

BLUE LOTUS 360
AI-Powered Cloud ERP

ERP Request for Proposal Template

UK Edition — Pre-structured for MTD, PAYE, RTI,
Auto-enrolment, CIS, and UK GDPR compliance.

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How to use this template

1. Complete the highlighted fields in Section 1 with your company details.
2. Review and adjust functional requirements in Section 3 — mark each as Essential, Important, or Desirable for your business.
3. Fill in your investment estimate fields in Section 5 before sending to vendors.
4. Send to three to four shortlisted vendors with a clear response deadline and mandatory format instruction.
5. Score returned proposals against the evaluation matrix in Section 7 before holding any further presentations.

This template is provided for planning purposes. Blue Lotus 360 accepts no liability for procurement decisions made using this document. Adapt all sections to reflect your specific business requirements before distributing to vendors.

Complete this section before sending the RFP to vendors. Give vendors enough context to tailor their proposal to your situation.

Company name	
Registered address	
Primary industry / sector	<i>e.g. Manufacturing, Distribution, Construction, Retail, Services</i>
Annual revenue (approximate range)	<i>e.g. £2M–£5M, £10M–£20M</i>
Number of employees	<i>Total headcount</i>
Number of sites / locations	<i>Include UK and any international sites</i>
Current ERP / accounting system(s)	<i>Systems being replaced or integrated with</i>
Primary driver for this project	<i>e.g. System end-of-life, growth, merger, compliance, operational inefficiency</i>
Target go-live date	<i>Or state if flexible</i>
RFP response deadline	
Primary contact name and email	<i>For vendor questions during the RFP period</i>

Define exactly what you are asking vendors to respond to. Be explicit about what is in scope and what is not.

Modules required (Phase 1)	<i>Tick or list: Finance & Accounting, Procurement, Inventory, Warehouse, Manufacturing, HR & Payroll, Sales, Project Management, Other</i>
Modules planned (Phase 2+)	<i>Modules not required at go-live but on the roadmap</i>
Number of named users	<i>Total users requiring system access</i>
Number of active transaction users	<i>Users who process transactions daily, by module if possible</i>
Known integrations required	<i>e.g. Bank feeds, e-commerce, CRM, payroll bureau, sector tools</i>
Data migration scope	<i>Which historical data must be migrated and from which systems</i>
Out of scope for this RFP	<i>Clearly state anything you are not asking vendors to respond to</i>

For each requirement, vendors must respond in the "Met?" column: Y (fully met out of the box), Partial (met with configuration or minor development), or N (not met). Any Partial or N response must include an explanation in the Vendor Notes column.

Essential — Must be met before go-live

Important — Required within 12 months

Desirable — Useful but not business-critical

3.1 Finance and Accounting

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
General ledger with multi-entity and consolidated reporting	Essential		
Month-end P&L, balance sheet, and cash flow statement by cost centre, exportable to Excel	Essential		
Making Tax Digital (MTD) compatible VAT return submission to HMRC	Essential		
Integration with HMRC digital tax portal for MTD for Income Tax (MTD ITSA)	Important		
Open banking or direct bank feed connectivity for major UK high street banks	Essential		
Bank reconciliation with automated matching	Essential		
Accounts payable with three-way purchase order matching	Essential		
Accounts receivable with automated aged debtor reporting	Essential		
Multi-currency support with real-time exchange rate feeds	Important		
UK GAAP / FRS 102 compliant financial reporting	Essential		
Fixed asset register with depreciation calculation	Important		
Intercompany trading and elimination for group consolidation	Desirable		
Budget management with variance reporting	Important		

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Drill-down from financial reports to underlying transactions	Essential		
Audit trail for all financial entries with user, timestamp, and change log	Essential		

3.2 Procurement

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Purchase requisition and approval workflow with configurable authorisation limits	Essential		
Purchase order generation from approved requisitions	Essential		
Supplier master with approved supplier list and performance tracking	Important		
Goods receipt note (GRN) matching to purchase order and invoice	Essential		
Supplier invoice processing with automated matching and exception flagging	Essential		
Construction Industry Scheme (CIS) deduction management for subcontractor payments	Important		
Supplier payment run with BACS file generation	Essential		
Preferred supplier pricing and contract management	Important		
Spend analysis reporting by supplier, category, and cost centre	Important		

3.3 Inventory and Warehouse Management

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Real-time stock levels across multiple locations and warehouses	Essential		
Stock valuation methods: FIFO, LIFO, weighted average	Important		

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Reorder point and reorder quantity management with automated purchase suggestions	Essential		
Batch and serial number tracking with full traceability	Important		
Barcode / QR code scanning for goods receipt and despatch	Important		
Cycle count and stock take management	Essential		
Stock adjustment with audit trail and reason codes	Essential		
Expiry date management for perishable or time-limited stock	Desirable		
Transfer orders for inter-warehouse stock movements	Important		
Landed cost allocation across received purchase orders	Desirable		

3.4 Sales Order Management

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Sales order entry with availability check at point of order	Essential		
Customer-specific pricing, discount structures, and price lists	Essential		
Credit limit checking with configurable hold and override workflows	Essential		
Sales order fulfilment with pick, pack, and despatch management	Essential		
Delivery note and invoice generation from despatch	Essential		
Customer returns management (RMA) with credit note processing	Important		
Sales analysis reporting by customer, product, region, and sales representative	Essential		
Integration with e-commerce platforms (Shopify, WooCommerce, or equivalent)	Desirable		

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
EDI order receipt and processing	Desirable		

3.5 HR and Payroll

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
PAYE calculation and HMRC RTI submission (Full Payment Submission and Employer Payment Summary)	Essential		
National Insurance contribution calculation for all NI categories	Essential		
Workplace pension auto-enrolment assessment, enrolment, and contribution calculation	Essential		
Pension contribution file export in PAPDIS format or equivalent for major providers	Essential		
Statutory pay calculations: SSP, SMP, SPP, and ShPP	Essential		
P60 and P11D generation and electronic distribution	Essential		
Student loan deduction management (Plan 1, Plan 2, Plan 4, and postgraduate)	Essential		
Holiday entitlement accrual and absence management	Essential		
Employee self-service portal for payslips, holiday requests, and personal details	Important		
IR35 contractor status tracking and off-payroll working compliance	Important		
CIS gross payment status verification and monthly return submission	Important		
TUPE transfer data management	Desirable		

3.6 Manufacturing (complete if applicable)

Requirement	Priority	Met? (Y/N/Partial)	Vendor notes
Bill of materials (BOM) management with multi-level structure	Essential		
Works order management with material issue and labour booking	Essential		
Production scheduling and capacity planning	Important		
Shop floor data capture for time and attendance against works orders	Important		
Quality inspection and non-conformance management	Important		
Material Requirements Planning (MRP) run with suggested purchase and production orders	Important		
Yield and scrap reporting with variance analysis	Desirable		

Vendors must respond to each technical requirement below and provide supporting detail where requested.

Deployment model

State whether the system is cloud SaaS, on-premise, or hybrid. Specify whether multi-tenant or single-tenant SaaS.

Vendor response

Data hosting location

Confirm all data is hosted within the UK or EEA. If hosted outside UK/EEA, state the legal basis for international data transfer under UK GDPR.

Vendor response

Uptime SLA

State guaranteed uptime percentage and measurement methodology. Confirm planned maintenance windows and advance notice period.

Vendor response

Disaster recovery

Confirm RPO (Recovery Point Objective) and RTO (Recovery Time Objective). Describe backup frequency and restore process.

Vendor response

Browser and device compatibility

Confirm supported browsers and versions. Confirm mobile browser support and whether a native mobile app is available.

Vendor response

API availability

Confirm availability of a documented REST API. State whether API access is included in the licence or priced separately.

Vendor response

Single sign-on (SSO)

Confirm compatibility with Microsoft Entra ID (Azure AD), Google Workspace, or other SAML/OAuth providers.

Vendor response

Role-based access control

Describe the approach to user roles, permissions, and segregation of duties. Can roles be configured without vendor involvement?

Vendor response

Audit trail

Confirm that all data changes are logged with user, timestamp, and before/after values, and that audit logs cannot be deleted by standard users.

Vendor response

Data export

Confirm that all data can be exported in standard formats (CSV, Excel, XML) at any time without vendor involvement and at no additional cost.

Vendor response

Penetration testing

Confirm whether annual penetration testing is conducted and whether the most recent report summary is available on request.

Vendor response

ISO 27001 or SOC 2 certification

Confirm current certification status and provide certificate details.

Vendor response

Proposals that do not include all cost components below will be treated as incomplete. State all costs in GBP excluding VAT.

5.1 Pricing Schedule

Cost component	Year 1 (£)	Year 2 (£)	Year 3 (£)	Notes
Software subscription / licence				
Implementation and configuration	N/A	N/A		
Data migration				
Training (specify days and format)				
Integration development				
Ongoing support and maintenance				
Other costs (specify)				
TOTAL COST OF OWNERSHIP				

5.2 Contract Terms

Minimum contract term

Notice period required for termination

Annual price escalation terms

State whether capped (and at what rate) or uncapped

Payment terms

e.g. Annual in advance, monthly, milestone-based

Data export terms at contract end	<i>Confirm format, timeline, and any cost for data return on termination</i>
Subprocessor disclosure	<i>List all third-party subprocessors who will have access to your data</i>
Written data processing agreement available?	<i>Required for UK GDPR compliance</i>

This section asks for information about your organisation, track record, and approach to implementation and support.

Company name and registered address

Year founded

Number of UK customers on this platform

Number of customers in our sector and at our scale

Approximate figure

Implementation methodology

Describe your standard approach: phases, milestones, go-live criteria

Proposed project timeline for our scope

Based on the scope described in Section 2

Proposed project team	<i>Name and role of the people who would work on our project, including their relevant experience</i>
Percentage of implementations delivered by your own team vs partners	
Three reference customers (last 12 months, similar sector and scale)	<i>Name, contact, industry, go-live date</i>
Post go-live support model	<i>Describe support tiers, response times, escalation process, and UK support hours</i>
Product roadmap highlights for the next 12 months	<i>Key developments relevant to our requirements</i>
Financial stability statement	<i>e.g. Most recent audited accounts summary, investor backing, or other stability indicator</i>

07 Evaluation Criteria and Scoring Matrix

Proposals will be scored against the criteria below. Adjust the weightings to reflect your organisation's priorities before sending this RFP to vendors.

Evaluation criterion	Weighting	Vendor A score (1–10)	Vendor B score (1–10)	Vendor C score (1–10)
Functional fit against documented requirements	30%			
Implementation quality, methodology, and UK experience	25%			
Total cost of ownership (3-year)	20%			
UK compliance capabilities (MTD, PAYE, RTI, UK GDPR)	10%			
Support model and response times	10%			
Vendor stability and product roadmap	5%			
WEIGHTED TOTAL	100%			

Scoring guidance

Score	Meaning
9–10	Fully meets requirement with no gaps. Demonstrated evidence provided.
7–8	Meets requirement with minor gaps or configuration required.
5–6	Partially meets requirement. Some development or workaround needed.
3–4	Significant gaps. Material development or third-party tool required.
1–2	Does not meet requirement. Vendor has confirmed limitation.

Need help scoping your ERP requirements?

The Blue Lotus 360 team offers a free 90-minute requirements scoping session for UK businesses. Book at bluelotus360.com/uk | No obligation, no sales pitch.