CAUFERO

Growing Businesses Through Technology

PROPOSAL

TO

KOOLTOOL
(A Manufacturing Company)

PREPARED BY

CAUFERO
(A Software Service Provider)

Proposal for KoolTool – FileMaker Custom Solution (PHASE 1)

Caufero, a registered software development company operating in Ghana, shall be referred to as the "Service Provider" throughout this proposal.

KoolTool, a company registered under the laws of Romania, shall be referred to as the "Client" within the context of this proposal.

The custom database application or software described herein shall be referred to as the "**Product**" for the purposes of this proposal.

PROJECT OVERVIEW

KoolTool manages a detailed and structured production system for color charts, swatches, packaging and client-specific requests. After reviewing KoolTool's internal workflows, technical documents, and production sheets, we have analyzed the system you proposed and are prepared to develop a custom FileMaker solution that digitizes your processes and connects your workflows into one cohesive platform.

The proposed FileMaker system will help KoolTool:

- Organize all projects and tasks in one place
- Track everything from client requests to final productions
- Speed up decision-making and production
- Improve accuracy and reduce mistakes

● Give your team a user-friendly interface to work with

Real-Life Examples of Your Workflow That Will Be Supported

Client Offer to Project Launch: When Silvia from PETTENON COSMETICS requests a new 4-panel chart with 175 swatches, the system will allow you to:

1.1 Document her request

1.2 Create a new project

1.3 Build the offer (OFC- Offer to Client) with pricing, packaging, and printing

1.4 Track when the client confirms

1.5 Automatically change the status of the project to begin production

Swatch Sampling Process: When KoolTool needs to check swatch samples:

1.1 A task is created for the salesperson and client

1.2 Samples are logged with dates

1.3 Approval/rejection is tracked per client

1.4 Follow-up reminders are set

1.5 Everything is linked to the project

Automatic List of Low Stock Items to Supplier Quote to Purchase Order:

When items are low in stock, they are automatically added to the list of low stock items to be reordered.

When AVEXAND SRL sends a quote for packaging:

1.1 The quote (OFR - Offer from Supplier) is stored in the system

1.2 Compared with quotes from other suppliers

1.3 Selected quote is converted into a Purchase Order

1.4 Quantity, price, and delivery date are tracked

1.5 Material arrival is linked to the project timeline

WHAT WE WILL BUILD IN PHASE 1

Client & Supplier Management

1.1 Save and manage contacts of clients and suppliers

1.2 Track country, terms and link to projects

1.3 Manage client and supplier interactions (Phone calls, emails, visits, online meetings)

Project Management

1.1 Create projects with timelines

1.2 Link to TDS (Technical Data Sheet), BOM (Bill of Material), tasks, quotes, and requests

Request Management

1.1 Track new product or sample requests

1.2 Assign staff, priority, and follow-ups

Sales Quotes (Client Offers)

1.1 Create OFCs with pricing, swatches, packaging

1.2 Generate printable quotes

Supplier Quotes (Offers Received)

1.1 Save and compare supplier quotes

1.2 Convert selected quotes to purchase orders

Technical Data Sheets (TDS)

1.1 Record chart structure: layout, glue, print type, etc.

1.2 Link to project for reference during production

Bill of Materials (BOM)

1.1 List materials per chart/project

1.2 Track cost, quantity, and link to suppliers

Task & Workflow Management (SAL)

1.1 Assign activities

1.2 Track status and display progress

Dashboard

1.1 Overview of pending tasks, active projects, and delays

1.2 Visual indicators for management and team productivity

User/Employee Management

1.1 Store employee details

1.2 Assign roles and permissions

1.3 Track staff activity and responsibilities

Quote & Order Conversion

1.1 Convert OFC to Sales Order

1.2 Convert OFR to Purchase Order

Invoicing

1.1 Generate and track invoices

1.2 Link billing directly to project or client quote

User Interface Language

1.1 The application's front end will be delivered in Romanian, to ensure comfort and efficiency for all KoolTool users.

Benefits to KOOLTOOL

1.1 Unified platform for all production activities

1.2 Smooth and connected workflow from quote to invoice

1.3 Faster, more accurate quoting and costing

1.4 Management dashboard for insights and deadlines

1.5 Secure employee management

1.6 Modular design for future expansion

Technology Used

1.1 **Platform:** Claris FileMaker Pro

1.2 **Runs on:** Web direct, FileMaker Pro (macOS, Windows), FileMaker Go (iPad)

1.3 **Hosting Options:** Final solution will be deployed on KoolTool's FileMaker Server or Claris Cloud

1.4 **Development Hosting:** During the development phase, the application will be hosted on our secure FileMaker Server located in France, allowing for remote access, reviews and collaborative testing

1.5 **Expandable:** Designed with flexibility to support future enhancements such as barcode scanning, mobile integrations, external portals (e.g., client or supplier portals), and reporting dashboards

1.6 **Note:** All development progress will be accessible to KoolTool for feedback and testing via a secure login during the project lifecycle.

1.7 **Communication Tools:** Project updates, collaboration, and feedback will be managed using Trello (task tracking), Slack (team messaging) and Zoom (meetings and demos)

Additional Features

1.1 The client may propose extra features beyond those outlined in this proposal. The service provider will assess their feasibility and, if approved, may include them in the current phase or schedule them for future development.

1.2 Features that fall outside the agreed scope may incur additional costs. Any such changes will be discussed transparently, with mutual agreement on their impact, benefits, and cost before implementation.

Development Process & Deployment

The development will follow a phased, collaborative approach:

1.1 **Planning & Setup:** We define the database structure, workflows and interface layouts based on KoolTool's needs.

1.2 **Module-by-Module Development:** Each part of the system (e.g., Projects, Quotes, Tasks) will be built, tested and reviewed with the client.

1.3 **Client Reviews:** KoolTool will have access to the system during development for regular feedback and suggestions.

1.4 **Testing & Adjustments:** We'll test the system thoroughly and make refinements based on client input.

1.5 **Final Deployment:** Once approved, the full system will be deployed to KoolTool's FileMaker Server or Claris Cloud.

1.6 **Training & Support:** We'll provide basic training to users and offer support as needed after deployment.

7. Timeline of Activities for Phase one.

Activity	Duration
Planning & Setup: Tables, relationships, user config	1 week
Core Modules: Client, Project, Request, TDS, BOM	2 weeks
Quotes & Orders: OFC, OFR, conversion logic	2 weeks
Tasks & Workflow: SAL modules + assignments	1.5 weeks
Dashboard & Users: Overview panel + user/employee management	2 week
Reports & Invoicing: Quote generation + full invoice system	2.5 weeks
Testing & Review: Language checks + interface testing	1 week
Final Delivery & Training: Live demo, final adjustments	1 week
Total Duration	**16.5 weeks**

1.1 The full project is estimated to take 16.5weeks, that's roughly 3 months and 3 weeks

1.2 This includes planning, development, testing, deployment, and training

1.3 We will work in phases, building and reviewing each module step by step

1.4 Some delays may occur due to reasons beyond our control (e.g., client feedback delays, technical complexity)

1.5 If delays happen, we will communicate clearly and agree together on any needed adjustments

1.6 Our main goal is to deliver a solid, working system, on time and with no surprises

8. Budget Estimate.

1.1 Our standard hourly rate is $35/hour

1.2 Estimated development time: 660 hours (based on 5 hours/day over 16.5 weeks)

1.3 Project duration: 3 months and 3 weeks

1.4 Estimated value of full development time: $14,000 (660 hours × $35/hour)

1.5 Discounted fixed project rate: $10,500 (Offered as a long-term partnership rate, below the standard hourly total)

1.7 Monthly budget estimate: $3,500 per month

1.8 Billing is done per project phase or monthly, based on completed work

1.9 Optional post-launch support is available at the same hourly rate ($35/hour)

1.10 Note: While these timelines are realistic, if a module proves more complex than expected, we will inform KoolTool and request approval for a time extension. No extra work will be billed without prior agreement.

12. Others

1.1 Where operations demand travels outside Ghana, the actual traveling expenses and accommodation will be provided by the client or reimbursed and recovered separately from the fees stated above.

1.2 All Fees quoted are exclusive of VAT, CRL, GETFUND LEVY & NHIL.

1.3 If the client is satisfied with this proposal, we strongly encourage the client to proceed by issuing a purchase order. The purchase order will serve as an official confirmation of the client's intent to proceed with the project, enabling us to initiate the implementation of this proposal promptly.

1.4 Osbert Yao Vulor will serve as the Technical Lead for this project. He will oversee the entire development process and be responsible for implementing the system as outlined in this proposal.

1.5 There will be a progress meeting every 2 weeks (via Zoom) to review completed work, gather feedback and discuss upcoming milestones. This ensures transparency, keeps everyone aligned and allows for quick adjustments when needed.