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Contract

Dynamics 365 Finance & Operations Property Management Add-on/Integration

Transport for Wales

F03: Contract award notice

Notice identifier: 2025/S 000-019414

Procurement identifier (OCID): ocds-h6vhtk-04a45b

Published 7 May 2025, 2:41pm

Section I: Contracting authority

I.1) Name and addresses

Transport for Wales

3 Llys Cadwyn, Taff Street

Pontypridd

CF37 4TH

Email

procurement@tfw.wales

Telephone

+44 2921673434

Country

United Kingdom

NUTS code

UKL - Wales

Internet address(es)

Main address

<http://tfw.wales>

Buyer's address

https://www.sell2wales.gov.wales/search/Search_AuthProfile.aspx?ID=AA50685

I.2) Information about joint procurement

The contract is awarded by a central purchasing body

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Other activity

Public transport

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Dynamics 365 Finance & Operations Property Management Add-on/Integration

Reference number

C001069.00

II.1.2) Main CPV code

- 48000000 - Software package and information systems

II.1.3) Type of contract

Supplies

II.1.4) Short description

TfW is looking to onboard a property management add on which can be implemented alongside Dynamics 365 to deliver all property managements functions currently carried out by a 3rd Party provider. This will ensure complete control of end-to-end processes compared to previous years of outsourcing services. TfW are looking to procure the services of a company who can support the implementation and maintenance of the add-on and align its functions to integrate our operational to finance processes with the current TfW D365 F&O instance (environments).

II.1.6) Information about lots

This contract is divided into lots: No

II.1.7) Total value of the procurement (excluding VAT)

Value excluding VAT: £245,910.72

II.2) Description

II.2.2) Additional CPV code(s)

- 48000000 - Software package and information systems
- 48100000 - Industry specific software package
- 48430000 - Inventory management software package
- 48440000 - Financial analysis and accounting software package
- 48445000 - Customer Relation Management software package
- 48900000 - Miscellaneous software package and computer systems
- 72000000 - IT services: consulting, software development, Internet and support
- 72200000 - Software programming and consultancy services

- 72210000 - Programming services of packaged software products
- 72212100 - Industry specific software development services
- 72212451 - Enterprise resource planning software development services
- 72227000 - Software integration consultancy services
- 72254000 - Software testing
- 72261000 - Software support services
- 72263000 - Software implementation services
- 72265000 - Software configuration services
- 72267000 - Software maintenance and repair services
- 72267100 - Maintenance of information technology software

II.2.3) Place of performance

NUTS codes

- UKL - Wales

II.2.4) Description of the procurement

Full details of the requirement available in the tender documentation.

TfW are looking for an experienced Microsoft approved add on partner to implement a Property Management add-on alongside their Dynamics 365 F&O system that meets the following requirements:

Operational Requirements

Solution must have:

Add and manage tenant records

Ability to raise core invoices

Ability to review historic data per property to include tenant payment history, passed events and lease details

Ability to handle renewal information.

Ad hoc Billing availability, for example ability for on-off charges and manual inputs.

Manage events for rent reviews and lease expiries and break options.

Payment capabilities for headlease rents and other charges.

Ability to view a summary of terms and conditions per agreement and tenant.

Portfolio growth ability over time.

Visibility to view property / unit / lease history and tenant information.

Task functionality to notify surveyors of required tasks.

Track overdue and time critical events to ensure they are monitored, this can be managed through a task highlight on the dashboard and a notification sent out to the surveyor.

Must have clear and fully integrated interface with Dynamics 365 Finance and Operations.

Recurrence cycle of each contract.

Manual and Automated capabilities need to be available for billing.

Ability to charge tenant for dilapidations.

Upload capability for statutory inspection results or energy performance certificates.

One stop Tennant view with an overview of key details, events, lease terms and relevant supplier links.

Provisions made for 15 – 20 operational users.

Be a Microsoft approved add-on partner.

Solution should have:

Station breakdown structure/floor plans with detail needs to be available as live data.

Mobile /Tablet app or availability to view and update while on site, offline functionality would be desirable.

Finance Requirements

Solution must have:

Ability to interface with TfW's Dynamics F&O system to produce core accounting reports such as Aged Debtors, Revenue recognition, etc.

Interlink easily with treasury function to ensure streamlines approach to cash collection.

Accounting to Project ledger & General Ledger – impacts financial statements.

Automated and Manual invoice capabilities.

Ability to handle consolidated invoices.

Direct Debit capabilities.

Deposit record keeping.

Dunning letter and chasing capabilities.

Must support IFRS, and specifically IFRS 16.

Manage invoices, calculate revenue, expenses.

Matching rent collections to the accounts receivable invoices.

Financial Dimensions

Core finance – Accounts receivable, accounts payables recharges, etc.

Support credit control. (credit limits and credit holds)

Accounting Standards Compliance.

Interest rates and Charges for Late payments.

Provisions made for 5 – 10 finance team users.

Support and interface to ensure bank reconciliation.

Testing and Implementation of the Real Estate Management module.

Data migration from current system into new module.

Security roles to be tested and implemented.

Azure Dev Ops (ADO) processes for deployment.

Upgrades to be in line with Microsoft release waves and schedules.

The ability to archive data in line with the TfW retention policy.

The supplier would need to complete the implementation / testing / staff training of the Property Management function ready for handover to TfW by 1st April 2025 at the latest.

The successful supplier will build and implement a system that satisfies the following non-functional requirements (please see ITT Volume 3 for full detailed non-functional scope)

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eTender Wales reference: project_57382 and itt_113362.

II.2.5) Award criteria

Quality criterion - Name: Property Management Accountancy System / Weighting: 10%

Quality criterion - Name: Functional Requirements / Weighting: 20%

Quality criterion - Name: Timelines / Weighting: 10%

Quality criterion - Name: Delivery Approach / Weighting: 5%

Quality criterion - Name: Support / Weighting: 10%

Quality criterion - Name: Alignment with Wellbeing of Future Generations Act Objectives / Weighting: 10%

Price - Weighting: 35

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number: [2024/S 000-031267](#)

Section V. Award of contract

Contract No

C001096.00

A contract/lot is awarded: Yes

V.2) Award of contract

V.2.1) Date of conclusion of the contract

4 April 2025

V.2.2) Information about tenders

Number of tenders received: 2

Number of tenders received from SMEs: 2

Number of tenders received from tenderers from other EU Member States: 0

Number of tenders received from tenderers from non-EU Member States: 1

Number of tenders received by electronic means: 2

The contract has been awarded to a group of economic operators: No

V.2.3) Name and address of the contractor

SIS GLOBAL LIMITED

41 Clarence Road

Chesterfield

S401LH

Telephone

+44 1158573762

Country

United Kingdom

NUTS code

- UK - United Kingdom

The contractor is an SME

Yes

V.2.4) Information on value of contract/lot (excluding VAT)

Total value of the contract/lot: £245,910.72

Section VI. Complementary information

VI.3) Additional information

Full tender documentation can be accessed via the eTender Wales sourcing platform at:
etenderwales.bravosolution.co.uk

Please use project code project_57382 and ITT code itt_113362 to access the tender documentation and register to for this opportunity.

(WA Ref:150636)

VI.4) Procedures for review

VI.4.1) Review body

High Court

Royal Courts of Justice, The Strand

London

WC2A 2LL

Telephone

+44 2079477501

Country

United Kingdom