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Request for Quotation

RFQ Number: IDT/HO/ITUNIT 20/04/2026 – MICROSOFT DYNAMICS GP

Description: INVITATION TO BID FOR TECHNICAL SUPPORT, MAINTENANCE AND FINANCIAL SUPPORT SERVICES FOR MICROSOFT DYNAMICS GP FOR THE PERIOD OF 12 MONTHS

Closing Date and Time: 30 APRIL 2026 @12:00PM

Submission of quotations: All quotations must be submitted physically at:

**INDEPENDENT DEVELOPMENT TRUST (IDT)
GLENWOOD OFFICE PARK
CNR. OBERON & SPRITE STREETS
FAERIE GLEN 0043**

on or before the closing date and time stipulated above. All quotations received after the closing date and time will not be considered.

Compulsory returnable documents that must be submitted with the response for this quotation are the following:

1. National Treasury Central Supplier Database number MAAA_____
2. Name of Company _____
3. Unique SARS Tax Compliance Pin Number (submit valid letter)
4. Duly completed and signed: SDB 4 (**Bidder's Declaration**), attached in this RFQ document.
5. Duly completed and signed: SDB 6.1 (Preference Points Claim Form in Terms of The Preferential Procurement Regulations 2022), attached in this RFQ document.

Detailed Specifications/ Terms of Reference for this RFQ

1.1 Background

The IDT is a Schedule 2 state owned entity which manages the implementation and delivery of critically needed social infrastructure programmes on behalf of government. The social infrastructure programmes include public schools, hospitals, courts, correctional services facilities, clinics, community centres, government offices. The IDT reports to the Minister of Public Works who is the Shareholder representative and Executive Authority. Its national office is located in Pretoria and has regional offices in all of the country's nine provinces.

1.2 Detailed Specifications / Terms of Reference for this RFQ

The main purpose of this document is to invite Service Providers to bid for the provision of technical support, maintenance on Microsoft Dynamics GP and advisory service in enhancing Great Plains functionality within the organisation in the areas detailed under the Scope of Work for the period of 12 months.

1.3 Scope of the project

The service provider will:

- Review the feasibility study to determine the current utilization of the Microsoft Dynamics GP within the organization and advise on existing modules that can benefit the organization.
- Consequently, configure Microsoft Dynamics GP to ensure that the systems support the IDT business with a particular focus on:
 - Configure Microsoft Dynamics GP to ensure the systems support the IDT business.
 - Programme reconciliations.
 - Provide a high standard value of automated reporting as per organizational requirements.
 - Provide a training and skills transfer programme for end users and technical support personnel (ICT).
 - Assist with appropriate transaction disclosure in conformity with applicable accounting standards, including SA GAAP, IFRS, IAS, and relevant exposure drafts (EDs).
 - Develop controls within Microsoft Dynamics Great Plains to prevent and account for irregular expenditure, and fruitless and wasteful expenditure
 - Ad hoc Development.
 - Development/enhancement of the functionality of an appropriate billing; and collection system for raising management fees.
 - Knowledge and support of the debtors and billing Module
 - System maintenance and ongoing technical support
 - User support and troubleshooting
 - Resolution of system errors, bugs, and performance issues
 - Resolution of stuck batches, integration and other processing errors
 - Database and application support (where applicable)
 - Monitoring system availability and stability
 - Support during month-end and year-end financial processes
 - Assistance with reconciliations and system reports
 - Assistance with the billing errors from the billing module
 - Clearing of cashbook errors
 - Assisting with payables module errors
 - Support for audit-related queries and data extraction
 - Minor system enhancements and updates
 - Guidance on system upgrades and patches

- Documentation of changes implemented
- Identifying of onerous and cumbersome activities in the management value chain and to make proposals on how to streamline Microsoft Dynamics GP functions to ensure efficiencies, especially as they relate but not limited to:
 - Project Accounting;
 - Supply chain Management;
 - Financial and Management Accounting;
 - Programme and Project Management;
 - ICT Management;
 - Asset Management;
- Provide a high standard value of automated reporting as per organisational requirements with emphasis on the following:
 - Integrated reporting from various organisational systems
 - Design and development of new customized reports as per requirements
 - Several programmes show zero cashbook balances with large HATB values, indicating timing or posting issues
 - Modification of existing reports
 - A number of **small residual balances (cents/rands)** suggest rounding or system-generated postings that should be cleared.
- Integration of SAGE 300 People and GP for Payroll Journals
- Availability during normal business hours (with escalation support where required)

1.4 Registered Modules

- Account Rollups
- Cashbook Bank Management
- Customization Site Enabler
- Electronic Bank Management
- Electronic Reconcile
- Electronic Reconciliation Management
- Field level Security
- Fixed Assets
- General Ledger / Advanced Financial Analysis
- GL Transaction Matching
- Integration Site Enabler
- Intercompany Processing
- Inventory Control
- Modifier
- National Accounts
- Payables Management
- Project Accounting
- Purchase Order Processing
- Receivables Management
- Sales Order Processing

1.5 Expected Results

- Fully functional System addressing all deliverables listed in above:
- Effective and efficient internal controls to prevent the recurrence of significant audit findings.
- Throughout the assignment, the service provider is expected to work with and ensure the transfer of the skills to relevant IDT staff. To this end, the service provider shall design and implement an appropriate plan in this regard.

- Priorities reconciliation of Note 5 programmes by value:
 - Validity of unrecorded invoices and Management Fees
 - Whether amounts relate to current vs prior financial years
 - Prepare adjustment journals where required (accrual reversals, reclassifications).
 - Clear immaterial balances to improve data cleanliness before year-end.

1.6 Required knowledge, skill and expertise

- The service provider must have proficient knowledge and experience in the following areas:
 - Highly skilled in Microsoft Dynamics GP application
 - Experience servicing government and/or private entities
 - Information Technology, particularly to:
 - ERP, Microsoft Dynamics GP 2018R2,
 - Database Knowledge-SQL
 - System development and design
 - Project Accounting
 - Billing, and collection software for raising management fees.
 - Proficient knowledge of Application Programming Interfaces (APIs)
 - Financial management and accrual accounting
 - Programme and project management
 - Public finance (including knowledge of the PFMA and related prescripts)
 - Contract management

1.7 Evaluation Criteria

1.7.1 Mandatory requirements

Phase 1:

- The bidder must indicate its compliance / non-compliance to the requirements and should substantiate its response with supporting evidence. If more space is required to justify compliance, please ensure that the substantiation is clearly cross-referenced to the relevant requirement.
- Failure to comply with Mandatory Requirements will lead to the bidder being disqualified, and not considered for further evaluation on the functionality requirements.

Description Requirements	Indicate Comply/Do Not Comply	Comment
Accreditation from the product OEM. (Attach a letter of accreditation from Microsoft)		

1.7.2 Functionality/Technical Criteria

Phase 2: Technical / Functional Evaluation Criteria

- In this phase all bids that met all the requirements in terms of the submitted proposal per the above set of mandatory requirements will be evaluated as follows:
- Qualification Threshold – Bidders must achieve 70% as per all the criteria for consideration to the next phase. Bidders who fail to comply with the set minimum threshold of 70% per the technical requirements will be eliminated.

CATEGORY	FUNCTIONALITY	SCORE
Experience Company Experience in conducting similar project(s) as described in the scope (List should state the nature of the assignment, the duration, the outcomes achieved and volume of the end-user base) (30 Points)	5 Years and above	30
	4 Years	20
	3 Years	15
	2 Years	10
	1 Year	0
Three Reference Letters in relation to the scope of work (The letter must indicate the contract period, details of services rendered and signed by the client) (25 Points)	3 Client Reference Letters	25
	2 Client Reference Letter	15
	1 Client Reference Letter	10
	0 Client Reference Letter	0
Qualifications and experience of core team members - Developer - Support Technician (CVs to be attached and include relevant Qualifications) Both work experience and relevant qualifications must be submitted. Failure to provide the required documents will result in no points being awarded. (30 Points)	There are 2 resources with the relevant qualification and at least 5 years' experience	30
	There are 2 resources with the relevant qualification and 4 years' experience	20
	There are 2 resources with the relevant qualification and 3 years' experience	15
	There are 2 resources with the relevant qualification and 2 years' experience	10
	There are 2 resources with the relevant qualification and 1-year experience	0

Support Methodology Describe your support implementation methodology for this project The methodology must demonstrate the support structure and overall resources available to service IDT In project plan format, provide high-level activities with desired outcomes that will be undertaken This plan should include the training plan, and transfer skills to IT technical staff (15 points)	The methodology is clear and relevant and has been adopted to the environment/requirements	15
	The methodology is clear and relevant but has not been adopted to the environment/requirements	10
	The methodology is poorly described or not relevant to the requirements	5
	No Submission	0
	TOTAL	100

1.7.3 Pricing Schedule

The cost is calculated on an hourly rate

Name of Bidder:			
Item description			
2nd line helpdesk SLA support for 12 months @ 40 hours per month for both resources <i>(Unused hours in a month will be rolled over to the next month)</i>			
	Estimated Hours	Rand Value Per Monthly	Rand Value Per Year
Support Technician	240hrs		
Developer	240hrs		
Subtotal	480hrs		
VAT @15% (If applicable)			
Total Cost Inclusive Vat			

Name of Bidder: _____

Signature: _____

1.8 Annexures Provided

The table below provides a summary list of all annexures provided as part of this Request for Proposal to provide a better understanding of the IDT systems environment. The IDT is currently running Microsoft Dynamics GP, version 2018R2. The IDT is running Microsoft SQL Server Version 17,9. Please see **Annexure A** for further versions details for both Great Plains Dynamics and Microsoft SQL Server Version. The IDT has third party applications or systems that are linked/integrated/support Great Plains Dynamics please see **Annexure B**.

NO.	ANNEXURES	UNIT	DESCRIPTION
1	ANNEXURE A	IT	Great Plains Dynamics version 2018 and Microsoft SQL Server details
2	ANNEXURE B	IT	A list module the IDT has relating to Great Plains, Microsoft and third parties

1.8.1 Annexure A

Microsoft Dynamics GP version 2018R2 and Microsoft SQL Server Details

The screenshot shows the 'About Microsoft Dynamics GP' window. The title bar reads 'About Microsoft Dynamics GP - MPUP (NthatiseM)'. The window features a menu bar with 'OK', 'Options', 'Additional', 'File', 'Tools', and 'Help'. Below the menu bar is a large blue banner with the Microsoft logo and the text 'Microsoft Dynamics GP 2018'. The main content area is divided into two columns: 'Session Information' and 'Version Information'. The 'Session Information' column includes fields for 'Users' (Current: 66, Total Registered: 100), 'Site' (IDT), 'Language-Country' (English-South Africa), 'Server' (Dynamics GP 2018), 'Session ID' (345), and 'Size' (1597MB). The 'Version Information' column includes fields for 'Microsoft Dynamics GP' (18.00.0704 (R2)), 'Dexterity' (18.00.0016.000), 'SmartList' (18.00.0699), 'Database' (SQL Server), 'System' (Windows 8), 'ODBC Driver Manager' (03.80.0000), 'ODBC Driver' (11.00.6540), and 'Microsoft SQL Server 2017 (RTM) - 14.0.1000.169 (X64)'. At the bottom, there are links for 'Software License Terms' and 'Third Party Notices', followed by copyright information: '© 2018 Microsoft Corporation. All rights reserved. Portions copyright 1992-2002 FairCom Corporation. All rights reserved.'

Session Information		Version Information	
Users	Current: 66 / Total Registered: 100	Microsoft Dynamics GP	18.00.0704 (R2)
Site	IDT	Dexterity	18.00.0016.000
Language-Country	English-South Africa	SmartList	18.00.0699
Server	Dynamics GP 2018	Database	SQL Server
Session ID	345	System	Windows 8
Size	1597MB	ODBC Driver Manager	03.80.0000
		ODBC Driver	11.00.6540
		Microsoft SQL Server 2017 (RTM) - 14.0.1000.169 (X64)	

SQL Server Version 17.9



1.8.2 Annexure B

Custom ised Systems, third party modules and systems interfacing with the current Microsoft Dynamics GP

- Programme Reconciler
- Account Payables/Accounts Receivables Reconciler
- Parity Creditors Recon
- Management Fees Calculator Module (Billing Module)
- Absa Access EFT
- SAGE 300 People (Integration Manager)
- SQL Services Reporting Manager (SSRS)

Service providers must quote the IDT a total price inclusive of VAT for the service that will be rendered, and the quoted price must be valid for at least thirty (90) days after the closing date of this Request for Quotation.

- All **SCM** queries related to this RFQ must be submitted in writing to: juniorm@idt.org.za
- All **Technical** related Queries must be directed in writing to: nthatsem@idt.org.za

NB: No query shall be allowed 12 hours prior to the closing date and time of this Request for quotation.

NB: *The Independent Development Trust Reserve the right to withdraw or cancel this RFQ without prior notification to the respondents*

CONFIDENTIAL

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise, employed by the state?

YES / NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? YES / NO

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? YES / NO

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, the undersigned, (name)..... In submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read, and I understand the contents of this disclosure.

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- The 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- The 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

The applicable preference point system for this tender is the **80/20** preference point system.

- a) **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black People	2	4
Total points for Price and SPECIFIC GOALS	100	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) & \text{Or} & P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)
 \end{array}$$

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) & \text{Or} & P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)
 \end{array}$$

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
 - (a) An invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) Any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

Then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points Allocated (90/10 system) (To be completed by the organ of state)	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black People	2	4		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) Disqualify the person from the tendering process;
 - (b) Recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) Cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) Recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) Forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....