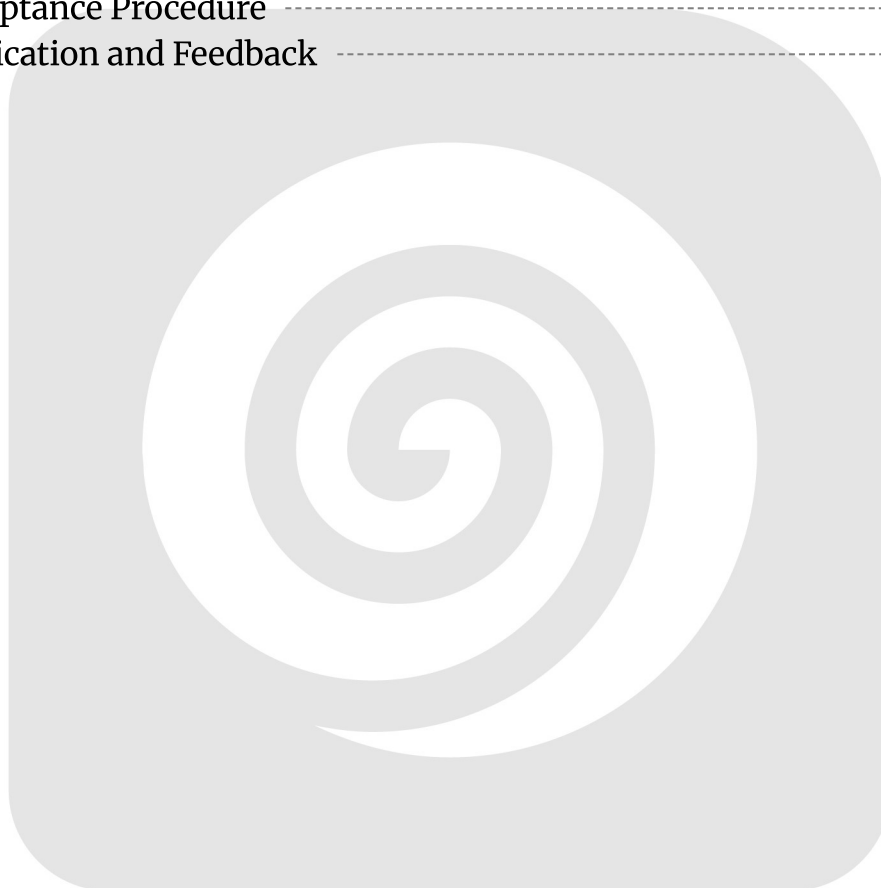


Table of Contents

Introduction	3
Proposal Overview	3
About Docupal Demo, LLC	3
Project Summary	3
Market Analysis	3
CRM Market Trends	4
Salesforce App Ecosystem	4
Growth Projections	4
Competitive Landscape	4
Project Scope and Objectives	5
Scope	5
Primary Deliverables	5
Objectives	6
Technical Approach and Architecture	6
Development Methodology and Tools	6
System Architecture and Integration	6
Development Phases and Milestones	7
Project Timeline and Milestones	7
Project Phases and Schedule	8
Key Milestones	8
Pricing and Payment Terms	9
Payment Schedule	9
Change Requests	9
Team and Expertise	9
Project Team	9
Key Personnel	9
Salesforce Expertise	10
Risk Management and Mitigation	10
Potential Risks	10
Mitigation Strategies	10
Risk Monitoring	11
Terms and Conditions	11
Payment Terms	11



Project Timeline and Delays	11
Intellectual Property	12
Confidentiality	12
Termination	12
Limitation of Liability	12
Governing Law	12
Contract Terms Summary	12
Conclusion and Next Steps	13
Next Steps	13
Post-Acceptance Procedure	13
Communication and Feedback	13



Introduction

Proposal Overview

Docupal Demo, LLC is pleased to present this proposal to Acme, Inc (ACME-1) for the development of a custom Salesforce application. Our aim is to provide ACME-1 with a tailored solution to streamline your sales processes and enhance customer relationship management.

About Docupal Demo, LLC

Based in Anytown, CA, Docupal Demo, LLC is a leading innovator in the Salesforce ecosystem. We specialize in creating custom Salesforce solutions that drive efficiency and growth for businesses like yours. Our expertise allows us to deliver applications that not only meet your current needs but also scale with your future ambitions.

Project Summary

This project will focus on building a Salesforce application designed to improve ACME-1's sales efficiency, increase customer satisfaction, and provide enhanced data visibility. By streamlining workflows and providing a centralized platform for customer data, this application will empower your team to close more deals and build stronger customer relationships. We are confident that this custom solution will deliver significant value to ACME-1.

Market Analysis

The market for CRM solutions, particularly those built on the Salesforce platform, is experiencing significant growth. This growth is fueled by businesses seeking to enhance customer relationships, streamline sales processes, and gain data-driven insights. ACME-1 can capitalize on these trends.



CRM Market Trends

The CRM market continues to expand, driven by the increasing need for businesses to manage customer interactions effectively. Cloud-based CRM solutions, like Salesforce, are particularly popular due to their accessibility, scalability, and cost-effectiveness.

Salesforce App Ecosystem

Within the broader CRM market, the Salesforce app ecosystem is a dynamic and rapidly evolving space. Businesses are increasingly turning to custom Salesforce apps to address specific needs that are not met by off-the-shelf solutions. This trend is creating opportunities for developers who can deliver innovative and tailored applications. The app we propose directly addresses the need for a more efficient and personalized sales process. It achieves this by automating key tasks and delivering real-time insights to sales teams.

Growth Projections

The Salesforce app development market is projected to maintain a strong growth trajectory over the next five years. Factors contributing to this growth include the increasing adoption of Salesforce across industries and the growing demand for specialized apps that can enhance the platform's functionality. The following chart illustrates the projected market growth from 2020 to 2025:

Note: Market Size in Billions of USD.

Competitive Landscape

The competitive landscape for Salesforce app development is diverse, ranging from large consulting firms to smaller, specialized development shops such as Docupal Demo, LLC. To succeed in this market, it is essential to offer a combination of technical expertise, industry knowledge, and a commitment to delivering high-quality solutions that meet clients' specific needs.



Project Scope and Objectives

This document outlines the scope and objectives for the Salesforce application development project for ACME-1. Docupal Demo, LLC will deliver a custom Salesforce application designed to streamline ACME-1's sales processes and enhance customer relationship management.

Scope

The project encompasses the development of a Salesforce application with the following core functionalities:

- **Lead Management:** Efficiently capture, qualify, and distribute leads.
- **Opportunity Tracking:** Monitor and manage sales opportunities from initiation to closure.
- **Automated Reporting:** Generate insightful reports to track key performance indicators (KPIs) and sales trends.
- **Customer Engagement Tools:** Facilitate effective communication and interaction with customers.
- **Integration with Existing Systems:** Seamlessly integrate the application with ACME-1's current infrastructure.

The project's boundaries are limited to these functionalities. Any integrations beyond those specifically mentioned in this proposal are outside the current scope and will require a separate agreement.

Primary Deliverables

Docupal Demo, LLC will provide ACME-1 with the following deliverables:

- A fully functional, tested, and deployed Salesforce application.
- Comprehensive user documentation detailing application features and functionalities.
- Training materials to enable ACME-1's team to effectively use the application.
- Ongoing support to address any issues and ensure optimal performance.

Objectives

The primary objectives of this project are to:



- Improve ACME-1's sales efficiency by automating key processes.
- Enhance visibility into the sales pipeline through comprehensive opportunity tracking.
- Provide data-driven insights through automated reporting.
- Strengthen customer relationships through improved engagement tools.
- Ensure seamless integration with ACME-1's existing systems to avoid disruption.
- Deliver a user-friendly application that is easy to adopt and use.

Technical Approach and Architecture

Our approach to developing ACME-1's Salesforce application involves a phased methodology, ensuring transparency and collaboration throughout the project. We will use Agile development principles, with short sprints and regular communication to adapt to ACME-1's evolving needs. Our team will leverage a suite of powerful Salesforce technologies and industry-standard tools.

Development Methodology and Tools

We will be using a combination of Apex and Visualforce for custom logic and user interface elements. Lightning Web Components (LWC) will be used to build modern, performant UI components, enhancing the user experience. To facilitate data exchange with other systems, we will utilize the Salesforce REST API for real-time, lightweight integrations, and the Salesforce SOAP API where more complex transactions are required. We will use Git for version control, and automated testing frameworks to ensure code quality.

System Architecture and Integration

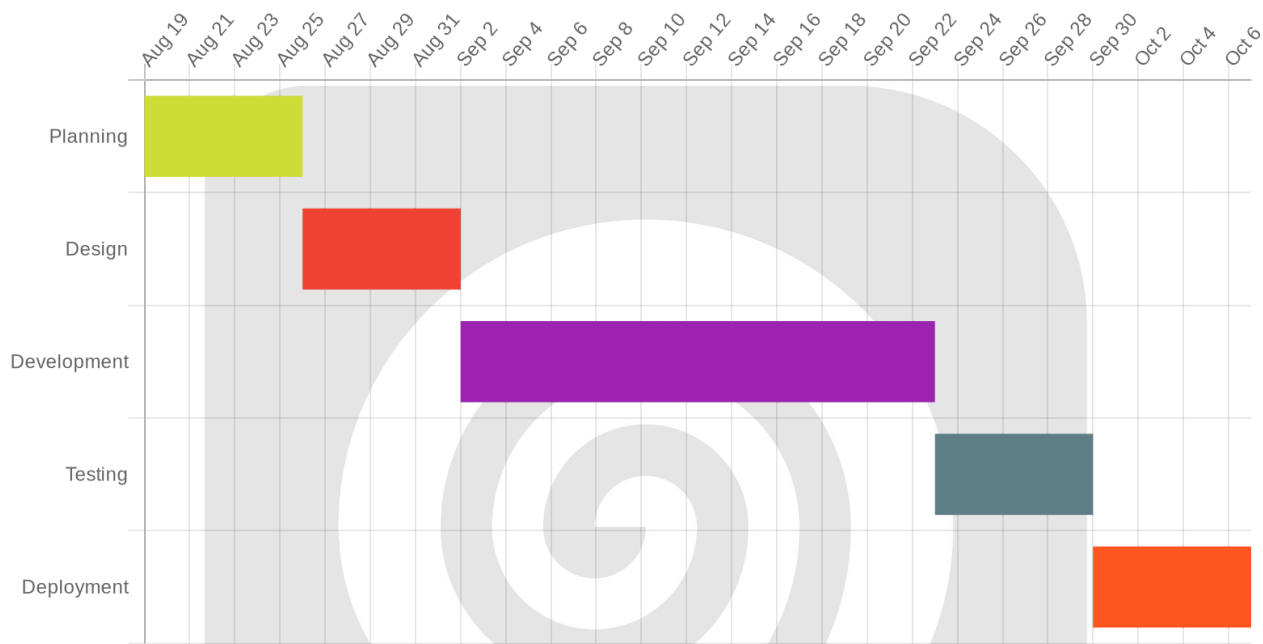
The application will be designed with a modular architecture, allowing for future scalability and maintainability. Integration with ACME-1's existing ERP system will be achieved through secure API connections, enabling seamless data flow between platforms. Similarly, we will integrate with ACME-1's marketing automation platform to synchronize customer data and marketing efforts. Our architectural design emphasizes data security, with encryption at rest and in transit. We will implement role-based access control to ensure that users only have access to the data and functionality they need. Regular security audits will be conducted to



identify and address potential vulnerabilities. We are committed to compliance with industry standards, including GDPR, and will implement appropriate measures to protect personal data.

Development Phases and Milestones

We have outlined the key phases of the project in the Gantt chart below, with associated milestones to track progress. The project will commence on 2025-08-19.



Project Timeline and Milestones

Docupal Demo, LLC estimates a 6-month timeline for the Salesforce app development, starting August 19, 2025, and ending February 19, 2026. We will track progress meticulously. Our team will provide weekly reports. Expect regular meetings to discuss progress. You will also have access to a dedicated project management portal for real-time updates.

Project Phases and Schedule

The project includes these key phases:

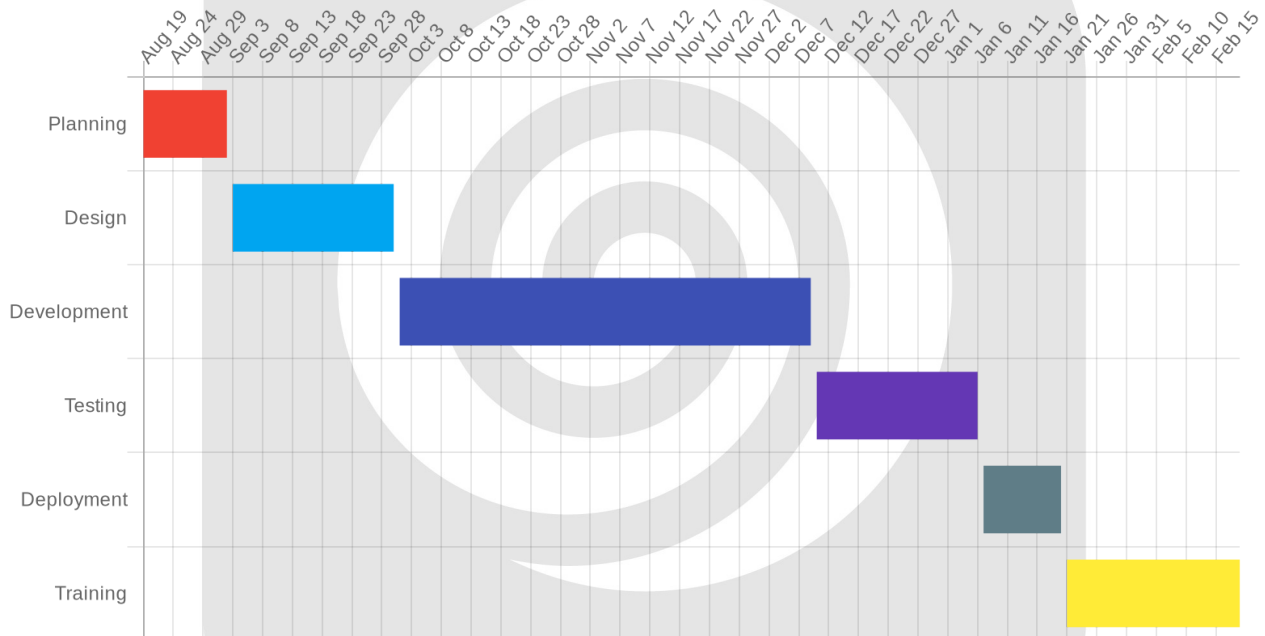
- 1. **Planning (2 weeks):** August 19, 2025 – September 02, 2025



2. **Design (4 weeks):** September 03, 2025 – September 30, 2025
3. **Development (10 weeks):** October 01, 2025 – December 09, 2025
4. **Testing (4 weeks):** December 10, 2025 – January 06, 2026
5. **Deployment (2 weeks):** January 07, 2026 – January 20, 2026
6. **Training (4 weeks):** January 21, 2026 – February 19, 2026

Key Milestones

- **Planning Completion:** September 02, 2025
- **Design Approval:** September 30, 2025
- **Development Complete:** December 09, 2025
- **Testing Sign-off:** January 06, 2026
- **Deployment to Production:** January 20, 2026
- **Training Completion:** February 19, 2026



Pricing and Payment Terms

The total cost for the Salesforce app development project is \$150,000. This figure covers all aspects of the project as detailed in this proposal.



Payment Schedule

We will invoice you according to the following milestone-based payment schedule:

Milestone	Percentage	Amount (USD)
Design Approval	25%	\$37,500
Development Completion	50%	\$75,000
Successful Deployment	25%	\$37,500

Change Requests

Any change requests or additional work beyond the initial scope will be subject to a separate agreement. We will evaluate these requests based on their impact on the project timeline and budget. A formal change order will be created outlining the adjusted costs and schedule, requiring your approval before implementation.

Team and Expertise

Project Team

Docupal Demo, LLC will provide a dedicated team to ensure the success of ACME-1's Salesforce app development project. Our team's expertise and certifications will drive efficiency and deliver a high-quality solution.

Key Personnel

- **John Smith (Project Manager):** John will oversee all aspects of the project, ensuring timely delivery and adherence to ACME-1's requirements.
- **Jane Doe (Lead Developer):** Jane will lead the development team, ensuring code quality and adherence to Salesforce best practices.
- **Mike Brown (Salesforce Architect):** Mike will design the application architecture, ensuring scalability and integration with ACME-1's existing Salesforce environment.



Salesforce Expertise

Our team holds several key Salesforce certifications, demonstrating our deep understanding of the platform:

- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Platform Developer I
- Salesforce Certified Platform Developer II

This expertise will enable us to build a robust and effective app tailored to ACME-1's specific needs.

Risk Management and Mitigation

Docupal Demo, LLC recognizes that potential risks may arise during the Salesforce app development project for ACME-1. We have identified key risks and established mitigation strategies to minimize their impact.

Potential Risks

We have identified several potential risks including:

- **Data Migration Issues:** Challenges during the transfer of existing data to the new Salesforce application.
- **Integration Challenges:** Difficulties encountered when integrating the new app with ACME-1's existing systems.
- **Scope Creep:** Uncontrolled changes or additions to the project's scope.

Mitigation Strategies

To address these risks, we will implement the following mitigation strategies:

- **Data Backup and Recovery:** We will establish robust data backup and recovery procedures to protect against data loss during migration.
- **Alternative Integration Strategies:** We will define alternative integration approaches to address unforeseen integration problems.
- **Change Management Process:** We will implement a clear change management process to control scope changes and ensure proper documentation and approval.

Risk Monitoring

We will monitor risks throughout the project lifecycle through:

- Regular risk assessments to identify and evaluate potential risks.
- Proactive monitoring of project activities to detect early warning signs of potential problems.
- Open communication among the project team and ACME-1 to ensure timely issue identification and resolution.

Terms and Conditions

Payment Terms

ACME-1 will pay Docupal Demo, LLC as described in the project proposal. Payments will be made in United States Dollars (USD). The payment schedule is outlined in the project cost section of this proposal. Late payments may incur interest at a rate of 1.5% per month, or the highest rate allowed by law, whichever is lower. Docupal Demo, LLC will invoice ACME-1 according to the agreed-upon schedule. Payment is due within 30 days of the invoice date.

Project Timeline and Delays

Docupal Demo, LLC will make every effort to adhere to the project timeline outlined in the proposal. However, certain delays may occur due to unforeseen circumstances or changes requested by ACME-1. Docupal Demo, LLC will communicate any potential delays to ACME-1 promptly. Any delays caused by ACME-1, such as failure to provide necessary information or approvals, may result in adjustments to the project timeline and cost.

Intellectual Property

Upon full payment, ACME-1 will own the intellectual property rights to the custom application developed by Docupal Demo, LLC. Docupal Demo, LLC retains the rights to any pre-existing intellectual property used in the development of the application.



Confidentiality

Both Docupal Demo, LLC and ACME-1 agree to hold each other's confidential information in strict confidence. This includes, but is not limited to, business plans, customer data, and technical information. This obligation of confidentiality will survive the termination of this agreement.

Termination

Either party may terminate this agreement with 30 days written notice if the other party breaches a material term of this agreement. Upon termination, ACME-1 will pay Docupal Demo, LLC for all work completed up to the date of termination.

Limitation of Liability

Docupal Demo, LLC's liability for any damages arising out of this agreement will be limited to the amount paid by ACME-1 under this agreement. Docupal Demo, LLC will not be liable for any indirect, incidental, or consequential damages.

Governing Law

This agreement will be governed by and construed in accordance with the laws of the State of California, without regard to its conflict of laws principles. Any legal action arising out of this agreement will be brought in the state or federal courts located in California.

Contract Terms Summary

This agreement outlines the terms and conditions for Salesforce application development between Docupal Demo, LLC and ACME-1. Key aspects include payment schedules in USD, adherence to project timelines, and ownership of intellectual property upon full payment. Both parties commit to maintaining strict confidentiality regarding sensitive information, even after the agreement concludes. The agreement can be terminated with 30 days' notice due to a material breach, with payment due for completed work. Liability is limited to the amount paid under the agreement, excluding indirect damages, and is governed by California law.



Conclusion and Next Steps

Next Steps

We appreciate ACME-1's consideration of Docupal Demo, LLC for this Salesforce app development project. The proposed solution addresses ACME-1's specific needs and objectives. We are confident that our expertise and approach will deliver a successful outcome.

Post-Acceptance Procedure

Following acceptance of this proposal, the next steps are designed to ensure a smooth project start. We will schedule a kickoff meeting to introduce the project team. This meeting will also be used to confirm project requirements and timelines. After the kickoff meeting, we will finalize the project requirements documentation. The design phase will then commence, laying the foundation for development.

Communication and Feedback

ACME-1 can provide feedback and request consultations throughout the project. Our project management portal offers a centralized platform for communication and file sharing. ACME-1 can also contact our project manager directly via email or phone to discuss any questions or concerns. We value open communication and collaboration.

