Document Title	**Specification for a Centralized CRM Software**
Number	ACS-MDS-TEN-0001
Revision	Rev 01

APPROVAL & DISTRIBUTION

	NAME	SIGNATURE*
PREPARED	A NELWAMONDO	Aubrey Nelwamondo 23/09/2021 16:51:19 (UTC+02:00) Signed by Aubrey Nelwamondo, Aubrey.nelwamondo@necsa.co.za SIGNIFLOW.COM
REVIEWED	D KOTZE	Deon Kotze 23/09/2021 17:57:01 (UTC+02:00) Signed by Deon Kotze, deon.kotze@necsa.co.za SIGNIFLOW.COM
APPROVED	Z ZITUTA	Zamokwakhe Zituta 24/09/2021 09:28:27 (UTC+02:00) Signed by Zamokwakhe Zituta, zama.zituta@necsa.co.za SIGNIFLOW.COM
DISTRIBUTION	ACS Document Management System	

* This document is subject to electronic approval in the Document Management System through authorisation of access and rights in the workflow setting of the system. The electronic version of this document on the document management system is the only authorised version, except in the case of issue of controlled copies.

** Dates are recorded and available in the Document Management System.

REVISIONS

Rev. No.	Date Approved	Nature of Revision	Prepared
01	See published date	First issue	Dr A Nelwamondo

TABLE OF CONTENTS

1. INTRODUCTION AND PURPOSE

ACS department needs to implement a centralized CRM software system through which the department will process and manage customer request for services and relationships. This will includes registration of customers, billing info and processing orders for a baseline of approximately 1500 customers. The required key features are customer contact management, accounts management, sales and contracts management, marketing management, inventory management, workflow management, reporting and business analytics. As part of this project, the winning bidder must put as an add-on to the CRM a Smart Asset Management and Laboratory Information Management Systems.

The purpose of this document is to set out the scope of work and specify requirements to be used to identify if a suitable off the shelf CRM software and the required services will be available from the market. Necsa shall engage with the service bidder to gain a better understanding of the conditions of services to be offered and their requirements.

2. SCOPE OF WORK

2.1 Background information

The current use of "Laboratory Sample Manager" software to service customer relationships management (CRM) needs has proven to be very limited in that the system is designed and configured for laboratory samples management. The ACS customer relationships management function database has also grown much larger and too complex for spreadsheets as Admin Assistants personnel now find themselves spending more time trying to customize LIMS and updating spreadsheets than actually using these tools to find information needed to do job. A centralized CRMs software is seen as the solution in that it will allow for quick access to information across all the relevant systems. For example, an integrated CRM will enable users to access customer accounts, billing information and customer addresses when processing orders. In addition to customer contact and orders management, CRM software will also handle contracts, marketing; sales pipeline activities and sales lead management.

2.2 Using ERP to centralize CRM software

ACS requires an Enterprise Resource Planning (ERP) system that offers integration across all its business units as well as Necsa relevant business systems, including Finance, Information Technology, Supply Chain Management and Human Resources. The goal is to integrate various functions across ACS businesses into a single system solution that can serve the different needs of specific functions. An all-encompassing Tier 2 Enterprise Resource Planning (ERP) system solution that is predominantly aimed at small to medium-sized businesses should be ideal for the purpose. Through the acquired CRM software, users will use tools to combine all laboratory and supporting Necsa systems into one single database. Different functions across the departmental business units will be able to share information and communicate with each other and the customers more effectively.

CRM processes and transactions will be streamlined and centralized giving management the ability to easily transact and draw reports. The envisaged workflow based solution will seamlessly concatenate everything from budgeting and job costing to final invoicing and processing, ultimately reducing complexity and saving the department time and the costs of doing business.

ACS department will be able to provide multiple integration options across all functions and role player department within Necsa systems. In an ERP environment, the department will be able to design and implement comprehensive customer care solutions as well as create sales marketing campaigns, track customers throughout the sales lifecycle, and gauge customer satisfaction.

2.3 Legal and accreditations requirements

The CRM software will assists the department in complying to both legal and accreditation requirements. These will include –

i. planning actions required to address regulatory and quality standards;
ii. upholding of confidentiality of customer information obtained through performance of lab activities;
iii. streamlining process and avoid errors that may have legal implications;
iv. implementing and maintaining management systems that support and demonstrate compliance to accreditation requirements;
v. managing records to demonstrate fulfilment of accreditations and certification requirements such as –
   - controlled access consistent with confidentiality requirements (ISO 17025:2017 Clause 7.5, 8.3, and 8.4)
   - control of database and information management (ISO 17025:2017 Clause 7.11)
   - reporting processes (ISO 17025:2017 Clause 7.8)
   - managing processes required for handling contracts, tenders and customers requests (ISO 17025:2017 Clause 7.1)

vi. assist the department to comply better with PFM Act and Treasury rules.

3. Objectives

Necsa is interested in selecting, implementing, and receiving ongoing maintenance and support for a new centralized CRM software system, which will have the capability to achieve features defined in Table **1**.

Table **1**: Summary of key CRM software required features with examples of the deliverables

Module	FEATURES	CAPABILITIES	DELIVERABLES (Examples)
1	**Customer Contact Management**	Customer Contact details Activity Management Appointment Management Case Management	Keep contact details for each customer such as email address, physical address, postal address, telephone number, contact persons, company registration number, etc. Reach out to current customers and case management - track, close and reopen individual customer existing cases & relationships in secured environment Send targeted content to the right contacts;

2	**Customer Accounts Management & Customer Survey**	Account Management Client Interaction Tracking Payment Management Customer Segmentation Customer Online Survey	Helpful for uniting finance, sales, and customer service; Keep tabs on every interaction a client has with lab Which customers have placed an order? Dividing customer base into groups using purchase history, location, responses, interests, etc. Customer survey /experience journey tracking; Track data related to billing, invoicing, order status and purchase history – and send real-time alerts/reports to a particular customer
3	**Sales & Purchase Order Management (and Contracts)**	Pricelists capturing Quotation generation Samples Submission forms Registration of Sales & PO Invoicing Sales Collaboration Opportunity Management Win/Loss Analysis	Quoting, territory management and sales collaboration Tracking of purchase order processing, deals, competitors, quotes, emails and client queries; Collecting real-time data on potential customer; How many customers renewed contracts; Look back on historical data to track a customer's journey Sorts reports from sales cycles, sales forecasts,
4	**Integration & Database Management**	Database Linking Data Import & Export Document & File Management Microsoft Dynamics LIMS Share Point, MS Office Comprehensive Records	Links between individual databases and master data Includes sorting, filing and categorizing rules Eliminates duplicate entry
5	**Workflow & Employee Management**	Task Scheduling Workflow Management Task Tracking Group Calendar Employee Records Performance Tracking	Supports schedules, performance tracking and other aspects of your workforce; Workflow alerts, configurable workflows, automatic notifications Notifications for tasks that require attention in some order; Task automation Share a calendar
6	**Marketing & Campaign Management**	Campaign Design Batch Email Marketing Campaign Delivery Email Tracking/Integration Competitor Tracking Customer Targeting Auto Responders	Create templates, plan, execute, track and analyse campaigns Includes events and email (social media and even direct mail) Messages and newsletters targeted to specific types of customers Manage cost of running campaigns and analyse return from marketing investments
7	**Reporting & Business Intelligence**	Sales Reporting Activity Dashboard Report on TAT Sales Intelligence Sales Forecasting monthly, quarterly and annual Graphs Business Intelligence	Predesigned reports; Quickly creates custom reports; Gain insight into their customers and users Dashboards provide a visual, interactive way to view the data; Measures and monitors data trends including customer satisfaction
8	**Knowledge Management**	Search Capabilities Document Creation	Supporting document creation; Search capabilities and knowledge creation workflows and storage of documents/templates like email templates,

			Welcome and thank you letters, and proposals
9	**Lead Management**	Lead Capture Pipeline Tracking Lead Follow-up Lead Generation	Score and categorize leads, Create web forms for lead capture Assign new leads to sales reps and manage the sales pipeline How many leads sales converts to customers
10	**Social Media Networking**	WhatsApp Facebook LinkedIn Twitter	Modern communications - quick distribution of info to designated social media

4. Services required

The service provider will be required to provide the following:

a) Application software - the supplier will deliver a centralized CRM system solution which can be installed on a Physical and/or Virtual Hardware, is capable of integrating with any Enterprise Resource Planning (ERP) system, have a server and client application for baseline of approximately 1500 customers;

b) Hardware –the supplier will be responsible for a line by line specification of required hardware but we will not be bound to buy it;

c) Customer consultation - the supplier will provide a consultation service to Necsa that will allow the CRM software to be supplied to be best configured to suit the requirements of the ACS department;

d) Software configuration - the supplier will be responsible for installing and configuring the chosen application software, and to work with relevant Necsa staff to ensure successful implementation;

e) Data transfer, conversion & mapping - the supplier will be responsible for extracting and migrating data from the existing repositories, converting and/or mapping the data as per the Necsa ACS's requirements;

f) Testing - the supplier will assist Necsa/ACS staff with acceptance testing of the Integrated CRM system/software and correct any components that fail to meet the agreed specifications;

g) Commissioning - the supplier will be responsible for preparing and commissioning the system for live use; and

h) Training - the supplier will provide training in the new system to relevant Necsa staff

5. Type of Contract for Deliverables

This bid is for the provision and implementation of a new centralized Customer Relations Management (CRM) software including ongoing maintenance support for an initial period of five years (5). The bidder must also provide, install and commission a Smart Asset Management System.

It is expected that the selected service provider will be requested to enter into negotiations for an agreement with Necsa for the provision of post implementation support, and ongoing maintenance support of a new centralized CRM system for an initial period of five years (5). The post implementation support will include, but is not limited to service disruptions, system failures, resolution of queries, and system enhancements and upgrades.

6. Core functional requirements

The following is a list of the most important CRM functional requirements. The requirements listed in the software system tables are mandatory; also described as "Must Have" unless stated otherwise.

a) General functional requirements;
b) Customer quotations functional requirements;
c) Registration of customer samples and processing of information;
d) Request to invoice (RTI) functional requirements;
e) Integration/interfacing with other systems;
f) Reporting functional requirements;
g) Technological functional requirements; and
h) Support functional requirements.

Bidder is required to make use of the following matrix as a key when responding to the CRM software requirement tables.

Response Code	Description
Y - Existing	Feature is delivered as standard functionality in the proposed version of the software and can be demonstrated by the vendor
C – Customer Customization	Not included. Tools are provided for customization at no additional cost
V - Vendor Customization	Not included. Vendor provides customization at an additional cost
N - Not Available	Requirement cannot be met

6.1.1 General functional requirements

	Requirements	code	module	comments
a)	The system must support different levels of access and permissions - view only, authority to input or amend specific data, ability to generate reports (this functionality must be customizable allowing addition of user defined access levels)			
b)	The system must allow at least 25 users (ACS and Finance) to utilize the system at the same time			
c)	The system must permit data fields to be added or removed without the need for additional system development			
d)	The system must allow for retroactive and future updates (e.g. activation of contract as soon as the company receives a signed contract as opposed to on the actual start date of contract)			

	Requirements	code	module	comments
e)	The system must be able to allow project costing and multilevel cost allocation structure per lab service code			
f)	The system must be able to accommodate Necsa sub accounts numbers system, customer id numbers and automatically generate similar numbers for new customers			
g)	The system must allow for upload and download of documents and files from external sources			
h)	There must be no restriction on the number of the users to be added to the database			
i)	The system must allow for cleaning data (i.e. amending or removing data in a database that is incorrect, incomplete, improperly formatted, or duplicated)			
j)	The system must allow for Alert Management & Information Alerts - keep the lab informed internally of transactions/ data driven events or stay in contact with your customers or suppliers, either via Email, WhatsApp and/or SMS's			

6.1.2 Customer quotations functional requirements

	Requirements	code	module	comments
a)	System must have ready access to customer information including contact details, credits, order history, complaints, etc.			
b)	The system must be able to trigger a workflow of flexible review by designated function and final approval by the supervisor			
c)	The system must automatically send the quote to be checked/reviewed by designated authorized personnel for approval, and thereafter send to issuing official who then sends to the customer			
d)	The reviewer can return the quotation to the requestor with comments			
e)	The supervisor can approve the quotation submission with or without comments			
f)	System must be able to send quotations by email			
g)	The system must support the ability to attach documents to a customer record and maintain unlimited history			
h)	The system must allow for the printing of current and old quotes and purchase orders received			
i)	The system must have functionality to allow for the creation and updating of annual prices list, specific earnings and calculations			
j)	System must allow for creating as many pricelists as are required, and mark-up % price control which ensures the labs always maintain a specified profit margin based on cost			
k)	The system must keep a register of standard pricing for all products and services which must be used for generating standard quotations			
l)	The system must send a reminder to the relevant person to review the price list on or before the 15th of December each year; and again by end of January of the following year; and			

	Requirements	code	module	comments
	allow electronic notification of new prices to all customers upon approval each year			
m)	The system must allow issuing of quotations for each lab (RA, PAL, CAL, RP and NFP) and any combination of quotes (such as RA & PAL, RA & CAL, RP & RA, and PAL & NFP)			
n)	The system must be able to flag a quote compiled and not authorized for issuing to a customer within a month (30 days)			
o)	The system must always include the sample submission form when issuing quotations			
p)	The system must yellow flag in real time if a quote is compiled and issued, but the customer has not accepted nor send samples within 30 days (red flag after three months)			
q)	The system must be able to archive the first version if a quote is compiled and issued, but the customer request a revised quote			
r)	The system must allow quotes to be done on the fly (i.e. generate quote anywhere outside work at any given time), and extracting data to compile a report any time			
s)	Financial profile must be entered once and directly linked with various components of the system enabling further analytics & processing (e.g. internal cost structure, cost processing, etc.)			

6.1.3 Registration of customer samples and processing information

	Requirements	code	module	comments
a)	The system must allow capturing information of new customer, customer contact information, geographic information, service types, account, etc.			
b)	The system must distinguish customer status between internal and external registration			
c)	Authorized personnel (e.g. Admin Assistants) must be able to register a new customer (i.e. create a customer profile in the system to be reviewed by supervisor, supported by manager, and then forwarded to finance for credit application assessment			
d)	Admin Assistants line supervisor to confirm new registration and request review of registration and to manager for authorization			
e)	The system must support dynamic processing and workflows. For example, when a new customer is being processed and service type is entered as contract, the system will navigate to another screen to enter contractual information, whereas if service type is purchase order the workflow avoids this step			
f)	The system must allocate a unique Task/Job number upon registering customer samples and then notify customers of the receiving of samples and provide Job no for use as reference			
g)	The system must follow job number notification with request for customer to send PO or Proof of Payment in order for the lab to commence with the analyses			
h)	The lab must return with TAT upon confirmation of PO, and report work done based on communicated TAT			

	Requirements	code	module	comments
i)	The system must have the ability to capture service agreements/contracts information including the name, duration and income, annual increases, etc.			
j)	The system must allow for the setup of multiple labs sub accounts for separate tracking and performance reporting in one database			
k)	The system must send auto notifications by e-mail to finance to confirm new registration and request for records update			
l)	The system must provide a library of standard email notices and communication correspondence for printing and electronic distribution to clients and new customers			
m)	The system must keep history of customer activities (quotes, PO, complaints, etc.)			
n)	The system must allow credits applications, contracts, orders, completed sample submission forms, etc. to be uploaded and maintained			
o)	Admin Assistants must be able to track customer sample submission status			
p)	Line management must be able to view customer communication history			
q)	The system must keep a register of signed/approved contract with the info about - start date, finish date, contract amount, etc. and must send a reminder to the relevant coordinator three months before date of expiry			
r	The system must support the tracking of service agreements periods and expiry of contracts. The system must support automatic notification of upcoming contract expiry, defaulting and end of contract			
s	Customer searches must be able to base on variety of criteria (e.g. name, geographic location, market segment, services requested, date of orders, complaints, etc.)			
t	The system must support a variety of customer related dates searches including; date registration, date of orders, period of service, date account placed on hold, restart date, etc.			
u	The system must allow workflow approvals to be configured differently depending on service agreement type (e.g. internal vs. external customers, purchase order vs contract) and other factors (such as cash payment or emergency orders with police case numbers)			
v	The system must allow Admin Assistant to update customer record for approval by line management			
w	The system must support the partial save of a record during customer information capturing and processing			
x	The system must allow administrators to establish access levels in the system by role (i.e., administrator,admin assistant, supervisor, line manager, senior manager)			
y	The system must prevent duplicate entries by accessing location and customer information already residing within the system			
z	The system must allow flagging, placing account on hold and any other customer changes			

	Requirements	code	module	comments
aa	The system must allow classification of services pattern as ongoing, weekly, monthly, quarterly, annual or some other frequency			
bb	The system must not allow a customer that has been registered to be deleted from the system, they may only be terminated			
cc	The system must provide detailed audit related data of any change of customer records			
dd	The system must have the ability to inactivate lab services as required			
ee	If a processing date falls on a Public holiday, Saturday or Sunday the system must automatically move to next possible date or allow the date to be manually changed			
ff	The system must have automatic triggers that are raised for any discrepancies in capturing, calculations, etc.			
gg	The system must allow that when registering a job it must be a mandatory for - certification to use the quote issued for the whole year, contracts and SLAs use of the unique number instead of quote number.			
hh	The system must flag jobs to relevant Section Heads and MDS personnel if TAT will not be achieved beforehand to inform the customer			

6.1.4 Request to invoice (RTI) functional requirements

	Requirements	code	module	comments
a)	Approved RTI are transferred to Finance by way of running a process batch on the system			
b)	System must allow for printing current and old purchase and RTI transferred to finance			
c)	The system must allow for the reversal/ voiding/ adjustment of issued invoices while properly maintaining customer year-to-date credit balances			
d)	The system must allow reversals/voids /adjustments to be fed to the General Ledger			
e)	Financial year-to-date, Calendar year-to-date and Month-to-date totals for RTI, Invoices received, payments, and none payments information must be maintained for reporting and auditing purposes			
f)	The system must produce error and warning report			
g)	The system must be able to trigger a RTI workflow of flexible approval by the supervisor. The supervisor can approve the RTI with (or without) comments			
h)	The system must have the ability for the user to print RTI and pro-forma invoices			
i)	The system must allow for electronic funds transfer (EFT/ACB)			
j)	All customer financial amendments must have a clear auditable trail that can be drilled down to time, date, user, etc.			
k)	The system must keep record of tracking and reporting of complaints, interactions with customers, retrieve and print			
l)	The system must allow users to print current and old PO and			

	Requirements	code	module	comments
	RTI reports/certificates			
m)	The system must be able to receive indication of all "completed" jobs ready for invoicing from a LIMS system and once this exercise is completed the system must flag all jobs that are ready for invoicing			
n)	The system must link to finance, generate requests to invoice and extract data for reporting, send to finance for Tax invoice			
o)	The system must be able to issue pro-forma invoices of which the record/register thereof must be sent electronically to Finance Department for information purposes; and Finance Department must have access to the system to view such records and upload if necessary			
p)	The system must allow merging Sales or Purchase Orders - merge multiple sales orders into a single invoice, multiple invoices into a single credit note, or multiple supplier invoices into a single supplier return.			
q)	The system must allow Purging and Cancelling Orders - Clean up and speed up the system by purging orders that you no longer need to see			
r)	System must be able to flag payment not received for sample processed and invoiced			

6.1.5 Integration/interfacing with other systems

	Requirements	code	module	comments
a)	Integration to be done with three systems, LIMS, SharePoint and Microsoft Dynamics and HR Payroll System			
b)	The system must allow uploads from excel or csv file to populate records			
c)	Necsa will require an interface with Microsoft Dynamics SL, our core financial system. Service provider must describe if, and how, this interface can be supported, and what experience their organizations have with Microsoft Dynamics SL			
d)	The system must allow for transfer to general ledger, Cash manager and Accounts Receivable of the Financial system (Interface of Transactions)			
e)	The system must be able to streamline data that is maintained in an external system or file that is transferred manually back into system			

6.1.6 Reporting functional requirements

	Requirements	code	module	comments
a)	The system must be able to pull historical data based on effective dates			
b)	The system must provide flexibility for defining selection criteria, data ranges, sorting and grouping options			
c)	The system must allow extracting of data to compile a registration and sample processing report any time			

d)	The system must analyse, track profit, loss and budgets per ongoing projects, jobs, cost centres, and so forth			
e)	The system must have ability to enable users to tailor information for their specific needs. (Hide columns, Fitter, Sort, etc.)			
f)	The system must produce system generated statistical reports prepopulated with existing data (i.e. number of PO, contracts, RTI submitted/returned, new customers registered, payments received against PO/contracts, outstanding work invoicing, etc.)			
g)	The system must have a report on the number of Credits applications and those who meet the requirements. It must be limited to line management, but can be forwarded to lab management			
h)	The system must allow for delivery of users defined reports in a variety of formats (e.g. PDF, Excel, etc.) and to download data extract to file these file formats.			
i)	Access to reports must be based on user's position and functional role; filtered security setup			
j)	The system must allow super users and/system administrator to perform the following functions: View Reports for All Clients; Draw dashboards/graphs; Download entire dataset in Excel (Filtering)			
k)	The system must allow for Dashboards; Report & Batch Scheduling; Transaction Audit Tracking; Data Imports and Exports			
l)	The system must allow bulk Emailing, Send customer statements via bulk statement run, Supplier remittances, customer and supplier sales and purchase document			
m)	System must allow sending Mail Merge, sending personalized letters of demand to customers with overdue terms or where past their credit limits via email and keep track of correspondence.			
n)	The system must automate reconciliation of RTI run variations and generate reports detailing variances at individual customers and summary level			
o)	The system must generate reports for all the information under case management			

6.1.7 Technological functional requirements

	Requirements	code	module	comments
a)	The system must be active directory (AD) integrated			
b)	The system must support SQL platform			
c)	The system must have the ability to provide automatic email notifications			

6.1.8 Service provider support requirements

	Requirements	code	module	comments

	Requirements	code	module	comments
a)	The service provider must provide relevant training to all users and system administrators			
b)	The bidder/service provider must give information regarding the following:			
	i. Provide an overview of customer support and maintenance services			
	ii. The cost of annual maintenance plan			
	iii. How does the firm educate and train its service and support staff			
	iv. What hours does the company provide service and support			
	v. Is there weekend or after hour support			
	vi. Is there an after-hours emergency contact number if needed, is there a charge for this service			
	vii. How often the company releases new versions of the software			
	viii. When are new releases and upgrades performed, for example, during weekends and non-business hours?			
	ix. What is the test process for new versions?			
	x. What is the migration process in upgrading to new versions?			

6.1.8 Other Service provider requirements

The service provider should be recognised by Treasury and by SITA. The service provider must also satisfy all the Necsa conditions of service provider.

7. Add-on modules to support specific business functionality needs

ACS requires few add-on modules to support specific business functionality needs. The additional modules are Integration, Automation, Data Analysis, Business Intelligence Reporting, Accounting, Tracking and Visibility.

The following is a brief description of the most important CRM software add-on features required.

7.1 Integration

Integration ensures the numerous capabilities offered by ERP systems work together harmoniously. That is, ACS requires the ability to integrate with other systems to provide a fully integrated, intuitive platform through which to can analyse, monitor and conduct the majority of data-driven tasks. ERP will enable the use of a single database to collect, store and analyse data across all laboratories and business units to ensure seamless communication within the department, relevant parts of the parent organization, and the customers. Integration will allow ACS business functions to work with multiple components at once. For instance, with integrated customer relationship management (CRM), personnel will access order history and customer information in the same system.

7.2 Automation

The inclusion of ERP automation will benefit a number of common tedious tasks including quotations, credits control, order entry, accounting management, invoicing, reporting and more. Automation will optimize the hours staff would typically spend on these processes, allowing them to focus on other assignments. Automating processes must also reduce human error and data will be send from one part of the system to another, without any chance of error.

7.3 Data analysis

The use of data analytics tool will provide insight into business trends and offer predictions based on past practices thereby ensuring smooth operations (efficiency) and improved productivity. ERP data analysis capability will enable the analyses of data relating to all business operations, including client data, production statistics, sales data and customer satisfaction. Data analysis function reveals trends and patterns in business processes and will enable personnel to reflect on the effectiveness of certain tasks, in addition to providing forecasts for future business decisions. This way, the department will be able to better predict demand, create a budget and analyse CRM functions, as well as to track ACS productivity and efficiency.

7.4 Intelligent reporting

ACS requires the tool to convey analysis to an end user to include customizable dashboards, charts, graphs and other visual representations. Access to reports must however be restricted to protect valuable department and customer information.

7.5 Accounting

Customer accounts and financial dealings are two of the most important functions in CRM scope of responsibilities and we therefore require strong account tool as an element of the CRM software package. This will help ACS business to manage sales and revenue processes like credits control, invoicing, accounts payable, accounts receivable, fixed-asset management, and risk management. It will enable automation of common accounting functions payments processing, sales analysis, and expense management.

7.6 Tracking and visibility

This will enable tracking of CRM function activities and thereby allow personnel to understand and foresee issues such as delays and accounts on credits hold. It must be used to manage sales, orders, and staff productivity. Personnel will be able to set up alerts for certain events, keeping them up to date on the most important activities.

8. Cost of ownership

The department wants a clear indication on how the cost of ownership will be structured based on the following categories.

a) License/Subscription cost;
b) Maintenance cost;
c) Hardware

d) Installation/Implementation cost;
e) Customization cost;
f) Data migration/transfer;
g) Training cost; and
h) Recurring/renewal costs;