



Proposal Title:

Implement Odoo for Quality Analytical Laboratories.

Proposal Document Number:

RFP/QAL/2016/v1

Customer Name:

Quality Analytical Laboratories

Customer Website:

<http://www.QAL.US/>

Version: 1-00

Document Security: CONFIDENTIAL

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Date: 28th March, 2016

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DOCUMENT CONTROL

Document Storage

Document title: Implement Odoo for Quality Analytical Laboratories.

Author: Shahid Bandarkar

Last Updated: March 28th, 2016

Last Saved by: Shahid Bandarkar

Version Control Log

Version	Author	Description of changes	Date
V-1.0	Shahid Bandarkar	Initial Proposal Release	28th March, 2016

Document Circulation

Organization	Department	Person	Title

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Originated in CA, USA.

Bista Solutions Inc

About Bista Solutions Inc

Bista Solutions is a dynamic software company providing world-class business solutions to a wide range of enterprises. Bista Solutions is headquartered in California with offices in Atlanta, Canada and India. We provide consulting services at competitive prices. We have many years of experience in analyzing requirements of businesses and developing applications to meet their business needs. Bista Solutions provides services through the all phases of development of an enterprise solution including:

- Business Process Analysis.
- Requirements Gathering.
- Choosing appropriate Architecture & Design.
- Development.
- Implementation & Roll-out.
- User Training

We have very strong expertise in open-source business applications. We evaluate the leading **open-source applications** for **ERP, CRM, BI**, etc and implement it for our clients.

We use the "Agile Software Development" methodology which includes iterative development, close customer collaboration & providing frequent releases to the Client.

1. BACKGROUND AND BUSINESS REQUIREMENT

1.1 About the Client

Quality Analytical Laboratories, LLC (QAL) has poised itself as the trusted industry partner by providing unbiased, accurate laboratory analysis to the horticulture industry as a whole. Laboratory staff is highly trained and qualified, with a dedication to accuracy and service that has earned the trust of thousands of customers worldwide.

1.2 Business Requirements

QAL is currently managing much of their processes manually. They are using QuickBooks for accounting.

1.3 Business Challenges

QAL has done extensive business analysis and provided us with detailed information regarding their needs for Odoo implementation.

2.0 Deliverables of this Phase

Odoo 9.0 Enterprise will be implemented. The following major modules of Odoo to be implemented are

- 1) Accounting
- 2) Sales
- 3) Purchase
- 4) CRM
- 5) Warehousing
- 6) HR
- 7) Inventory
- 8) Manufacturing (Basic)
- 9) Integrations
- 10) Reporting

SrNo	Details
1	Masters and Configuration
	Install Odoo and setup related modules
	Configuration of Products, categories, uom, attributes and procurement policies
	Pricelist setup (cost price & sale price)
	Stock and Manufacturing Locations

	Employee Set up with access privileges and roles
	Customer & Suppliers setup with related configuration data
	Configuring generated documents of Odoo as per Client's template (Logo, formatting, etc.)
2	Warehouse & Inventory Management
	Setup and configuration of Warehouses & Locations and their hierarchy
	Tracking of all items by Serial number and related Warranty period (needs support from Activation process)
	Bar coding support
	Configure & setup Stock Rules
	Stock Traceability (from Purchase to Sale)
	UPS, Fed-Ex & USPS Integration
	Import of Inventory levels at go-live
	Stock Aging and historical reports
	Setup of MRP and reordering rules for Inventory
3	Purchase Management
	Setup of Suppliers and related configuration
	Implementation of Odoo Purchase process
	Receiving goods from Suppliers
	Suppliers payments
4	Sales Management
	Setup of Customers and related configuration
	Setup of payment terms and credit limits
	Configuration of shipping & invoicing policies
	Dispatch of goods to customers
	Drop-ship (if required)
	Implementation of Odoo Sales process
	Handling Sales returns and refunds as per Odoo implementation
	Sales forecasting module
5	Manufacturing
	Out-of-box Manufacturing implementation
	Setup BoM
	Manufacturing Orders processing and Work Order processing
	Reports & analytics
6	CRM Implementation
	Implement Client's CRM workflow using Odoo out-of-box CRM module

	Setting up Sales team, hierarchy, roles privileges etc.
	Marketing campaign management in Odoo
	Odoo will be the master for all Customer data
	Odoo will be the master for all leads captured through various campaigns
7	Integration with Lab Instrument
	Integration will be done via SQL tables.
8	HR
	Employee Self Serve
	Leave Management
	Appraisal Process (360 appraisals)
	Recruitment process and applicant tracking
	Expense management
	Timesheet management for hourly employees
9	Accounting & Finance
	Implementation of out-of-box accounting of Odoo
	Setup of customer's chart of account
	Setup of Fiscal year, periods and banking details, bank statement import
	Setup FiFo costing of Inventory
	Configuration of Tax and Tax codes based on the location of the customer
	Multi-company / multi currency setup (if required)
	Import of Account balances, pending AR/AP by using CSV file
	All Accounting reports will be available including Balance sheet, PnL, Aging
	Budgeting module will be setup to manage budgets and reporting
	Asset management and depreciations
	Support for billing of Apple sales which work as consignment inventory and hold back some payments for charges of holding inventory
10	Final Integration & Roll-Out
	Integration of all the modules
	Integration testing of entire solution
	Roll-out & training for users on all the implemented functionality

2.1 Integrations

Odoo will be connected to lab instrument via SQL tables. QAL will provide SQL tables to which Odoo will read/write data.

2.2 Data Migration

Master data (customers, products, vendors, etc.) will be migrated to Odoo. Open orders, invoices, etc. will also be migrated to Odoo. Historical transactions will not be migrated to Odoo. Bista Solutions Inc uses ETL solutions such as Talend to achieve data migration.

3.0 Timelines, Resources and Costs

3.1 Timeline

18 Calendar Weeks

Start Date: April 4th, 2016.

Go Live Date: August 1st 2016.

3.2 Resources

The team will comprise of the following members. Training will be done onsite.

1. Three Odoo developers

3.3 Costs

Estimate in hours

High Level Task	Estimate
Detailed Business Analysis	16
CRM	80
Inventory Management	80
Lab Workflow	280
Matrix Creation and Configuration	80
Masters for matrix	200
Reporting workflow	120
Customer Portal	120
QC Process	120
Reporting template	80
Purchase	40
Accounting	120

Integration with Lab Instrument	160
Export of reports in Excel	80
Reports for Different Department	160
Report for Top Management	160
Data Migration - Old Customers (Without Reports and Sample)	40
QA	160
Training	40
Server Setup	40
Total	2,176

S.No.	Resource	Estimated hours	Rate	Cost
1.	Onsite	0	\$125/hour	\$0
2.	Near shore	0	\$80/hour	\$0
3.	Off shore	2,176	\$25/hour	\$54,400
		Total		\$54,400

1) Timesheets and invoices will be emailed once every 2 weeks.

2) Advance of \$10,000 to be adjusted against the initial fortnightly bills.

3) Payment term is Net 15

4) Annual Odoo enterprise cost is \$240/user to be paid to Odoo.

3.3 Hardware

- 1 - Application Servers (c4.2xlarge)
 - Ubuntu 14.04, 64 bit
 - 2 X Intel Xeon processor Quad Core
 - 16 GB RAM
 - 250GB HDD
- 1 -DB Server (m4.2xlarge)
 - PostgreSQL 9.4
 - 2 X Intel Xeon processor Quad Core
 - 32 GB RAM

- 2 TB High Speed HDD (SSD/SAS/RAID)

3.5 Terms and Conditions:

- All quotations, proposals and estimates provided are valid for a period of 30 days from date of issue. Quotations or Proposals not accepted within this timeframe must be re-issued.
- Any advance payment from the client means financial commitment and project approval.
- Invoices are Net 30 or as per the payment terms of the invoice. If payment is delayed it leads to termination of this contract or client has to pay penalty for late payment.
- Work commenced on the project only when advance payment received.
- Any delay in providing information will result in project delay. If the client provides delayed responses that lead to project delays then it nullifies timeline clauses in this proposal. Any such project delays will be billed to the client.
- Client should provide contacts of appropriate members of the staff for coordination regarding the project. For prompt and speedy completion of project, we want client to delegate a single individual as 'first-point-of-call' to aid Bista Solutions Inc. The client should offer complete cooperation and support in providing all relevant content, images and reference that go into successful completion of the project.
- Any scope changes, alterations or extra work requested by the client after development has begun will incur extra development and testing cost. Dependent upon the change requested we will quote the extra time and the charges that will apply. Bista Solutions Inc. doesn't take responsibility of any third party dependencies due to which scope of the work changes. Any scope changes, extra work required to be done due to such dependencies will be charged at the hourly current rate at the time of carrying out this extra work.
- Bista Solutions Inc. will endeavor to complete all work within the estimated timeframes discussed with the client in the proposal. However, Bista Solutions Inc. will not be liable for any penalties, monies or hardships otherwise incurred by the client if the application cannot be delivered within the estimated timeframe.
- Bista Solutions Inc. will not release the application unless all payments have been met under the obligations of the Proposal or agreement.
- In case of cancellation or discontinuation of project, client needs to send the request to us in writing. Bista Solutions Inc. will invoice the client for any work completed to date, as a percentage of the total work involved.
- During the term of this contract and for a period of 2 years following the termination of this contract, either party shall not directly or indirectly employ any person from each other company.
- Bista Solutions Inc shall not be liable for any losses or damages related to loss of business profits, interruption of business, loss of information or any other type of direct or indirect losses arising from use of our Services. Further Bista Solutions shall not be liable for any losses or damages arising from prolonged non-availability of our Services due to whatever reasons. In such cases, you may choose to cancel our services. In all such cases, our liability will be limited to the fees that you have paid towards our services.

These Terms and Conditions supersede all previous representations, understandings or agreements. The Client's signature below or payment of an advance fee constitutes agreement to and acceptance of these Terms and Conditions. Payment online is an acceptance of our terms and conditions.

4.0 Change Request (CR) Process

During the course of project execution, if customer wants any changes to the proposal then those changes will be managed through the Change Request process as shown below.



Any Change Requests will be documented by Bista team and must be signed off by the customer. Records of all change requests will be maintained by Bista team and will be produced to the customer for reference if needed.

Quality Analytical Laboratories

BistaSolutions Inc

By:

By:

(Authorized Signature)

(Authorized Signature)

Name:

Name: [Shahid Bandarkar](#)

(Print or Type)

(Print or Type)

Title:

Title: Director