

Setup Pack Scope Document – India

OpenAnalyst AI Pvt. Ltd. · templates on WhatsApp · Manufacturing, E-commerce, Finance

Version 1 · 6 September 2026 · prices in INR, 18% GST extra

1. Overview

The Setup Packs exist so that a small unit can put AI templates on its existing WhatsApp, registers and books without a long implementation. Each pack is a fixed scope, a fixed number of engineer hours and a fixed price, delivered remotely by OpenAnalyst engineers or by partners trained and monitored by OpenAnalyst.

Packs suit units with fewer than 50 users in manufacturing, e-commerce and finance that will run standard templates without custom code. The software runs on the unit's own machine or server with the unit's own AI key; a pack sets it up and teaches the team.

- Delivered by a named OpenAnalyst engineer or trained partner
- Configured on the unit's own registers, ledgers and WhatsApp number
- Limited to standard templates, listed connectors and the rules files

2. Pack options and commercials

Pack	Scope	Hours	Validity	Price
Self-setup	5 hours of expert help while you set it up yourself	5 hrs	30 days	₹10,000
Starter	One workflow live on one WhatsApp group	10 hrs	30 days	₹25,000
Core	Five industry templates on your own registers, one connector	20 hrs	45 days	₹45,000
Core + Connectors	Core plus two connectors, approval gate, scheduled digests	40 hrs	60 days	₹80,000
Finance firm	Bank statement analysis for up to five clients	30 hrs	30 days	₹60,000
All in one	Two functions, all connectors, self-hosted on your server	70 hrs	90 days	₹1,40,000

GST (18%) applicable extra. New customers: 15% off the first pack.

3. Detailed scope

3.1 Self-setup • 5 hours • 30 days • ₹10,000

Area	Scope coverage
Consultation	Five one-hour sessions on WhatsApp or video, booked within 30 days
Typical use	Reviewing the unit's folder layout, format map and rules; answering setup questions; checking the first run
Exclusions	Hands-on configuration; the unit does the work

3.2 Starter • 10 hours • 30 days • ₹25,000

Area	Scope coverage
Install	OpenAnalyst on one machine, model key on the unit's account, WhatsApp connector on the unit's number
Workflow	One template from the industry set, configured on the unit's own register (for example shift report by voice note, order exceptions, or bank statement categorisation)
People	Two training sessions for the owner and the operators of that workflow; approval gate on the owner's WhatsApp
Records	One digest scheduled; action record switched on
Support	Two weeks after go-live on WhatsApp
Exclusions	Connectors to Tally, ERPNext or storefronts; more than one workflow

3.3 Core • 20 hours • 45 days • ₹45,000

Area	Scope coverage
Manufacturing Core	Capture (shift report by voice note), Alert (stock warns early), Approve (PO closed with one reply), File (fault photo becomes a ticket), Report (morning production digest)
E-commerce Core	Order exceptions, stock reconciliation, return and refund handoff, catalogue and COD updates, daily order digest
Finance Core	Bank statement categorisation, payment-to-invoice matching, invoice follow-up, daily finance review, month-close checklist
Masters	Customers, vendors, items or clients loaded from the unit's export; narration patterns added
Rules	Category and routing rules copied from the kit and tuned on the first month of real data

Area	Scope coverage
Connector	One of Tally, ERPNext, Google Sheets, Shopify or Medusa, read and write to the listed records
Reports	Two scheduled digests on WhatsApp
Support	One month after go-live
Exclusions	Second connector, self-host, custom templates, multi-entity

3.4 Core + Connectors • 40 hours • 60 days • ₹80,000

Area	Scope coverage
Everything in Core	As above for one industry
Connectors	Two of Tally, ERPNext, Google Sheets, Shopify, Medusa or WhatsApp Cloud API
Approvals	Approval gate per template with named approvers; nothing posts without a name and a time
Digests	Up to five scheduled digests
Data import	Complete import of masters and opening data from clean exports
Change requests	Basic rule and routing changes during the validity period
Support	Two months after go-live
Exclusions	Self-host, custom code, integrations outside the listed connectors

3.5 Finance firm • 30 hours • 30 days • ₹60,000

Area	Scope coverage
Clients	Up to five client folders with the finance kit layout
Bank formats	Up to three bank statement formats mapped and checked with the running-balance test
Masters	Loaded from each client's Tally ledger export
Rules	Category rules tuned on one month of each client's statements
Questions	WhatsApp question flow to each client, in the client's language
Reconciliation	Books-versus-bank with named items; Tally-ready CSV after approval

Area	Scope coverage
Reports	Monthly summary to each client on the first
Support	One month after go-live
Exclusions	OCR for scanned statements beyond one format, GST filing, more than five clients (add clients in blocks of five, 5 hours each)

3.6 All in one • 70 hours • 90 days • ₹1,40,000

Area	Scope coverage
Two functions	Any two of Manufacturing, E-commerce, Finance, each as in Core
Connectors	All available connectors the unit runs
Self-host	Installed on the unit's own server, with backups and access rules
Approvals and digests	Configured across both functions; up to ten digests
Data import	Complete
Support	Three months after go-live
Exclusions	Custom code, integrations outside listed connectors, multi-company consolidation

4. Included in all packs

- Starter software licence for the unit (₹999 value) and 12 months of template updates
- Install on the unit's machine or server, API key set up on the unit's own account
- Standard user roles and the approval gate switched on
- WhatsApp connector on the unit's number
- Naming convention, folder layout and one data-import session
- Standard digests for the templates in scope
- A written setup record: what was configured, who approves what, where the data lives

5. Strictly excluded (add-ons)

- Custom templates or code beyond the rules files
- Third-party integrations outside the listed connectors (biometric, bank APIs, payment gateways)

Data cleaning; the unit provides clean Excel or CSV exports
Scanned-document OCR beyond one bank format per Finance pack
Mobile app development
On-site work; packs are delivered remotely
Work beyond the allocated hours
Post go-live support beyond the pack window (Pro subscription covers it)

6. Commercial terms

100% advance payment before kick-off
18% GST extra on every price; GST invoice issued by OpenAnalyst AI Pvt. Ltd., GSTIN 09AAFCO1076N1Z0
Additional hours ₹2,000 per hour + GST, in blocks of 5
Hours are valid for the pack's validity period from the kick-off date
New customers: 15% off their first pack; webinar attendees also get the first one-hour session free
No refund once work has started
Applicable to units with fewer than 50 users on standard templates

7. Important terms

AI usage is billed by the unit's model provider under the unit's own key; it is not part of any pack
Pro (₹2,000 per month) is billed separately and is the post go-live support and updates plan
Scope is limited to the items listed in this document; any deviation needs a written change request and more hours
Packs are delivered by OpenAnalyst engineers or by partners trained and monitored by OpenAnalyst
OpenAnalyst may change pack pricing or terms with notice; a signed pack keeps its terms

8. Customer responsibilities

To keep the pack on schedule, the unit must:

Nominate one owner-side champion who can decide
Provide registers, ledgers and masters as clean Excel or CSV exports before kick-off
Give the engineer access to the machine or server and the WhatsApp number
Approve rules and templates within two working days of review
Make users available for the training sessions
Keep to the scope; raise change requests in writing

9. Contact information

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