future reference apart from e-mail notifications, where feasible.</p> <p>10. The receipt shall be electronically signed using Document signer certificate (Server Signed). This will ensure that the information received by portal cannot be repudiated.</p> <p>11. As these are not envisaged to be full-fledged secure electronic forms, it should be possible for securing this against any tampering once it is uploaded. (The mechanism could be achieved through signing or encryption). Incase of any modification in the information the system shall prompt the users of any such change.</p> <p>12. Nature of Creditors and Claimants</p> <ul style="list-style-type: none"> i. Homebuyers (Residential/Commercial) ii. Land Owners iii. Banks/Financial Institution/NBFC/ Asset Reconstruction Companies iv. Authorities v. Public Term deposit Holders vi. Operational Creditors <ul style="list-style-type: none"> (a) Ex-Employees (b) Vendors of goods and services providers including Labor contractors (c) Others vii. RWAs viii. Related parties' loans and advances, INTER CORPORATE DEPOSITS. And other claims including from Promoters and each of their affiliates/ associations ix. Joint Venture partners <p>Each registered user can submit claims. Claims may be made for one or more of the above category. There will be separate eform for each category of claims.</p>
CS.5	Workflow	<p>1. There shall be functionality to configure normal submission duration of form with start and end date.</p>

SL No	Functional Area	Description of Requirement
		<ol style="list-style-type: none"> 2. There shall also be a facility to initiate delayed submission with a start and end date. After the delayed end-date no form shall be accepted into the system. 3. System shall check that delayed submission starts only after end date of normal submission. 4. There shall be a functionality to switch ON and OFF on normal submission and delayed submission. 5. Claims submitted during normal submission duration will be pushed directly to Claims Processing portal. 6. Delayed submission shall have additional fields and attachment to capture reason for delay along with documentary evidence. Users shall be able to specify the reason for delay and attach documents. 7. Acknowledgement receipt generated on delayed submission shall specify that it is delayed submission and liable for rejection due to delay. 8. All such Claim submitted during delay submission duration to be forwarded to a back-office user. This should be a configurable parameter. 9. Back-office user can accept and reject the delayed claim request. For Back-office user there shall be an input capture mechanism to capture reason for acceptance or rejection. 10. Once accepted the delayed submission be put in claims processing portal for further processing. 11. All such accepted delayed claim submissions be identifiable on a later date. 12. Delayed submitted Claims final status shall be intimated to the user. 13. All rejected delayed claims will be marked separately and stored for future reference purpose.
CS.6	“My Account” features should consist of	<ol style="list-style-type: none"> 1. View / Print Submission History 2. View / Print Documents uploaded 3. View / Print Claim filing Status using Tracking Number 4. Communication box for any intimation to the applicant by

SL No	Functional Area	Description of Requirement
		<p>the Unitech</p> <p>5. View services under “My Account” features shall be supported over popular browser for Windows, Linux Mac OS.</p>
CS.7	Transaction Referencing	<ol style="list-style-type: none"> 1. Each transaction or service request should be identified through a system generated unique service request number. Each category shall be identifiable through the Service request number. The service request number will remain unique across sub-systems. 2. This will need to stay good on a permanent basis and provision to search and access these transactions using the transaction reference number should be provided anytime in the future. 3. Depending on the nature of the transaction it is possible that a single service request will have one eforms and multiple documents.
CS.8	Operational and MIS Reports	<ol style="list-style-type: none"> 1. Variety of operational and MIS reports for all domain related needs (for purposes of estimation, about 15 reports may be considered). 2. Each of the reports mentioned above should be feasible for generation with user defined inputs 3. Weekly Performance Report, containing Hits, Unique visitors, Upload details of various Forms and their status, etc. 4. Weekly Claims submission report, Category wise claim report etc. 5. Provision to save reports in Excel / PDF format should be possible.
CS.9	Data Management	<ol style="list-style-type: none"> 1. Create various Master databases from legacy data available in excel or other electronic form with the organization. 2. Shall have a facility to transfer data from the form to the database automatically upon final submission. 3. Shall have facility to secure the data related to form

SL No	Functional Area	Description of Requirement
		<p>submissions, approvals/rejections, etc. through some secure means such as PKI/Digital signature based or such other methodologies (as may be deemed appropriate to the context by the Service provider) that will prevent tampering of data once it is inside the system including means to verify the same.</p> <ol style="list-style-type: none"> Maintenance of archives of all information for future reference in a secure form. Backup and Restore options with secure facility for selective restoration. Proper Audit Log to be maintained.
CS.10	Digital Documents	<ol style="list-style-type: none"> All the documents uploaded into the portal shall have facility to be digitally secured; by ensuring that there are no changes to the data in the eform at any point of time once it is uploaded (i.e. post final submission). Such server signed documents should have means for verification at the portal. All documents maintained in the digital repository shall be suitably indexed and metadata relating to each document shall be maintained in accordance with the norms that are evolved. Powerful search and retrieve mechanisms should be provided for this document repository
CS.11	Dashboard	<ol style="list-style-type: none"> Be able to show a comprehensive Dashboard about the claims (i.e. category wise) including all aspects such as the category, project details, financial details, people related information, filings, compliances, violations, etc. Allow for powerful search facilities on this database to selectively search for data of one or a group of entities satisfying the search criteria. Each user shall also be provided a Dashboard for viewing and managing his claims.
CS.12	Data Migration	<ol style="list-style-type: none"> Facility to migrate Operational and Legacy data. Facility to verify and validate Data

SL No	Functional Area	Description of Requirement
CS.13	Security features - Data, Access, System (Common for all sub-systems)	<ol style="list-style-type: none"> 1. User login - Authorized access for each user. 2. Prevent unauthorized access and changes to Data 3. Access control to software functionality based on user roles. 4. Security of document store, DB etc. should be taken care. They should not be available for direct access. 5. Hash of all documents uploaded shall be created, signed (server signed using Document signature) and time stamped. These Hashes shall be maintained in secured table and use for future verification purpose only. 6. Time stamping service might be from a third party service. Integration with time stamping server to be done.
CS.14	Master Data Availability	<p>Following Master Data will be made available</p> <ol style="list-style-type: none"> I. List of Projects -Homebuyer This shall come as drop down list. ii. Each Project will also have some attributes like Tower, Category of Flat, number of floors, total number of units in each category etc.
CS.15	Look-up Table	<p>Following Lookup table will also be made available</p> <ol style="list-style-type: none"> I. List of Homebuyers against each project 2. List of FD details.
CS.1f	e-Form Details for Fixed Deposit Claimants	<ol style="list-style-type: none"> a) Scheme - check box - Scheme 'A - Non-cumulative" or Scheme 'B - Cumulative" b) Period of Investment - 6 months, 1 year, 2 years and 3 years c) Name of First Applicant <ol style="list-style-type: none"> i. Pan Number ii. Date Of Birth iii. Address of First Applicant iv. Second Applicant Name v. Third Applicant Name vi. Status of Applicant - Individual, HUF, Trust, Corporate

SL No	Functional Area	Description of Requirement
		<p>d) FDR Number</p> <p>e) Principal Amount Deposited</p> <p>f) Date of Deposit</p> <p>g) Maturity Date</p> <p>h) Maturity Amount</p> <p>i) If Claimant is other than First Applicant</p> <ul style="list-style-type: none"> Nominee/Second Applicant/Third Applicant/Successor (Check Box) Nominee Name Date of Birth Relationship Address of Nominee <p>j) Amount Received from Unitech</p> <p>k) Bank Details of Claimant</p> <ul style="list-style-type: none"> i. Bank A/c No. ii. Bank Name & Address iii. IFSC Code iv. Cancelled Blank Cheque (Document to be uploaded) <p>l) Litigation in Any Forum</p> <ul style="list-style-type: none"> Case Number in Court Court Or Forum Name <p>m) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documents to be uploaded</p> <p>n) Copy of Fixed Deposit Receipt</p> <p>o) In case of Claimant is Nominee/2nd applicant/3 rd. Applicant, then upload death certificate</p> <p>p) In case of Successor, upload Successor certificate</p> <p>q) Cancelled Cheque</p>
CS.17	eForm details of Homebuyers	<p>a) Customer Details</p> <ul style="list-style-type: none"> i. Customer Code

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> ii. Name of Allottee iii. Current Address iv. Contact Details Phone/email etc. v. PAN details of the Allottee <p>b) Project Details</p> <ul style="list-style-type: none"> i. Project name ii. Project Location iii. Commercial or Residential <ul style="list-style-type: none"> 1. Property Details <ul style="list-style-type: none"> • Block/Tower • Floor • Unit 2. Financial details <ul style="list-style-type: none"> • Total Cost of Property • Amount Paid till date 3. Incase of Loan <ul style="list-style-type: none"> • Loan Account Number • Current Loan Statement (Document to be uploaded) <p>c) Bank Details of Claimant</p> <ul style="list-style-type: none"> ii. Bank A/c No. iii. Account holder Name: iv. Bank Name & Address v. IFSC Code vi. Cancelled Blank Cheque (Document to be uploaded) <p>d) Litigation in Any Forum</p> <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name <p>e) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documents to be uploaded</p>

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> a) Copy of purchase agreement/receipt b) In case of Claimant is Nominee/2nd applicant/3 rd. Applicant, then upload death certificate c) In case of Successor, upload Successor certificate
CS.18	Bank/FI/NBFC/ARC	<ul style="list-style-type: none"> a) Details of Financing Agency <ul style="list-style-type: none"> i. Name of Agency ii. Type of Agency: Bank/FI/NBFC/ARC iii. Contact Details of Representative of Financing Agency iv. Name of Representative v. Designation vi. Contact Number & e-mail Address b) Financing Details <ul style="list-style-type: none"> i. Amount Financed (Principal) ii. Interest Rate iii. Period of Financing iv. Mode of Financing - Loan/Debenture/Finance Lease v. Date of Financing c) Repayment Details <ul style="list-style-type: none"> i. Principal Amount repaid ii. Interest Amount Repaid iii. Total Amount Repaid d) Outstanding Details <ul style="list-style-type: none"> i. Principal Amount Outstanding ii. Interest Amount Outstanding iii. Total Amount Outstanding e) Charge Created (secured/Unsecured) <ul style="list-style-type: none"> i. Yes/No ii. Details of Charge f) Bank Details of Claimant <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) g) Litigation in Any Forum

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name h) Details of any Decree held in this regard <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documents to be uploaded</p> <ul style="list-style-type: none"> i) Copy of Financing Instrument j) Documentary evidence of Charge Registered
CS.19	Land Owner	<ul style="list-style-type: none"> a) Details of Land Owner <ul style="list-style-type: none"> i. Name of Person ii. Contact Details of Person b) Land Details <ul style="list-style-type: none"> i. Date of Agreement to sale ii. Date of Sale Deed iii. Date of Mutation iv. Size of Plot (in acres) v. Location of Plot vi. Details of Plot (Khata number) vii. Type of Land c) Agreement details <ul style="list-style-type: none"> i. Total Cost of Land ii. Amount paid d) Nature of Dispute <ul style="list-style-type: none"> i. Date of dispute ii. Description of Dispute iii. Total amount under dispute (if any) e) Litigation in Any Forum <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name f) Details of any Decree held in this regard <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal)

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> iii. Brief Description of Decree iv. Upload copy of Decree g) Bank Details of Claimant <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) Documents to be uploaded h) Agreement to Land Sale deed i) Land Deal Tile
C.20	Vendors of Goods and services including Labor contractors	<ul style="list-style-type: none"> a) Details of Agency <ul style="list-style-type: none"> i. Name of Agency: ii. Type of Agency : Material Supplier/Works contractor/ Labor Contractor/ Consulting service iii. PAN number of the agency iv. Service Tax Number (if applicable) v. VAT number vi. GST/WCT/PF/ESI registration vii. Contact Details of Representative of Agency viii. Name of Representative ix. Designation x. Contact Number & e-mail xi. Address b) Work Order/Purchase order Details <ul style="list-style-type: none"> i. Name of Project ii. Work order number/Purchase order number iii. Description of Contract iv. Total Value of Contract c) Claim for Invoice/Security deposit d) Invoice raised Details (based on above selection) (for each work order there can be multiple invoices) <ul style="list-style-type: none"> i. Date of Invoice ii. Invoice Number

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> iii. GST number (if applicable, depending on date of invoice) iv. Amount for which Invoice is raised v. Taxes (type of taxes to be specified) vi. Total Amount <p>e) Payment can be made against each invoice or can have a Running account payment. Incase of running account payments made will be captured separately</p> <ul style="list-style-type: none"> i. Date of payment ii. Amount paid iii. Deduction made, if any iv. Payment made against invoice/RA payment v. Invoice number if made against an invoice <p>f) Security Deposit details (based on above selection)</p> <ul style="list-style-type: none"> i. Security deposit amount ii. Mode of deposit of Security deposit iii. Date of deposit iv. Period of deposit v. Repayment amount of security deposit vi. Date of repayment <p>g) Bank Details of Claimant</p> <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) <p>h) Litigation in Any Forum</p> <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name <p>i) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documents to be uploaded</p>

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> j) Documentary evidence for which invoice is being raised k) Copy of Work Order l) Copy of Invoice m) State Of Accounts
C.21	Ex-Employees	<ul style="list-style-type: none"> a) Employee details <ul style="list-style-type: none"> i. Name of Employee ii. Date of Joining iii. Date of Leaving iv. Designation d) Details of Claim (Can be multiple) <ul style="list-style-type: none"> i. Amount Due against (Salary/Bonus/Full and Final Settlement) ii. Period for which due iii. Amount Due c) Bank Details of Claimant <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled BlankCheque (Document to be uploaded) d) Litigation in Any Forum <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name e) Details of any Decree held in this regard <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree Documents to be uploaded <ul style="list-style-type: none"> f) Appointment letter g) Relieving Letter h) Full and Final Statement (if provided)
C.22	Authority	<ul style="list-style-type: none"> a) Details of Agency <ul style="list-style-type: none"> i. Name of Agency: ii. Name of Representative

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> iii. Designation iv. Contact Number & e-mail v. Address <p>b) Details of Claim</p> <ul style="list-style-type: none"> i. Nature of Claim (License Renewal/Lease Rent/EDC/IDC/Other Charges) ii. Total Amount which was support to be paid iii. Due Date for Payment iv. Amount already paid v. Penalty imposed vi. Outstanding amount as on date vii. Purpose for which payment be made (select from drop down) <p>c) Litigation in Any Forum</p> <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name <p>d) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Document to be uploaded</p> <p>e) Evidence for claim</p>
C.23	Related Parties Loan and Advances, Inter Corporate Deposits & Other claims	<p>a) Details of Agency</p> <ul style="list-style-type: none"> i. Name of Agency ii. Type of Agency: iii. Contact Details of Representative of Agency <ul style="list-style-type: none"> • Name of Representative • Designation • Contact Number & e-mail address <p>b) Financing Details</p> <ul style="list-style-type: none"> i. Mode of Financing - Loan/Advances/Deposits ii. Amount Financed (Principal) iii. Interest Rate iv. Period of Financing

SL No	Functional Area	Description of Requirement
		<ul style="list-style-type: none"> v. Date of Financing c) Repayment Details <ul style="list-style-type: none"> i. Principal Amount repaid ii. Interest Amount Repaid iii. Total Amount Repaid d) Outstanding Details <ul style="list-style-type: none"> i. Principal Amount Outstanding ii. Interest Amount Outstanding iii. Total Amount Outstanding e) Charge Created (secured/Unsecured) <ul style="list-style-type: none"> i. Yes/No ii. Details of Charge f) Bank Details of Claimant <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) g) Litigation in Any Forum <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name h) Details of any Decree held in this regard <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree Documents to be uploaded <ul style="list-style-type: none"> i) Copy of Financing Instrument j) Documentary evidence of Charge Registered
C.23	RWA/AOA/Owners Association	<ul style="list-style-type: none"> a) Name of Resident Welfare Association b) Project Details <ul style="list-style-type: none"> i. Project name ii. Project Location iii. Block/Tower

SL No	Functional Area	Description of Requirement
		<p>c) Total Corpus Amount to be transferred</p> <p>d) Due Date for transfer</p> <p>e) Amount Transferred</p> <p>f) Date of Transfer</p> <p>g) Amount Due for transfer</p> <p>h) Details of Representative of RWA</p> <ul style="list-style-type: none"> • Name of Representative • Designation • Contact Number & e-mail address <p>i) Bank Details of Claimant</p> <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) <p>k) Litigation in Any Forum</p> <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name <p>l) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documentary Evidence</p> <p>m) Handing Over Details</p>
C.24	Joint Venture	<p>a) Details of Joint Venture Partner</p> <ul style="list-style-type: none"> i. Name of Joint Venture ii. Name of Joint Venture Partner iii. Share of Joint Venture Partner iv. Contact Details of Representative of Joint Venture Partner <ul style="list-style-type: none"> • Name of Representative • Designation • Contact Number & e-mail address

SL No	Functional Area	Description of Requirement
		<p>b) Financing Details</p> <ul style="list-style-type: none"> i. Mode of Financing - Equity/Debt ii. Amount Financed (Principal) iii. Interest Rate (only for Debt) iv. Period of Financing incase of Debt v. Date of Financing <p>c) Repayment Details (Debt)</p> <ul style="list-style-type: none"> i. Principal Amount repaid ii. Interest Amount Repaid iii. Total Amount Repaid <p>d) Outstanding Details (Debt)</p> <ul style="list-style-type: none"> i. Principal Amount Outstanding ii. Interest Amount Outstanding iii. Total Amount Outstanding <p>e) Charge Created (secured/Unsecured)</p> <ul style="list-style-type: none"> i. Yes/No ii. Details of Charge <p>f) Bank Details of Claimant</p> <ul style="list-style-type: none"> i. Bank A/c No. ii. Account holder Name: iii. Bank Name & Address iv. IFSC Code v. Cancelled Blank Cheque (Document to be uploaded) <p>g) Litigation in Any Forum</p> <ul style="list-style-type: none"> i. Case Number in Court ii. Court Or Forum Name <p>h) Details of any Decree held in this regard</p> <ul style="list-style-type: none"> i. Name of Court ii. Status (Final/under appeal) iii. Brief Description of Decree iv. Upload copy of Decree <p>Documents to be uploaded</p> <ul style="list-style-type: none"> i) Copy of Financing Instrument <p>j) Documentary evidence of Charge Registered</p>

SL No	Functional Area	Description of Requirement
CS.24		The system is to be developed as three sub-parts. The first sub-system is Claim Submission sub-system, second is Claim processing system and third sub-system will be Homebuyer account management sub-system. The system should be designed in a way that in future it is integrated with other sub-systems.
CS.25	DISCLAIMER	There shall be provision of Disclaimer with each form. There shall be provision of adding and modifying of disclaimer. Any modification in the disclaimer shall be done audit trail mode.

4.1.2 Claims Processing Functions (Claims Processing Portal)

SL No	Functional Area	Description of Requirement
CP.1	Administrative Portal	<ol style="list-style-type: none"> 1. Administration Panel for User Management of Claims Processing Functions. (CMS based web management console). 2. User Module as applicable to the other functional needs described in this section. 3. Have provision to add back office users and assign role of the back office user. 4. Back office users can be assigned processing role on particular category of claims or all claims. 5. There may be multi-level of processing.
CP.2	Administrative Dashboard	<ol style="list-style-type: none"> 1. Provide administrative dashboard to the Management on back office users, their activity log and claims processing history. 2. There shall be drill down functionality on the dashboard for easy navigation.
CP.3	Back office processing	<ol style="list-style-type: none"> 1. It shall provide all enabling features related to the back office processing of the forms submitted through e-filing as part of the service delivery function 2. Facility to allocate work items to concerned Claim

SL No	Functional Area	Description of Requirement
		<p>Management Agency for further processing and the same should be possible to any number of people involved in servicing the work item.</p> <ol style="list-style-type: none"> 3. There shall be two Levels of Work flow processing at Claim Management Agency. At each level there will be multiple agents/users to process the claims. 4. There shall be facility of putting comments at each level of processing. 5. Approval, Partial-approval, Rejection or On-hold functionality shall be part of final recommendation of work item at Claim Management Agency. 6. At each level the back office user shall have functionality to set the recommendation to Approval/Rejection etc. and input comments. For example, an approved claim might be rejected or partial approved. The system shall be able to track all such changes at each level of processing. 7. Once the work-item i.e. claim is processed by Claim Management agency it will be forwarded to Unitech for further processing. 8. Within Unitech the approval process may be single or two levels. There shall be a mechanism to define this. Facility shall be there to define next level on run-time also. 9. Unitech will do final approval or rejection. 10. Facility to define 'Escalation Matrix' and Permissible Time limits' at each level and enable escalation of pending work items beyond permitted time limits 11. Comprehensive Dashboard for the Management with all status displayed. 12. There shall be two levels of processing at Claim management Agency and two levels at Unitech. So four Levels of workflow has to be built. 13. Amount approved may vary from amount claimed. But there shall be a check that amount paid is less or equal to

SL No	Functional Area	Description of Requirement
		<p>amount claimed. In no case this shall be more than claim amount.</p> <p>14. There shall be provision to enter settlement of claims on portal.</p> <p>15. There shall be facility to upload a document and attach with a claim during back office processing. There shall be provision to add comments on the uploaded documents.</p> <p>16. There shall be a provision that for FD related claims that approval shall be linked to Lookup FD data on basis of FDR receipt number.</p> <p>17. Once a FD claim is recommended related FD information the lookup table shall be marked as claim filed. No further claim on the same FD shall be processed.</p>
CP.4	Communication Management	<p>1. There shall be provision to send message to Claimant/user from Portal by the Back office users i.e. Claim processing agency.</p> <p>2. The communication can be sent on one on one, group or all claimants. Communication has to be sent on mail, SMS and/or physical letter.</p> <p>3. Shall keep track of all communication send from the portal.</p>
CP.5	Transaction Referencing	<p>1. Each transaction or service request should be identified through a system generated unique service request number.</p> <p>2. For each settlement there shall be a unique identifiable number.</p> <p>3. This will need to stay good on a permanent basis and provision to search and access these transactions using the settlement reference number should be provided anytime in the future.</p> <p>4. There shall be a provision to identify duplicate claims in the system. Once identified and verified as duplicate claims all such claims has to be locked and there shall be no further processing. This will be the first step and only upon completion of this processing for the claims shall</p>

SL No	Functional Area	Description of Requirement
		<p>start.</p> <ol style="list-style-type: none"> For Vendor claims, there shall be a provision to match information with the legacy information uploaded in the system. This financial information will be vendor wise information. There shall also be provision available to back office users to mark a claim request as duplicate.
CP.6	Data Management	<ol style="list-style-type: none"> Create various lookup databases from legacy data available in excel with the organization. Shall also have functionality to transfer Vendor balances from Tally/ FoxPro system. This data is to match with details provided by Vendor through claims portal. Should have a facility to transfer financial data of all partial and full-approved claims into a separate table. Should have facility to secure the data once approved or rejected through some secure means such as PKI/Digital signature based or such other methodologies (as may be deemed appropriate to the context by the Service provider) that will prevent tampering of data once it is inside the system including means to verify the same. Maintenance of archives of all information for future reference in a secure form. Backup and Restore options with secure facility for selective restoration. Proper Audit Log to be maintained. Shall be able to generate detailed financial statement in CSV/excel format for various categories. Details will be provided at time of requirement finalization. Against each Lookup table i.e. for FD, Homebuyer, vendor any entry for which claim is not made shall be identifiable. A report on this regard shall also be generated.
CP.7	Dashboard & Reports	<ol style="list-style-type: none"> Be able to show a comprehensive dash board about the Claims (i.e. category wise) including all aspects such as the category, project details, financial details, people

SL No	Functional Area	Description of Requirement
		<p>related information, filings, compliances, violations, etc.</p> <ol style="list-style-type: none"> 2. Allow for powerful search facilities on this database to selectively search for data of one or a group of entities satisfying the search criteria. 3. Shall have provision of at least 20 reports (details will be worked at time of Requirements gathering)
CS.8	Look-up Table	<p>Following Lookup table will also be made available</p> <ol style="list-style-type: none"> 1. List of Homebuyers against each project 2. List of FD details along with Financials 3. Vendor balance details -(Vendor wise trail balance)

4.1.3 Homebuyer Account Management Functions

SL No	Functional Area	Description of Requirement
HB.1	Front end Portal	<ol style="list-style-type: none"> 1. The claimant, who has submitted claims under homebuyer category (includes Residential and Commercial). 2. Homebuyer will have functionality to view revised Payment schedule. 3. Homebuyer will also be able to view the details of payment made and outstanding as of date. 4. Homebuyer shall be reminded by SMS and/or email on payment to be made. 5. Incase the project is abandoned then the Homebuyer shall have provision to migrate to new project.
HB.2	Payment Integration	<ol style="list-style-type: none"> 1. Homebuyer shall have facility to made online payment through RTGS/Net Banking and other online means using the portal itself. 2. The system shall maintain account of all payments made prior to launch of this portal and through this portal. 3. Incase payment is made post due date then an interest (x%) as defined in the system shall be added to payment 4. Payment of interest is to capture in the system independently.

SL No	Functional Area	Description of Requirement
HB.3	Back Office Portal	<ol style="list-style-type: none"> 1. Shall provide mechanism to upload revised payment schedule of the project. (A project will have tower and then type of house) 2. Shall also have mechanism to upload payment schedule homebuyer wise. 3. There shall be mechanism to assign tentative completion date for each project. 4. Shall have mechanism to send communication (SMS or e-mail) to group of users based on project or some other key. 5. Shall also have provision to upload milestones on each project. 6. Shall have provision to mark milestone completed in the project. 7. Shall have provision to download financial statement for offline reconciliation. 8. Shall have provision to mark a Project as abandoned.
HB.4	Transfer to other project	<ol style="list-style-type: none"> 1. Each Homebuyer will be associated to one or more project. 2. Once their claim is approved they are permanently linked to a project. 3. Transfer from one project will happen only incase the project is abandoned 4. Request for transfer will be enable only for such users whose home project is abandoned. 5. User can select other project and type of house he is opting for as transfer. This request will be pushed to back office for approval. 6. Once approved he will be linked to new project with all other details like payment schedule etc. marked as in new project.
HB.5	Reports & Dashboard	<ol style="list-style-type: none"> 1. Generate reports in various Slice and Dice (20 reports). Under each report there will various sub-categories. 2. For each category of the user the system shall have provision of Dashboard

SL No	Functional Area	Description of Requirement
HB.6	Audit	1. System shall maintain audit log for all activities carried on the portal.

4.1.4 Non-Functional Requirements

SL No	Functional Area	Description of Requirement
GEN.1	Cloud Deployment	<ol style="list-style-type: none"> 1. The developed application has to be deployed in Cloud (IaaS/PaaS). The service provider has to provide sizing of the infrastructure required for successful execution 2. The software developed shall be compatible to multiple Cloud environments and has functionality to scale up as the load increases.
GEN.2	Work Flow	3. The workflow might undergo change. It should be designed in a way that change can be implement quickly. A BPMN workflow engine (Enterprise supported Open source) is to be proposed as part of solution. The cost of support of the BPMN workflow shall be included as part of development cost.
GEN.2	Backup & Restoration	1. There shall be mechanism to periodically ship the data from Data center to disaster site or data backup site. The Service provider shall mention RTO and RPO of the complete solution
GEN.3	Testing	<ol style="list-style-type: none"> 1. Test report for functional, performance, usability and security shall be provided 2. As part of security testing OWASP top 5 vulnerabilities as a minimum to be covered. 3. Testing shall be performed by separate team.
GEN.4	Technology	<ol style="list-style-type: none"> 1. The solution developed shall follow the Micro services Architecture. The Technical Proposal shall enumerate on the same. 2. It is highly recommended that fully functional container platform shall be used for implementation of micro-services.

4.2 Deliverables of Service provider

1. Detailed Project Plan along with periodical Project Status Reports
2. The detailed System Requirement Specification (SRS) including the process definitions, codification schemes and eForms.
3. IT Infrastructure sizing along with Bill of Materials (BOM) to cover current and envisaged future growth and corresponding transaction loads. In addition, it would be necessary for the Service provider to clearly segregate the Test/UAT and production environments and accordingly propose suitable virtual machines. Any licenses procured will be in favor of the Unitech to cover intended scope of use for perpetual time period. The bill of material should clearly indicate all such factors besides the minimum required technical specifications.
4. Web portal and application software as per requirements specified duly certified and installed as per the guidelines in conformity with the high level scope defined in this section of the document.
5. Source and Executable code of the developed Software including any third party base software licenses. In case of packaged software, the code related to customization should be provided.
6. Technical Documentation and User Manuals (as per agreed formats)
7. Procedure Manuals related to installation, operation, administration (including backup and restoration) and such other details.
8. Data Migration Plan along with Migrated Data.
9. Services as agreed upon, such as but not limited to Implementation, Operation support, Maintenance, Training, etc. for the agreed duration.
10. Active facilitation for obtaining certifications from an agency that is designated by the Unitech, if necessary.
11. Approved changes to the solution, as may be necessary, including integration with any external applications as may be necessary as the solution evolves and matures.

4.3 Performance Requirements (SLAs)

The purpose of this Service Level Agreement (SLA) is to clearly specify performance criteria that shall be adhered to by the Service provider for the duration of the project.

#	Major Area	Parameter	Requirements	Penalty/Breach
1	Portal Development and Implementation	Timelines for meeting (major) delivery milestone during development and implementation period	Delay of no more than 2 weeks for any given milestone AND no more than 4 weeks time cumulatively for the entire project.	Between 2 and 4 weeks, will attract a 1% penalty per week of delay (on that milestone payment) ; will be 'breach' thereafter
2	Availability of application	Software solution covering all business functionalities	98% availability between 8am and 8pm during all working days. (computed monthly)	Will constitute breach if it is less than 90% for two consecutive quarters.
3	Response time for bug fixing (once it is in production mode)	Time taken to acknowledge reported problem	Within 4 hours from the time the problem is reported.	Maximum limit of 8 hours for Severity level 1 problems
4	Resolution Time (Only for Bug fixing)	Time taken by the Service provider to fix the problem & release the same into the production system	Severity Level 1: within 24 hours Severity Level 2: within a maximum of one week. Problems with Severity Level 3: As mutually agreed.	Inability to resolve Severity level 1 problem on more than two occasions in a quarter shall attract a penalty of 1% for each additional 24 hours of delay beyond permissible limit.

Software Defect Categorization

Severity level 1: critical business functionality is impacted.

Severity level 2: Problems which affects the normal execution of the work, but work around is available for the work to be completed in the existing functionality.

Severity level 3: Problems which have minimal impact on the operation or system and are trivial in nature.

4.4 Estimated Volumes

#	Description	Total
1	Estimated number of Claims	100000 (Max)
2.	Average Documents (pages) per Claim	2-3 documents (total 20 pages)

* Data pertaining to these units is required to be maintained in the database, but these companies may not be doing any active filings (or submission of data)

Note: Estimated effort for data migration and IT infrastructure sizing to be done on above basis.

4.5 Desirable Timelines for Project Implementation

The project will need to be developed in phases and the core functionality of claim submission is to be completed first. This shall be designed, developed, tested and deployed in Production environment in 6-8 weeks. The associated back office processing related to the claim submission i.e. Claims Processing Portal, would need to be designed, developed, tested and deployed in a period of 8 weeks post completion of claim submission portal.

Claim submission portal for the Unitech shall be installed within a period of six (6) weeks from the date of contract formalization and made operational within eight (8) weeks thereafter after obtaining necessary security clearances.

Subsequently, Homebuyer account management portal be completed in period of eight weeks (8) post Claims processing portal. However, the plan shall be jointly reviewed upon completion of detailed requirements and analysis to factor in any refinements to the plan, with approval of the Unitech.

4.6 Acceptance, Certification and Roll-out

As this project involves both the development and the roll-out of the software solution, the following points related to Acceptance, Certification and Roll out shall be considered:

- a. An acceptance test plan along with test cases and expected results traced to the requirements shall be provided during the development and the Unitech shall accept the same.
- b. Test cases shall consist of functional, usability and should include a minimal set of conditions to simulate high level of concurrent access to the website.
- c. Any observations/feedback from the Unitech related to the test plan and test cases shall be duly factored in as relevant.
- d. A separate test environment should be identified and readied for testing and UAT as per the BOM submitted.
- e. Creation of the test data is the responsibility of the Service provider. However, Unitech will provide all possible assistance for the same.
- f. Unitech shall constitute a team of users who will facilitate the test process, but the Service provider's personnel shall carry out the tests.
- g. The errors identified during testing, shall be duly rectified and resolved. Maximum of three rounds of testing shall be permitted within which the UAT should be completed.
- h. The pre-requisite for the software to be accepted is that it should have ZERO Severity Level 1 defects.
- i. Deployment of the software in 'production mode' will be permitted only after the above is completed successfully.
- j. Roll out of the solution i.e. 'Go Live' would be deemed completed only if the software becomes operational and necessary data (as agreed) is migrated to the new system. The date on which this has been completed would be deemed to be the start date for the commencement of the Maintenance Support.
- k. Procurement of the production related IT infrastructure as per the BOM would be done only after the successful completion of the UAT.

4.7 Payment Milestones

Sr. No.	Milestone	Percentage Payment
1	Requirement gathering and analysis, delivery of SRS including user interfaces, process documents and eforms for claims submission portal. Demonstration of all User Interfaces and its approval.	25% of cost of Claims Submission Portal
2	Completion of data migration activity and Go-live of Claims Submission Portal (including User Acceptance Test)	50% of cost of Claims Submission Portal
3.	Successful operation of Claims Submission portal for 2 months port go-live	25% of cost of Claims Submission Portal
4.	Requirement gathering and analysis, delivery of SRS including user interfaces, process documents and work flows for Claims Processing portal. Demonstration of all User Interfaces and its approval.	25% of cost of Claims Processing Portal
5.	Completion of Go-live of Claims Processing Portal	50% of cost of Claims Processing Portal
6.	Successful operation of Claims Processing portal for 2 months port go-live	25% of cost of Claims Processing Portal
7.	Requirement gathering and analysis, delivery of SRS including user interfaces, process documents and eforms for Homebuyer Account management portal. Demonstration of all User Interfaces and its approval.	25% of cost of Homebuyer Account Management Portal
8.	Completion of Go-live of Homebuyer Account Management Portal	50% of cost of Homebuyer Account Management Portal
9.	Successful operation of Homebuyer Account management for 2 months port go-live	25% of cost of Homebuyer Account

		Management Portal
10.	The amount due on account of support of particular module will be paid on quarterly basis upon the completion of Quarter.	As quoted in the Financial Quote to be paid quarterly.

Note: All payments would be subject to withholdings, if any, due to SLA and performance criteria besides other statutory withholdings. Payment for Support will be made on quarterly basis from date of Go-live.

Part V: Formats for Submission of Proposal

5.1 *Covering Letter (on letter head of Service Provider)*

To

<Title of authorized person>

[Date]

<Address>

Madam/Sir,

Subject: Software Development & Support services for your Organization

Reference: RFP document entitled “Development and Operations of Claim management system ” issued by your UNITECH dated dd/mm/yyyy

We, the undersigned, offer to provide the required services software/website design, development and other support services in accordance with your above mentioned Tender notification / Request for Proposal.

The enclosed documents include Technical and Financial Proposals as per the required formats sealed in separate envelopes. It is hereby confirmed that our proposal will be valid for the period as required in the tender document.

We solemnly affirm that this proposal is binding upon us. Further, we understand and agree that acceptance of our proposal is not binding upon you.

We undertake that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws against fraud and corruption in force in India.

Yours sincerely,

Signed by Authorized Signatory

Name and Title of Signatory

Contact details (Address, Phone, Email ID)

5.2 **Format for Technical Proposal**

5.2.1 **Part A: Conformance to Prequalification Criteria**

S.No	Criteria	Whether Met	Reference Details
1	Company Incorporation and Commencement of business	Yes/No	Relevant document(s) self certified
2	Financial Statements of the preceding three years in support of turnover	Yes/No	Financial statements duly attested
3	Turnover from IT Services or evidence for having at least 30 technical resources on roll for startups	Yes/No	Auditor's statement or and other documentary evidence. In case of Startup documentary evidence to be provided.
4	PAN, Service Tax and such other statutory registrations	Yes/No	Relevant document(s) self certified
5	Project experience of at least one similar project. Similar means a portal for submission of information through an eform its processing etc.	Yes/No	Certificate from customer

Part B: Core Technical Proposal

The Technical Proposal should be concise and should cover without ambiguity, the following: -

1. Brief Profile of Service provider.
2. Project Experience (as per format proposed below).
3. Conformance to Project (Functional / Solution) Requirements highlighting non-compliances, if any.
4. Details of proposed solution along with technology, platforms, existing and/or third-party software solutions that are being proposed.
5. Demonstration of any earlier similar work.
6. Sizing details and Bill of Materials (for IT Infrastructure based on IaaS/PaaS cloud model)
7. Work Plan indicating start/end dates, project milestones and dependencies (clearly highlighting the tasks where support is expected from the Unitech)
8. Resource deployment plan (as per format proposed below)
9. Brief resume of Project Manager and technical lead (as per format proposed below)
10. Any other information that is relevant to the RFP

Format for Project Experience

Using the format below, provide information on each reference assignment along with a client certificate or suitable supporting documentation.

Name of Project	
Location where services were delivered	
Name of the Client:	
Name and address of Client Contact Officer	
Duration (dates) of assignment:	
Status of assignment: Completed / Ongoing (if it is on-going, level of completion)	
Approx. Value of engagement	
Brief description of engagement and services provided by your company	
Similarity of products and/or services (if any) with this tender requirements	

Format of Resume of Key Staff

Name of Employee	
Role in proposed engagement	
Designation in Service provider's Organization	
Age	
Educational Qualifications & certifications	
Proficiency in English and Hindi	
Years of relevant experience in the industry	
Number of years with the Service provider's organization	

Employment Record	In reverse order list employing organizations, job title and locations of assignments
Experience Profile (limited to most recent five years), clearly highlighting relevant experience	Project Name, Client Name, Role performed, Year and Duration of assignment, brief description of the key activities performed

5.3 Format for Financial Quote

Covering letter (on letter head of Service provider)

To

<Title of authorized person>

[Date]

<Address>

Madam/Sir,

Subject: Financial Quote towards Software Development & Support services for your Organization

Reference: RFP document entitled “Claims Management System” issued by your UNITECH dated dd/mm/yyyy

Pursuant to our technical proposal submitted for the above mentioned Tender notification / Request for Proposal, we hereby submit our financial Quote.

Our attached financial proposal is on a fixed price basis along with taxes and other project expenses (including travel and out of pocket). The proposal covers optional cost items and cost for additional work resulting from scope changes as specified in the tender document. We further confirm that our pricing is not conditional.

We understand and agree that payments made to us would be as per the milestones specified in the tender document and the same shall be subject to deduction of tax at source as applicable under law.

Any variation in taxes applicable to the contract will be to the client's account subject to production of documentary evidence of change.

We confirm that our financial proposal shall be binding upon us subject to the modifications resulting from contract negotiations, up to expiration of the validity period of the Proposal.

Yours sincerely,

Signed by Authorized Signatory

Name and Title of Signatory

Contact details (Address, Phone, Email ID)

Financial Quote

A. Project Costs

Head of Cost	Application Development Cost exclusive of Tax. (A)	Applicable Taxes (B)	Operations Support (monthly basis) (C)	Applicable Taxes (D)	TOTAL (A+ CX)	Total Applicable Taxes (B+DX)
Claims Submission Portal			(For 3 months period 'X')			
Claims Processing Portal			(For a period of 6 months 'X')			
Homebuyer Account Management System			(For a period of 2 years 'X')			
TOTAL					Total Cost	Total Applicable Tax

Note: All of the above should be ITEMIZED

B. List man month rates for any additional work or onsite support (Location: Gurugram). This is only for additional development work which is not part of RFP and comes up during the course of development of the application.

Category	Experience level	Monthly rate
Junior software developer/ Engineer	Up to 2 years	
Software developer / engineer	Between 2 and 5 years	
Senior software developer /engineer	Between 5 and 10 years	
Manager	Above 10 years	
Onsite support person	Up to 2 years	

B. Any other cost that are optionally required (if applicable)