KasemCPA

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Sample Fixed-Price Proposal

How a KasemCPA fixed-price proposal is structured

1. Proposal details

Item	Detail
Prepared for	[Client company name], attention [Contact name, title]
Prepared by	Ahmed Kassem, KasemCPA · Ahmed@kasemcpa.org · +20 106 600 8890 · kasemcpa.org
Project	[e.g. Odoo 18 Accounting and Inventory implementation]
Proposal number	KCPA-[YYYY]-[###]
Date	[Date]
Valid until	[Date + 30 days]
Currency	[USD / SAR / AED / EGP]

2. Your needs

[Client company] is a [industry] business in [country] with [number] users and [number] entities. Today you run [current system or spreadsheets], and the main problems you described are:

- [Problem 1, e.g. month-end close takes 15 working days]
- [Problem 2, e.g. invoices are not yet ZATCA Phase 2 compliant]
- [Problem 3, e.g. inventory values do not match the general ledger]

The goal of this project is [one sentence outcome, e.g. a live Odoo system with ZATCA-compliant invoicing and a 5-day close by 31 March 2027].

3. Scope of work

KasemCPA will deliver the items below. Anything not listed is out of scope and, if requested, will be quoted separately as a change request.

#	Deliverable	Detail
1	[Requirements and design]	[Business requirements document and solution design, signed off by the client]
2	[System configuration]	[Modules: Accounting, Inventory, Sales, Purchasing; chart of accounts, taxes, journals]
3	[Data migration]	[Customers, vendors, products, opening balances as at the go-live date]
4	[Tax compliance]	[ZATCA Phase 2 / UAE VAT / Egypt ETA set-up and test submissions]
5	[Training]	[Up to X hours of online training for key users, recorded]
6	[Go-live support]	[X weeks of support after go-live, replies within 1 working hour]

Out of scope: [custom module development, hardware, Odoo licence fees, third-party integrations not listed above, historical transaction migration].

4. Approach and timeline

The project runs in four phases over [X] weeks, starting within [5] working days of the signed engagement letter and first payment. Work is delivered remotely, with a weekly 30-minute progress call.

Phase	What happens	Weeks	Sign-off
1. Discover	Workshops, requirements document, solution design	[1–2]	Client approves the design
2. Build	Configuration, data templates, tax set-up	[3–5]	Client approves test results
3. Test and train	User testing, data load, key-user training	[6–7]	Client approves go-live
4. Go-live and support	Cut-over, first close, support period	[8–10]	Project closed

5. Fixed price and payment

The fixed price for the scope above is **[Currency] [Amount]**, excluding VAT and third-party fees (for example Odoo licences or hosting), which the client pays directly.

Milestone	Share	Amount	Due
Signed engagement letter	40%	[Amount]	On signing
Design approved	30%	[Amount]	On approval
Go-live	30%	[Amount]	On go-live
Total	**100%**	**[Amount]**	

- **Payment methods:** bank transfer to [bank details], Upwork contract, or [PayPal].
- **Invoices** are due within 7 days. Work pauses if a milestone invoice is more than 14 days overdue.
- **Change requests** are quoted in writing before work starts, at [Currency] [rate] per hour.
- **Monthly support after the project** (optional): [Currency] [Amount] per month for up to [X] hours.

6. Client responsibilities and acceptance

The timeline depends on the client providing the following on time:

- A named project owner who can approve decisions within 3 working days.
- System access (admin user, Odoo.sh or hosting access) and tax portal access where needed.
- Complete master data and opening balances in the agreed templates.
- Key users available for workshops, testing and training.

Assumptions: [e.g. one company, one currency, up to 20 users, standard Odoo features without custom code].

Acceptance: each phase is accepted when the client signs off in writing, or 5 working days after delivery if no issues are raised.

This proposal is governed by the KasemCPA Engagement Letter and Terms of Service. To accept, sign below or reply by email confirming acceptance.

	KasemCPA	Client
Name	Ahmed Kassem	[Name]
Title	Founder	[Title]
Signature		
Date		