



**REQUEST FOR PROPOSALS FOR CONSULTANCY
SERVICES FOR THE DEVELOPMENT OF AN
INTERGRATED SYSTEM**

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The Procurement Committee
AA Kenya
P.O, BOX 40087-00100
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1. TENDER NUMBER: AAK/37/20224/25
2. TENDER NAME: REQUEST FOR PROPOSALS FOR CONSULTANCY SERVICES FOR THE DEVELOPMENT OF AN INTEGRATED ICT SYSTEM FOR THE AA KENYA PLC.

To all eligible firms,

AA Kenya invites proposals to provide Consultancy services for the Development of an Integrated ICT System. This system is expected to encompass all AA primary business functions and processes essential for the company's core operations. The system will be operational on web and mobile platforms.

AA Kenya has contracted SRM eprocurement as consultants to manage this RFP.

The proposal must be submitted electronically to be received on or before 16th April 2024, 1400hrs EAT through SRM portal www.srmhub.com.

There is a non- refundable access fee of KES 3,000 payable via M-pesa Paybill No. 805291, Account No. "Name of the Supplier/ Service Provider"

You may seek clarifications through the emails tenders@aakenya.co.ke and admin@srmhub.com

Bids will be opened electronically thereafter and bidders will be provided with an access link.

The procurement committee of AA Kenya shall carry out evaluation of the bids.

AA Kenya

3. PRE-QUALIFICATION INSTRUCTIONS

3.1. Introduction

AA Kenya is a motoring organization with affiliation to FIA. For over 100 years, we have played a critical role in defining the Automobile industry in Kenya. We offer a range of products and services including, training, Learner Driver classes, International Driving permits, Carnet De Passage, among other mobility products. In 2023, the organization changed its structure to a public limited company through demutualization.

We would like to invite interested bidders in the ICT industry, both local and international, who must qualify by meeting the set criteria as provided in this pre-qualification document to develop an ICT Core System.

3.2. Invitation of Pre-qualification

AA Kenya intends to select a consultant from interested bidders in the Request for Proposals (RFP), against the set criteria.

Interested Consultants are invited to submit Technical and a Financial Proposals, for consulting services required for the assignment named above. The Proposal will be the basis for negotiating and ultimately signing the Contract with the selected consultant.

All international consultants should familiarize themselves with the local conditions and take them into account in preparing their Proposals.

3.3. Pre-Qualification Objective

The main objective is to Develop an ICT Integrated system for AA Kenya and offer training and maintenance support on the system. The ultimate system is expected to provide the following solutions to the company:

- a) **Automate** all our core business processes
- b) Put all our **client data in one place**, where it will be accessible by all our subsystems and users on demand. This will give us top-level business intelligence through data mining and analysis.
- c) The system in itself should be an **integration of all sub-systems** that run our core business process and most importantly will create an integration point for any other system we work with for example vendor systems.
- d) The system should give us a **360 view of any of our clients** at any given time.
- e) **Security**. The system is expected to produce clear auditable digital prints across all the subsystems. Every transaction will run across the different subsystems and hence be trackable in a maker checker pattern.
- f) The system will introduce a non-repudiation and integral workflow using the logs captured from the different subsystems.
- g) The system should be **scalable** to cater for growth.

Refer to document labelled Appendix 1 for further guidance.

3.4. Experience

Prospective consultants must have carried out successful delivery of a similar assignment to organizations of similar size and complexity. Potential consultants must demonstrate the willingness and commitment to meet the pre-qualification criteria.

3.5. Preparation and submission of Pre-Qualification Document

This document contains questionnaire forms and documents required of prospective consultants. In order to be considered for pre-qualification, one must electronically submit the information herein requested.

The Proposal, as well as all correspondence and documents relating to the Proposal exchanged between the Consultant and the AA Kenya shall be written in the English language.

3.6. Submission Address for the Pre-Qualification Documents

The proposal must be submitted electronically to be received on or before 16th April 2024, 1400hrs EAT through SRM portal www.srmhub.com

Manual submissions shall not be evaluated.

3.7. Questions Arising from Documents

Questions that may arise from the pre-qualification documents should be directed to admin@srmhub.com and tenders@aakenya.co.ke

3.8. Any additional Information

The Procurement Committee reserves the right to request submission of additional information from prospective bidders.

3.9. Financial Proposal

- a) The Financial Proposal shall be prepared using the Standard Forms provided in this RFP. It shall list all costs associated with the assignment.
- b) Financial proposal shall be reviewed for bidders whose technical proposals are accepted by AAK after scoring 70% and above.
- c) Irrespective of the consultant selection method, any Consultant that does not submit itemized and priced financial proposal, or merely refers the Procuring Entity to other legal instruments for the applicable minimum remuneration fees shall be considered non-responsive.
- d) The Consultant and its Sub-consultants and Experts are responsible for meeting all tax liabilities arising out of the Contract unless stated otherwise.
- e) The Consultant may express the price for its Services in the Kenyan Shilling. Payment under the Contract shall be made in Kenyan shilling.

3.10. Conflict of interest

All bidders are required to provide professional, objective, and impartial advice, strictly avoiding conflicts with other assignments or its own corporate interests and acting without any consideration for future work.

The Consultant has an obligation to disclose to the Procuring Entity any situation of actual or

potential conflict that impacts its capacity to serve the best interest of the Procuring Entity. Failure to disclose such situations may lead to the disqualification of the Consultant or the termination of its Contract.

Without limitation on the generality of the foregoing, and unless stated otherwise in the Data Sheet, the Consultants shall not be hired under the circumstances set forth below:

Conflicting Assignments

- a) Conflict among consulting assignments: A Consultant (including its Experts and Sub-consultants) or any of its Affiliates shall not be hired for any assignment that, by its nature, may conflict with another assignment of the Consultant for the same or for another Procuring Entity.
- b) Any existing relationships with the AA Kenya's Senior management and Board of Directors must be disclosed. The Consulting firm (including its Experts and Sub-consultants) that has a close business or personal relationship with senior management or professional staff of the AA Kenya who has the ability to influence the bidding process and:
 - i. are directly or indirectly involved in the preparation of the Terms of Reference for the assignment.
 - ii. The selection process for the Contract.
 - iii. The supervision of the Contract, may not be awarded a Contract, unless the conflict stemming from such relationship has been resolved in a manner that determines there is no conflict to affect this selection process.
- c) And any other types of conflicting relationships.

4. PRE-QUALIFICATION DATA FORMS

The attached questionnaire forms PQ-1, PQ-2, PQ-3, PQ-4, PQ-5, PQ-6, PQ-7 and PQ-8 are to be completed electronically by prospective bidders who wish to be pre-qualified for this service.

Any incomplete or wrongly filled up forms will not be considered. All the documents that form part of the proposal must be written in English and in ink.

4.2. Declaration

Application must include statement Form PQ-7 by the tenderer ensuring the accuracy of the information given and PQ-8 for integrity declaration.

4.3. Withdrawal of Pre-Qualification

Should a condition arise between the time the firm is pre-qualified to bid and the bid opening date which could substantially change the performance and qualification of the bidder or the ability to perform such as but not limited to bankruptcy, change in ownership or new commitments the AA reserves the right to reject the tender from such a bidder even though they have been initially pre-qualified.

The firm must have a fixed Business Premise and must be registered in Kenya with certificate of Registration, Certificate of Registration and Business permit should be attached.

The firm must show proof that it has paid all its statutory obligations and have current Tax Compliance Certificate.

4.4. Pre-Qualification Criteria indicating Maximum Points to be scored

1.		FORM PQ 1 PREQUALIFICATION - BUSINESS COMPLIANCE	Scores
	a)	Copy of Registration Certificate	Pass or fail
	b)	Copy of Current Tax Compliance Certificate	Pass or fail
	c)	Submission of all the other required documents Business Permit,	Pass or fail
		Manufacturers or distributors license (if not your proprietary software)	Pass or fail
	d)	Copy of compliance certificates on Data protection Act from the Office of Data Protection Commissioner and Content Service Provider, Accreditation by ICT Authority in this Category (Systems and applications. (2 points)	2
3.		FORM PQ2- PHYSICAL LOCATION	
		Proof of physical location - copy title deed, utility bill, lease /tenancy agreement, Rent receipts or rent invoices	5
4.		FORM PQ3 - FINANCIAL POSITION & TERMS OF TRADE	
	a)	Audited & Certified Financial Statements Not older than year 2020	10
	b)	Payment terms	Pass or fail
	c)	Letter demonstrating relationship with bankers	3
5.		FORM PQ4 - CONFIDENTIAL BUSINESS QUESTIONAIRE (must be filled accordingly) - (2 points)	2
6.		FORM PQ5 - PAST EXPERIENCE	
7.	a)	Provide evidence of having undertaken at least four similar service contracts two from the public institutions of above Ks.10,000,000.00 in form of correlating Purchase Orders OR contracts Evidence of four clients 12 points Evidence of three clients 9 points Evidence of two clients 6 points	12
	b)	Provide trade references/recommendation letters matching to Purchase orders and contracts above i.e from same clients that provided POs.(2 points for each letter matching to PO or contract above).	8
	c)	Submit CVs and certificates of the managerial and technical personnel who should have qualifications and experience in maintaining the following modules; Team leader (One) Total (10 points) <ul style="list-style-type: none"> ▪ A degree in IT related field from a recognized University or College (3 points) ▪ Certification in any of the above modules (4 points) ▪ 3yrs IT working experience at a senior level in a firm. (3 	18

		points) Two Technical Staff Total (8 points) <ul style="list-style-type: none"> ▪ At least a Diploma/Degree in IT related field from a recognized University or College. (1 points) ▪ At least 2 Technical staff with specific certification and experience to provide both technical and functional Support for the modules listed in the systems requirements in Appendix 1. (Total (1 points) ▪ Three (3) years or more experience in the respective relevant field mentioned above. (1 points) 	
7.		FORM PQ6 - LITIGATION HISTORY (filled and signed) - (2 points)	Pass or fail
8.		FORM PQ7 -STATEMENT (filled and signed) - 2 points	Pass or fail
9		FORM PQ8 -INTEGRITY DECLARATION (filled and signed)- 2 points	Pass or fail
10	a)	PROPOSAL Proposed implementation schedule/work plan for assignment ... (5 points)	5
	b)	Proposed approach and methodology in support and maintenance... (5 points)	5
	c)	Proposed Service Level Agreement including an escalation support matrix... 5 points	5
	d)	Detailed technical knowledge transfer proposal with plans for the training on the system. (5 points)	5
	e)	Compliance with technical specifications in Appendix 1 (The Core System Requirements Specification Document) <i>Either Fully Compliant, Partially Compliant or Not Compliant</i>	20
TOTAL POINTS			100

5. FORM PQ-1: PRE-QUALIFICATION DOCUMENTS

All firms must provide copies of: -

1. Submit the legal status of the organization in the form of a Certificate of Incorporation/Registration or its equivalent to be used as proof and is relevant in the country of origin.
2. Submit Proof of Tax Compliance in the country where the firm is registered and in countries of operations.
3. Has or is prepared to establish a presence in Kenya to support service delivery either directly or through a locally registered company in Kenya, or commitment to establish a service support center.
4. Provide evidence of experience in providing services of similar nature, complexity, and magnitude.
5. Demonstrate ability to meet all requirements as defined in the scope of work provided in the detailed Terms of Reference.
6. The interested firms may be required to illustrate the platform's ability to meet the Associations requirements by way of a product demonstration at the bidder's cost.
7. Accreditation by ICT Authority in this Category (Systems and applications)
8. Give an outline proposal and operational model of the platform including typical components under the proposed model.
9. Provide information on possible timelines for implementing the solution by submitting a comprehensive project plan.
10. Define the infrastructure required to support the implementation, rollout and operate the proposed solution.
11. Detail your support model (s).
12. Detail your Licensing model (s)
13. Abridged CVs of no more than two (2) pages for each proposed key personnel should also be submitted showing the capacities and capabilities of each personnel
14. KRA PIN Certificate of Firm/company or individual.
15. Valid Business Permit.
16. Letter of recommendation from at least 3 previous organization served. {Please specify the magnitude of the work done}
17. When mandatory for service provision, each firm must attach evidence of registration with professional bodies/authorities
18. E-mail Contacts: Valid and active e-mail address
19. Certificate of Compliance from the Office of Data Protection Commissioner and Licensed content service provider
20. Any other workplace compliance certificates where possible.
21. Audited financial statements for the last 3 years
22. Bidding Fee Payment Evidence (Bidders are required to make the payment before. Once this is done, bidders should collect receipts from the AA Kenya Head Office and attach to pre-qualification documents)

7. FORM PQ-6: LITIGATION HISTORY

Name of Contract Supplier

Contractors/Suppliers should provide information on any history of litigation or arbitration resulting from contracts executed in the last five years or currently under execution.

YEAR	AWARD FOR OR AGAINST	NAME OF CLIENT, CAUSE OF LITIGATION AND MATTER IN DISPUTE	DISPUTED AMOUNT (CURRENT VALUE, KSHS. EQUIVALENT)

Name of Authorized Signatory:

Title of Authorized Signatory:

Sign:

Date and Stamp:

8. FORM PQ -7: FIRM'S DECLARATION

Having studied the pre-qualification information for the above project I/We hereby state:

- a. The information furnished in our application is accurate to the best of our knowledge.
- b. That in case of being pre-qualified we acknowledge that this grants us the right to participate in due time in the submission of a tender or quotation on basis of provisions in the tender or quotation documents to follow.
- c. We enclose all the required documents and information required for the pre-qualification and evaluation.

Category No...

Supply/Provision of

Date

Applicant's Name

Represented by (Authorized Signatory)

Signature

(Full name and designation of the person signing and stamp or seal)

9. FORM PQ 8: INTEGRITY DECLARATION FORM

I, of P. O. Box being a resident of in the Republic of Kenya do hereby make declare as follows: -

1. **THAT** I am the Chief Executive/Managing Director/Principal Officer /Director of (Name of the Candidate) which is a Candidate in respect of Tender Number to supply goods, render services and/or carry out works for AA Kenya (AA Kenya) and duly authorized and competent to make this Declaration.
2. **THAT** the aforesaid Candidate has not been requested to pay any inducement to any member of the Board, Management, Staff and/or employees and/or agents of AA Kenya, which is the procuring entity.
3. **THAT** the aforesaid Candidate, its servants and/or agents have not offered and will not offer any inducement to any member of the Board, Management, Staff and/or employees and/or agents of AA Kenya.
4. **THAT** what is responded to hereinabove is true to the best of my knowledge information and belief.

Name of Chief Executive/Managing Director/
/Director

Organizations Stamp/Seal

.....

.....

On this day of 20.....

Signed:

Appendix 1: The Core System Requirements Specification Document *(The bidder shall indicate Fully Compliant, Partially Compliant or Not Compliant)*

Introduction

The software requirements document (SRD) serves as a crucial starting point for any software development project. It outlines the specifications, functionalities, and constraints of the desired software solution. The purpose of the SRD is to clearly define the expectations and requirements of the stakeholders, including clients, users, and development teams. By providing a comprehensive and structured overview, the SRD sets the stage for effective communication, collaboration, and successful project execution.

1.1. Scope

This system is expected to encompass all the primary functions and processes essential for the organization's core operations. The system will be operational on web and mobile platforms. The backend system should be a micro service architecture with each micro service taking care of the different modules within the system. The backend systems are then expected to expose APIs that will be accessed from mobile and the web for the successful functioning of the system.

1.2. Objectives

The outcome of this system is expected to provide the following solutions to the company:

- a) **Automate** all our core business processes
- b) Put all our **client data in one place**, where it will be accessible by all our subsystems and users on demand. This will give us top-level business intelligence through data mining and analysis.
- c) **Secure and Reliable data migration.**
 - i) Data migration with robust security protocols, encryption techniques, and access controls to safeguard sensitive information during data migration
 - ii) Data remediation using technologies that facilitates interoperability between different systems.
- d) The system in itself should be an **integration of all sub-systems** that run our core business process and most importantly will create an integration point for any other system we work with for example vendor systems
- e) **Provide High availability architecture:** The use of the modern architectural designs that supports high availability within the data centers and across multi-data centers for both the application and the database to ensure 100% availability
- f) Demonstrate Ability to carry out **maintenance without downtime** experience by the end-users
 - (i) Decoupled applications components implemented as micro services
 - (ii) Auto scale in response to traffic based on defined metric
 - (iii) Ability to operate between various data centers.
- g) The system should give us a **360 view of any of our clients** at any given time through the utilization of existing internal data sources, 3rd party sources, customer interactions with AA systems, data received from all data documents and information linked to the customer.
- h) **Security.** The system is expected to produce clear auditable digital prints across all the subsystems. Every transaction will run across the different subsystems and hence be trackable in a maker checker pattern.
- i) The system will introduce a non-repudiation and integral workflow using the logs captured from the different subsystems.
- j) Enterprise wise Document Management System (DMS) to enable secure storage, retrieval, and organization of electronic documents submitted by the customer, from integrated digital services or from internal operations
- k) Use of generative AI to respond to customer enquiries intelligently.

- l) Centralized user access providing ease of admission to all services
- m) Digitalized end to end paperless workflows to enhance visibility and adherence to the Service Level Agreement. Include a work flow engine that can be customized to automate any business process work flow based on the services below offered by the business.
- n) Creation of top-level reports and dashboards for **Reporting and Analytics**, along with the capability to drill down into detailed insights, is crucial. Ensure ease of generating ad hoc reports.

2. System Requirements and Functional Requirements

This list details the sub-systems of the core system and its functional requirements. The subsystems are as follows;

- a) Driving school
- b) Membership
- c) Institute (Learning Management System)
- d) Customer Relationship Management (CRM)
- e) Licensing (International Driving Permits and Carnets)
- f) Tours and travels
- g) Fleet management
- h) Service Center
- i) Payments

2.1. Driving school

This module defines all the driving school operations and functions in the system. The objective is to streamline end-to-end core business processes, operations, and management of the driving school, including but not limited to onboarding of new branches, customer reception/inquiry, registration, payment, and full admission as a driving school learner. Below is a summary of the system's expected functionality;

2.1.1. Registration/onboarding.

A potential student should be able to register through the following means:

- Web application
- Mobile application on both android and IOS
- USSD

During the registration process, the client should be able to input relevant bio-data (i.e., full name, identification (I.D) number, and location), driving school category, and the preferred branch for undertaking the classes. After successful registration, the client should be issued a unique student number that will be used to identify him/her in the system. After registration, the students are not fully admitted but should be under a 'pending/approval' listing for relevant approvals and payment processing to be made.

2.1.2. Class Scheduling

After full admission of a student/learner, the system should provide a provisional timetable and allow set user groups (i.e., an instructor or a customer experience advocate) to be able to schedule classes by assigning a group of learners of a similar driving class/category to a specific class, selecting a time period for the lesson, the unit to be covered and the available instructor.

2.1.3. Student Progress Tracking

The system ought to also capture the class attendance of students, allowing an instructor to do a class roll call through a checklist of the students who attended a particular class for every class assigned to him/her. The system should provide a track record of a student's attendance of classes up to graduation level.

2.1.4. Instructor Management

The system should allow the addition of instructors, and assign classes and vehicles to instructors. The

branch manager should be able to monitor, track and assess all instructors.

2.1.5. Vehicle Management

The system should allow adding vehicles per branch, reassigning the vehicles to different instructors within a branch, and also reassigning a vehicle to a different branch. During the scheduling of practical classes, the system should also allow assigning of set groups of students to a particular vehicle with a selected instructor.

2.1.6. Payment Processing

Based on the category a student registered him/herself to, the system should be able to automatically invoice the student the specific amount for that given driving class/category. After registration payment details should also be displayed to the student and possible payment methods.

Students are expected to make the required payment using their preferred method (e.g., EFT, PDQ, cheque, a mobile banking option (M-Pesa)) and based on the integrated payment APIs on the system (i.e., M-PESA API) the payment should be automatically mapped and posted, invoiced and receipted to the specific student account using the student/application number as the unique identifier.

The system should also provide an option for the manual generation of payment receipts where other payment methods that lack integrated APIs in the system have been used to make payments.

After the payment has been processed the system should fully admit the student by mapping the student account from the 'pending/approval' listing to the specific listing based on the category selected during registration. The transition is fully dependent on the payment processing i.e. if no payment has been made the client should not be admitted as a learner.

Downloading and printing receipts, invoices, and statements of accounts should be an available option for users.

2.1.7. Reports generation

The system should avail different types of reports based on available data/information; this includes but is not limited to:

- An application summary report: for all registered students, and pending applications (i.e., students who are yet to be converted)
- Student listing reports based on driving category/class
- Credit control/management reports: showing payment balances per student and per branch.
- An income report: showcases the total payment amounts that have been made during a specific time period (i.e., daily/monthly/quarterly/yearly) for the entire company or for a specific branch.

2.1.8. Driver Assessment

The system should allow examiners to conduct driver assessments on clients through the creation of an assessment report with selected parameters based on the assessment being done. The report should provide input options (e.g., text box/ check box/ dropdown) for the assessors where they can provide a given rating or a remark on what is being assessed (i.e., for gear changing or braking can be rated as average/good/poor). On completion the report should have a unique report number and the final rating should be the cumulative sum of the different arrears that have been assessed and rated.

2.1.9 Student Management

The system should support viewing, editing of student KYC data as well as support transfer of students and history between branches and reassignment of instructors via a student portal on web and mobile.

2.1.10 Driver Recruitment Service

The system should facilitate the registration of drivers along with their qualifications, enable corporates and individuals to request driver services, and maintain a comprehensive record of transactions and payments.

2.2. Membership

Membership systems should be able to automate the entire journey for a client until they become a member of AA. The system should provide functionality to create, update and deactivate a member's profile. Membership is based on vehicles, the system should allow adding, updating, and deleting a member's vehicles. Importantly, the system should automatically expire members' vehicles whose subscription has ended. There are different categories of memberships with different benefits. The system should therefore allow for the creation of these categories and assign the relevant benefits. Finally, the system should be able to query the payment system to initiate payments and perform user management, by allocating roles and rights where required. Below is a summary of the system's expected functionality;

2.2.1. Membership management

The system should handle member onboarding, member renewal subscription, and editing of member information. The system should provide the ability to add members individually and in bulk. For instance in cases where a huge list of members has to be uploaded into the system. The system should allow for uploading xls or CSV for such lists. The system should also provide approval workflow for the batch upload, edit member details, deactivate members, and card printing for the member.

2.2.2. Vehicle management

The system should allow the addition of vehicles, vehicle renewals, and vehicle category upgrades. The system should be able to monitor vehicle membership expiry dates based on the date of renewal and not based on the date of membership account creation. The system should allow for the selection of vehicle/s due for renewal and renew them without affecting the expiry dates of the other vehicles. The system should allow a member to upgrade their vehicles to new categories without changing to other vehicles in different categories.

2.2.3. Benefits management

The system should allow adding, assigning, and tracking of benefits consumption of vehicles. The system should keep track of benefits consumed by the member and deduct all the benefits where necessary and send reminders upon completion of the free tows benefits to the member. Benefits are mapped to a vehicle. Benefits from Partner organizations (riders) need to be incorporated in the system and managed effectively.

2.2.4. Category management

The system should allow the creation of categories, assigning, and changing the category of a member from one to another. The system should also allow the creation of subcategories of the category.

2.2.5. Payment

The system should allow online and mobile payments. Also, the system should allow LPO mode of payments for corporations. The system should facilitate secure payment processing including voucher/coupon and discount management for membership subscription fees, allowing members to make online payments using various payment methods.

2.2.6. User management

The system should support viewing and editing of KYC data, view active user sessions, allow credentials management such as resetting credentials and generation OTPs

2.2.7. Communication Tools

The system should enable efficient communication with members through email notifications, newsletters, announcements, and targeted messaging to specific member segments or Categories. The system should include a member portal where members can view their membership details and access their associated benefits.

2.2.8. Reports

The system should allow the viewing and downloading of reports. The reports should include; All members' reports per category and sub-category, new registrations, renewals, due renewals, all vehicles per category and subcategory, total revenue and revenue per category, revenue per branch, and members' contact list.

2.2.9. Integration

The system should allow integrations to the payments module and the other subsystems of the core. The system should allow integration with other software systems (e.g., CRM and ERP).

2.2.10. Search/Filter

Search/filter functionality should be provided by the system for all types of members.

The system should allow search of members using scheme, corporate of members name, vehicle number, ID number and phone number. The search should return a clickable record that points to a user, corporate or scheme profile.

On the profile information including expired and active vehicles should be displayed.

2.2.11. Integrity

The system should offer maximum data integrity by use of unique keys that include

1. Phone number
2. Vehicle number
3. ID number
4. Passport Number for foreign clients

The fields above should be unique and therefore should not be allowed for more than one entry in the system.

Additionally, this sensitive data should be encrypted at rest and only be visible to users who are logged in on the platform.

2.3. Payment

The payment system is an application expected to be at the center of monetary transactions within the company. This system is expected to initiate all mobile and online payments while allowing the user to insert other forms of payment like cheques, bank slips, and LPOs. The payment system achieves this by having API integration with the other systems or modules which the user interacts with directly to make the payment requests. Most importantly, the payment system should integrate with the company's ERPs to register payments for financial analytics and decision-making. The system should:

2.3.1. Initiate payments, for mobile and online payments.

The system should basically be the origin of all payment requests for online payments and the recipient of payments from other modes of payments as highlighted. The system should also allow for online card payments and APIs for STK push. The system should initiate Mpesa payments, Card payments, record bank slip payments, record cheque payments, and credit payments. It should include voucher/coupon and discount management functionalities.

2.3.2. Record payments for other forms or payments like cheques

The system should provide an API to allow the user to provide details for bank slip payments, and also an API for users to provide bank slip payments, cheque payments, and credit card payments.

2.3.3. Validate payment as per the laid business constraints

The system should allow the processing of payments. It involves validation, recording or storing, posting the payment, and finally returning either a successful or failed message to the user. The system should also provide APIs for all other applications to remit payments to AA of Kenya systems. Receiving

payments, means all payments are either registered or initiated from here. A payment made can vary depending on various factors, for instance, payment method, remitted amount versus the paid amount, failed or successful payment, etc. By payment validation, the system should ensure all the underlying constraints are met.

2.3.4. Store a backup of payment information

The payment system should store payment information. A payment whether failed or successful, meets the expected limits or not must be stored for reference. The distinguishing factor should be the correct status i.e. failed, successful or pending. The system should map payments to the correct mode of payment. Different payment modes can be Mpesa, Card, Cheque, Bank slip, or Credit.

2.3.5. Post payments to the company's ERP, Navision in this case.

Posting payment means writing the payment to the company's ERP (Navision). Payments should only be posted if successful. Customer details are also to be created on the ERP. The system should be able to handle store requisitions for items and vehicle spare parts. The system should allow sending of success or failure notifications through email and also create a return invoice to the user and to the ERP and generate a respective receipt. The system should generate a sales order and transfer order for the items in the inventory.

2.3.6. Reporting

The system should provide a dashboard where payment data will be displayed for reporting purposes. Data like revenue per department and revenue per branch and revenue models should be displayed here. Some of the reports that the system should provide include total association revenue, total revenue per branch, total revenue per department, total revenue per payment mode, total credits, cost of goods sold, and profit reports.

2.4. Institute

The institute system has to automate the student onboarding, learning, and certification process both on the student and admin side. The system has to provide features that come into effect when a client walks in, gets onboarded, becomes a student of AA Institute, and finally completes the learning process. The system has to automate class, fee payment, and examination management. The student should be able to track their own progress in terms of class attendance, exam performance, and fee payment. The tutor should also be able to do the same while having a portal to compose lesson content and set exams. The system should allow for a provision to enable students to learn online. Outlined below are some of the features expected for the application.

2.4.1. Student Registration

The system should allow registrations of new learners, and the ability to self-register by prospective students, and upon review by the admin, the student record is accepted and enrolled for the course of choice. This means approvals should be there for new self-registration learners. Registration channels should include USSD, web portal, and mobile app. The staff should also be able to register new learners through a web admin portal.

2.4.2. Student admission

The system should be able to allocate admission numbers automatically. Admission numbers cannot be reserved or skipped. Once assigned, it should not be edited. For students registering/ enrolling online. The admission number should not be assigned automatically. The assignment of the admission number should only take place once the student has been verified and accepted by the admin.

2.4.3. Fee payment

An invoice should be generated once the registration has been completed and a receipt after fee payment. Receipts should be generated once the payment has been made. The system should allow all modes of payment. This feature should facilitate viewing students' payment summary records while on student records and also have it viewed as a report.

2.4.4. Class attendance management

There should be a functionality to record attendance via QR or bar codes via student cards so as to easily and quickly capture attendance. The feature should also track student performance and progress for all students.

2.4.4. Exam administration

The system should provide the capability to register a student for a specific exam at a time. Students can book multiple exam modules. Fee payment validation is required during exam booking. The system should allow the admin to create exams, tabulate exams and generate exam reports. The functionality should also allow students to view transcripts in the system so that they can see their results and print them if they have to and also show their exam history. The system should provide a feature for an admin to send a link for the student to view their results or for them to print their results.

2.4.5. Grading management

The system should provide a mechanism to set the grading parameters that will be used to grade the examinations. The admin should allow the admin to manage the grading system. This includes setting parameters and updating.

2.4.6. Virtual learning

The system should provide an e-learning portal for a tutor to be able to do online training coaching via the web. It should also provide functionality to record training that can be retrieved in the future for different purposes and also to facilitate an online platform that can upload video lessons and keep track of progress for each student. The system should be designed to automatically identify the appropriate recipients for tests based on the percentage of completion of online lessons. Additionally, it should incorporate functionality on the online platform to provide feedback, enabling automated responses for students during tests and Q&A sessions.

2.4.7. Certificate management

This is a feature to allocate certificate numbers automatically/dynamically for easy tracking. It should also allow certificate authentication on the validity of a certificate. The system should allow students to provide feedback and raise their concerns.

2.4.8. Course Management

The system should allow the admin to create a course, add content to a course, add the amount to the course, create an exam, add the amount to the exam, and share exams with a specific group of students.

2.4.9. Corporate Partners Management

The system should have a partner portal for corporates to review their students' course progress, grades and certificate validity.

2.4.10. Reports and dashboard

The system should allow the generation of the following reports; student registration summary, fee balance summary, certificate issue summary, students revenue per course summary, exam performance summary, reports on issued certificates, and students' class attendance reports.

2.4.11. Integration to other AA systems

This feature facilitates integration with the Navision ERP on matters of payments and other transaction details as will be agreed upon. Also a real-time integration with the CRM.

2.5. Customer Relationship Management (CRM)

This application is expected to perform all the fundamental CRM functionalities alongside other customized functionalities for the association through integration with the other applications. For instance, the system should allow a user to search for a customer. Results are either found or not. If found the system should return an application ID showing exactly where the customer belongs to in the association. For example, if the application ID is mb102, the customer is part of AA through the membership department. If the customer is not found, then the process of making a lead to becoming a

customer for a given product begins. The system should allow for:

2.5.1. Contact and Account Management

The system should provide a customer snapshot screen showing the customer portfolio with AA. Historical and current products and services. The system should be able to store customer contact details, including names, addresses, phone numbers, email addresses, ID (, Or Company reg number), KRA PIN, Physical address, and other relevant information. The system should also classify customers as either corporates, individuals, or a student. Provide 2 email options with only one being mandatory. The system should provide a search capability using all the key parameters including Customer ID, National ID, Passport number, KRA PIN number, Company name, and Surname.

2.5.2. Lead Management

The system should be able to manage the process of converting leads into customers, including lead tracking, lead qualification, and lead nurturing. The system should enable workflow for lead creation, qualification, lead approval, product creation/update, and discount proposal. Any incomplete registration/inquiry from any client application should be logged as a lead for follow-up. The system should also provide the capability to capture all staff with different profiles.

2.5.3. Customer Service and Support

Provide a capability for the CRM to sync with Specific customers based on the unique Customer identifier from the call center third-party application. >> Date of the call, time for the call, duration of the call, and notes captured by the call center agent. The system should have the capability to import and export customer data regarding a case. This could be a report required by a corporate or individual on a case that is either ongoing or closed. Provide the capability for handling and keeping track of interactions with clients, such as invoices, purchase history, and order status. The CRM should allow the admin to set prices to be uploaded on the CRM Products and services and also the product's business rules and policies.

2.5.3. Sales and Marketing Automation

The system should allow salespeople to manage their sales pipeline, track opportunities, and manage deals through the entire sales cycle. Sales Pipeline - Contact>Qualification>Meeting>Proposal>Closing>Retention. After closing the opportunity for any AA product, payment mode is selected - Company Paybill, Branch pay bill, Debit card, Credit card, or Cheque. The system should also provide the capability for document management. Sales officers should be able to generate quotations and invoices. The system should be able to automate marketing activities such as email campaigns, social media management, and lead capture.

2.5.4. Reporting and Analytics

The system should provide real-time reporting and analytics on customer behavior, sales performance, and other key metrics, enabling users to make data-driven decisions. The system should provide sales Intelligence, Sales Reporting, Sales Forecasting, Activity Dashboard, Revenue Cycle Modeling, and Business Intelligence. It should provide reports on new daily sale leads, pipeline forecasting, statuses of all leads, leads created, and conversions. The dashboard of the CRM should provide access levels. This means branch managers' access levels should be different from the sales teams and also senior managers.

2.5.5. Collaboration and Communication

The system should enable collaboration between users and departments, allowing them to share

information and work together more effectively. The system should be responsive to mobile devices.

2.5.6. Integration and Customization

The system should be able to integrate with other business applications in all business lines, such as payments module, membership, Driving school, Call center, ERP system, bulk SMS, and email platforms to allow configurable communication alerts to be sent out. It should be customizable: Branch managers and Senior managers should be able to see the information that is valuable and actionable to them. They should be able to adjust their views by removing and adding what matters to them. Data reflecting their business. Default settings - The business development manager and the Operations manager roles should be able to view all sales opportunities through any channel. Branch managers have access to only their branches. Sales representatives and call center representatives should only view their pipelines. A branch manager should have the ability to add to a maximum of two other branch sales information for comparison if need be.

2.6. Tours and Travels

This system must provide the functionality to allow and make it easy for all our customers to preview, select and book the different packages offered by our tours department. The system should allow the customer to submit any inquiries, comments, and complaints. The clients should be able to book for their desired packages and this information is immediately sent to our backend for the admin's attention. The system should allow for email and real-time communication between the user from AA and the customer. The system should be integrated to the other systems to offer functionalities such as consistency of service and loyalty rewards. To pass the company's smoke test, the system should provide the highlighted functionalities at a minimum:

2.6.1. Client onboarding

Provide a web portal for prospective clients to self-register. This information should be held with a view to validating to accept the client in our customer base. Approval for the customer to be verified and registered fully on our CRM. Provide prospective customers with preferences and activate notifications based on their preferences. Allow for the system to capture Clients' flight details based on the bookings on the Global Distribution Systems e.g. Amadeus, Galileo's, etc

2.6.2. Package management

The system should provide the ability for adding all Hotel deals extended to AA while allowing AA to set mark-up percentages as we sell the same to our clients

2.6.3. Package Booking

The system should allow customers to view and manage their travel itinerary, including flight schedules, hotel bookings, and tour reservations.

2.6.4. Enquiry and Customer support management

The system should allow customers to send inquiries, and book tours, hotels, and other travel-related services online. Information is to be processed by our internal staff for onward booking with the respective booked facilities. The system should provide real-time availability, and personalized travel recommendations, based on customer preferences and previous travel history. Clients should also create and manage their profiles, manage their travel itineraries, and provide online chat and email communications.

2.6.5. Lead management

The system should allow tracking of customers from the point of inquiry to the end. Customers should also view and manage their travel itinerary, including flight schedules, hotel bookings, and tour

reservations.

2.6.6. Reports, dashboards, and customizations

The system should provide reporting and analytics capabilities, allowing travel agencies to track key metrics, such as booking volumes, revenue, and customer satisfaction. The system should be customizable to meet the unique needs of different hotels, including branding, user interface, functionality, support multiple languages and allow mobile access.

2.6.7. Ticket management

The system should allow users throughout the mobile application, and web portal to temporarily make bookings for hotel, flight and any other services. The system should then log and assign the tasks to different AA staff who should then follow up on behalf of the client and update the progress accordingly

2.7. Fleet Management

This system is expected to perform end-to-end management of the fleet department's clients, users, and products. The system should allow user(company users) account creation and profile management, stock management for the equipment required by the department, and customer management.

The system should allow for the following outlined features.

2.7.1. User and customer onboarding

The system should allow the onboarding of new clients. For new Customer creation, provide the capability to link to the CRM for new customer creation or customer detail updates, or Customer portfolio. For new Customer creation, provide the capability to link to the CRM for new customer creation or customer detail updates, or Customer portfolio.

2.7.2. Customer account management

Logged-in users can view the products or services enjoyed by the customer and all details related to that product(s) or service(s) offering. All products and services uploaded have their properties displayed for differentiation. Allow configurable workflows for Customer creation, Customer qualification, Control room process, Technical departments, Customer training, and Certificate issuance. Provide a capability for adding vehicle information, client-specific information, form uploads, and credit application.

2.7.3. Stock tracking

The system should allow viewing of the Store Fleet management stock availability with configurable re-order levels for each store item. The system should allow the updation of Stock items both ways. From ERP to Fleet Management System, and from Fleet Management System to ERP NAV.

2.7.4. Customer workflow management

Provide configurable workflows for Customer creation, Customer qualification, Control room process, Technical departments, Customer training, and Certificate issuance. Once the installation and configuration are done the client is trained on the system. Ending the training advances the workflow and a task is created for the Customer Service team.

2.7.5. Product Management

Admin users should be able to create and manage products. During new installations, the available and active products should be selectable from a dropdown.

2.7.6. Payments

The system should support all modes of Payment based on the client's preference i.e. Mpesa, Bank transfer, Cheque, and LPO. Payments received against an invoice from the Fleet management system

should be reflected on the fleet aggregation system and also on customer records as credit offsetting an approved invoice.

2.7.7. Dashboard and Reports Management

Provide an automated dashboard for fleet management to view the following:

All Fleet management Leads Product distribution by product/service offering, and a listing of all expiring in three months contracts by Customer type. Reports should also include; All Customers by product type, Customers by Expiry date Customers per specific Customer type (Corporate, Individual).

2.7.8. Integration And Customization

The system should allow Integration with CRM System - Customer, Products and Services, Customer case management, Integration with Payments System - Payment type, Product or service Cost less any discount offered. Discount offered is subject to approval by the BDM as per the workflow to be agreed upon. The system should also allow integration with SMS solutions.

2.8. Licensing

This application is meant to simplify the process of management of licensing by enabling the licensing department to achieve its goal through monitoring the licensing process, inventory management guided by the number of applications handled, and customer satisfaction through efficiency in delivering the licenses. To drive this goal it's expected that it has to fulfill the following requirements;

2.8.1. Client Onboarding

The system should allow capturing the biodata of the client; KYC information, and details of the carnet (validity, countries to visit, Date of departure, Place of issue). The system should also allow the addition of the vehicle data and editing of KYC data while ensuring maker checker functionality

2.8.2. Renewal Management

The system should allow reusing previous details for the client if the client is coming for a renewal i.e. If the client is using the same car, reuse the details of the vehicle. The system should allow the user to; Add vehicle details and update the biodata in case of any changes.

2.8.3. Vehicle management

The system should allow the addition of vehicles and also reuse of the same vehicle in case of carnet renewal.

2.8.4. Enquiry management

The system should allow all the inquiries to come through the system; All inquiries from the website, and USSD to directly come to the system, notifications to appear on the screen on unresolved inquiries, and respond to inquiries through the system.

2.8.5. Inventory management

The system should allow the system to receive stock and tracking; Track the booklets through the system; sold and those still in stock.

2.8.6. Payments

The system should generate an invoice. Invoicing should consider the number of pages of the carnet applied (10 pages or 25 pages) and the period (3 months or 12 months). The system should allow the user to generate and print receipts within the system. It should have a report of enquiry module including turnaround time in resolving /responding to client requests in any given time scope.

2.8.7. Reports and Printing

The system should provide the following management reports: A list of new registrations and renewals with date filters, a list of the available copies of the carnet booklets (serialized), a list of due renewals, and total revenue/sales with date filters. It should also allow the user to print the carnet once invoicing and receipt is complete.

2.9. Service Centers and Garages

This should be a comprehensive system designed to streamline and automate various operations and processes within our service centers or customer support environment. It should help the company's service centers manage their activities more efficiently, improve customer service, and increase overall productivity. Outlined are the critical features expected within the service center solution

2.9.1. Registration/Onboarding

The system should allow capturing the biodata of the client; KYC information and detail of the vehicle. A potential client should be able to register through the following means:

- Web application
- Mobile application
- USSD

2.9.2. Service Booking

The system should allow the customer to book a service through a web portal or through a mobile application. Bookings should be sent to the admin who will confirm the booking. Customers should then receive a confirmation of the booking. Booking details should include; Customer name, phone number, type of service, date, and time.

2.9.3. Product creation

The system should allow the admin to create products and services. The admin should also set the days and times that the bookings can be made. The system should handle spare parts inventory management including but not limited to minimum stock recommendation, alerts when parts fall below the above threshold and Parts ageing analysis.

2.9.4. Ticket Management

The system should allow service center agents to create, track, and manage customer service tickets. It should provide a centralized platform for organizing and prioritizing customer requests, ensuring efficient ticket resolution.

2.9.5. Knowledge Base

The system should include a knowledge base where users can store and access information, troubleshoot guides, FAQs, and other resources. This helps users provide accurate and consistent information to customers and reduces the need for repetitive inquiries.

2.9.6. Communication and Campaign Channels

The system should integrate various communication channels like email, live chat, and social media to facilitate seamless customer interactions. It should enable users to respond to customer queries through their preferred channels, enhancing customer satisfaction. The system should also send notifications to customers on reminders for vehicle servicing.

2.9.7. Automation and Workflow Management

The system should automate routine tasks and workflows, such as ticket routing, assignment, and escalation. It ensures efficient handling of customer requests.

2.9.8. Reporting and Analytics

The system should provide reporting and analytics features to track key performance indicators (KPIs) and generate insightful reports. The reports should include; total sales, new clients registered, and jobs done. Service center managers can monitor user performance, identify bottlenecks, and make data-driven decisions for process improvements.

2.9.9. Integration Capabilities

Service center systems should integrate with other business systems like customer relationship management (CRM) and ERP systems. This integration streamlines data exchange and ensures a seamless flow of information across different departments.

2.9.10. Customer Self-Service

The system should offer self-service options for customer registrations and booking, FAQs, and online knowledge bases. This empowers customers to find answers to their questions independently and reduces the need for contacting support.

2.9.11. SLA Management

Service Level Agreement (SLA) management features help to track and meet predefined service level targets. This will enable monitoring of response and resolution times, escalations, and overall compliance with SLAs.

2.9.12. Payments

The system should be able to generate invoices based on the services selected. The system should also generate a receipt. The system should support all modes of Payment based on the client's preference i.e. Mpesa, Bank transfer, Cheque, and LPO.

2.10. AA Insurance Brokers (AAIB)

The system is intended to support our insurance brokerage department. It should have inbuilt and can be interfaced with in-house and external agents' commission processing and productivity reporting systems. It should have modules covering all functions of an insurance intermediary which include:

2.10.1. Customer And Account Management

The system should enable users to manage client information, including contact details, policy history, communication logs, and document management. It helps brokers maintain a centralized client database and provides quick access to relevant information.

2.10.2. Quotation Management

The system should generate quotes and proposals for different insurance products based on client requirements. It streamlines the process of comparing policies, calculating premiums, and presenting options to clients.

2.10.3. Policy Underwriting, Maintenance, And Renewal

The system should manage policies for their clients efficiently. It includes features to create, update, and maintain policy records, including policy details, coverage information, premium calculations, and renewal management.

2.10.4. Claims Management

The system should facilitate claims processing by capturing and managing claim information, tracking claim status, and facilitating communication between brokers, clients, and insurance companies.

2.10.5. Financial Management

The system should generate quotes and proposals for different insurance products based on client requirements. It streamlines the process of comparing policies, calculating premiums, and presenting options to clients.

2.10.6. Reporting and Analytics

The system should provide reporting and analytics features to track sales, commissions, client retention, and other key metrics. It helps to make informed decisions and identify growth opportunities.

2.10.7. Integration with partners

The system should integrate with insurance carriers' systems to streamline policy quoting, submission, and endorsement processes. Integration reduces manual data entry, improves accuracy, and accelerates policy issuance.

2.10.8 Payments

The system should be able to generate invoices based on the services selected. The system should also generate a receipt. The system should support all modes of Payment based on the client's preference i.e. Mpesa, Bank transfer, Cheque, and LPO.

2.11. Integration

The integration involves making the modules communicate with each other. The initial visualization of this system is to have every component be a stand-alone backend microservice that is integrated into its own database. In instances where a microservice has to communicate to another microservice gRPC, AMQP or API calls can be used where necessary. The microservices should then be integrated using an API gateway that channels the requests and responses to and from the microservices.

The integrating solution should produce:

2.9.1. Compatibility

The systems being integrated should be compatible with each other, and the integration solution should be designed to work with the specific versions and configurations of each system.

2.11.1. Data Mapping

The integration solution should include data mapping capabilities, which enable users to map data fields between the different systems.

2.11.2. Data Transformation

The integration solution should be able to transform data between the different systems, ensuring that the data is in the correct format for each system.

2.11.3. Error Handling

The integration solution should include robust error-handling capabilities, enabling users to quickly identify and resolve any errors that occur during the integration process. Additionally, visibility into system errors should be possible and error reports should be available to admin users.

2.11.4. Real-Time Integration

The integration solution should enable real-time data integration, ensuring that data is up-to-date across all systems.

2.11.5. Security

The integration solution should provide robust security features, ensuring that data is protected during the integration process. In addition to this an audit trail should be maintained for all user operations and it should be able to attribute all activities to individual users. Data storage should be compliant with the

Data protection laws in the Republic of Kenya

2.11.6. Scalability

Scalability is paramount for the integration solution, enabling it to manage substantial data volumes and adapt to system expansions seamlessly. To achieve this, each service should be encapsulated in Open Container Initiative (OCI) compliant images, ensuring portability and consistency across environments. Furthermore, the platform should support the utilization of OCI management tools such as Kubernetes and OpenStack. This facilitates efficient orchestration and scaling of services, empowering the system to dynamically adjust resources in response to workload demands.

2.11.7 Documentation

Each service should be well documented with details about what endpoints are exposed and the input and output models of each endpoint using the Open Api Specification

**By Management
AA Kenya**