



CANYON LAKE PROPERTY OWNERS ASSOCIATION

REQUEST FOR PROPOSAL:

Point of Sale System

for

Food and Beverage Sales

Golf Services

Gift Cards

Released: **May 12, 2010**

Proposals Due: **June 7, 2010** by 5 p.m.

Installation: No later than **July 12, 2010**

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Introduction

The Canyon Lake Property Owners Association (CLPOA) is a California nonprofit corporation that manages a community association under the Davis Sterling Common Interest Development Act. The CLPOA is soliciting requests for proposals from qualified vendors to provide Point of Sale (POS) systems to the Canyon Lake Country Club as well as at the Canyon Lake Lodge and the Canyon Lake Pro Shop.

CLPOA is a community of 4800 residential units and lots within a gated community located in western Riverside County. The community has many resources and activities that include a lake for water sports and fishing, an equestrian facility, tennis, golf, and swimming facilities, as well as a senior facility, and restaurant facilities. The finance base of the community is primarily funded by association dues, and secondarily by fees, assessments, and revenues from operations. CLPOA employs a staff of 47 full-time, 25 part-time, and 8 seasonal employees.

Overview of Requirements

The POS system must allow for connectivity and management of all transactions between both facilities. The system must have 8 computer terminals: 3 at the Country Club, 2 at the Lodge and 1 at the Pro Shop, 2 Wireless POS units that could be used at either location as well as 2 computer servers: 1 at the Country Club and 1 at the Lodge. The POS software must have inventory control functionality. Additionally, the contractor shall train end-users, management, and IT staff in the operation of this software. Bidders must submit bids for all aforementioned devices and services.

Specific terms and conditions of this request-for-proposal (RFP) are described in the requirements document. Special attention should be paid to the following:

- Adaptability
- Ease of use
- Training
- Company history that supports your long-term commitment to your product

The POS system must integrate with the current/future financial software as well as be easy and intuitive for the end-user. **The system should also be SQL.**

The contractor shall adhere and be available to meet the following timetable:

- Submit proposal by 5:00 p.m. on **June 7, 2010**
- Product demonstrations **June 14–24, 2010**
- Receive notification of award by 5:00 p.m. on **June 25, 2010**
- Complete user training by 5:00 p.m. on **July 12, 2010**
- Deliver/installation of production system to be completed no later than 5:00 p.m. on **July 12, 2010**

Proposal Requirements

Each company will be required to submit the following information in connection with their bids:

1. Detailed accounting of proposed software functionality
2. Detailed specifications of all software
3. Detailed specifications of all proposed hardware
4. Operating System Version Information
5. Touch Screen Brand and Model
6. Estimated Installation time period to include:
 - a. Required lead time
 - b. Proposed daily work schedule
 - c. Expected vendor workforce
7. Proposed training schedule
8. Underlying database engine description
9. Whether the system has any Golf Course functionality

The contracted price will include:

1. Software
2. Software licenses
3. Hardware
4. Installation
5. Instruction and Operating Manuals
6. Initial assistance in setup
7. Customization of software
8. Technical support
9. System Diagrams, charts or other visual displays
10. Training
11. On-going Maintenance Support contract may include:
 - a. Future software updates
 - b. Trouble calls (after warranty period)
 - c. Equipment troubleshooting and fault isolation
 - d. In-person technical support (as required)
 - e. Phone technical support (as required)
 - f. Equipment adjustments (as applicable)
12. Vendor provided on-site technician during normal hours of operation, including opening and closing procedures, for the first seven days of system use.

The selected vendor will be required to provide to the Canyon Lake POA after installation:

1. All software licenses
2. All hardware/software documentation
3. All installed software including drivers and operating systems
4. Any vendor installed or vendor utilized lock out codes
5. Step by step use guides covering:
 - a. System use
 - b. Procedures for restarting/reloading system software
 - c. Basic fault isolation and troubleshooting

Technical and Functional Specifications

Objectives:

1. **Ease of Use**

In order for the project to succeed, the system must be easy to use for the users. Software shall provide an easy to use graphical user interface that is intuitive. Icons should be multimodal; they shall give a graphical representation of the action that they perform. If the mouse is positioned over the icon, a tag will appear displaying the function performed. Basic functions should be able to be completed in a minimum number of steps.

2. **Adaptability**

The point of sale system should be adaptable enough to allow the owner to make modifications or upgrades if required. Should the business being served by the POS change to meet the needs of the customer; the POS system should be able to meet the needs of the owner.

3. **Scalability**

This system should be able to expand to meet future business needs. This should include increasing the number of sales per day or increasing the number of connected stores.

4. **Maintainability**

This system should include technical support and upgrades.

5. **Integration With Other Systems**

The POS system will need to integrate with **SQL databases** currently owned by the POA.

Functionalities:

1. Inventory Control

a. POS system must do Inventory Control.

- i. Inventory should be **SQL compliant**.
- ii. The POS system should decrement inventory on a sale.
- iii. The POS system should increment inventory on return.
- iv. The POS system should provide for import and export into a text file.

b. Keep Real-Time, Perpetual Inventory.

- i. POS System should decrement directly.
- ii. Inventory should be real time for multiple locations. Reports for locations should/may include:
 1. Total quantity of Item x.
 2. Total quantity of Item x in Restaurant 1.
 3. Total quantity of Item x in Restaurant 2.
 4. Total quantity of Item x in storage 1.
 5. Total quantity of Item x in storage 2.
 6. Total quantity of Item x on order.
 7. Total quantity of Item x in transit.

2. Reporting

a. POS system should generate reports.

- i. Inventory status on merchandise.
- ii. Audit trails.
 1. Users hours.
 2. Users actions.
 3. No Sales logs.

b. Must break down sales between different categories (i.e. wine, steak, shrimp...etc.).

c. Reports should be available in multiple formats.

d. Reports should be custom as well as existing as templates.

3. Multiple Pricing
 - a. Automatic price adjustment capabilities.
4. Multiple Store Fronts
 - a. A minimum of two restaurants must be supported in the software.
5. Search Capabilities
 - a. Availability of a search feature for inventory lookup and pricing.
6. Technical Support
 - a. 24/7 technical support should be available.
 - b. Onsite support should also be available 24/7 Next Day service.
 - c. The first week, technical support must be located on site for both locations for the complete work schedule. The work schedule is as follows:
 - i. Country Club 6:30 am – 10:00 pm
 - ii. Pro Shop 6:00 am – 6:00 pm

Technical Requirements

1. Back-end Servers
 - a. The database used to store all POS information must be SQL:
 - b. Two servers (One at the Country Club, one at the Lodge)
 - i. Server should be capable to run the POS management.
 - ii. Server needs to come with:
 1. A monitor, Keyboard and mouse.
 2. Report Printer.
 3. Any additional peripherals needed to complete a POS server.
2. Hardware
 - a. Four computer terminals
 - i. Each computer should be capable to run the POS software.
 - ii. Each computer needs to come with:
 1. A Touch screen monitor.
 2. Multiple Cash drawers.
 3. Receipt printer.
 - a. Should produce consecutive tape.
 4. Credit Card readers.
 5. Any additional peripherals needed to complete a POS system.
 - b. One computer terminal
 - i. Computer should be capable to run the POS software.
 - ii. Computer needs to come with:
 1. A monitor, Keyboard and mouse.
 2. A handheld scanner and cradle.
 3. Cash drawer.
 4. Receipt printer.
 - a. Should produce consecutive tape.
 5. Credit Card readers.
 6. Any additional peripherals needed to complete a POS system.
 - c. Two computer terminals
 - i. Each computer should be capable to run the POS software.
 - ii. Each computer needs to come with:
 1. A Touch screen monitor.
 2. Cash drawer.
 3. Wireless Connection
 4. Receipt printer.

- a. Should produce consecutive tape.
 5. Credit Card readers.
 6. Any additional peripherals needed to complete a POS system.
3. Data-Dictionary
- a. Database information must be furnished to CLPOA. Data should include:
 - b. All tables and fields.
 - d. Definitions of all of the fields.
 - e. Data types of all of the fields.

Delivery/Setup of System

There will be two installations of the POS system. The new computers will be available for a test POS environment. After the system is tested, the software will be installed or converted to connect to the current SQL financial system.

The contractor shall provide delivery and setup of the production system, to be completed no later than **July 12, 2010**. This shall include the following:

- o All hardware
- o All software
- o System certification
- o Setup of user IDs, Passwords and Permissions

Training

The contractor shall provide training to be completed no later than 5:00 p.m. on **July 12, 2010**. The training should be comprehensive and tailored to the users' technical proficiency.

Submission Requirements

The original proposal along with 10 copies shall be submitted to Canyon Lake POA office at the following address by **4:00 p.m. on June 7th, 2010**:

Canyon Lake Property Owners Association
31512 Railroad Canyon RD
Canyon Lake, CA 92548
Attention: James Trask
Tel.: 951-246-2714
Fax: 951-244-6845

Vendor Selection

All received proposals will be evaluated by the CLPOA and will be based on features, cost, and conformance to outlined specifications and functional requirements.

More Information

If you have any questions concerning the RFP or need clarification on any aspect, please contact James Trask at (951) 246-2714.

Also Note any Tee Time integration and whether credit cards are dialup or TCP/IP connections