Rowhouse SYSTEMS

SAMPLE: FICTIONAL COMPANY

UPGRADE PROPOSAL

Orders, stock and shipping in one system

for Brightwater Fittings Co.

PREPARED FOR	PREPARED BY	DATE	VALID UNTIL
Tom Reyes, Owner	David Gul, Rowhouse Systems	July 20, 2026	August 19, 2026

IN SHORT

Your order spreadsheet has served the business for ten years, but it now holds you back. Only one person can use it at a time, the same order is typed more than once, and stock counts are a week old by the time anyone reads them. We recommend moving orders, stock and the shipping list into a simple web system that all five of you use at the same time, on a computer or a tablet. Your customers, QuickBooks and your product codes stay exactly as they are.

$18,500
Fixed price

10 weeks
Until you switch over

2 hours
Of your team's time a week, roughly

3 months
Of support included

What you told us

This is what you and your team told us in your walkthrough video and our emails, in your own words.

> “ We spend more time keeping the spreadsheet alive than running the business.
>
> Tom, Owner

> “ If Maria has the file open, I write the order on a sticky note and type it in later.
>
> Dana, Sales

> “ Half the time I find out we’re short when I’m standing at the empty shelf.
>
> Luis, Warehouse

In March the order macros stopped working after a Microsoft 365 update. We had them running again the same day, and our stabilization report gave the workbook a fragility score of 8 out of 10. This proposal answers the question you asked at the end of that job: what would it take to stop depending on it?

What we recommend, and why

We always recommend the smallest step that solves the problem. Here are the three we considered for Brightwater, and why we chose the third.

NOT ENOUGH

Fix

Repair the workbook and leave it as it is.

We did this in March. It keeps the file running, but the waiting, the retyping and the out-of-date stock numbers all stay.

NOT ENOUGH

Strengthen

Keep Excel, and move the data into a proper database behind it.

It would end the waiting and the retyping. But Luis would still need Excel on the warehouse floor, and stock would only change when someone types it in.

RECOMMENDED

Upgrade

A simple web system for orders, stock and shipping.

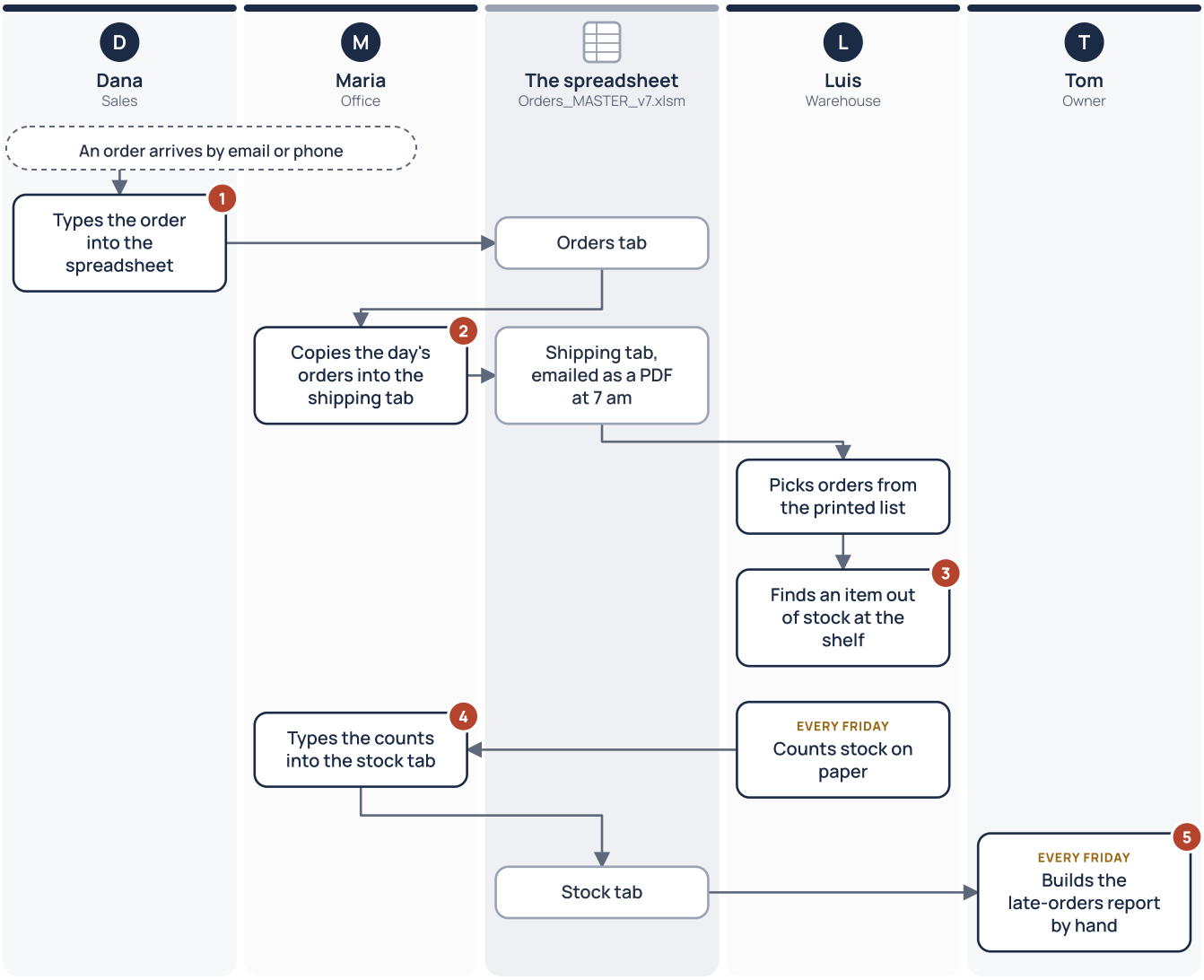
Everyone works at once, from any computer or tablet. Stock changes the moment an item ships, so Dana sees a shortage before she promises a date, not after.

Why not a full business system?

We also looked at ERP software, the large systems that run purchasing, accounting and everything else. They would do this job and much more, but they charge for every user every month, take months to set up, and would change how you invoice and keep your books. You would pay for far more than you need. If Brightwater ever outgrows what we build, your data exports cleanly into any of them.

How it works today

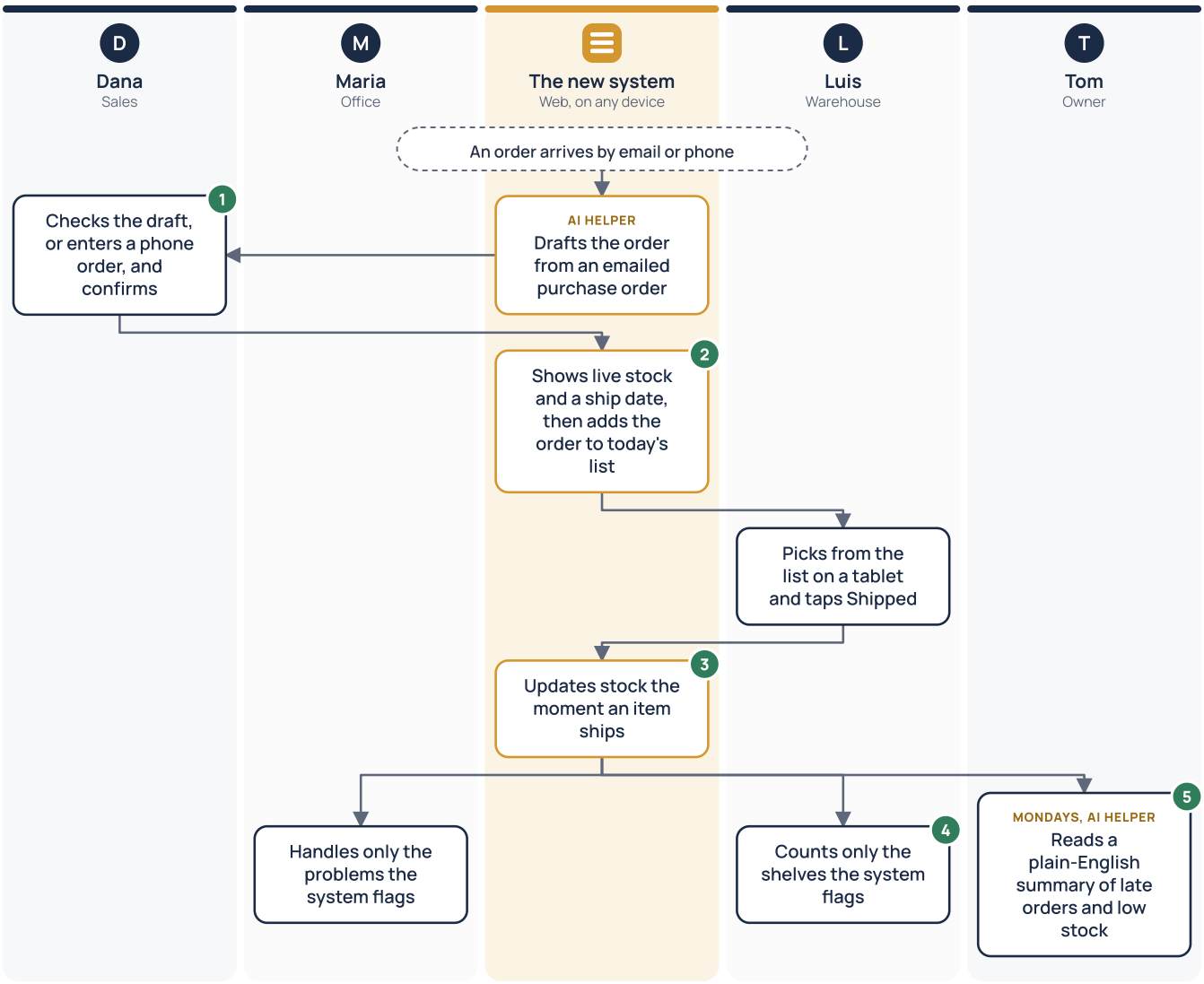
Every order passes through one spreadsheet, and people carry the information between its tabs by hand. The red numbers mark where time is lost or mistakes creep in.



1. Only one person can have the file open. Everyone else waits, or writes the order down and types it in later.
2. The same order is typed a second time. Every copy is a chance for a mistake, and this is the step the March failure stopped.
3. Stock numbers can be a week old, so a shortage shows up at the shelf instead of when the order is promised.
4. The Friday counts are typed in by hand, about 90 minutes every week.
5. The late-orders report takes about two hours every Friday and is out of date by Monday.

How it will work after

The same people and the same orders, with one system in the middle instead of a file. Each green number answers the red number on the page before.



1. Everyone works at the same time, from any computer or tablet. No more sticky notes.
2. Each order is entered once. The shipping list builds itself.
3. Stock is always current, so a shortage shows up when the order is promised.
4. No Friday retyping. Luis counts only where the numbers look wrong.
5. Tom's report arrives on its own every Monday morning.

Before and after, in numbers

	TODAY	AFTER
People who can work in the system at once	1	Everyone
Times each order is typed	2	1
How current the stock numbers are	Up to a week old	Up to the minute
Orders found short at the shelf	About 6 a month	Flagged before the date is promised
Office time on Friday counts and the report	About 3.5 hours a week	Under 30 minutes

Today's figures are your estimates from our emails.

What stays the same

- Your customers order exactly as they do now.
- QuickBooks stays for invoices and your books.
- Product codes, prices and your customer list come across unchanged.
- If you'd rather print the shipping list than use a tablet, you can.
- The data is yours. You can export all of it to Excel at any time.

Where AI helps

AI is used in two places where it saves real time. In both, a person checks the result and makes the decision.

Purchase-order reader AI

When a customer emails a purchase order, the system reads it and drafts the order. Dana checks every draft before it is confirmed; nothing ships on the AI's word alone.

Monday summary AI

Every Monday at 7 am, Tom gets a short email in plain English: which orders are late, which items are running low, and what changed since last week.

How we get there

Four phases over ten weeks. The spreadsheet keeps running until the day you switch over, so the business never stops.



PHASE	WHAT WE DO	WHAT WE NEED FROM YOU
1. Set up and move your data Weeks 1 to 3	Build the order, stock and customer screens, and move ten years of data across.	Check a sample of 20 orders and the stock list. About 2 hours in total.
2. Orders and shipping Weeks 4 to 6	Order entry, live stock and the tablet shipping list.	Dana and Luis try it with real orders, about 30 minutes a day.
3. Side by side Weeks 7 to 8	Run both systems in parallel and fix anything that doesn't match.	Keep working as normal, and email us anything that looks odd.
4. Switch over Weeks 9 to 10	Make the spreadsheet a read-only archive and switch on the AI helpers.	Pick the switch-over day. We suggest a Monday.

Price and what's included

$18,500

Fixed price. Your $1,500 Blueprint fee is already deducted.

$5,550	$5,550	$7,400
To start	When orders and shipping are live	At switch-over

Included

- ✓ Everything in the four phases above
- ✓ Logins for up to 8 people
- ✓ Hosting, daily backups and security updates
- ✓ 3 months of Standard support: 6 hours of changes a month and replies by the next business day (a $2,700 value)

Not included

- — Sending invoices to QuickBooks automatically. Optional, $2,400 fixed, and it can be added at any time.
- — Tablets or other hardware
- — Anything outside this proposal. We quote changes in writing before doing any work.

After the included three months, Standard support is $900 a month, or Essentials at $350 a month, billed monthly in advance. Hosting is included, and orders.brightwater.com stays on your own domain account. Your data runs on our hosting provider's servers, and goes to Anthropic, the maker of Claude, only when an AI helper runs.

If you ever leave. Month to month, with 30 days' notice. You choose how it ends: a full copy of the code, data and documentation, or every table exported to Excel (both included), or we set it up on your own hosting for a fixed $400. Your data is never held back. Once it runs on your own hosting without a support plan, keeping it secure is yours.

Next step

Reply to this email with "Approved" and we will send the first invoice. Work starts within two weeks of payment. Questions about anything in this proposal? Reply to the same email and you'll have an answer within one business day.

This proposal is valid until August 19, 2026.

Rowhouse SYSTEMS

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Sample proposal. Brightwater Fittings Co. and its staff are fictional, and all prices are illustrations.