*Appendix No. 1 to the Request for Quotation*

**DESCRIPTION OF THE PLANNED ORDER.**

**I. Subject of the planned order:**

1. The subject of the planned order is the purchase, implementation and launch of a coherent IT system in the form of a personalized, scalable and secure B2B platform for construction materials trade. As a result of such a project, Quantum will be able to operate a B2B platform integrating manufacturers, wholesalers, contractors and developers in a given market in order to conduct efficient, data-driven sales of building materials between integrated entities. The system will enable the use of remote sales account managers and field representatives to conduct sales activities in Germany and Sweden, and provide the potential for expansion into additional markets.

2. The implementation of the planned order will be carried out in 7 Phases:

A. Phase 1 - Launch of the web version of the platform, without the discount management and logistics module, with translated system phrases directly related to the functionalities

B. Phase 2 - Implementation of a structured database of 20,000 - 30,000 products

C. Phase 3 - API module for integration with ERP systems

D. Phase 4 - Discount management module

E. Phase 5 - Launching a mobile application for customers

F. Phase 6 - Launch of CRM for Field Representatives.

G. Phase 7 - Logistics module

The Employer allows the same person to combine functions from Phase 1 to Phase 7:

* Business analyst, with at least one year of experience in developing complete SRS/ SOW and UseCases, in developing Information Systems for B2B platforms and mobile applications in cooperation with UX designer and in business analysis,
* Backend developer, with at least two years of experience in backend development,
* Mobile application developer, with at least one year of experience in designing B2B Systems and/or applications for Android mobile platform and iOS mobile platform,
* Quality Assurance/quality control specialist with at least one year of experience in test automation and experience in testing Information Systems for B2B platforms and/or mobile / web applications,
* Server & Repository support specialist with at least one year of experience in CI/CD pipeline development and experience in providing GIT support and server configurations,
* Information Systems developer for B2B platforms and/or web applications, with at least one year of experience building scalable/reliable Systems and/or applications and experience developing Systems and/or web applications,
* A computer graphic designer with at least one year of experience in developing graphic designs for Information Systems and/or web and mobile applications. while the Employer allows the same person to combine the functions of computer graphics from Phase 1 to Phase 7
* An information systems security expert with at least two years of experience in information systems security development, with the Employer allowing the same person to combine the functions of an information systems security expert from Phase 1 to Phase 7,

3. Functionality of the System:  
The Contracting Authority requires direct management of individual Phases of the planned contract and direct supervision and coordination of the work of individual teams of specialists, carried out by a dedicated Project Manager (Project Manager), with at least three years of experience in managing software projects to develop an IT product in the construction industry involving artificial intelligence (AI) solutions, and qualified in managing IT projects using thePRINCE2 methodology or equivalent, whereby the Contracting Authority allows combining the function of Project Manager with the function of specialist

**II. System Technical Specifications:**

1. Purpose of the System:

The purpose of the System is:

To launch and offer a scalable and secure B2B platform for trading construction materials. As a result of the project, the company will be able to operate a B2B platform that integrates manufacturers, wholesalers, contractors and developers in a given market to conduct efficient, data-driven sales of building materials between the integrated entities.

2. System Performance Standards:

* meeting operator hardening guidelines: https://www.cisecurity.org/cis-benchmarks/, https://csrc.nist.gov/Projects/National-Checklist-Program,
* ensuring compliance with TLS1.3,
* ensuring compliance with RODO/GDPR,
* basing the Application on OAUTH2/JWT tokens,
* ensure compliance with the AAA model, i.e. provide A- Authentication.Authentication, A-Authorization, and A-Accounting,
* The need to provide multi-level protection for input and read data
* data, including: standard administrative mechanisms to protect access to databases and the operating system by unauthorized persons,  
  mechanisms for authorizing individual system users to perform strictly specific activities,  
  authentication mechanisms for users opening a session,  
  Equipped with an authorization control module defining the scope of authorization of individual data, operations and events,  
  provide the ability to assign users both group rights and individual rights regarding functions, access to data, operations and events,
* ensure interoperability with F5 BIG-IP,
* ensure compatibility with IP6,
* ensure correct and unambiguous use of DNS addressing (FQDN),
* ensure correct operation of the Application in an environment that uses the translation of IP addresses (NAT/PAT).

3. Functionality of the System:

The B2B-based system is designed to streamline business processes and ensure effective communication between manufacturers and customers. Within this system, there are three key roles: the Administrator, the Account Manager and the Field Representative. Each of these roles has specific tasks and authorizations that enable effective management of product offerings, trade negotiations and order coordination. The system also provides functionality for accessing customers' financial data, generating offers, and conducting real-time communications.

Roles in the system

Admin

The administrator has control over product offerings and all users on the platform, and has the authority to manage pricing policies.

* Customer Care Manager

The account manager is responsible for direct contact with assigned customers on the platform. Conducts communication and commercial negotiations within the boundary conditions defined by Admin. He enters offers into the system and coordinates order processing. His role is also to remotely support the Field Representative, who has direct contact with customers.

* Area Representative

The field representative is responsible for direct contact with customers. His job is to give the entities he visits access to the platform and maintain direct relationships. Every day, he makes sales visits, which he schedules and reports in the CRM system available through the mobile app, which is directly linked to the platform. The field representative works closely with the Account Manager. Thanks to the data shared through the system, they have standardized, real-time updated information about each customer.

* Client

A customer is a B2B buyer through the platform who receives access to the system from the Field Representative and communicates with the Customer Care Manager to complete the sales process.

* Functional requirements
* Admin

Access to all the functionalities of the Customer Account Manager.

Access to the data of all Customers, regardless of the assigned Customer Account Manager and Field Representative.

Management of product offerings in the system

Adding products to the system

Removing products from the system

Disabling the visibility of products from the system offer

Changing the order in which products are displayed in the offer

Managing product information in the system

Changing the name of a product

Adding alternative product names

Changing the sales units of a product

Specifying the number of units of a product in a package/pallet

Updating product descriptions

Updating technical specifications of products

Updating product images

Managing product offerings in a given language version

Enabling product visibility in an offer of a given language version

Disabling product visibility from the offer of a given language version

Managing the price offer of products

Entering the list price of a given product

Entering the minimum acceptable margin for a given product

Managing discounts

Admin can add discounts for products of a given manufacturer.

Adding discounts

Enabling discounts

Disabling discounts

Specifying types of discounts

Admin can add the following types of discounts

Fixed discounts

Reduce the list price

Logistic discounts

reduce the list price when certain logistics minimums are reached

Price change

Change the list price to the value specified by the Admin

Customization of discounts

Admin can customize discounts according to the following criteria

Calculation method

Admin can specify whether a discount, in combination with other discounts, should be calculated linearly or cascaded.

Value

Admin can specify whether a given discount reduces the list price by a certain amount or percentage.

Administrative region

Admin can specify the administrative region within which a given discount applies to customers doing business in its area

Products

Admin can specify the products for which a given discount applies.

Customer Guardian

Admin can specify the Customer Guardian for which Customers the given discount applies.

Customer

Admin can specify Customers for which the given discount applies.

Time

Admin can specify the dates and times during which the given discount applies.

Terms and conditions calculator

Admin can check the price for a given customer, for a given product, and the applicable discounts.

Access to customers' business terms and conditions

Admin has access to customer-entered terms of trade for a given product, so he can buy products from a given customer on behalf of the company.

Management of questions in field representatives' reports

Admin can manage the questions available in the report that Field Representatives fill out after visiting customers.

* Account manager
* List of customers
* Access to assigned customers
* Information about the last activity of the customer in the system
* Ability to filter by currently active Clients
* Distinction of the Client on the list, which has unread messages
* Ability to mark the Client who requires activity in the future and to enter the date of reminder of a given activity
* Communicator

The Account Manager can conduct real-time communication with assigned customers for sales and business negotiations.

Preparing offers for customers

The Account Manager can enter offers for customers in an automated manner, which are based on the following criteria

* Products included in the offer with quantities
* Duration of the offer
* Dynamic price, based on admin-defined business conditions entered by the admin
* Possibility to change in price within admin-defined boundary conditions (Margin, customer financial data)
* Payment term
* Payment method
* Place of delivery
* Method and cost of transportation
* Managing customer orders
* The Customer Supervisor can update the status and edit order items, as part of the order processing.
* Customer data management
* Generate login codes for customers
* The Customer's Supervisor can generate a one-time, 6-digit login code for the Customer and send make it available via email or sms.
* Update customers' financial data
* The Customer's Supervisor can update the Customer's credit limit.
* Managing product offerings for Customers
* The Customer's Supervisor can determine the visibility of products on offer for a given Customer.
* Access to customer offers
* Access to customer orders
* Notifications
* The Customer's Supervisor receives an audible notification when a Customer sends a message.
* The Customer's Supervisor receives an email if he/she has unread messages from the Customer.
* Access to customers' financial data
* Credit limit
* Balance
* Overdue
* Customer activity data
* List of manufacturers and product groups viewed by the customer, along with the date of activity
* Sending text messages to customers
* Sending sms to selected customers
* History of sms sent to a customer
* Access to the schedule of sales visits of Field Representatives
* Customer name
* Contact person
* Planned visit date
* Actual visit approval date
* Access to Field Representatives' reports on visits to Customers
* Access to selected manufacturers for quoting, marked by Field Representatives
* Field Representative
* List of customers
* Search engine for customers assigned to a Field Representative
* Ability to select a customer to view details
* Management of customer data
* Generation of login codes for Customers
* The Field Representative can generate a one-time, 6-digit login code for the Customer and make it available via SMS or email
* Updating Customer financial data
* The Field Representative can update the Customer's credit limit
* Access to call history
* The Field Representative has access to the history of communications between the Customer and the Customer's Supervisor
* Access to Customer offers
* Access to Customer orders
* Notifications
* The Field Representative receives a notification when an offer is sent to the Customer by the Customer Service Representative
* Field Representative receives notification when Customer's order is accepted
* Ability to select manufacturers for quotations
* The Field Representative can flag manufacturers of potential interest to the Customer's Supervisor.
* Management of product offerings for Customers
* The Field Representative can hide selected manufacturers in the product offering to the Customer.
* Access to Customers' financial data
* Ability to schedule sales visits
* The Field Representative can enter scheduled visits for new and existing Customers in the system.
* Ability to confirm the completion of sales visits to Customers
* Ability to report on sales visits to Customers
* Klient

Simplified login

The customer can log in with a one-time, 6-digit code generated by the Field Representative or Customer Service Representative.

Access to financial data

Credit limit

Balance

Past due receivables

Overdue invoices

Data management

Product offerings

The customer can browse the product offer with dynamically calculated prices, based on the conditions entered by the Admin, by manufacturers and assortment groups

Recommended products

The system displays a personalized list of recommended products to the customer, based on his activity and recommendations from the Field Representative.

Product search engine

The customer can search for a product on offer by name, manufacturer and assortment group.

Communicator

Customer's Supervisor data

The system displays the photo, name and phone number of the assigned Customer Caregiver

Real-time communication

Communication between the Customer and the Customer Caregiver takes place in real time.

Sending attachments

The Customer can send an image, a pdf document or a voice message to the Account Manager

Sales negotiations

The Customer and the Customer Caregiver can conduct trade negotiations through message exchange.

Receiving commercial offers

Customer can receive offers in the form of messages sent via messenger.

Accepting trade offers

The Customer can accept offers directly from messages in the communicator.

Notification

The Customer receives notification of each message, offer and order sent by the Customer Service Supervisor.

Preview of commercial offers

Customer has access to all, current, offers sent by the Account Manager.

Tracking orders

Customer has access to details of orders in progress.

Order history

The customer has access to the history of completed orders.

Sales documents

The customer has access to the sales documents of a particular order.

Specifying business terms and conditions

The customer can enter his terms of trade for products available in the system to allow the company to purchase his products.

# Technology requirements

* The system should be available in SaaS architecture, allowing rapid scaling
* The system should have support for different language versions, with the assumption of a proper structure, allowing correct indexing of selected sub-pages in search engines.
* The system should support dynamic translation of untranslated content in the database, through Google Translate or other equivalent service.
* The system should support calculation of product prices into different currencies.
* The system should have a pre-implemented product database with descriptions and technical specifications. (Base to be determined)
* The system should allow development of the product base and the ability to add images, descriptions and technical specifications.
* The system should have native mobile applications for iOS (Swift UI) and Android (Kotlin), which will be added to the AppStore and Google Play stores.
* The system should provide access to the following functionality, via the aforementioned mobile apps:
* Communicator for Customers
* Communication history of Customers, for Customers and Field Representatives
* Access to Customer offers, for Customers and Field Representatives
* Access to Customer orders, for Customers and Field Representatives
* Access to Clients' financial data, for Clients and Field Representatives
* Manage customer data, for customers and field representatives
* Access to Customer sales documents, for Customers and Field Representatives
* CRM for Field Representatives

The back-End of the system should be created via the PHP Laravel framework.

The Front-End of pages indexed by search engines should be created using clean, fast-loading JS. The interfaces of the different types of users should be created using the Vue JS framework.

All functionality for Admin, Account Manager and Customer should be accessible from a web browser.

The system should allow integration with an enterprise management ERP system to exchange data on contractors, transactions, product offerings and sales documents.

Integration with Google Analytics and Mixpanel

The system should have implemented Google Analytics, Mixpanel or other equivalent user activity analytics tools.

Details of user license requirements:

Administrator

* The system must provide an unlimited number of licenses for Administrators, who have full control over product offerings and all users on the platform. Administrators should be able to manage pricing policies and have all the necessary permissions to effectively manage the system.

Account Manager:

* The system should allow the assignment of an unlimited number of licenses for Customer Caregivers, who are responsible for direct contact with assigned customers on the platform. Customer Supervisors should be able to communicate, conduct business negotiations and enter offers and coordinate order processing. The system should also provide integration with the Field Representative and enable support for their activities.

Area Representative

* The system must offer an unlimited number of licenses for Field Representatives, who are responsible for direct contact with customers. Field Representatives should be able to grant access to the platform to the entities they visit and maintain direct relationships. They should also have access to a dedicated mobile application linked to the CRM system for scheduling and reporting on sales visits. The system should allow close collaboration with the Account Manager and provide real-time updates on customers.

Client

* The system must provide an unlimited number of licenses for Customers who make purchases through the B2B platform. Customers should be given access to the system by the Field Representative and be able to communicate with the Account Manager to complete the sales process.

**III. CPV codes:**

72268000-1: Software delivery services

72265000-0: Software configuration services

77263000-6: Software implementation services

**IV. Order completion date:**

1. Anticipated period of execution of the planned order: up to 2 months.
2. The implementation periods for Stages 1-7 will be determined by the Contractor, with the participation of the
3. Ordering Party, in the form of the Material and Financial Schedule.
4. Anticipated date for conclusion of contract with the Contractor: August 1, 2023.

**V. Place of contract execution:**

The Employer allows the provision of services in remote form, subject to:

* the obligation to ensure the presence of members of the individual teams of specialists and each time the Project Manager at working meetings, which will be held at the place of implementation of the project, i.e. Żary (68-200), 5B/5A Broni Pancernej Street,
* at least 1 once a month and no more often than once a week, situation,
* when technical considerations oblige the Contractor to implement the subject of the of the planned order at the site of the project, i.e., Żary (68-200), 5B/5A Broni Pancernej Street, particularly at the stage of implementation of the System.

**VI. Terms of payment:**

1. Remuneration for the execution of the subject of the planned order: lump sum, subject to the determination of the lump sum remuneration individually for each Stage of execution. The remuneration for the execution of the planned order shall also include:

* training of the Employer's employees, co-workers and management staff on the operation and functionality of the System - in the amount not exceeding 16 training hours, at the place of project implementation, i.e. Żary (68-200), 5b/5A Broni Pancernej Street,
* The Ordering Party provides for partial payments for each completed Stage, on the basis of a VAT invoice, issued on the basis of a partial acceptance protocol.
* The Ordering Party allows partial payments for realization of individual modules of the System, after appropriate tests have been carried out, on the basis of a VAT invoice, issued on the basis of the protocol of partial acceptance.
* The Ordering Party stipulates that the final payment, made after acceptance of the System by the Ordering Party, on the basis of the final VAT invoice, issued on the basis of the final acceptance protocol, will be no less than 10% of the Contractor's gross remuneration.
* Payment of partial invoices and the final invoice - up to 30 days.

**VII. Warranty/maintenance terms of the system:**

The ordering party requires that the subject of the contract be covered by a warranty for a period of at least 36 months from the date of acceptance of the subject of the planned contract. Under the warranty, the Contractor shall be obliged to:

a. ensure the continuity of the System's operation, understood as the ability of the System to perform the implemented functions on the production environment by accepting and performing warranty repair requests, in the following areas: verification, diagnostics and analysis of errors, removal of errors and the effects of errors by preparing target or temporary solutions to errors, preparing and making available for implementation tested solutions together with an analysis of the impact of the change resulting from the removal of the error on the functionality of the System and/or its components, optimization of the System configuration and data processing processes, for processes for a specific performance of the System, cyclic monitoring of the System,

with the Employer requiring the Contractor to ensure the possibility of reporting and subsequent debugging on a "24/7/365" basis,

b. (optionally, for an additional fee) technical assistance (technical support), including answering the Ordering Party's questions on the operation and functionality of the System, at a rate of no less than 8 hours per month and ensuring the availability of consultants on a "24/7/365" formula (helpdesk).

**VIII. Additional information:**

1. Methodology for managing the implementation of the subject of the planned contract: in accordance with PRINCE2 methodology or equivalent.
2. The Contracting Authority requires the Contractor to have a third party liability insurance policy for at least PLN 1 Million for the entire period of providing services.