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**Invitation to Tender**

Integration and Implementation of Netsuite ERP with an E Commerce website

BIG 2051

1. **Introduction**

Rocket Gardens Ltd grow and sell unique instant organic vegetable, herb, salad and fruit gardens, which we then dispatch direct to the customer’s door. The boxes of baby organic plants arrive packed in straw with a comprehensive growing guide so that each customer has all the information required to plant out and look after their vegetable garden.

Our gardens are sold predominately via our own website to individual customers and schools, but also through our network of online and high street retailers.

So that these instant gardens can be sold all year round, we have also developed Instant Garden Gift Vouchers. These vouchers are for specific gardens and have proved to be very popular, especially around Christmas time.

We have now reached a point where our current ERP system (Mamut) is no longer able to provide us with the information or functionality required for the company to continue to grow.

We have undertaken a review of existing ERP solutions and have decided on Netsuite as our solution. The key objective of this project is to implement a Netsuite solution which will handle all aspects of business processes, from holding customer information, orders, gift voucher redemptions, stock control, accounting and delivery management of orders fully integrated with our own ecommerce website within one seamless system.

1. **Project Specifications**

Our project is to implement a Netsuite/ecommerce solution that is fully integrated with our website. It must be able to fulfil tasks detailed below that are fundamental to the running of our business.

The Netsuite/ecommerce solution will be handling every aspect of our business so we would be looking to work with a company that has a minimum of 5 years’ experience integrating Netsuite to ecommerce websites.

To make sure that all our current customer data is migrated successfully from our existing system (Mamut) to the new ERP, the successful developer will need to create a Sandbox test environment. This will allow the developer to work on real data, but without effecting our system on a day to day basis and to check that all the functions are working as per the specification detailed in this tender document.

Fundamentally, the successful developer will need to develop a high level of customisation beyond the standard functionality of Netsuite for it to integrate with the ecommerce aspect of the project and be able to handle the business processes that we require.

**Customer Data**

The system must be able to hold all the following information for each individual customer on their own personal record:

* Customer account on the website links to their record in the ERP showing their contact details as we have them, order history and status of outstanding orders.
* Name.
* Billing address.
* Delivery addresses.
* Email address.
* Customer telephone numbers.
* Order history and outstanding orders.
* Have the facility for us to record any correspondence with the customer.
* Opt-in/out for marketing information.
* Have the facility for us to identify on the customer record the different types of customer, i.e. schools, customers buying for their own homes/allotments, retailers etc.

**Orders**

As the Netsuite solution will be integrated to the website, it is vital that it is able to handle the orders that are placed online correctly and can fulfil the following requirements:

* Needs to be able to check whether the customer has previously ordered from us to make sure it doesn’t duplicate records.
* If the order has items that cannot be dispatched at the same time of year (i.e. spring plants and Autumn plants) then it needs to create 2 orders in the system for this customer.
* Any delivery notes and gift messages must be held within the order.
* If the delivery address is different to the billing address, this needs to be added to the order.
* If a discount code has been used, then this information needs to be held within that order and be in a searchable field so that we can track the success of a campaign.
* There needs to a be a field that can hold any dates that an order **CANNOT** be delivered between.
* We also need a field which will hold a date that an order **MUST** be delivered on.
* We need to have the ability to amend delivery address, delivery dates and delivery notes.

**Gift Vouchers**

The sale of our unique range of Instant Garden gift vouchers through our own website and via other retailers is a fundamental part of our business that needs to be fully automated to allow the business to expand by being able to sell these products through a larger number of retailers. The gift vouchers are for specific products, not a monetary value.

* When a customer purchases a gift voucher online, the system needs to create the customer order.
* A unique activation code must be generated for each voucher that is ordered and this must be visible in the order.
* Each code will need an expiry date, 1 year from date of production for customer orders and 2 years for retailers who hold stock of the vouchers.
* We need to be able to see every day how many gift vouchers need to be delivered so that they can be dispatched in a timely manner.
* The office team need to be able to generate codes as well for any orders placed over the phone, or by retailers.
* These activation codes need to be able to be printed through our zebra printer and they need to include the following information:
	+ Product Name
	+ Activation Code
	+ Expiry Date
* When a customer redeems a voucher, the system must validate the code as soon as it is entered onto the website.
* If a code is incorrect, already redeemed or expired, it needs to communicate with the website to make sure that the relevant message appears on the customer’s screen.
* If the code is correct, it identifies which type of product this voucher is for, and creates an order in the ERP system for that customer with a value of £0.
* This process needs to also work for E-Vouchers, so that an email is sent straight to the nominated email address with the information regarding the garden they have been bought, and with their unique activation code.

**Gift Tokens**

* These are monetary value vouchers.
* This needs to work in a similar way to the Gift Vouchers, but for a monetary value instead of for a specific product.
* If the whole value of the token isn’t used, it needs to show in the customer record how much is still left and allow them to use the remaining balance on a later order

**Delivery Management**

Due to the nature of our products, we have customers who pre-order their plants months in advance of them being ready to dispatch. We need the system to be able to handle the scheduling of these deliveries as and when the plants become available.

We have a Delivery Management System in place at the moment which works independently from our current ERM system which carries out the following processes. It is vital that the new solution is able to carry out all of these processes too and function seamlessly within the single Netsuite environment rather than our current reliance on a series of disparate software solutions.

Before Scheduling

* We decide how many packers there are going to be for the shift and how many hours they will be working, and set the correct number of batches for the date we are looking at.
* The system must only batch products which we have marked as in stock.
* If an order has some items in stock and some out of stock, this order **MUST NOT** be scheduled.
* Each product must have timings set for how long each of the products takes to pack, so that it can work out how many orders, based on these timings can be packed per batch for the allocated time.

Scheduling

* Once we are sure all the settings from above are correct, we then look at each batch individually.
* We have 3 possible ways to batch the orders
	+ For any product (so that we have said is in stock)
	+ For only (we select which product is the only thing we want to pack in this batch)
	+ Containing (any orders which contain the product we select AND anything else which is now in stock)
* The first batch we always run is for our “must go” orders. These are orders which MUST be packed on a specific date, and this overrides any other settings, such as the in/out of stock list.

After Scheduling

* Once we have confirmed that we are happy with a batch, the DMS then drops the batch number and estimated delivery date into each order on our existing ERM that has been included in the batches.
* We are then able to print summaries of the batches and the delivery notes.
* The delivery notes have a barcode on them which we scan to generate our courier label.
* It also generates a plant list for each shifts packing, detailing each plant and the number of plants required.
* We can specify which batches we want to be included in each plant list. E.g. sometimes we want a plant list for a packer for a specific day, whereas other times we want to see what they will need for a whole week.
* The DMS is also linked to our courier system, so when an order is scanned, the DPD system is able to print the courier labels.

Packing

* The Packhouse have a screen within the DMS which they use to show them which orders are still remaining to be packed. This is a live feed.
* Any orders which are “must goes” have a red triangle on it to flag up it must leave that day.
* Orders going to address which take more than one day are flagged with a yellow triangle so we know that these must also leave us that day.
* The DMS will not batch an order which takes 2 days for a Thursday packing for instance, and this is based on a list of postcodes and the number of days it takes to reach them, which is held within the DMS.
* Once DPD has left, we run an end of day process in the DMS which looks at the courier’s manifest and then puts into each order on Mamut that has been sent the consignment number and the date that the parcel left us.

Other Functionality

* Sometimes a customer will request that an order must delivered on a specific date (must goes), and the DMS identifies these from the date of delivery which we have entered in the order.
* In other cases, we have dates that an order cannot be delivered between, so the DMS will skip these when batching. This is identified by the dates we have entered into the order as date of production and date of delivery or our current system, so it’s really important to us that we have somewhere to be able to enter “do not send” dates to orders.
* Once we have emailed customers to say that their order has been scheduled for dispatch, we often have people wanting to rearrange the delivery date. There is a function within the DMS to “pull” an order. This removes it from the batch and give us the opportunity to enter new delivery dates.

**Reporting**

Being able to extract data from the ERP system is extremely important to us. Not only for sales figures, forecasting etc., but also to help us market our products more effectively.

* It must be able to allow us to track any campaign or promotion that we run so that we can see which campaigns are the most successful and use this to help us with future marketing campaigns.
* Being able to look at sales data is also key for us to be able to make sure that we are marketing the correct products to each customer profile.

**Accounting**

The Netsuite solution must be able to provide us with a full accounting package that is held in the same system as our customer database and delivery management tool. We require the accounting package to be able to carry out the following tasks:

* Customer invoicing and payment.
* Purchase order processing**.**
* Item creation (sale, purchase, resale, group, kit).
* General ledger.
* Profit and Loss account.
* Balance Sheet.
* VAT recording/reporting.

**Commissioning and setting to work**

The system will be required to be commissioned by demonstrating the functionality listed above.

1. **ITT Timetable**

The anticipated timetable for submission of the tender and commission milestones are set out below:

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Date ITT available on Contracts Finder | 03/10/2016 |
| Last date for raising queries | 10/10/2016 |
| Last date for clarifications to queries | 12/10/2016 |
| Deadline to return ITT | 17/10/2016 |
| Evaluations of ITT | 18/10/2016 |
| Award of Contract | This is subject to successfully obtaining grant funding and will normally be no later than 90 days from contract evaluation |

1. **Conflicts of Interest**

Please provide a statement with regards to a conflict of interest for this procurement through the provision of either: -

A Declaration that to your knowledge there is no conflict of interest between your company and Rocket Gardens Ltd that is likely to influence the outcome of this procurement either directly or indirectly through financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the contexts of this procurement procedure.

Or

A Declaration that there is a likely conflict of interest between your company and Rocket Gardens Ltd that is likely to influence the outcome of this procurement either directly or indirectly through financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the contexts of this procurement procedure, please provide details of this connection.

This will permit Rocket Gardens Ltd, that in the event of a conflict of interest, appropriate steps are taken to ensure that the evaluation of any submission will be undertaken by an independent and impartial party.

**Exclusion**

Rocket Gardens Ltd shall exclude applicants from participation in this procurement procedure where they have established or are otherwise aware that the applicant, to include administrative, management or supervisory staff that have powers of representation, decision or control of the applicants company, has been the subject of a conviction by final judgment of one of the following reasons: -

 Participation in a criminal organisation

 Corruption

 Fraud

 Terrorist offences or offences linked to terrorist activities

 Money laundering or terrorist financing

Child labour and other forms of trafficking in human beings

1. **Consortium or Sub-Contracting**

Where a consortium or sub-contracting approach is proposed, all information requested should be given in respect of the proposed prime contractor or consortium leader. Relevant information should also be provided in respect of consortium members or sub-contractors who will play a significant (greater than 25%) role in the delivery of the services under any ensuing Contract.

1. **Tender Application Requirements**

Please provide paper copies of your application which should include:

* Confirmation that you the supplier are able to meet the requirements outlined in the brief above.
* Have included the Reference requested be used with all Tenders.
* Details of who to contact in your company in relation to this tender.
* Total cost of providing the goods/services requested in the format required.
1. **Tender Scoring Criteria**

The tender will be scored only on their compliance to the specification set out in section 2 and awarded to the lowest compliant tender.

1. **Tender Returns**

Tenders may be returned by email or post, or by delivery in person.

Tenders are to be returned by: -

* Latest date to be returned: 17/10/2016
* Latest time to be returned: 17.00 pm

If submitting by email, tenders should be sent electronically to mike@rocketgardens.co.uk with the following message clearly noted in the Subject box; “Integration and Implementation of Netsuite ERP with an E Commerce website”.

Tenderers are advised to request an acknowledgement of receipt when submitting by email.

If submitting by post or in person, the Tender must be enclosed in a sealed envelope, only marked as follows: -

Tender - Strictly Confidential – ““Integration and Implementation of Netsuite ERP with an E Commerce website”.

Contract Reference Number: BIG 2051

Addressed to:

Mr M Kitchen

Rocket Gardens Ltd

Treverry Farm

Mawgan

Helston

Cornwall

TR12 6BD

The envelope should not give any indication to the Tenderer’s identity. Marking by the carrier will not disqualify the tender.

If delivery by hand please obtain an official Receipt at point of delivery

1. **Clarification**

There will not be any negotiations of any of the substantive terms of the Tender Documents. Only clarification queries will be answered. Any clarification queries arising from the Tender Documents which may have a bearing on the offer should be raised as soon as possible in writing. The deadline for clarification questions is 7 days before the submission date. All e-mailed queries should be sent to: -

Name: Michael Kitchen

E-mail: mike@rocketgardens.co.uk

No representation by way of explanation or otherwise to persons or corporations tendering or desirous of tendering as to the meaning of the tender, Contract or other Tender Documents or as to any other matter or thing to be done under the proposed contract shall bind us unless such representation is in writing and duly signed by Michael Kitchen of Rocket Gardens Ltd. All such correspondence shall be returned with the Tender Documents and shall form part of the Contract.

Tenderers must provide a single point of contact in their organisation for all contact between the Tenderer and Rocket Gardens Ltd.

Responses to any queries will be shared through Contracts Finder website.

1. **Disclaimer**

The issue of this documentation does not commit Rocket Gardens Ltd to award any contract pursuant to the bid process or enter into a contractual relationship with any provider of the service. Nothing in the documentation or in any other communications made between Rocket Gardens Ltd or its agents and any other party, or any part thereof, shall be taken as constituting a contract, agreement or representation between Rocket Gardens and any other party (save for a formal award of contract made in writing by or on behalf of Rocket Gardens Ltd).

Bidders must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender responses. Information supplied to bidders by Rocket Gardens Ltd or any information contained in Rocket Gardens Ltd’s publications are supplied only for general guidance in the preparation of the tender response. Bidders must satisfy themselves by their own investigations as to the accuracy of any such information and no responsibility is accepted by Rocket Gardens Ltd for any loss or damage of whatever kind and howsoever caused arising from the use by bidders of such information.

Bidders shall be responsible for their own costs and expenses in connection with or arising out of their response. Rocket Gardens Ltd reserves the right to vary or change all or any part of the basis of the procedures for the procurement process at any time or not to proceed with the proposed procurement at all.

Cancellation of the procurement process (at any time) under any circumstances will not render Rocket Gardens Ltd liable for any costs or expenses incurred by bidders during the procurement process.