

ODOO IMPLEMENTATION AND TRAINING PROPOSAL

CILTAX LIMITED



10 YEARS OF
BUILDING TIMELESS BUSINESSES
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Project Proposal for Ciltax Limited

Project Name: Ciltax Limited Odoo ERP Implementation and Training

Date Submitted: 18 September 2024

1. Project Objectives

- **Odoo ERP Implementation:** Provide a fully functional Odoo ERP system tailored to Ciltax Limited's operational needs.
- **Comprehensive Training:** Ensure that all users are fully trained on the relevant modules of Odoo for smooth and effective utilization.
- **Streamlined Business Operations:** Integrate key business functions such as accounting, sales, payroll, and HR management into a single platform for enhanced efficiency and data-driven decision-making.
- **Odoo Smart Invoicing Integration:** Intergrate the Odoo System with the ZRA Smart Invoicing for efficient tax compliance.

2. Company Overview

Ciltax Limited is a company aiming to modernize its operational processes by implementing an Enterprise Resource Planning (ERP) system. The goal is to move to **Odoo ERP** for managing various business operations, including sales, accounting, payroll, and human resources. By implementing Odoo ERP, Ciltax Limited seeks to improve efficiency, enhance operational accuracy, and streamline workflows, while ensuring that staff are well-trained to utilize the system effectively.

3. Project Deliverables

Deliverable No.	Description
1	Odoo ERP Implementation: Installation and configuration of Odoo ERP tailored to Ciltax Limited's operations.

2	Data Migration: Migration of legacy data into the Odoo system, ensuring a smooth transition.
3	Training: Comprehensive training for staff on the use of Odoo ERP modules.
4	System Testing: Conduct system testing to ensure all modules function correctly.
5	Go-Live Support: Provide support during the go-live phase to ensure smooth system launch.

4. Project Tasks

Task No.	Description
1	System installation and configuration of Odoo ERP tailored to Ciltax Limited's business needs.
2	Data migration from legacy systems, including customer data, supplier data, and transactional history.
3	Setup and configuration of the following modules: Accounting, Sales, Payroll, CRM, Fleet Management and Employees.
4	Conduct testing to ensure all systems and modules function properly.
5	Provide user training and manuals for system utilization.
6	Go-live support and system monitoring.

5. Project Assumptions

No.	Assumption
1	Ciltax Limited will provide all necessary data for migration.
2	The system will be hosted on Odoo.sh or on-premise, depending on client preference.

3	Staff will be available for training sessions during the scheduled training period.
4	Adequate internet connection and hardware will be available for system installation and training.

6. Project Timeline and Investment

6.1 Estimated Project Timeline and Hours

- **Total Estimated Hours:** 89 hours
- **Project Timeline:** 2-4 weeks

6.2 Investment Breakdown

Item	Investment Needed
Implementation, Migration & Training	ZMW 66750
Annual License Fee Per User <i>NB. This license fee applies to Standard Cloud but won't be possible to have Payroll on the same. Payroll is only supported on Odoo.sh or On Premise.</i>	USD 156/user/year
Odoo.sh Cloud Hosting <i>Integration with Smart Invoicing will also require Odoo.sh or on premise because on Odoo SAAS, the integration will be one way sending data from Odoo to ZRA VSDC and not vice versa.</i> <i>When an invoice is issued from Odoo, it is sent to the VSDC for validation and compliance checks. The VSDC then returns a validated invoice number and QR code, which must be included on the invoice.</i>	USD 72.50/month

Payment Terms

To ensure smooth project progress and align our efforts with key milestones, we propose the following payment structure:

1. **Upfront Payment: 50%: K33375**
This initial payment will cover the costs associated with project setup, resource allocation, and commencement.

2. **Milestone 1: 25%: K16687.5**

The 2nd payment will be made before the system goes live, ensuring that all preparations for a smooth transition have been completed.

3. **Milestone 2: 25%: K16687.5**

The final payment will be made after the system goes live, ensuring that all preparations for a smooth transition have been completed.

This milestone-based structure ties payments to critical project stages, providing transparency and shared commitment throughout the implementation process.

One Month Free Support: We will provide one month of complimentary support post go-live to ensure a smooth transition and to address any issues that may arise.

License Payments should be made upfront before we start the implementation to ensure we have the platform up and running.

6.3 After-Service Support

After the initial setup and training, we will enter into an annual support contract, billed monthly at **ZMW 2,500.00**, which includes:

- System monitoring and issue resolution.
- System updates and module upgrades.
- Responding to support requests within two working days.
- Ongoing communication with Ciltax Limited to ensure system optimization.

NB. Should you not opt for the retainer for support, we will charge a callout fee for support request which is pegged at ZMW 749 per hour.



8. Endorsement

By initialing each page and signing below, I, _____, in my capacity as _____ of **Ciltax Limited**, agree to and accept the terms set forth in this Statement of Work.

Ciltax Limited

Signature: _____

Witness Name and Title: _____

Signature: _____

By initialing each page and signing below, I, _____, in my capacity as _____ of **M&J Consultants**, agree to and accept the terms set forth in this Statement of Work.

M&J Consultants

Signature: _____

Witness Name and Title: _____

Signature: _____

We look forward to working with Ciltax Limited to implement Odoo ERP and provide the necessary training for a smooth transition to a more efficient, integrated business system.

Thank you for choosing M&J Consultants for your Odoo ERP implementation and training services.



Our Clients





CERTIFICATE OF ACHIEVEMENT

This certificate is presented to

Temptation Mhonda

by Odoo S.A. for successfully completing
ODOO 17 FUNCTIONAL CERTIFICATION

06/15/2024 DATE



Certification n°0000436714



CERTIFICATE OF ACHIEVEMENT

This certificate is presented to

Raphaely Chigaru

by Odoo S.A. for successfully completing
ODOO 17 FUNCTIONAL CERTIFICATION

05/25/2024 DATE



Certification n°0000423836



CERTIFICATE

OF ACHIEVEMENT

This certificate is presented to

More Nyazungu

by Odoo S.A. for successfully completing
ODOO 17 FUNCTIONAL CERTIFICATION

06/08/2024 DATE



Certification n°0000432110