



REQUEST FOR PROPOSAL (RFP)
INTEGRATION OF PENSION ADMINISTRATION
SYSTEM (BUSINESS CENTRAL 365) WITH
ENTERPRISE SYSTEM

PIONEER ASSURANCE COMPANY LIMITED

12/01/2026



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1. Introduction

Pioneer Assurance Company Limited invites qualified and experienced vendors to submit proposals for the **integration of the Pension Administration System (PAS) developed on Microsoft Dynamics Business Central 365** with various internal and external systems. This project aims to streamline data exchange, improve operational efficiency, enhance customer experience, and support digital transformation across the enterprise.

2. Background

Pioneer Assurance is a leading provider of insurance and pension services in Kenya. The Company has implemented a Pension Administration System on **Business Central 365**, which needs to be integrated with existing operational and customer-facing platforms to enable seamless automation, reduce manual interventions, and improve service delivery.

The PAS is to be integrated with the following systems:

1. **TurnQuest Core Insurance System**
2. **Alfresco Document Management System (DMS)**
3. **USSD Platform**
4. **SMS Gateway**
5. **CRM System**
6. **Mobile Money Payment Gateway**
7. **Bank Payment Gateway**
8. **Portals**
9. **Email System**

3. Project Objectives

The main objectives of this integration initiative include:

- Achieving seamless communication between PAS and all relevant systems.
- Automating member onboarding, contributions, claims, benefit payments, and employer interactions.
- Reducing manual data entry and reconciliation.
- Enhancing customer self-service and digital access through portals and mobile channels.
- Improving data accuracy and operational efficiency.
- Ensuring strong security, auditability, and compliance with the Data Protection Act (Kenya).

4. Scope of Work

4.1 Integration with TurnQuest Core Insurance System

The vendor shall provide integrations that support:

- Member and employer data synchronization
- Product and policy information exchange
- Premium and pension contribution data flow
- Claims processing, approval, and status updates
- Real-time or scheduled data sync via APIs

4.2 Integration with Alfresco Document Management System (DMS)

Requirements include:

- Document archiving and retrieval directly from PAS
- Automatic tagging and metadata synchronization
- Bidirectional communications for document access
- Compliance with document lifecycle policies

4.3 Integration with USSD Platform

Scope includes:

- Member contributions balance inquiries
- Claim status inquiries
- Employer payment status inquiries
- Secure session management and callback handling
- Real-time lookup from PAS

4.4 Integration with SMS Gateway

The integration shall enable:

- Automated SMS notifications for contributions, claims, approvals
- Two-factor authentication (2FA/OTP) where applicable
- Bulk messaging capabilities
- Delivery tracking and error logging

4.5 Integration with CRM System

The vendor shall integrate:

- Customer profile syncing between PAS and CRM
- Case/ticket creation from PAS events
- Service request escalation and workflow integration
- Update of member interactions and communication history

4.6 Integration with Mobile Money Payment Gateway

The solution should support:

- Mpesa mobile money channel
- STK Push, Paybill
- Automatic payment posting to PAS
- Real-time notifications and reconciliation
- Integration with SMS/email alerts

4.7 Integration with Bank Payment Gateway

Integration should support:

- Direct bank payments (RTGS, EFT)
- Payment status validation and confirmations
- Automated reconciliation with PAS
- Retrieval of digital bank statements or APIs

4.8 Integration with Portals (Customer, Employer, Agents)

The vendor shall integrate:

- Real-time member and employer data access through portals
- Contribution statements, benefit statements, personal details
- Employer bulk contribution submission/validation
- Claim application and status tracking
- Secure document upload through portals (synced with DMS)

4.9 Integration with Corporate Email System

Scope includes:

- Automated email dispatch for statements, confirmations, alerts
- Integration via SMTP or modern APIs
- Support for PDF attachments generated from PAS

5. Functional Requirements

5.1 General Functional Requirements

- Use of APIs, web services, or ESB/middleware for integration
- Data transformation, validation, and error handling
- Logging, monitoring, and audit trails
- Scheduling capabilities for batch jobs
- Role-based security and encryption

5.2 Non-Functional Requirements

- High availability and scalability
- Secure communication (TLS 1.2+)
- Compliance with Data Protection Act, and ICT standards
- Performance optimized for high-volume transactions
- Robust fault tolerance and recovery

6. Project Deliverables

The vendor shall provide:

1. Detailed Requirements Specification
2. Solution Architecture Design
3. API/Middleware Development
4. Data Mapping Sheets
5. Integration Workflows
6. Test Plans and Cases
7. UAT Support and Sign-off
8. User Manuals and Technical Documentation
9. Training for ICT and Business Users
10. Go-live Deployment
11. Post-implementation Support (minimum 6 months)



7. Eligibility and Mandatory Requirements

Bidders must demonstrate:

- Proven experience with Business Central 365 integrations
- Experience with TurnQuest integrations is highly desirable
- Experience integrating DMS (Alfresco), CRM, USSD, SMS, and payment gateways
- Valid business registration and tax compliance documents

8. Proposal Submission

Kindly submit your proposal sealed in an envelope to the following address latest on the 19th of January 2026 at 11:00 AM.

The Managing Director,
Pioneer Assurance Company Limited,
Pioneer House 7th Floor,
P.O. Box 20333-00200,
Nairobi-Kenya