

## **TERMS OF REFERENCE (TOR) TO PURCHASE THE QUICKBOOKS ONLINE SUBSCRIPTION**

**Tender Reference Number:** 01/CARITAS RWANDA/SG/AUGUST/2025

### **1. Background**

Caritas Rwanda currently uses the **Desktop QuickBooks** for its financial and accounting operations. In alignment with upgrading efforts, increased accessibility, improved collaboration, and enhanced data security, a transition to an **Online QuickBooks** is projected. This move supports remote work capabilities and ensures real-time financial reporting and cloud-based access for users.

### **2. Objective**

The objective of this ToR is to outline the rationale, scope, and requirements for the procurement of a **QuickBooks Online** subscription, including the transition from the desktop version.

### **3. Scope of Work**

The scope includes:

- Procuring an **Enterprise QuickBooks Online** subscription plan based on the organization's needs
- Migrating existing data from QuickBooks Desktop to QuickBooks Online.
- Ensuring all users are trained and provided access to the new platform.
- Ensuring minimal disruption during the transition.

## **4. Justification for Transition**

- **Accessibility:** Cloud-based access allows authorized users to access the system anytime, anywhere.
- **Collaboration:** Enables multi-user access in real-time.
- **Security:** Cloud hosting ensures automatic backups and secure storage.
- **Scalability:** Easier to scale with business needs.
- **Support & Updates:** QuickBooks Online receives regular updates and support without requiring manual installation.

## **5. Requirements**

- Subscription fee must be for a minimum of one year renewable. (Active license).
- Plan must support at least 6 users and include multi-currency.
- The Service provider must provide technical support during the transition period.
- Migration tools or services must be included or available.
- Compliance with data protection and financial recordkeeping standards.
- Subscription confirmation.
- License/activation details.
- Customer support contact information.
- Renewal reminders at least **30 days before expiration**.
- Configuration of user rights and security controls.
- Be compatible with **mobile and desktop access**.
- Provide **integration capability** with other tools (Excel, banking platforms, etc.).

## **6. Roles & Responsibilities**

- **Finance Department:** Define requirements, oversee migration, and manage training.
- **IT Department:** Provide technical assistance, ensure secure migration, and maintain system access.





- **The Service Provider:** Deliver QuickBooks Online subscription, assist with migration, train and provide necessary support and documentation (subscription details, renewal terms, invoice/receipt and training materials).

## **7. Declaration**

- The Service Provider agrees to comply with Caritas RWANDA's Safeguarding and PSHEA Policies to the extent permissible by the law, and by submitting both technical and financial applications, the applicant, in the motivation letter, will agree to abide by the policy and commit, himself/herself and team, to behave accordingly and report any case or suspicion arising while performing the assigned duties if awarded this tender.
- The Service Provider agrees to abide by Caritas Rwanda's data privacy and protection Policies, and by signing this contract agrees to having read and understood the policy, and commits to report any data breaches arising while performing the work related to this contract to the Caritas Rwanda's Data Protection officer (IT & DPO).

## **8. How to apply**

Interested companies are requested to submit their Technical and Financial proposals through the following email [tenders@caritasrwanda.org](mailto:tenders@caritasrwanda.org) no later than Wednesday, August 27<sup>th</sup> 2025 (by 5:00Pm).

Proposal received after the submission deadline will not be considered. Bidders are responsible to ensure their proposals are submitted according to the instructions stated herein.

## **9. Other required administrative documents**

- Letter expressing interest to carry out this required service;
- Latest detailed Curriculum vitae/s of the members of the team;
- Notarized degrees of the members of the team;

- A copy of the company registration certificate (Issued by RDB);
- A copy of RRA VAT registration certificate;
- A copy of Proof of EBM Possession;
- A valid RSSB clearance Certificate;
- A valid RRA Tax Clearance certificate;
- At least three (3) Good completion certificates of the previous similar service conducted.

**N.B:** Submission of all administrative documents listed above is mandatory and non-submission of one of said documents will cause the rejection of the offer.

Done at Kigali on August 18, 2025

 Father Oscar KAGIMBURA

Secretary General

