01 / EXECUTIVE SUMMARY

An investment that needs clear terms.

Assessment of an order-management and ERP integration proposal. The question: “Do we have enough evidence to commission the project?”

OUR RECOMMENDED DECISION

Continue the negotiation. Four clarifications are needed before commissioning.

The proposed direction matches the need. Before committing, agree integration boundaries, acceptance criteria, full operating costs and exit arrangements. In this fictional material, **there is no evidence requiring rejection of the vendor**; there is insufficient evidence for an unconditional award.

DEVELOPMENT	STATED DURATION	KNOWN 24-MONTH COST
€18,000 excluding VAT	8 weeks of development	€26,640 + unpriced items

What we retain

Single entry, order tracking and ERP as the main data source. This direction addresses duplicate entry [B-01, P-01].

What could change the decision

If integration excludes essential flows, total cost exceeds the business limit, or usable data export is unavailable, request a revised or alternative proposal.

02 Evidence 03 Coverage 04–05 Findings 06 Options 07 Costs 08 Actions

All information is fictional. This original sample demonstrates report structure and depth. It is not a client engagement or an assessment of a live system. €26,640 is the sum of stated scenario charges, not a complete budget or an Ili quotation.

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02 / ASSESSMENT BASIS

What we know. What supports it.

References make the reasoning traceable. The extracts and documents below were invented for this sample.

SCENARIO BUSINESS	OPERATIONS	MAIN NEED
B2B distribution · 12 users	**2 warehouses · 80 orders/day**	**One entry instead of two**

Fictional evidence register

Reference	Material / location	Scenario content
B-01	Management brief · v1	Reduce duplicate entry and show order status. ERP remains the primary system. No approved budget ceiling or time-saving measurement is available.
P-01	Proposal · v1 p. 2, §2	“Single order entry, fulfilment status and user roles.” Warehouse-specific permissions are not described in detail.
P-02	Same proposal p. 3, §3	“Integration with the existing ERP.” The scenario omits data, flow directions, available API, ERP charges and failure reconciliation.
P-03	Same proposal p. 4, §4	“Eight weeks of development.” No starting point, acceptance criteria or transition schedule is defined.
P-04	Same proposal p. 5, §5	Development €18,000, hosting €240/month, support €120/month, excluding VAT. Third-party licences/work excluded. Price changes and support limits are undefined.
P-05	Same proposal p. 6, §6	“The customer owns the data.” Export format/completeness, attachments access and termination procedures are not described.

Method

Compare needs with scope, check dependencies and reconcile stated charges. Every finding has an evidence reference and a closure criterion.

Evidence limits

No code review, production inspection, security or legal/contract review was performed. Missing information is an explicit assumption of this sample. A real engagement examines the full agreed material.

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03 / NEED → PROPOSAL

What is covered and what remains open.

This report does not assign arbitrary percentage scores. It separates described, partially described and unsupported requirements.

01		02		03
Order entry	→	Transfer to ERP	→	Status return

Mapping business priorities

Need / reference	Evidence coverage	Required before commissioning
Single entry B-01 → P-01	Described	Confirm through one shared order scenario and exact fields.
Avoid re-entry B-01 → P-02	Partial	ERP fields and direction, updates and failures. Essential to the original objective.
Roles and two warehouses B-01 → P-01	Partial	Who can view/change what in each warehouse. Mentioning roles does not establish the details.
Controlled go-live P-03	Unsupported	Tests, transition, initial-data ownership and conditions for returning to the previous process.
Predictable operating costs P-04	Partial	Support limits, third-party licences, recurring-charge start and price changes.
Ability to change vendor P-05	Partial	Complete data/attachment export and access without an active subscription.

The essential gap is in the workflow, not the screen.

If users must still correct ERP transfers manually, a new application may leave the original problem unresolved. F-01 is the first clarification priority.

Reading the table: a description is not a functional test. Missing evidence does not establish a technical defect.

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04 / FINDINGS / OPERATIONS

Agree on what “working” means.

F-01 and F-02 affect the main objective and acceptance. Resolve them before secondary visual improvements.

F-01 Integration does not define completion of the workflow

Before commissioning · Evidence: B-01, P-02 · Documentation gap

Observation	ERP integration is mentioned, but entities, the primary source per field, synchronisation direction and handling of uncertain outcomes are missing.
Business impact	An order could appear sent without confirmation that it was recorded. Manual retries may create duplicate work or records. This is a risk scenario, not an observed failure.
Recommendation	An integration appendix defining flows, ERP access requirements and owners. Specify how a transferred order is identified and discrepancies reconciled.
Closed when	Both vendors confirm the appendix and the test plan covers successful transfer, timeout and retry without duplicate records.

F-02 Eight development weeks are not a go-live date

Before commissioning · Evidence: P-03 · Documentation gap

Observation	It is unclear whether the eight weeks start at payment, material delivery or ERP availability. Acceptance tests and transition are not described.
Business impact	The business cannot reliably plan training, process changes or go-live. Pending ERP access can delay the whole project.
Recommendation	Separate milestones: prerequisites ready → development → customer testing → corrections → go-live decision. Agree who approves each milestone.
Closed when	A written starting point, dependencies, acceptance scenarios with expected results and an approver exist. The business keeps its previous workflow operational until acceptance.

> The assessment defines what must be agreed and checked. It does not design the ERP protocol or execute tests.

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05 / FINDINGS / COST AND CONTINUITY

Know what you are buying. And how you can leave.

The initial charge is only part of the decision. Continued access and predictable costs serve different purposes.

F-03 Known prices, but an open total cost

Before commissioning · Evidence: P-04 · Documentation gap

Observation	Development is €18,000 and combined hosting/support €360/month. Third-party ERP work, support limits, price changes and billing-start conditions are undefined.
Business impact	The known 24-month sum is €26,640, not a binding all-in price. Offers with different exclusions cannot yet be compared or a final spending limit approved.
Recommendation	A table of included/excluded costs. Clarify support hours, channels and response times, change policy and price validity. Do not treat unlisted charges as zero.
Closed when	Each category has a price or a clear calculation method and an owner. Management approves a budget including known dependencies before committing.

F-04 Data ownership does not define a usable exit

Before commissioning · Evidence: P-05 · Documentation gap

Observation	Customer ownership is acknowledged, but export, attachments, history, delivery timing and migration cost are not specified.
Business impact	A change of vendor could yield a file that is insufficient to continue operations. The issue is practical recoverability, not proven dispute over ownership.
Recommendation	Request structured export, field/relationship definitions, attachment coverage and access after termination. Examine code/licence terms separately.
Closed when	An agreed sample export, complete content list, owner, timing and charges are specified. Buying new implementation from Ili is not required.

> These are technical and commercial clarifications. Legal wording of rights and contracts requires a separate qualified review.

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06 / ALTERNATIVES AND DECISION

Three routes. One recommended starting point.

You do not have to change vendor to use this report. The right choice depends on the answers and the cost of resolving the gaps.

Comparing routes on common criteria

Route	Benefit	Trade-off / condition
A / Complete the existing proposal First choice	Keep the functional direction and clarify what the price covers before commissioning.	Requires cooperation between application and ERP vendors. Unclear terms remain unresolved without written commitments.
B / Staged engagement	First define/demonstrate integration and acceptance criteria, then complete the remaining development.	A separately agreed deliverable and possible fee/schedule revision. This stage is not assumed to be free or already accepted.
C / Comparable second offer	Check another approach against the same requirements and cost horizon.	Additional selection time. A lower initial price is insufficient if integration, support or exit is excluded.

WHY WE SUGGEST A FIRST

The evidenced problem is an unclear commitment.

The material does not establish that the solution or vendor is unsuitable. First request specific additions. If substantial technical investigation is needed, consider B. If essential answers are missing or inadequate, proceed to C.

FOUR CONDITIONS BEFORE COMMISSIONING

01

Defined ERP workflow

Fields, failures, licences and responsibilities [F-01].

02

Acceptance and transition

Scenarios, milestones and timing start [F-02].

03

Approved expenditure

Known charges and resolution of unpriced items [F-03].

04

Usable exit

Agreed data, format and procedure [F-04].

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07 / FINANCIAL VIEW

The known cost.
And what cannot yet be quantified.

Fictional P-04 charges, excluding VAT. Arithmetic does not establish market competitiveness or complete disclosure of all costs.

Scenario: 24 full operating months after delivery

Stated category	Basis	24 months
Development	One-off	€18,000
Hosting	€240 × 24 months	€5,760
Support	€120 × 24 months	€2,880
Sum of stated charges	€18,000 + €8,640	**€26,640**

STATED MONTHLY CHARGE

€360

Hosting + support. Included services and the fixed-price period remain to be confirmed.

ROI NOT CALCULATED

The comparison baseline is missing.

We need measurements of current duplicate work, actual time cost and the share the solution removes. No arbitrary savings percentage is introduced.

Unpriced items and assumptions

Item	Status	Who clarifies it
API licence / ERP work	Not priced	ERP vendor and contractor
Initial data / training	Inclusion not specified	Contractor and operations owner
Price changes / overages	No complete policy	Contractor
Recurring-charge start	Calculation assumption: after delivery	Written commercial offer

If billing starts at a different time, the comparison changes. Each additional full month of both recurring charges adds €360 at the scenario rates. No extra month is included in the sum. Taxes, internal time and unknown amounts are not treated as zero.

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08 / THE PRACTICAL NEXT STEP

One consolidated response. A decision with conditions.

Use the following vendor questions in your next exchange. They address F-01 to F-04, not a new technical scope.

Subject: Clarifications before commissioning

Thank you for the proposal. To finalise scope, budget and acceptance, please incorporate the following clarifications into the revised offer:

1. Which data moves between the systems, in which direction and how often? Who owns each flow?
2. How are failures/timeouts handled, duplicates prevented and discrepancies checked? Who is responsible?
3. Which third-party licences or tasks are required, and who handles coordination and charges?
4. When do the eight weeks start, and what are the testing, correction and go-live milestones?
5. Which acceptance scenarios will we run, with which roles/warehouses and expected results?
6. What do €18,000 and €360/month include, when do recurring charges start and when can they change?
7. Are initial-data migration and training included? Which support limits and exclusions apply?
8. How are complete data and attachments exported on exit, in which format, within what period and at what charge?

Who does what after the response

Order	Action / owner	Outcome
1	Revised offer · contractor + ERP	Written answers to F-01 through F-04
2	Confirm scenarios · operations owner	The solution covers actual workflows
3	Commissioning decision · management	Approved cost, scope and conditions

The recommendation changes when the evidence changes.

New material evidence or a different proposal requires reassessment. This report advises on the agreed material; it is not certification, an outcome guarantee or an obligation to commission implementation from Ili.

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