REQUEST FOR PROPOSAL

ENTERPRISE RESOURCE PLANNING SYSTEM

SUBMISSION DEADLINE: 3rd NOVEMBER 2025

ED PARTNERS AFRICA LTD. * P.O. Box 1063 - 00100, NAIROBI *
PARKFIELD PLACE
4TH FLOOR
MUTHANGARI DRIVE
OFF WAIYAKI WAY
WESTLANDS

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1. Introduction

Ed Partners Africa Limited, a licensed Digital Credit Provider by the Central Bank of Kenya, invites qualified vendors to submit proposals for the provision, implementation, and support of an **Enterprise Resource Planning (**ERP) system. The purpose of this Request for Proposal (RFP) is to identify and engage a competent solution provider with proven expertise in delivering an integrated ERP platform that will enhance efficiency, transparency, and accountability across the organization's operations.

The selected system will be expected to streamline and automate key business processes, including **finance, procurement, human resources, customer relationship management, inventory management, and ICT administration**, while ensuring compliance with applicable laws, regulations, and industry best practices.

Through this engagement, Ed Partners Africa Limited seeks a long-term partnership with a provider who will not only implement a robust and scalable solution but also provide continuous support, training, and system optimization to align with the organization's growth and evolving needs.

All interested and eligible bidders are invited to carefully review the requirements outlined in this RFP and submit comprehensive proposals in accordance with the instructions provided herein.

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2. Preliminary Requirements

To ensure that only eligible and credible firms proceed to the technical evaluation stage, all bidders must meet the preliminary requirements listed below. These requirements are mandatory and will be assessed on a **compliance basis**. Failure to submit any of the requested documents or evidence will result in the automatic disqualification of the proposal at this stage.

The documents provided should be valid, current, and duly certified where applicable. Bidders are encouraged to present the information in an organized manner for ease of verification.

No	Requirement	Marks
1.	Valid Certificate of Incorporation / Registration	1
2.	Valid Tax Compliance Certificate (PIN & VAT)	1
3.	Valid CR12 if a company	1
4.	Audited financial statements 2024 and 2025	2
5.	Memorandum and articles of association	1
6.	Professional indemnity cover for protection against negligence, errors, or omissions in providing technical service.	1
7.	Valid Business Permit 2025	1
8.	Data controller/processor certificate/GDPR Compliance	1
9.	Consumer protection certificate, if any	1
10.	Membership certificates for professional bodies.	1
11.	Business Continuity Plan and Disaster Recovery Plan	1
12.	Reference letters, at least 3 letters not older than 1 year.	3
13.	Updated Company Profile, Business structure and Physical Address	2
14.	Letter of Expression of Interest with Self-declarations against debarment from participation in procurement and engagement in fraudulent practices.	2
15.	Duly filled Ed Partners Supplier Registration Form. Form accessible via the link https://forms.office.com/r/eTjLs2p5dV.	1
16.	Duly filled Ed Partners Data Consent Form	1
17.	Acceptance of Ed Partners Supplier Code of Conduct	1
18.	ID of Company Directors in CR12	1
19.	KRA PIN Certificates of Directors in CR12	1
20.	A statement of disclosure (Ultimate Beneficial Owners)	1
21.	Practicing certificates and Academic Certificates of the Project Team to serve Ed Partners (Certified professionals in penetration testing (e.g., OSCP, CEH, CISSP, CREST, GIAC GPEN).	1
	Total	**25**

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3. SPECIFICATIONS

The specifications outlined in this section define the **functional, technical, and integration requirements** for the Enterprise Resource Planning (ERP) System. Vendors are expected to carefully review each requirement and demonstrate in their proposals how their solution addresses these needs.

The specifications cover key organizational areas, including **Finance, Customer Relationship Management (CRM), Human Resources (HR), ICT, Procurement, and Inventory Management**. Each category is weighted according to its importance, and proposals will be evaluated based on the extent to which the proposed solution meets or exceeds the stated requirements.

Bidders are required to provide clear, detailed responses indicating compliance, partial compliance, or non-compliance with each specification, supported by references to system functionality, case studies, or demonstrations where possible.

3.1. FINANCE REQUIREMENTS 15%

3.1.1. Financial Management Modules

3.1.1.1. General Ledger (GL)

- Chart of accounts
- Supports multi-currency postings.
- Journal entries (e.g., GL to GL, Bank to GL, etc.) with approval workflows.
- Period closing and locking for audit integrity.

3.1.1.2. Cash & Bank Management

- Real-time view of all bank accounts with balances and reconciliation status.
- Bank Reconciliation Module:
    - Upload of CSV bank statements.
    - Auto or manual matching against posted GL transactions.
    - Unreconciled transaction reports.
- Integration with local banks and mobile money platforms (e.g., M-PESA C2B/B2C).
- Payment automation (bulk payments, scheduled disbursements).

3.1.1.3. Fixed Assets Management

- Asset register with categories and locations.
- Tagging and depreciation schedules (straight-line).
- Asset disposals, impairments, and revaluations.
- Asset movement tracking and verification logs.

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3.1.1.4. Payment & Procurement Workflow

- Staff-initiated requisitions as the first step.
- Workflow: General Requisition → Purchase Order → Payment Voucher.
- Attachments supported at each step (Quotes, invoices, LPOs, contracts).
- Automated 3-way matching (PO, GRN, Invoice).
- Vendor records with contract and performance tracking.

3.1.1.5. Prepayments Management

- Prepayment ledger tracking.
- Amortization of prepayments by predefined schedules.
- Alerts for prepayment period completion.

3.1.1.6. Budget Impact Checks

- Automated budget checks for OPEX and CAPEX – the system should allow uploading of the approved budget and flag/restrict if a requisition exceeds the remaining budget. This should be flexible to monthly, Quarterly, or Yearly.

3.1.2. Self-Service and Staff Interaction Modules

3.1.1.7. Imprest & Petty Cash Module

- Imprest request → Approval → Disbursement → Surrender → Reconciliation.
- Petty cash float requests by custodians and control of replenishment only after complete surrender.

3.1.1.8. Leave Management

- Leave application, tracking, and balance history.
- Manager approval workflows.
- Link to payroll system for financial provisioning.

3.1.1.9. Salary Advance Module

- Application, approval, and deduction schedule integrated with payroll.

3.1.1.10. Staff Reimbursement

- Expense claims portal.
- Categories for travel, utilities, etc.
- Policy enforcement and approval chain.

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3.1.3. Loan, Treasury, Grants & Investment Modules

3.1.1.11. Borrowings Management

- Capture loan facilities, repayment schedules, and interest accruals.
- Covenant tracker with alerts for breaches.

3.1.1.12. FX-linked loan support with mark-to-market evaluations.**Investments Management**

- Track short-term and long-term investments (Fixed Deposits, Call Deposits).
- Maturity tracking and drawdown logs.
- Interest accrual schedules.

3.1.1.13. Grant Income Management

- A module that tracks committed and received grant income, links to specific projects or cost centers, supports donor reporting, and ensures compliance with grant conditions.

3.1.4. Reporting, Audit & Compliance

3.1.1.14. Financial Statements & Reports

- Income Statement, Balance Sheet, Cash Flow (customizable for monthly/quarterly).
- Drill down from reports to source transactions.
- Chart of Accounts viewer/editor (based on role).
- Trial Balance Reports:
    - By period, branch, department, or product.
- Payables/Receivables Reports:
    - Aged summary & detailed views.
    - Separate reports for Staff Receivables and Other Receivables.
- Ratio analysis dashboard (e.g., ROA, Debt Ratio, Liquidity Ratio).
- IFRS Reporting Module - Ability to generate IFRS-compliant financial reports (e.g., IFRS 9, IFRS 16, IFRS 15), including disclosures and audit-ready formats.

3.1.1.15. Audit Trail

- Full traceability for every financial transaction (who, what, when).
- Logs for requisitions, approvals, and payments.
- Retrieval of attached supporting documents for all transactions.

3.1.1.16. Period Closing Controls

- Reporting period locking to prevent backdating.

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- Editable calendar by Finance Admin only.

3.1.5. System Integration & Automation

1. **Email Notifications:** At every stage (e.g., requisition, approval, rejection, payment).
2. **Integration Capabilities:**
   2.1. API connectors for M-PESA, banks, and the core banking platform.
   2.2. Export/import via Excel or CSV for external analysis.
3. **Live Alerts/Dashboards:** For pending approvals, unreconciled items, and unposted journals.

3.1.6. Security, Roles & Access

1. **Role-Based Access Control (RBAC):** Ensure proper segregation of duties.
2. **Approval Workflows:** Configurable based on departments or users.
3. **User Activity Logs:** For monitoring and compliance purposes.

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3.2. CRM Software Requirements 5%

3.2.1. Customer Management

- Centralized customer database with a 360-degree view.
- Customer segmentation and categorization.
- Duplicate detection and record merging.
- Lifecycle stage tracking (lead, prospect, active, dormant, churned).
- Contact history (emails, calls, meetings).
- Relationship mapping (linking subsidiaries, parent companies, partners).
- Customer tagging and custom attributes.
- Sales pipeline reports (deal stages, conversion ratios, bottlenecks).
- Activation reports (new customer activations, first-use adoption, and onboarding progress).

3.2.2. Sales & Pipeline Management

- Lead capture, scoring, routing, and nurturing workflows.
- Opportunity management with custom sales stages.
- Pipeline visualization and conversion tracking.
- Automated task and activity scheduling.
- Quota and target tracking for sales teams.
- Territory and account assignment rules.
  Integration with digital channels (social media leads, web forms).

3.2.3. Marketing Automation

- Campaign planning and execution tools.
- Segmentation based on behaviour, demographics, and transaction history.
- Email, SMS, and push notification campaign support.
- Campaign ROI tracking and attribution modeling.

3.2.4. Customer Service & Case Management

- Ticket creation from emails, calls, web forms, or manually.
- SLA monitoring and automated escalation rules.
- Agent performance tracking.
- Feedback loops and satisfaction surveys.
- Self-service portal and knowledge base.
- Chatbot/AI assistant integration.
- Omnichannel support (voice, chat, WhatsApp, email, SMS, social media).

3.2.5. Surveys & Feedback

- Dynamic survey creation and automated distribution.
- Integration with customer records.
- Sentiment analysis and reporting dashboards.
- Routing of negative responses to service teams.

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3.2.6. Reporting & Dashboards

- Real-time dashboards for sales, service, and marketing.
- Custom report builder with filters and export options.

- Scheduled report delivery to stakeholders.
- Predictive insights (e.g., churn risk, upsell potential).

3.2.7. Technical Requirements

- Web-based interface accessible via modern browsers (Chrome, Edge, Firefox).
- Support for mobile devices (Android & iOS). App preferred.
- Modular architecture with scalability to add/remove features.
- Configurable workflows and user interface (low-code/no-code preferred).
- Role-based access with fine-grained permissions.
- API-first architecture with RESTful endpoints.
- Scheduled and manual backup capabilities.
- Audit logs for all critical user and system actions.

3.2.8. Integration Requirements

3.1.8.1. Third-Party Tools

- Email systems (e.g., Outlook, Office 365, Gmail).
- SMS gateways (e.g., Africa's Talking, Infobip etc).
- BI and analytics tools (e.g., Power BI, Tableau).

3.1.8.2. Data Migration

- Tools for importing existing customer data from legacy CRM or Excel.
- Support for bulk updates and record validation.

3.1.8.3. Authentication & Identity

- Integration with Single Sign-On (SSO) systems.
- Support for Active Directory/LDAP.
- OAuth2 and JWT token support for APIs.

3.2.9. Security Requirements

3.2.9.1. Data Protection

- Data encryption at rest and in transit (TLS 1.2+).
- Role-based access control (RBAC).
- Field-level access restrictions (e.g., hide financial data from service users).
- Masking of sensitive information (e.g., national ID, account numbers).

3.2.9.2. Compliance

- Compliance with the Kenya Data Protection Act, GDPR, or other applicable regulations.
- Consent management features for marketing and communication.
- Data retention policies and tools for archival/deletion.

3.2.9.3. Audit & Monitoring

- Complete audit trail of data access and changes.
- Admin dashboards for user sessions and access logs.
- Intrusion detection or suspicious behaviour alerts.

3.2.9.4. Availability & Recovery

- 99.9% uptime commitment (SLA-backed).

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- Disaster recovery plan and offsite backups.
- Redundancy and failover infrastructure.

3.2.9.5. System Administration

- Admin panel for user provisioning, configuration, and health checks.
- Logging of administrative activities (e.g., account changes, permission grants).

3.3. HR REQUIREMENTS 15%

3.3.1. Employee Information Management

A. **Employee Records Management**

- Maintain a centralized database of all employee records, including personal details, employment history, job roles, salary structures, reporting lines, and contractual information.
- Support document management (e.g., contracts, IDs, certificates).
- Maintain lists of active employees, exited employees, and employees on probation.
- Provide robust controls over the creation, modification, and maintenance of employee master data, including:
  - ✓ **Version history management**: Retain previous and current versions of employee master data for traceability.
  - ✓ **Role-based access control**: Restrict access to create, update, or delete employee records based on defined user roles.
  - ✓ **Approval workflows**: Support configurable approval processes for high-risk or sensitive changes to employee data (e.g., salary structure, reporting line).
  - ✓ **Audit logging**: Maintain comprehensive audit trails of all actions performed on employee master data, including details of who made the change, when, and what was modified.

B. **Employee Onboarding Information Management**

- Manage onboarding information separately from employee master records to clearly distinguish between pre-employment data (e.g., applicant documents, pre-joining requirements, reference checks) and official employment records.
- Allow tracking of onboarding progress, tasks, and required documentation before formal inclusion in the employee records database.

3.3.2. Payroll Management

- Automate payroll processing, including salary computation, tax deductions, statutory contributions (e.g., PAYE, NSSF, NHIF), overtime, and bonuses.
- Integrate with finance and accounting modules for accurate payroll posting.
- Generate payslips and bank payment files.
- Generate, SHIF, NSSF, HELB, PAYE &Bank schedules
- Generate & Send P9s.
- Generate payroll Summary.
- Generate transactions – Power &Safaricom Deductions File.
- Maintain a list of active and exited employees.
- The system should have an automated module for calculating and applying staff rewards and commissions based on pre-defined rules or performance parameters
- Should be able to **automatically calculate and process final dues** for an exiting employee, including:

1. Salary Dues

Prorated salary up to the last working day

2. Leave Encashment

Unused annual leave days are paid out based on the company policy

3. Gratuity or End-of-Service Benefits

If applicable by law or company policy

4. Deductions

Loans or advances not cleared

Company assets not returned (based on clearance status)

Statutory deductions (e.g., PAYE, NSSF, SHIF, Housing levy)

5. Notice Pay

Either paid in lieu of notice or recovered if notice is not served

6. Bonus or Commissions

Pending commissions or performance bonuses if contractually due.

NB

- ✓ **System must enforce segregation of duties** by defining distinct user roles (e.g., Human Resource, Accounts Payable, Finance Manager) to prevent conflicts of interest in payroll activities.
- ✓ **System must maintain a complete audit trail** of all payroll-related activities, including details of data entry, approvals, modifications, and processing actions, with time stamps and user identification.

3.3.3. Time, Attendance & Leave Management

- Track employee attendance via biometric or digital check-in/check-out systems.
- Manage leave balances, accruals, applications, and approvals for various leave types (sick leave, annual leave, maternity/paternity, compassionate leave, study leave).
- Send automated alerts and reminders to both employees and line managers regarding attendance, leave requests, and approvals.
- Provide an Employee Self-Service (ESS) module that enables employees to:
  - ✓ Apply for leave through the system, with configurable approval workflows.
  - ✓ Retrieve and download payslips and P9/tax forms.
  - ✓ Update personal data such as next of kin and beneficiaries, with approval workflows to validate changes.

- Ensure all ESS functions are integrated with HR and payroll modules for real-time updates, accurate reporting, and audit trail maintenance.

3.3.4. Recruitment & Talent Acquisition

- Manage the end-to-end recruitment process: job requisitions, vacancy postings, application tracking, CV screening, interview scheduling, selection, and offer management.
- Integrate with career portals and recruitment agencies.
- Facilitate background checks and tracking
- Facilitate digital onboarding, orientation, and induction programs.

3.3.5. Performance Management

- Enable goal setting, performance tracking, mid-year and annual reviews.
- Support 360-degree feedback and appraisal workflows.
- Track competencies, skills gaps, and training needs.
- Link performance outcomes to promotions, salary reviews, and career development.
- Maintain employees who are on probation.

3.3.6. Training & Development

- Manage employee learning plans, internal and external training programs.
- Track training budgets, attendance, feedback, and outcomes.
- Support certifications, learning history, and e-learning integration.

3.3.7. Benefits Administration

- Manage employee benefits, including health insurance, pension schemes, wellness programs, and company perks.
- Allow employees to view and enrol in benefit plans during open enrolment periods.

3.3.8. Disciplinary Management

- **Incident reporting and tracking**
- **Automate workflows** for investigations, hearings, and approvals
- **Recording disciplinary actions** like warnings, suspensions, or terminations
- **Privilege and role-based access to disciplinary management records.**

3.3.9. HR Analytics & Reporting

- Provide real-time dashboards and reports on headcount, attrition, diversity, attendance, payroll, performance, and compliance metrics.
- Enable custom report generation for management and audit use.

3.3.10. Compliance & Regulatory Management

- Ensure adherence to local labour laws, health and safety regulations, and HR best practices.

- Maintain audit trails and documentation for legal and statutory requirements.
- Facilitate data privacy and security compliance.

3.4. ICT Functional Requirements 10%

3.4.1. System Administration Requirements

User & Role Management

- Create, edit, disable, and delete user accounts.
- Role-based access control (RBAC) with configurable permissions per module.
- Support for multiple roles per user.
- Time-bound roles to allow temporary or project-based access with automatic expiry.
- Single Sign-On (SSO) integration using industry-standard protocols (e.g., SAML, OAuth2 (Microsoft)).
- Audit trail for user logins, actions, and administrative changes.

3.4.2. Security & Password Policy

- Enforce strong password rules (minimum length, character requirements).
- Password expiration policy (e.g., every 90 days).
- Password aging to prevent frequent password changes.
- Enforce history to disallow reuse of the last 5 passwords.
- Two-Factor Authentication (2FA) for administrative roles.
- Session timeout controls and IP whitelisting options.
- Encrypted data both at rest and in transit.
- Compliance with the Kenyan Data Protection Act and related standards.

3.4.3. Configuration & Customization

- GUI-based configuration of forms, modules, and workflows.
- Add custom fields, validation rules, and conditional logic.
- Enable/disable modules per department or role.
- Drag-and-drop workflow builders or business rule engines to allow non-technical configuration of logic and flows

3.4.4. Monitoring & Logs

- Full system logging: login attempts, user actions, failed API calls, system errors.
- Real-time alerts via email or SMS for critical failures or security issues.
- Dashboard for system performance (CPU, memory, API latency).
- API requests/responses
- Integration errors
- Retry attempts and failure rates
- Dashboard for ICT/Admin to monitor:
- Sync status (success, partial, failed)
- Last sync timestamp

- Data volume synced
- Integration with Security Information and Event Management (SIEM) platforms
- Log retention policy defining duration, access control, and archival procedures

3.4.5. Backup & Recovery

- Scheduled and manual full-system backups.
- Point-in-time restoration and recovery support.
- Option for offsite/cloud backup integration.
- Data retention and archival
- Define clear Recovery Point Objective (RPO) and Recovery Time Objective (RTO) per system or module
- Disaster Recovery (DR) and Business Continuity Planning (BCP) framework, includes infrastructure, process, and communication plans
- Backup restoration testing is conducted periodically to verify data integrity and restore time
- Offsite/cloud backup support with encryption at rest and in transit

3.4.6. Environment & Deployment Management

- Support for multiple deployment environments: Development, Staging, Production.
- Controlled deployment processes with rollback options.
- Versioning and changelog management.

3.4.7. REST API Provisions

- All integrations must use RESTful APIs over HTTPS.
- Data should be exchanged in JSON format only among others where applicable.

3.4.8. Real-time or Scheduled Sync

- Allow data exchange between ERP and the core banking system in real-time or at defined intervals.

3.4.9. Support syncing of:

- GL-to-GL Synchronization
- Staff Profile Sync
- Finance – Fixed Asset Synchronization

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3.5. PROCUREMENT REQUIREMENTS 10%

3.5.1. Requisition Management

- Allow users to create and submit purchase requisitions.
- Requisitions to contain fields for summary of need, specifications, expected delivery date, etc.
- Support multiproduct requisitioning
- Support for item catalog browsing and non-catalog requests
- Multi-level approval workflows (based on amount, department, etc.)
- Notification and alert system for pending approvals

3.5.2. Request for Quotation (RFQ) / Tendering

- Create and send RFQs to multiple vendors from requisitions.
- Compare quotations side-by-side (price, delivery, terms)
- Manage tender submissions, evaluation criteria, and scoring
- Automate award decisions and generate POs from accepted quotes

3.5.3. Budget Control

- Allocate budget limits to departments, categories, or projects
- Real-time budget checks during requisition and PO creation
- Block or alert for over-budget spending
- Generate budget utilization reports

3.5.4. Purchase Order (PO) Management

- Convert approved requisitions to purchase orders (POs).
- Create, edit, cancel, and resend POs.
- Track PO status (e.g., draft, sent, accepted, fulfilled).
- Provide PO numbering, version control, and history logs.
- Support PO templates and automatic vendor notifications.
- Ensure POs are fully integrated with the Accounts Payable process to enable matching of Local Purchase Orders (LPOs) against invoices, receipts, and payments.
- Allow the Payables Officer to initiate and process the PO matching function, ensuring proper three-way matching (PO, goods/services received, and supplier invoice).
- Maintain correct accounting entries automatically from the issuance of the PO through to goods/services receipt and final payment.

3.5.5. Goods & Services Receipt

- Record receipt of goods and services (partial or full)
- Match against PO and invoice (3-way match)
- Generate Goods Received Notes (GRNs)
- Flag discrepancies (over delivery, damaged goods, etc.)

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3.5.6. Invoice & Payment Processing

- Capture and validate supplier invoices
- Match invoices with POs and GRNs (3-way match)
- Send approved invoices to accounting/ERP for payment
- Track payment status and aging

3.5.7. Vendor Management

- Maintain vendor master records with contact, banking, and certification details
- Enable vendor onboarding and registration workflows
- Store supplier documents (e.g., Cert of Incorporation, CR12, ISO certifications etc)
- Rate vendors based on delivery time, quality, price, etc.

3.5.8. Contract Management

- Store procurement contracts and link to vendors or POs
- Set reminders for renewals, expirations, and compliance checks
- Allow digital contract approvals and e-signatures
- Track contract spending vs. agreed limits

3.5.9. Reporting & Analytics

- Requisition and PO reports (by vendor, department, item)
- Supplier performance and cost trend analysis
- Spend analysis by category, region, or cost center
- Exportable reports (Excel, PDF, CSV)

3.5.10. Compliance & Audit Trails

- Maintain audit logs of all procurement actions
- Enforce procurement policies (e.g., approval thresholds, preferred vendors)
- Role-based access and segregation of duties
- Integration with internal/external audit systems

3.5.11. Integration Capabilities

- Integrate with ERP, finance, inventory, and HR systems
- API and web services support for real-time data sync
- EDI support for electronic documents (POs, invoices, etc.)

3.5.12. User Roles & Security

- Role-based permissions (e.g., requester, approver, buyer, admin)
- Secure login with two-factor authentication
- Access logs and user activity tracking

3.5.13. **Mobile & Cloud Support**

- Mobile-responsive UI or native apps for requisition and approval
- Cloud-based or on-premise deployment options
- Offline functionality with sync when online
- Provide a mobile-responsive user interface or native mobile applications for requisition and approval processes.
- Support both cloud-based and on-premise deployment options.
- Offer offline functionality with synchronization once connectivity is restored.
- For on-premise deployments, bidders must provide detailed technical requirements to ensure compatibility with available resources, including but not limited to:

  - ✓ System hardware requirements
  - ✓ Database service requirements
  - ✓ Software requirements
  - ✓ Caching service requirements
  - ✓ Any additional infrastructure dependencies

- Bidders must also disclose all third-party vendors or subcontractors involved in delivering mobile or cloud services, including their role, scope of responsibility, and any licensing requirements.

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3.6. INVENTORY MANAGEMENT 5%

3.6.1. Inventory Control & Tracking

- Track stock levels in real time across company branches
- Support for SKU, batch number, lot number, and serial number tracking
- Real-time updates for stock-in and stock-out transactions
- Track inventory status (available, reserved, in-transit, damaged, etc.)

3.6.2. Stock Receiving

- Record incoming stock from purchase orders or transfers
- Generate Goods Received Notes (GRNs)
- Support for partial and over-receipts
- Automatically update inventory levels upon receipt

3.6.3. Stock Issuance & Dispatch

- Record outgoing stock for internal use

3.6.4. Stock Transfers

- Support inter-warehouse or inter-location transfers
- Generate stock transfer requests and track approval
- Record stock movement with in-transit status and final receipt confirmation

3.6.5. Reorder Management

- Set minimum stock levels, safety stock, and reorder points per item
- Automatically generate alerts or purchase requisitions when stock falls below thresholds
- Calculate optimal reorder quantities based on usage history or lead time

3.6.6. Barcode / QR Code / RFID Support

- Generate and print barcodes/QR codes for inventory items
- Scan codes for receiving, picking, transferring, and auditing
- Support for RFID for automatic inventory detection (optional)

3.6.7. Stock Adjustment & Reconciliation

- Perform physical stock counts and reconciliations
- Record stock adjustments with reason codes (e.g., damage, theft, audit variance)
- Generate discrepancy reports
- Approval workflow for adjustments

3.6.8. Expiry & Batch Tracking

- Track items by expiry date, batch, or lot
- Alert for nearing-expiry or expired products
- FIFO/FEFO (First In, First Out / First Expiry, First Out) logic support

3.6.9. Inventory Valuation

- Support multiple costing methods: FIFO, LIFO, Weighted Average, Standard Cost
- Real-time and historical stock valuation
- Inventory aging and obsolescence reports

3.6.10. Reporting & Analytics

- Inventory summary and detail reports (by item, location, status)
- Stock movement reports (inbound, outbound, transfers, adjustments)
- Inventory turnover ratio and slow-moving/dead stock reports
- Customizable dashboards and KPIs

3.6.11. Alerts & Notifications

- Low stock, stockout, and overstock alerts
- Notifications for pending receipts, transfers, or adjustments
- Configurable user alerts by item, location, or category

3.6.12. User Roles & Security

- Role-based access control (e.g., viewer, operator, manager)
- Restrict access by location, item category, or transaction type
- Full audit trail of inventory transactions by user

3.6.13. System Integration

- Seamless integration with procurement system
- API and data import/export support
- Real-time data sync with other business systems

3.6.14. Mobile & Cloud Support

- Mobile app or responsive interface for on-site inventory actions
- Cloud deployment for multi-location access
- Offline support with sync capability when back online

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4. **FINANCIAL PROPOSAL**

In addition to the technical submission, all bidders are required to provide a **comprehensive financial proposal** detailing the total cost of ownership of the proposed ERP solution. The financial proposal should be clear, transparent, and structured to reflect all relevant cost components, including but not limited to software licensing per module, implementation, customization, training, support, and maintenance.

The proposal must be presented in **Kenyan Shillings (KES)** and should indicate all applicable taxes. Vendors are also expected to propose favorable payment terms and highlight any discounts or value-added benefits offered.

The financial proposal will play a critical part in the evaluation process, with an emphasis placed not only on cost competitiveness but also on sustainability, value for money, and alignment with the organization's financial policies.

No	Component	Requirement	Marks
	Price Schedule	Detailed, including all taxes	2
	Breakdown of Pricing per cost drivers	Required	2
	Currency	Must be in Kenyan Shillings (KES)	2
	Payment Terms	Must provide favourable payment terms with a credit period, e.g., 30 days after delivery and acceptance, massive discounts, etc.	5
	Financial stability	Liquidity & Solvency of firm (share Financial statements)	3
	Total		**15**

5. **Evaluation Criteria**

Criteria	Weight
Preliminary Evaluation	25%
Technical Proposal (compliance & features)	60%
Financial Proposal (cost-effectiveness)	15%
Total	**100%**

6. **Submission Guidelines**

- All proposals should be submitted in soft copy to: **procurementcommittee@edpartnersafrica.com**

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7. Deadline for Submission

All proposals must be received **on or before November 3, 2025, at 5:00 PM (EAT).** Late submissions will not be accepted.

8. Clarifications

All requests for clarification should be directed to the **procurementcommittee@edpartnersafrica.com**

9. Confidentiality

All information obtained in the process of this engagement shall be treated as confidential and used solely for this request for proposal.

10. Right to Accept or Reject

Ed Partners Africa Ltd reserves the right to accept or reject any proposal, wholly or partially, and is not bound to provide reasons for its decision.

Approved By

Kibet Kipkemoi

Head of Operations & Technology

2nd October 2025

APPENDIX 1: DATA SHEET(MANDATORY)

A. SUBMISSION CHECKLIST (PRELIMINARY REQUIREMENTS) 25%

Ref. No.	Requirement	Marks	Compliant (✓)	Partially Compliant (✓)	Not Compliant (✓)	Supporting Evidence/ Documentation
1	Valid Certificate of Incorporation / Registration	1				
2	Valid Tax Compliance Certificate (PIN & VAT)	1				
3	Valid CR12 if a company	1				
4	Audited Financial Statements 2024 and 2025	2				
5	Memorandum and Articles of Association	1				
6	Professional Indemnity Cover	1				
7	Valid Business Permit 2025	1				
8	Data Controller/Processor Certificate or GDPR Compliance	1				
9	Consumer Protection Certificate (if any)	1				
10	Membership Certificates to Professional Bodies	1				
11	Business Continuity Plan & Disaster Recovery Plan	1				

12	Reference Letters (3, within the last 1 year)	3				
13	Updated Company Profile, Business Structure & Address	2				
14	Letter of Expression of Interest & Self-Declarations	2				
15	Duly filled Ed Partners Supplier Registration Form	1				
16	Duly filled Ed Partners Data Consent Form	1				
17	Acceptance of Ed Partners Supplier Code of Conduct	1				
18	ID Copies of Company Directors (as per CR12)	1				
19	KRA PIN Certificates of Directors (as per CR12)	1				
20	Statement of Disclosure (Beneficial Owners)	1				
21	Practicing & Academic Certificates of the Project Team	1				
	Total	25%				

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B. COMPLIANCE TEMPLATE FOR TECHNICAL & FUNCTIONAL REQUIREMENTS (WITH SUB-SECTIONS)

Section Ref.	Requirement	Weight (%)	Compliance Status (Compliant / Partially Compliant / Not Compliant)	Supporting Evidence (Demo, Case Study, Screen Shots, Proposal)	Remarks
A. FINANCIAL MANAGEMENT (WEIGHTED AVERAGE (X/95) *15%)					
3.1.1	General Ledger (GL) - Chart of accounts, multi-currency postings, journal entries, period closing/locking	5			
3.1.1	Cash & Bank Management - Bank reconciliation, integration with banks/M-PESA, payment automation	5			
3.1.1	Fixed Assets Management - Asset register, depreciation, disposals, impairments, tracking	5			
3.1.1	Payment & Procurement Workflow - Requisitions → PO → Payment Voucher, attachments, 3-way matching	5			
3.1.1	Prepayments Management - Ledger, amortization schedules, alerts	5			
3.1.1	Budget Impact Checks - Upload budget, restrict/flag excess requisitions	5			

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3.1.2	Imprest & Petty Cash Module - Request, approval, disbursement, surrender, reconciliation	5			
3.1.2	Leave Management - Application, tracking, approvals, payroll integration	5			
3.1.2	Salary Advance Module - Application, approval, and deduction schedule	5			
3.1.2	Staff Reimbursement - Expense claims, categories, approvals	5			
3.1.3	Borrowings Management - Loan facilities, repayment schedules, covenant tracker	5			
3.1.3	Investments Management - Fixed/Call deposits, maturity tracking, accrual schedules	5			
3.1.3	Grant Income Management - Committed/received income, donor reporting	5			
3.1.4	Financial Reports - Income statement, balance sheet, cash flow, trial balance, ratio analysis	5			
3.1.4	IFRS Reporting Module - IFRS 9, 15, 16	5			
3.1.4	Audit Trail - Full traceability for transactions	5			

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3.1.4	Period Closing Controls - Period locking, editable by finance admin	5			
3.1.5	Integration & Automation - Email notifications, APIs, CSV import/export, live dashboards	5			
3.1.6	Security & Access - RBAC, approval workflows, user activity logs	5			
B. CUSTOMER RELATIONSHIP MANAGEMENT (WEIGHTED AVERAGE (X/45) * 5%)					
3.2.1	Customer Management - Centralized database, lifecycle tracking, contact history	5			
3.2.2	Sales & Pipeline Management - Lead capture, opportunity tracking, quotas	5			
3.2.3	Marketing Automation - Campaigns, segmentation, ROI tracking	5			
3.2.4	Customer Service - Ticketing, SLAs, self-service portal, omnichannel support	5			
3.2.5	Surveys & Feedback - Dynamic surveys, sentiment analysis, routing	5			
3.2.6	Reporting & Dashboards - Real-time, custom builder, predictive insights	5			

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3.2.7	Technical Requirements - Web-based, mobile support, modular, configurable	5			
3.2.8	Integration Requirements - Email, SMS, BI tools, data migration, SSO	5			
3.2.9	Security Requirements - Encryption, compliance, audit & monitoring	5			
C. HUMAN RESOURCE MANAGEMENT (WEIGHTED AVERAGE (X/55) *15%)					
3.3.1	Employee Records Management - Centralized database, version control, approvals, audit logs	5			
3.3.1	Onboarding Management - Pre-employment data, progress tracking	5			
3.3.2	Payroll Management - Salary computation, tax, segregation of duties, audit trails	5			
3.3.3	Attendance & Leave Management - Biometric/digital check-in/out, ESS integration	5			
3.3.4	Recruitment & Talent Acquisition - Vacancy, tracking, interviews, digital onboarding	5			
3.3.5	Performance Management - Goals, reviews, 360 feedback, probation tracking	5			

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3.3.6	Training & Development - Learning plans, training budgets, certifications	5			
3.3.7	Benefits Administration - Health insurance, pension, perks, enrolment	5			
3.3.8	Disciplinary Management - Incident tracking, workflows, disciplinary actions	5			
3.3.9	HR Analytics & Reporting - Dashboards, custom reports	5			
3.3.10	Compliance & Regulatory Management - Labour laws, health/safety, data privacy	5			
D. INFORMATION COMMUNICATION TECHNOLOGY(ICT) (WEIGHTED AVERAGE (X/40) *10%)					
3.4.1	System Administration - User/role management, SSO, audit trails	5			
3.4.2	Security & Password Policy - Strong password rules, 2FA, encryption	5			
3.4.3	Configuration & Customization - GUI-based workflows, rules engine	5			
3.4.4	Monitoring & Logs - Logging, alerts, SIEM integration	5			

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3.4.5	Backup & Recovery - Scheduled backups, DRP/BCP, RPO/RTO	5			
3.4.6	Environment & Deployment - Dev/Stage/Prod, controlled deployments	5			
3.4.7	REST API Provisions - JSON, HTTPS	5			
3.4.8	Real-time/Scheduled Sync - GL, Staff Profiles, Fixed Assets	5			
E. PROCUREMENT (WEIGHTED AVERAGE (X/65) *10%)					
3.5.1	Requisition Management - Multi-level approvals, alerts	5			
3.5.2	RFQ/Tendering - Vendor quotes, evaluations, PO generation	5			
3.5.3	Budget Control - Department/project limits, reports	5			
3.5.4	PO Management - Version control, 3-way matching, accounting entries	5			
3.5.5	Goods & Services Receipt - GRNs, discrepancy flags	5			
3.5.6	Invoice & Payment Processing - Invoice capture, matching, status tracking	5			
3.5.7	Vendor Management - Vendor onboarding, documents, performance rating	5			

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3.5.8	Contract Management - Storage, reminders, digital approvals	5			
3.5.9	Reporting & Analytics - Supplier performance, spend analysis	5			
3.5.10	Compliance & Audit Trails - Logs, policies, segregation of duties	5			
3.5.11	Integration Capabilities - ERP, finance, HR, APIs, EDI	5			
3.5.12	User Roles & Security - RBAC, 2FA, logs	5			
3.5.13	Mobile & Cloud Support - On-prem/cloud, vendor disclosures	5			
F. INVENTORY MANAGEMENT (WEIGHTED AVERAGE (X/70) *5%)					
3.6.1	Inventory Control & Tracking - SKU, batch/lot tracking	5			
3.6.2	Stock Receiving - GRNs, partial/over-receipts	5			
3.6.3	Stock Issuance & Dispatch - Internal use, approvals	5			
3.6.4	Stock Transfers - Inter-warehouse/location	5			
3.6.5	Reorder Management - Alerts, optimal reorder levels	5			
3.6.6	Barcode/QR/RFID Support - Code generation & scanning	5			
3.6.7	Stock Adjustment & Reconciliation -	5			

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	Variance reports, approvals				
3.6.8	Expiry & Batch Tracking - Expiry alerts, FIFO/FEFO	5			
3.6.9	Inventory Valuation - FIFO, LIFO, weighted average	5			
3.6.10	Reporting & Analytics - Stock movement, turnover	5			
3.6.11	Alerts & Notifications - Stock levels, receipts	5			
3.6.12	User Roles & Security - Access restrictions, audit logs	5			
3.6.13	System Integration - Procurement/ERP, APIs	5			
3.6.14	Mobile & Cloud Support - Mobile apps, offline sync	5			

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C. GENERAL TERMS OF ENGAGEMENT

1. **Validity of Proposal** – Proposals must remain valid for a period of at least 360 days from the submission deadline.
2. **Contract Duration** – The engagement shall cover ERP system implementation, training, and support for as long as the system meets functional performance standards.
3. **Performance Standards** – The provider shall meet the functional, technical, and compliance requirements outlined in the RFP and agreed contract (upon successful award).
4. **Confidentiality** – All information shared in the course of engagement shall remain confidential and not be disclosed without prior written consent.

5. **Compliance** – The provider must comply with all applicable Kenyan laws, including the Kenya Data Protection Act, labor laws, and relevant statutory obligations in the country of origin, including GDPR.

6. **Subcontracting** – Any third-party vendors or subcontractors involved must be disclosed in advance, with a clear definition of roles and responsibilities.

7. **Dispute Resolution** – Any disputes shall be resolved amicably, failing which arbitration under Kenyan law shall apply with finality.

8. **Termination** – Ed Partners Africa Ltd reserves the right to terminate the contract for non-performance, breach of terms, or violation of applicable laws.

9. **Payment Terms** – Payments shall be made as per the agreed schedule in the financial proposal, subject to successful delivery and acceptance of milestones.

10. **Audit Rights** – Ed Partners reserves the right to audit project deliverables, financial records related to the project, and system security compliance during the contract period.

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