



REQUEST FOR PROPOSALS

FOR

PROVISION OF ICT SERVICES

ELIGIBLE TO REGISTERED FIRMS ONLY
(NOT INDIVIDUALS)

Description of Bid: MICROSOFT DYNAMICS ENHANCEMENT TO INCLUDE CLIENT PORTAL AND ANALYTICS.

Bid Number: MESPT-ICT-I0099-2026

Bid Closing/Opening Date: 16th July 2026

Bid Opening Time: 12:00 noon East Africa Time

Issue Date: 2nd July 2026

1. Micro Enterprises Support Programme Trust (MESPT) invites sealed bids from eligible candidates for development of an Institutional Management Information System Eligible candidates may obtain further information from MESPT at the address below during business hours **0800hrs** to **1700hrs**.

Micro Enterprises Support Programme Trust (MESPT)

Tausi Lane 01, Westlands

P.O. Box 187-00606,

Nairobi, Kenya

Tel: 0722 207 905 / 0735 333 154

Email address: procurement@mespt.org

2. Bid documents herein are free of charge.
3. All bids shall not be accompanied by bid security.
4. Complete bidding documents **shall be** submitted through electronic means in the manner indicated below:

[submission via email: tender@mespt.org]

Email attachments should be 10Mbs maximum. If it exceeds, submit in form of a link.

Bids must be received on or before the date and time indicated below:

Date: 16th July 2026

Time: 12:00 Noon (East Africa Time)

5. Prices quoted should be net inclusive of all taxes and quoted in **Kenyan Shillings**. All prices shall remain valid for **90 days** from the closing date of the bid.

Link for clarifications: [MESPT-ICT-10099-2026 - Ms Dynamics Enhancement](#)

Chief Executive Officer

Micro Enterprises Support Programme Trust

TERMS OF REFERENCE

MICROSOFT DYNAMICS ENHANCEMENT TO INCLUDE CLIENT PORTAL AND ANALYTICS

INTRODUCTION

Micro-Enterprises Support Programme Trust (MESPT) is a Kenyan development organization established in 2002. MESPT's overall objective is to promote economic growth, employment creation and poverty alleviation through enterprise development. This is achieved predominantly through support to the development of agricultural value chains whilst embracing and promoting the green growth and climate change agenda. Through its vision of building a more Prosperous Society, MESPT facilitates increased commercialization, decent employment and green transformation through targeted interventions in the selected value chains. The Trust is a multi-donor entity jointly founded by the Government of Kenya and the European Union who later relinquished their position to the Royal Danish Embassy in Kenya, Ministry of Foreign Affairs of Denmark (DANIDA). To learn more about MESPT, please visit www.mespt.org.

I. INTRODUCTION AND BACKGROUND

MESPT is seeking proposals from qualified IT service providers to enhance its Microsoft Dynamics ERP. Currently, the Credit team manually emails account statements and posts financial receipts upon request, which causes operational bottlenecks, processing delays, and occasional data entry errors. To resolve this, the project introduces a secure, 24/7 web-based client self-service portal alongside automated statement dispatch and instant receipt notifications. These technical interventions will eliminate manual administrative tasks, improve data accuracy, and elevate the overall customer experience.

II. OBJECTIVE

The primary objective is to enhance the existing Microsoft Dynamics Navision ERP system to automate core credit processes, eliminate manual tasks, improve data accuracy, and elevate the customer experience. The project aims to deliver a secure, web-based client self-service portal, automate monthly statement distribution, establish instant payment notifications, and integrate advanced credit data analytics.

III. SCOPE OF WORK

The vendor will design, develop, test, and deploy system enhancements across the following key areas:

3.1 Client Self-Service Portal

- **Access & Authentication:** Build a secure, web-browser-accessible portal with username/password login. Implement best-practice security protocols, including Multi-Factor Authentication (MFA), encryption at rest, and HTTPS.
- **Architecture:** Separate the portal interface from the core database to maximize system security.
- **Features:** Enable clients to view real-time loan account summaries, view outstanding balances, track historical postings, and generate/download real-time PDF statements.
- **Permissions:** Enforce strict data boundaries so clients only access their own data, while granting Credit/Admin users complete visibility for support.

3.2 Automated Monthly Statement Dispatch

- **Generation:** Build an automated engine to generate monthly statements using the approved organization credit template.
- **Scheduling:** Implement a configurable scheduler to automatically dispatch statements on a fixed monthly date (e.g., 1st, 2nd, or last day of the month) without human intervention.
- **Pre-Dispatch & Consent Controls:** Create system flags to ensure statements only send after the credit team marks reconciliations, postings, and interest calculations as accurate. Incorporate a "Consent to Receive Statements" flag per client to comply with Data Protection requirements.
- **Email Delivery:** Integrate with the existing email setup to reliably deliver emails containing the client's name, statement period, and an attached PDF statement to active clients.

3.3 Automatic Email Payment Notifications

- **Triggers:** Create instant real-time or near instant (within minutes) email triggers upon posting any receipt to a client's loan account.
- **Content & Frequency:** Configure emails to pull the stored client email and dynamic fields, including the amount, date received, loan account number, and updated outstanding balance. The logic must support multiple payment notifications within a single day.

3.4 Data Analytics & Non-Functional Compliance

- I. **Analytics:** Integrate Power BI with the Navision ERP to enable credit, financial and other data analytics and reporting.

2. **Security & Performance:** Enforce OWASP Top 10 web application controls. Ensure portal pages load within 3 seconds and statements generate within 10 seconds.
3. **Scalability:** Architect the solution to easily scale with increase of clients without requiring a structural system redesign.
4. **Secure the statement:** statements sent via email should be secured with a password.

IV. **EXPECTED DELIVERABLES**

5. **Requirements gathering, Analysis, Design & Architecture deliverables:**

- ✓ Signed off requirements document
- ✓ System Design Document (SDD)
- ✓ Client portal user interface (UI) mockups and screens.

6. **System Development, Configuration & Quality Assurance deliverables:**

- ✓ Backend development in Navision (including the statement generator and automated triggers).
- ✓ Automation scripts for the scheduled email dispatch system.
- ✓ Seamless integration with the existing Navision loan posting logic.
- ✓ Full testing plan and User Acceptance Testing (UAT) Scripts
- ✓ User Acceptance Testing (UAT) support and Signed off UAT documents

7. **Deployment to Production**

- ✓ Deployment plan
- ✓ Technical and user documentation
- ✓ Handover training sessions for both the Credit and ICT teams.

V. **TECHNICAL AND ORGANIZATIONAL REQUIREMENTS**

To be considered, the vendor's proposal must explicitly include:

- **Proposed Development Approach:** A detailed methodology explaining the tools, development strategies and steps taken to minimize downtime and security risks.

- **Technical Capacity of the Team:** Resumes/CVs and professional certifications (e.g., Microsoft Dynamics Certified Professionals) of the specific engineers assigned to this project.
- **Organizational Experience:** Proof of company capability in handling similar Navision ERP development projects.
- **Reference Letters:** A minimum of three (3) formal reference letters from previous clients detailing successful Navision ERP client self-service portals development completed within the last 7 years.

VI. FINANCIAL PROPOSAL STRUCTURE

Vendors are required to detail the total cost for the complete project scope.

VII Assignment Timelines

The consultant should finish all the above within six (6) weeks.

IX. Criteria Score

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization. The purpose of this RFP is to identify those suppliers that have the interest and capability to support MESPT with the ERP enhancement to include data analytics and self-service portal.

Deliverables	% Amounts to be paid
1. Requirements gathering, Analysis, Design & Architecture deliverables: ✓ Signed off requirements document ✓ System Design Document (SDD) ✓ Client portal user interface (UI) mockups and screens.	20%
2. System Development, Configuration & Quality Assurance deliverables: ✓ Backend development in Navision (including the statement generator and automated triggers). ✓ Automation scripts for the scheduled email dispatch system. ✓ Seamless integration with the existing Navision loan posting logic.	50%

✓ Full testing plan and User Acceptance Testing (UAT) Scripts ✓ User Acceptance Testing (UAT) support and Signed off UAT documents	
3. Deployment to Production ✓ Deployment plan ✓ Technical and user documentation, as built document ✓ Handover training sessions for both the Credit and ICT teams.	30%
Total	100%

VII. PART VI: EVALUATION AND QUALIFICATION CRITERIA

Stage 1: Preliminary/Mandatory Evaluation

The following criteria apply for the preliminary/mandatory evaluation. Failure to meet the requirements of the preliminary/mandatory evaluation shall lead to disqualification from the rest of the bidding process.

1. Must submit a duly filled serialized Technical Proposal.
2. Must submit a duly filled Financial Proposal.
3. Company's certificate of incorporation/registration.
4. Latest CR12 not more than 12 months.
5. Must submit a current and valid Tax Compliance Certificate issued by the Kenya Revenue Authority.
6. Must submit copies of the Identification Card (ID) or passports of the consultants.

Stage 2: Technical Evaluation

Evaluation Criteria

1. **Completeness of Solution in regard to satisfying requirements.** Evaluation of the supplier's overall solution regarding how well it satisfies our requirements. Include planning, scheduling, designing, implementing, managing risks and post deployment testing and validation.
2. **Experience.** Evaluation of the supplier's experience implementing the proposed solution. The supplier must demonstrate that they can provide a solution that meets the requirements of this RFP and encompass flexibility, scalability, performance, management, security, and usability while leveraging our existing system components where feasible. Evaluation of the supplier's track record of product service, support,

and customer satisfaction. Supplier commitment to developing, enhancing, and maintaining systems and flexibility of systems to meet future changing business needs.

Notice to bidders on Technical Evaluation

- All bidders should indicate reference sites on Navision/dynamics 365 self-service portal development.
- All proposals shall be submitted in soft copy.
- Bidders Must meet all our requirements to be progressed to the financial evaluation.

The following criteria shall apply.

Criteria	Points
Understanding of the assignment	30
Qualification and experience profile of the firm relevant to this assignment. At least 6 years' experience in development of Navision ERP. Proof indicating that the vendor is a Microsoft Certified Partner for Navision/dynamics 365) (25 Points)	25
Technical qualifications of the technical personnel, certified personnel with certifications for Navision/dynamics 365. The engineers will have at least 5 years' experience developing and implementing Navision/dynamics 365. (25 Points)	25
Letters of recommendation by three major clients where the vendor has implemented a similar solution of the size of MESPT or larger. (20 points)	20

Minimum points for technical evaluation is 70 points.

Financial Evaluation

- The lowest evaluated bidder who meets all our technical evaluations will be recommended for award
- Detailed Cost Schedules: Provide detailed, itemized units and total costs for each component and service proposed.

Stage 3: Award Selection Method

LCS – Least-Cost Selection Method will be used to select the winning bidder.

In the case of Least-Cost Selection (LCS), MESPT's evaluation committee will select the Bidder whose Proposal is the lowest evaluated total price among those Proposals that achieve the minimum technical score required to pass, notify the bidder and invite them to negotiate the Contract.

Notice to bidders on Technical Evaluation

- All bidders should indicate reference sites on sales force development and implementation.
- All proposals shall be submitted in soft copy.
- Bidders Must meet all our requirements to be progressed to the financial evaluation.

Financial Evaluation

- The lowest evaluated bidder who meets all our technical evaluations will be recommended for award
- Detailed Cost Schedules: Provide detailed, itemized units and total costs for each component and service proposed.

Deliverable	Percentage payment
Inception Report	10 %
Requirements gathering, Analysis, Design & Architecture deliverables	15%
System Development, Configuration & Quality Assurance deliverables	40%
Capacity Building & Sustainability Deliverables	10%
System Implementation / Deployment to Production	25%
Total	100%

VII. SUBMISSION OF PROPOSALS

The Financial Proposal and the Technical Proposal files **MUST BE COMPLETELY SEPARATE** and emailed through tender@mespt.org and clearly named as either “TECHNICAL PROPOSAL” or “FINANCIAL PROPOSAL”. The subject of the email should clearly capture the description. The file with the “FINANCIAL PROPOSAL” must be encrypted with a password so that it cannot be opened nor viewed until the Proposal has been found to pass the technical evaluation stage. Once a Proposal has been found to be responsive by passing the technical evaluation stage, MESPT shall request via email the Proposer to submit the password to open the Financials. Interested applicants should send their proposals to tender@mespt.org by **16th July 2026 at 12.00 Hours**. Kindly send your clarifications to procurement@mespt.org by **9th July 2026 at 12.00Hours**. Check for clarifications [here](#) before submission.

Conditions

- i. MESPT reserves the right to accept or reject any proposal.
- ii. Any canvassing will lead to automatic cancellation of the submitted proposal.