Introduction

Purpose of the Tender:

Our company is seeking a qualified vendor to develop a new commerce website dedicated to selling our range of course products (including in-person, e-learning, and blended programs), merchandise products, and subscriptions.

Scope of Work

We require the development of an **e-commerce website** that will serve as the platform for customers to browse and purchase courses, merchandize products and etc. This website must be integrated with our existing Salesforce CRM to ensure customer data management is synchronized and up-to-date.

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Functional Requirements

1. Course and Event Setup

1.1. The system shall allow the creation and setup of an unlimited number of courses/events, sessions, and subscriptions.

1.2. For each course/event, the system shall allow the setup and configuration of unlimited number of fields, including but not limited to the following:

1.2.1. Category

1.2.2. Sub-Category

1.2.3. CPE Category

1.2.4. Number of CPE Hours

1.2.5. Study Level

1.2.6. Training Mode

1.2.7. Facilitator/Trainer/Speaker

1.2.8. Collaboration Partner(s) and their corporate logos

1.2.9. course/event Code

1.2.10. course/event Name

1.2.11. Revenue Code

1.2.12. Accounting Division Code

1.2.13. Accounting Department Code

1.2.14. Accounting Cost Centre

1.2.15. Minimum Class Size

1.2.16. Maximum Class Size

1.2.17. Allow Waiting List

1.2.18. Course Outline

1.2.19. Price

1.2.20. Revenue Amortisation

1.2.21. Certificate

1.2.22. For specific audience only, for example

1.2.23. Age

1.2.24. Membership class

1.2.25. Membership type

1.2.26. Gender

1.3. The system shall allow the creation of a course as a private event, making it unsearchable on the website. It will only be accessible through a direct link.

1.4. The system shall provide the flexibility to enable or disable the sale of specific courses/events, bundle packages, or subscriptions based on currency or country. For example, an in-person program may not be available for sale to the overseas market.

1.5. The system shall offer the flexibility to enable or disable the feature for capturing additional participant information for specific courses/events related to a collaboration program. This information will only be stored if the registration is successful.

2. Seat Capacity Management

2.1. For chargeable courses/events, a seat shall not be assigned to a registered participant until they have been billed. For clarity, "billed" refers to the generation of an invoice for that registration. Once billed, the system shall reduce the number of available seats based on the number of participants invoiced for that registration.

2.2. For non-chargeable courses/events, a seat shall be assigned to the registered participant when the registration is submitted successfully.

2.3. The system shall offer flexible tracking of capacity for various attendance modes for a course. For example, a course may offer users the option to choose between in-person, virtual, or playback attendance. The system shall track and display how many participants will attend in-person, virtually, or via playback, ensuring that each attendance mode has its own separate capacity management.

2.4. Tenderers need to consider the scenario whereby there is an insufficient number of available seats to accommodate the number of persons attempting to register in a single registration. For example, there are 2 remaining seats with 3 participants attempting to register in the same sitting at one time. Tenderers shall describe in their proposals the handling of such scenario.

2.5. The system shall indicate seat availability using the below as an example. The criteria shall be configurable for each course/event and may be turned on/off as desired.

Seat Availability	**Display As**
Less than 25%	Limited Seats!

2.6. The system shall automatically change the status of a course/event to "Confirmed" when the Minimum Class Size is reached.

2.7. In the event that the Minimum Class Size is not met, one of the following actions will be taken:

2.7.1. Manually change the status of the course/event to "Confirmed", or

2.7.2. Cancel or defer the course/event.

2.8. When the status of a course/event is changed to "Confirmed" (regardless automatically or manually), an email notification shall be sent to all registered participants.

2.9. The system shall offer an option to turn waiting list on or off.

2.9.1. Waiting List Option – Off

When the Maximum Class Size is reached, the system shall not accept any more new registrations. The system shall automatically offer interested participants an option to be notified when the next run of the same course/event is available.

2.9.2. Waiting List Option – On

When the Maximum Class Size is reached, the system shall automatically offer interested participants the option to be put on waiting list.

2.10. The system shall automatically invite those on waiting list to confirm their registrations when there are available seats.

2.11. At registration close, the system shall automatically send a notification to all those on waiting list to inform them of the closure.

3. Tracks

3.1. Some courses/events contain multiple tracks for a session where participants may need to select the track for each session.

3.2. The system must be capable of accurately aggregating the number of participants for each track, as well as for the entire course/event. For example, in a full-day conference with 1000 available seats, participants need to choose a track for the afternoon session. Track 1 has 800 seats available, and Track 2 has 200 seats. The system should correctly track the number of participants who select either Track 1 or Track 2. If a track reaches full capacity, The system should hide the option for that track.

3.3. Each track issues a certain number of CPE Hours under a specific Competency. The number of CPE Hours and Competency vary from session to session.

3.4. The system shall integrate accurate CPE hours and competencies into the CRM to ensure the correct recording of CPE records and certificates.

4. Price Management

4.1. The system shall provide configurable pricing options based on the following.

4.2. Rack rates based on participant types

4.2.1. For all chargeable courses/events, all ISCA members and corporate members enjoy a discounted rate ("Members Price").

4.2.2. For selected chargeable courses/events, the Member Price or a special rate may also be extended to employees of collaboration partners or clients of collaboration partners. Currently, a discount voucher is issued to collaboration partners to apply the discount, without any verification process. Tenderers are requested to propose an improved method to enhance and streamline this process.

4.2.3. Staff price is extended to all staff.

4.2.4. For all others, a rack rate is being charged ("Non-Member Price").

4.2.5. Rack rates vary with each course/event.

5. Multi-currencies

5.1. The system shall support multiple currencies for individual or corporate users to select and view prices in their preferred currency. The website should automatically detect the individual or corporate users' location or allow them to manually choose their currency.

5.2. The system shall provide real-time currency conversion rates, ensuring accurate pricing for the selected currency. Exchange rates should be updated periodically to reflect the most current market rates.

5.3. The system shall integrate with payment gateways that support multi-currency transactions, enabling customers to complete purchases in their chosen currency.

5.4. The system shall enable administrators to manage multiple currencies, with the ability to configure fixed pricing, apply discounts, and set exchange rates for each supported currency.

5.5. The system shall allow users to select their preferred language and region, ensuring that both currency and language preferences align.

6. GST

6.1. The system shall allow the configuration of the GST percentage for applicable transactions.

6.2. The system shall provide the option to input prices for courses/events, bundle packages, or subscriptions before GST is applied. The system must then calculate the GST accurately based on the entered prices.

7. Zero-rated

7.1. The system shall allow for the creation and designation of specific course/event or bundle package and subscriptions that are eligible for a zero-rate and ensuring that no GST is calculated or added to the price during checkout.

7.2. The system shall allow the zero-rate to be applied automatically based on predefined conditions (e.g., category, country, currency, or customer eligibility).

7.3. Tender to suggest the optimal checkout flow for overseas transactions, both with and without GST, within a single transaction. We may offer in-person programs to overseas participants, who will fly in to attend the course. In this case, the overseas participant will be required to pay GST for the in-person programs.

8. Promotions, Bundle and Discounts

8.1. Prepaid

8.1.1. The system shall provide flexibility to allow purchases of prepaid credits by individuals only, corporations only, or both. These credits, which can be in the form of CPE hours or Credit, may be used to redeem courses/events or sponsorship events. The system shall also allow participants to top up their balance if the available credits are insufficient. The top-up amount may differ from the course/event credit rate. Additionally, the system must include a page to track and maintain credit records.

For example,

Individual only - FlexLearn Package

Corporate only – Corporate Training Package

Corporate only – Sponsorship package

8.2. Bundle

8.2.1. The system shall allow administrators to create bundle packages by grouping multiple courses/events or products together such as ISCA PBA programme

8.2.2. The system shall support the ability to bundle various types of products or services (e.g., Courses, subscriptions, merchandise products, etc.).

8.2.3. The system shall provide the flexibility to sell bundle packages at either a fixed amount or a percentage discount off the total individual prices

8.2.4. The system shall support tiered bundles where the discount increases as more items are added to the bundle.

8.2.5. The system shall provide the flexibility for participants to choose a session and select different attendance modes.

8.2.6. The system shall allow for the easy addition of new courses to an active bundle package or promotion.

8.3. Discount

8.3.1. The discount will apply to all courses/events and subscriptions, with varying rates based on account type (e.g., member, non-member, corporate member, etc.). The following are the discount types, but not limited to:

8.3.1.1. Referral Discount

8.3.1.2. Loyalty Discount

8.3.1.3. First-Timer Discount

8.3.1.4. Tiered Discount

8.3.1.5. Flash Sales Discount

8.3.1.6. Bulk Purchase Discount

8.3.1.7. Bundle Discount

8.3.1.8. Fixed Amount Discount

8.3.1.9. Buy X Free X

8.4. Promo Code

8.4.1. The system shall provide the flexibility to enable or disable the application of promo codes on all or specific courses/events, bundle packages, prepaid, subscriptions and merchandise products.

8.4.2. The system shall allow for the inclusion or exclusion of a specific list of courses/events or merchandise products.

8.4.3. The system shall offer the flexibility to define a minimum number of courses or a minimum amount required to qualify for the promo code.

8.4.4. The system shall support the bulk creation of unique promo codes, which can be issued to specific individuals, corporate users or companies.

8.4.5. The system shall allow restrictions based on different currencies, enabling promo codes to be valid only for certain currencies or countries.

8.4.6. The system shall provide the flexibility to offset the course fee by applying the promo code or charge a special rate when the voucher is used, with the pricing varying based on the account type (e.g., member, non-member, corporate member).

8.4.7. The promo code discount can be applied as either a fixed dollar amount or a percentage discount.

8.4.8. The promo code discount can be applied to each eligible item individually or to the total amount. The system shall have the flexibility to configure this.

8.4.9. For subscription-based products, the system shall have the flexibility to restrict the discount to new subscriptions only, renewals only, or both new subscriptions and renewals.

8.5. All promotions, bundle and discounts may be subjected to the following rules and will vary with every course/event and bundle:

8.5.1. Valid for a limited time only, either based on a set number of months from the purchase date or a specific fixed date.

8.5.2. Applicable to all or certain courses/events only

8.5.3. Applicable to all or certain account type

8.5.4. Applicable to all or certain currencies or countries

8.5.5. May be limited to one-time use only

8.6. The system shall allow the option of applying stacked discounts or highest single discount.

8.7. For each course/event, the system must present the price table in an easy-to-understand manner.

8.8. The system shall verify the eligibility of the registered participant(s) and must be able to calculate automatically the correct net price payable during check-out.

8.9. The system shall allow zero-rate products to be combined with other discounts, such as promotional codes or bulk purchase discounts, without impacting the zero-rate itself.

8.10. The system must be able to handle the reversal of such discounts correctly when registrations are withdrawn or cancelled. See below for two examples:

8.10.1. Example 1: A participant has been given a loyalty discount code and registers for a course. If this course is cancelled, the system shall allow the participant to reuse this discount code for another Course.

8.10.2. Example 2: If the participant defers a course and a time-limited discount such as 10% discount is applied, the system shall automatically calculate the price difference.

8.11. The system shall provide the flexibility to create referral codes to track sales made by sales representatives. Currently, individual or corporate users are required to enter the referral code during checkout. The tender may suggest a seamless or enhanced process to improve this experience.

9. ISCA Loyalty programme

9.1. The loyalty points earned from purchasing courses/events, or subscriptions shall be integrated into the CRM system for seamless tracking and management.

10. Email notification (CRM via SFMC)

10.1. The system shall provide the flexibility to create various email notification types triggered at different points, including but not limited to the following examples:

10.1.1. Registration Acknowledgement: Sent upon successful registration

10.1.2. Programme Confirmed: Sent once the course is confirmed

10.1.3. Email Reminder: Sent 3 days before the course start date (not applicable for e-learning programmes)

10.1.4. Cancellation Email: Sent when the course is cancelled by ISCA and upon approval by the HOD

10.2. The system shall offer the flexibility to enable or disable specific email notifications for particular courses/events, bundle packages, or subscriptions.

10.3. For bundle packages, the system shall send a single email template for the entire package to the individual or corporate users, rather than sending one email per course within the package.

10.4. The system shall provide the flexibility to create tailored content for different training modes and courses for all email types.

11. Multi-Languages

11.1. The system shall support multiple languages to cater to a diverse user base. Users shall be able to view the website in their preferred language.

11.2. The system shall detect the user's browser language settings/IP address and automatically display the website in the appropriate language. Users should also have the option to manually select a language from a list.

11.3. All website content, including product descriptions, navigation, checkout, and user interface elements, shall be translated into the selected language.

11.4. When switching languages, the system should also update the currency based on the region associated with the selected language.

11.5. The system shall allow administrators to manage and add translations for different languages. Admins should also be able to set default languages based on regions and adjust language settings accordingly.

12. Repeat Runs

12.1. Selected courses/events are run repeatedly on a regular basis. For each repeat run, certain details such as course/event Title, date, price, venue, or speaker/trainer may change.

12.2. The system shall:

12.2.1. Allow the copying of such courses/event in a single-click.

12.2.2. Allow editing of the copied course/event and publish it.

12.3. Perform reporting and analytics for each course/event individually and on a consolidated level.

13. Funded Courses

13.1. The system shall enable the setup and configuration of an unlimited number of funding options, including but not limited to SSG Funding, SFC Funding, CCF Funding, and SGX Subsidy. This includes factors such as age, eligible funding percentage, and other relevant criteria for specific courses or events, bundle package or subscriptions.

13.2. The system shall provide the flexibility to set a limit on the number of available funding seats for specific funding types and manage seat availability within the funding's validity period. For example, if CCF funding is valid from 01/02/2025 to 31/01/2026 and is capped at 20 participants for the course session TAX001, the system shall only allow the first 20 participants who register for the course with CCF funding for any session of TAX001 conducted between 01/02/2025 and 31/01/2026. If the 21st participant attempts to register, the system shall display an error message notifying that they are not eligible for funding. Similarly, the system shall prevent registrations for courses held before 01/02/2025 or after 31/01/2026 from applying for the funding.

13.3. The system shall allow the flexibility to set a limit on the number of available seats for a company for certain funding type.

13.4. The system shall allow individuals or corporate users to make declarations and capture this information.

13.5. The system shall capture and store the participant's details for each funding type, with the ability to customize these details for different funding types.

13.6. The system shall accurately calculate the funding amount based on the details provided by the participant.

14. Portal

14.1. Course/Event, Bundle Package, Merchandise Product Finder

14.1.1. The system shall offer the flexibility to add and configure search filters.

14.1.2. The system shall support various search options, including wildcard search, keyword search, multi-select values from a list, dropdown lists, and range-based filters (e.g. start date to end date, promotion, trainer, price, products), etc.

14.2. Course/Event, Bundle Package, Merchandise Product Listing Page

14.2.1. This listing page shall accurately display all items that match the values entered or selected in the search filters. For courses/events, the system should combine all active sessions into a single listing. If no active sessions are available, the listing page shall show a "No session available" message.

14.2.2. Each result shall be hyperlinked to the detail page corresponding to that item.

14.2.3. The system shall provide sorting options for each field in the search results.

14.2.4. The system shall provide the option to display preferred number of results in a single page (e.g., 10, 20, all).

15. Detail Page

15.1. The system shall provide a facility for the creation of rich content pages for every course/event. Besides text, images and rich media, the detail page shall also display details such as tracks and session information, prices (including Members and Non-Members prices, promotional prices), speaker, venue, registration links, testimonials, funding type etc.

15.2. For new courses/events, this page shall display a “New” status prominently next to the course/event title. This “New” status shall be automatically removed after the completion of the first run.

15.3. At a dedicated area of the detail page, there shall be a “Information At-One-Glance” section where visitors can easily obtain details of the course/event within a glance.

15.4. The page shall include a "Notify Me for Next Session" feature, allowing individual or corporate users to sign up for email notifications whenever a new session of a course or event is scheduled or published.

15.5. This page shall also include recommendations from to promote sales.

15.6. For each course/event, there shall be:

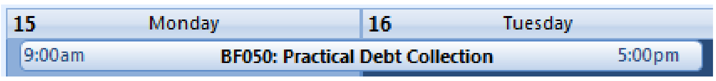
15.6.1. A Registration Open and Close Date where the course/event is open for registration between these dates, with both dates inclusive. The system shall also provide the option to set the Registration Close Date using calculated formula (e.g. seven days before course/event date), or upon satisfaction of certain conditions (e.g. where registration is full).

15.6.2. A Publish Start Date and Publish End Date where the course/event is published and searchable on the Website between these dates, with both dates inclusive. The system shall also provide the option to set the Publishing End Date using calculated formula, for example three months after the registration closes.

16. Calendar

16.1. This calendar shall list the titles of courses/events in monthly, weekly and daily views, arranged in ascending order by time and title. courses/events that are cancelled or deferred shall not be displayed in this calendar.

16.2. If a course/event spans across multiple days, this calendar shall display it as a single entry. See below screenshot for an example:



16.3. When hovered over a specific course/event, a brief description of that course/event shall be displayed.

16.4. The system shall also allow users to input an exact date, and display a list of matching courses/events for that day.

16.5. Each course/event in the calendar shall be hyperlinked to the detail page corresponding to that course/event.

16.6. The search filters specified in Clause 14.314.1.1 shall be extended to this calendar.

17. Registration and Subscription

17.1. The system shall support registration for individuals, corporate users, and guests.

17.2. Registrations may be open to public, corporate only, Members only, or by invitation only or all.

17.2.1. For Members-only courses/events,

17.2.1.1. the system must verify the identity of the participant during registration.

17.2.1.2. The system shall have an option to hide the non-member pricing.

17.2.2. For "by-invitation",

17.2.2.1. The system shall provide an invitation link for the guest to register. OR, the recipient shall have the option to accept or reject the invitation via a unique link. Once the invitation is accepted, the registration will be confirmed, and a registration acknowledgment email will be sent to the participant.

17.2.2.2. The system shall allow customization of the fields required for each course and provide an option to submit the registration for management approval after submission.

17.2.3. For corporate registrations, the system shall allow corporate users to add participant details by searching using their email address or membership number. If no account is found, the system will automatically generate a new account for the participant.

17.3. All participants, whether self-sponsored or company-sponsored, are required to create an account, except for individuals who register via a guest link.

17.4. The system shall facilitate a quick checkout process without requiring users to log in. During checkout, users will be prompted to provide their email address or membership number (if applicable) to link the purchase to an existing account or create a new one. The system must ensure the correct amount is charged based on the provided email address or membership number.

17.5. Upon logging in or matching the account type in the CRM, the system shall display the correct price.

17.6. The system shall allow participants to select their dietary preferences.

17.7. Multiple registrations may take place at the same time. For example, a participant may register for more than one course/event, or multiple participants may register for the same or different course/event in the same sitting. The system must be able to calculate automatically the correct net price payable during check-out.

17.8. The system shall not allow participants from registering for multiple courses/events that take place at the same time. The system shall display a “conflict in timing” alert to the participant.

17.9. Upon successful registration, the system shall automatically send an acknowledgement email to the registered email address.

17.10. For incomplete registrations, the system shall send reminders to the participants to complete their registration before the course/event date. The system shall provide an option to automatically delete an incomplete registration by a specified date (e.g. registration close date) or manually.

17.11. For pending payment registrations, the system shall send reminders to the participants to make their payment before the course/event date.

18. Venue Change / Training Mode Change Notification

18.1. In the event of a change in the venue/training mode, The system shall automatically send notifications to the registered participants based on the following rules:

18.2. X days before the course/event – via email and SMS notification

18.3. The content of the email/SMS may differ for each course. The system shall have the capability to allow customization of content for different courses.

19. Cancellation, Deferment, Withdrawal and Replacement

19.1. ISCA may initiate a cancellation or deferment under the following circumstances:

19.1.1. A cancellation may take place where the Minimum Class Size is not met or unavailability of Facilitator/Trainer or venue.

19.1.1.1. Registered participants may choose from the following two options

19.1.1.1.1. Request a refund – The system shall automatically generate the required financial transaction to reverse the sale; or

19.1.1.1.2. Select another course/event.

19.1.1.1.2.1. If the new course is priced higher than the original course, the participant will be required to pay the difference (top-up).

19.1.1.1.2.2. If the new course is priced lower than the original course, the participant will receive a refund for the difference, and The system shall automatically generate the required financial transaction to reverse the sale

19.1.1.1.2.3. Available seats for the new course will be reduced.

19.1.1.1.2.4. The registration will be cancelled directly, with no option provided if the participant has applied for any funding.

19.1.2. A deferment may take place where the course/event is unable to run as planned.

19.1.2.1. Request a refund – The system shall automatically generate the required financial transaction to reverse the sale.

19.1.2.2. The system shall provide one or more new date options for the same course/event for the participant to choose from.

19.1.2.3. The registration will be cancelled directly, with no option provided if the participant has applied for any funding.

19.1.2.4. The system shall allow the setting of a cut-off date for participants to respond with their preferred option. If no response is received before the cut-off date, all registrations will be automatically refunded.

19.1.2.5. Once the course/event is deferred, the course/event shall be automatically unpublished from the course/event Portal upon cancellation.

19.1.2.6. An email and SMS notification will be sent immediately upon deferment.

19.2. Withdrawal

19.2.1. Withdrawal is typically not allowed but requests may be assessed on a case-by-case basis(e.g. due to medical reasons).

19.2.2. Where withdrawals are approved, The system shall:

19.2.2.1. Automatically generate the required financial transaction to reverse the sale.

19.2.2.2. Increase the number of available seats and reduce the number of successful registrations accordingly.

19.3. Replacement (Corporate registration only)

19.3.1. A registered participant may be replaced by another person. If a Member is replaced by a non-member, a top-up will be required. No refunds will be issued if a non-member is replaced by a Member.

19.4. Deferment initiated by Participant

19.4.1. Registered participant may request to defer to the next intake of the same course/event (subject to availability). When a deferment request is made, the system shall automatically present the next available intakes of the same course/event if available.

19.5. Switch initiated by Participant

19.5.1. Registered participant may request to switch to another course/event (subject to availability).

19.6. By default, the system shall disallow individual or corporate users from using the portal for self-service actions such as switching, deferring, or substituting a registration that involves funding or is part of a package.

19.7. An administrative fee will be levied for switching, deferment and withdrawal initiated by participant. The system shall have the flexibility to waive the admin fee.

19.8. The system shall calculate the difference in course fees when a participant defers, switches to another course, or is substituted by another participant. If the new course has a higher fee, the participant must top up the difference. If the new course has a lower fee, the difference will be forfeited.

20. Certificate

20.1. The system shall allow the upload of templates for various certificates, including attendance certificates, certificates of completion, certificates of competency, or overall certificates. A single course/event can have more than one type of certificate.

20.2. The system will ensure seamless integration with the CRM to facilitate the certificate issuance process.

21. CPE Hours

21.1. The system will ensure seamless integration with the CRM to facilitate the CPE hours issuance process.

22. Subscription-Based Products

22.1. The system shall allow administrators to create and configure subscription-based products. For example, corporate membership, ISCAccountify, Boardflix and etc.

22.2. The system shall support various subscription plans (e.g., monthly, quarterly, yearly) with configurable pricing options, including the ability to configure multiple currencies.

22.3. The system shall allow for different subscription options (e.g., individual or corporate plans) with customizable validity and pricing.

22.4. The system shall support both new and renewal subscriptions.

22.5. The system shall send confirmation emails to users upon successful subscription enrolment and renewal.

22.6. The system shall allow flexible billing cycles for subscriptions (e.g., monthly, annually), and ensure accurate invoicing based on the chosen plan.

22.7. The system shall allow individuals or corporate users to manage their subscription preferences, including cancellations, through their account portal.

22.8. The system shall automatically handle recurring payments for subscriptions, including sending reminders before the renewal date and processing renewals on time.

22.9. The system shall provide functionality to apply discounts or promo codes for subscription products.

22.10. The system shall provide individual users or corporate users with an overview of their active subscriptions, including renewal dates, next billing cycle, and etc.

22.11. The system shall integrate it into the CRM and the product portal once the payment is made.

23. Recommendation Algorithm

23.1. The system shall have the ability to suggest personalized recommendations to users based on their previous behavior, preferences, and interactions with the platform.

23.2. The system shall suggest additional items, such as related courses, events, products, or subscriptions, when a user adds an item to their cart.

23.3. The system shall also provide the click-through and conversion rates of such recommendations.

23.4. Tenderers shall describe how this algorithm works and how it has helped organizations in similar businesses to increase sales, and demonstrate the level of accuracy and speed of generating recommendations.

24. Sponsorship Management

24.1. The system shall provide the flexibility to create various sponsorship packages, each with a predefined monetary value and credits.

24.2. The system shall allow for the enabling or disabling of sponsorship packages for individual or corporate users.

24.3. The system shall support the creation of different sponsorship event categories and individual sponsorship events.

24.4. The system shall allow corporate to redeem credits for a sponsorship event after purchasing the package.

24.5. The system shall accurately record the utilization of credits.

24.6. The system shall generate a financial document (Statement of Utilization) upon credit utilization.

24.7. The system shall have the flexibility to enable or disable the feature for individual or corporate users to top up credits if insufficient. The top-up amount may differ from the rate/credit of the originally purchased package.

24.8. The system shall display the top-up amount correctly in financial documents.

24.9. The system shall accurately record revenue and integrate with the finance system, with the flexibility to configure whether certain events need to be amortized.

24.10. The system shall allow individual users only or corporate users only or both individual and corporate users to purchase ala-carte sponsorship events, which will be charged at the applicable ala-carte rate.

25. Merchandise Product

25.1. The system shall provide the ability to add, edit and manage products easily.

25.2. The system shall be able to track stock levels and automate low-stock alerts.

25.3. The product pages should include the following, but not limited to:

25.3.1. High-quality product images with zoom and 360-degree view functionality.

25.3.2. Product descriptions, features, and specifications.

25.3.3. Allow to enable and disable size guides and available options (e.g., colour, size, material).

25.3.4. User reviews and ratings.

25.3.5. Availability/stock status.

25.4. The product may not always be a physical item, such as online resources. The system should provide the flexibility to upload links or digital copies of materials. Access to these materials will be sent via email once payment has been successfully processed.

26. Redemption System

26.1. The system should allow administrators to mark which products are available for redemption (by points) and which are for sale (via payment).

26.2. For redeemable products, there should be a field where the number of points required for redemption is specified.

26.3. A section where members can browse products eligible for redemption using points. Each product will display the points required for redemption.

26.4. When a member redeems a product, the points balance will be deducted automatically from their account.

26.5. Upon successful redemption, an order confirmation will be sent to the member via email, including redemption details.

26.6. Staff members can claim products internally for internal use or distribution, and the system will automatically deduct items from the stock.

26.7. Staff claims should be tracked separately from member redemption and sales for internal accounting purposes.

27. Payment Methods

27.1. Credit Card (Wooshpay, Paypal)

27.2. E-invoice for government sector

27.3. Giro for companies that have credit terms set in the CRM

28. Billing (Invoice and Credit Note)

28.1. The system must be able to itemize each billing item (including discounts, funded amounts) and payment modes, where applicable and desired. For instance, the discount amount applied must be clearly shown.

28.2. The system must calculate subtotals, funding amounts, total payable amounts, and other financial figures accurately, ensuring they are rounded to two decimal places and displayed correctly on financial documents such as invoices, receipts, and credit notes.

28.3. The system must correctly allocate revenue for bundle packages across individual courses or items.

28.4. The system must accurately calculate the differences in course fees for scenarios such as course switching, deferment, or substitution, including handling top-up, forfeiture, and refund situations.

28.5. The system must convert foreign currencies to SGD for all billings but display the foreign currencies in financial documents like invoices, receipts, and credit notes.

28.6. The system shall allow billing details on invoices to be edited or enable the creation of manual billing. For example, an administrative fee may be imposed by ISCA for such services.

28.7. The system must generate a credit note accurately.

28.8. All financial documents (such as invoices, receipts, credit notes, discount vouchers, and etc) shall be accessible for viewing and/or downloading by both individual and corporate users via the Self-Service Portal.

29. Refund

29.1. The system shall generate a refund advice to initiate and process the refund.

29.2. Tender should propose a flow to automate the refund process for both individual and corporate users across all payment modes. This should address, but not be limited to, the following scenarios:

29.2.1. Multiple billing line items, including discount line items

29.2.2. Billing that includes funding line items

29.2.3. Billing that includes switching, deferment, substitution, and withdrawal processes.

30. Centralized Admin Functions for Easy Withdrawal, Substitution, and Fee Management

30.1. The system shall enable administrators to execute withdrawal, switching, deferment, substitution, and admin fee charges with a single click.

31. Finance revenue and recognition

31.1. The system shall offer the flexibility to configure finance-related information, including but not limited to the following: advance revenue code, revenue code, transaction type, recognition date, amortization months, and more.

31.2. The system shall provide the flexibility to configure whether to recognize the bundle package as a single revenue center or allocate it to the revenue center for each course/event.

31.3. The system shall be capable of accurately integrating all invoices, credit notes, and accounting journals with the finance system.

32. Reporting and Analytics

32.1. Sales Course Sales Performance Report
32.2. Enrolment and Registration Report
32.3. Customer Behaviour and Engagement Report
32.4. Promotions and Discount Effectiveness Report
32.5. Country sales report

Integration

1. Salesforce CRM
2. Payment Gateway
3. Learning Management System
4. Finance System
5. Mobile Apps

Timeline - 4 months of development