RFQ - Customer End

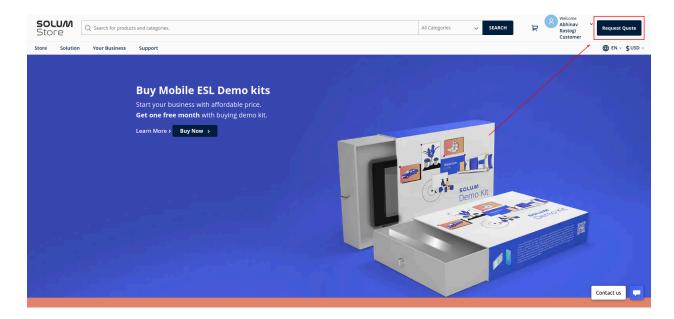
In this manual, you will see how the customer can request for quote.

With this feature, the customer will get the ability to share a few details with sellers, and on the basis of these details, sellers can quote the products.

To know more about seller workflow, please check the below guide: <u>https://docs.google.com/document/d/1oXzmqo5Wo11jDrhg-zVOU5mphW1v4WrW</u> <u>ygklkfzHPRk/edit?usp=sharing</u>

Workflow

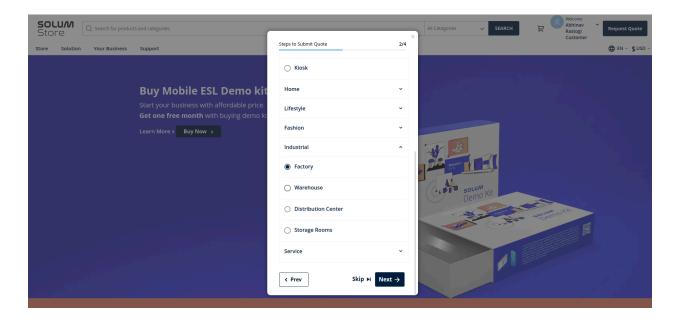
• Login as a customer, and click on the **Request Quote** button in the top right corner.



- When a customer clicks on the **RFQ Quote** button, the RFQ form will be displayed.
- In the first step, the customer has to select any desired category and click on the Next button.
- Customers can also skip any step if they want to.

Store Q. Search for products and categories.		All Categories V SEARCH	Request Quote
Store System Esl Digital Signature Solution Your Business Support	Steps to Submit Quote 1/4	4 ×	⊕ EN ~ \$USD ~
	Which Solution are you interested in?	e future of retail	
THERE IS	O System Esl	siness is here	
RANCE AND DEVICE	Mobile Esl	m ESL Kit Starts with 499 USD	
	O Digital Signature		
	Skip ► Next →		6
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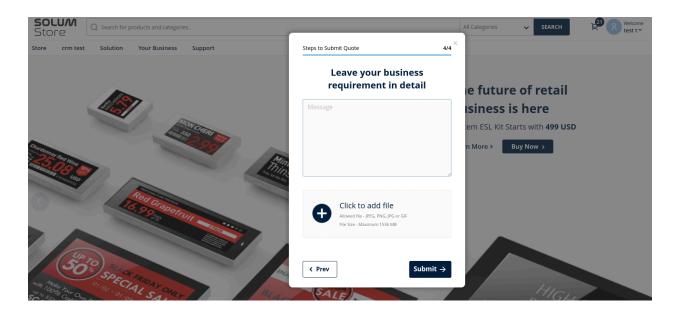
• Step 2: Customers can select the Industry type or Business Type.



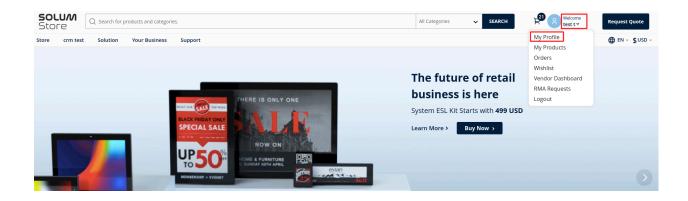
• Step 3 - Enter the Number of Stores and the Quantity per Store

SOLUM Store Q Search for products and categories.		All Categories V SEARCH
Store crm test Solution Your Business Support	Steps to Submit Quote 3/4	
	Please let us know more about your business	e future of retail
THERE IS	Number of Stores	isiness is here
	4	em ESL Kit Starts with 499 USD
SPECIAL SALE	Quantity per Store	n More > Buy Now >
	✓ Prev Skip ► Next →	

• Step 4: Add the message or attachments.



- After submitting the form, customer can check their raised quote in my quotation list.
- Customers can navigate to User Icon >> My Profile >> My Quotation List on the left menu.



Store Q Search for p	roducts and categories.				All Categorie	s 🗸 SEARCH		Request Quote
Store crm test Solution	Your Business Su	pport						⊕ EN ∽ \$USD
Dashboard	My Quotation L	ist Open		n Progress		Accepted		Rejected
My Orders	Search by keyword	i	Q					Ţ
My Product	73 records found						20 •	per page < 1 of 4
My Wishlist	Subject	Туре	Qty. per store	No of Stores	Seller	Valid Till	Created at	1 Action
My Quotation List	b	System Esl	4	4	test t1	N/A	17/01/2023	View
RMA	b	System Esl	4	4	vivek webkul	N/A	17/01/2023	View
Address Book	b	System Esl	4	4	alok y	N/A	17/01/2023	View
Account Information	b	System Esl	4	4	shilpi joshi	N/A	17/01/2023	View
	b	System Esl	4	4	Kush Mathur	N/A	17/01/2023	View
5ub Accounts	b	System Esl	4	4	rashi webkul	N/A	17/01/2023	View
Stored Payment Methods	aa	System Esl	4	4	test t1	N/A	17/01/2023	View
Data Request	aa	System Esl	4	4	vivek webkul	N/A	17/01/2023	View
Support Tickets	aa	System Esl	4	4	alok y	N/A	17/01/2023	View
	aa	System Esl	4	4	shilpi joshi	N/A	17/01/2023	View
My Subscription	аа	System Esl	4	4	Kush Mathur	N/A	17/01/2023	View
My Downloadable Products	aa	System Esl	4	4	rashi webkul	N/A	17/01/2023	View
My Product Reviews	а	System Esl	4	4	test t1	N/A	17/01/2023	View

Note:

- When the customer requests the quotation, on the basis of the customer's country the quotation will be assigned to different sellers.
- The customer will get quotations from different sellers and they will accept accordingly.
- To know more about seller workflow, please check the below guide: <u>https://docs.google.com/document/d/1oXzmqo5Wo11jDrhg-zVOU5mphW1v</u> <u>4WrWygklkfzHPRk/edit?usp=sharing</u>

My Quotation List

Here, the customer will get four columns, that indicate the four different stages of the RFQ.

- **Open:** A newly requested quotation,
- In Progress: When any RFQ is updated by the seller (can be a chat message or quotation)
- Accepted: When a quotation is accepted by the customer.
- **Rejected:** When a quotation is rejected by the customer.

View Page

On the view page, we are managing three statuses **Open, Pending,** and **Answered**.

• Initially, the status of **RFQ** is **Open**, when the customer adds any message to the conversation the status will get **Answered**, and the stage is **In Progress**.

					Welcome	
Store	ucts and categories.		All Categories	V SEARCH	Rastogi	Request Quote
					Customer	
Store Solution Your Business	Support					⊕ EN ~ \$USD ~
	Source Page:	My Account				
Dashboard	Category:	System ESL				
	Status:	Answered				
My Orders	Business Type:	Cafe and Bakery				
	No. of Stores:	50				
My Product	Quantity per Store:	5000				
My Wishlist	Destination Country:	India				
ing manage	Created At:	09/19/2023 19:31:06				
My Quotation List	Message:	User Manual				
My Inquiry						
RMA	Quote Message					Expand
			You			09/19/2023 20:11:26
Address Book			You			09/19/2023 20:11:26
Address Book			You Hello			09/19/2023 20:11:26
						09/19/2023 20:11:26
						09/19/2023 20:11:26
Account information Sub Accounts						09/19/2023 20:11:26
Account Information	Enter your message		Hello			09/19/2023 20:11:26
Account Information Sub Accounts Stored Payment Methods						09/19/2023 20:11:26
Account information Sub Accounts	Enter your message Allowed File types: jpeg.png.pdf,doc.docx,jpg.xls,xlsx		Hello			09/19/2023 20:11:26
Account information Sub Accounts Stored Payment Methods Data Request			Hello			09/19/2023 20:11:26
Account Information Sub Accounts Stored Payment Methods			Hello			09/19/2023 20:11:26

• When the customer gets any revert from the seller, then the status will become **Pending.**

Store	ucts and categories.		All Categories	∽ SEARCH È	Abhinav Rastogi Customer
Store Solution Your Business	Support				⊕ en ~ \$usd ~
Dashboard My Orders My Product My Wishlist My Quotation List	Source Page: Category: Status: Business Type: No. of Stores: Quantity per Store: Destination Country: Created At: Message:	My Account System ESL Pending Cafe and Bakery 50 5000 India 09/19/2023 19:31:06 User Manual			
My inquiry	Quote Message				Expand
RMA					
Address Book			You Hello		09/19/2023 20:11:26
Account Information			Helio		
Sub Accounts	Abhinav Rastogi	09/19/2023 20	:17:35		
Stored Payment Methods	Hello, let me share the quote with you				
Data Request					
Support Tickets	F				Contact us
My Subscription	Enter your message		ତ →		

- Once the quotation is received by a customer, they can **Accept** or **Reject** the quotation.
- Once, the customer accepts the quotation the status will be **Answered**.

Note: If customers accept the quote, then they cannot accept any other quote on the same lead.

My Wishlist My Quotation List	Quantity per Store: Destination Country: Created At: Valid Till: Message:	5000 India 09/19/2023 19:31:06 09/20/2023 User Manual
My Inquiry		User Maridar
	Quote Message	ŀ
Address Book		
Account Information	Abhinav Rastogi	09/19/2023 20:17
Sub Accounts	Hello, let me share the quote with you	
	Abhinav Rastogi	09/19/2023 20:32
Data Request	Please find the Quotation.	
Support Tickets	View Quote-1695081600	
My Subscription My Product Reviews		
my Product Reviews		
	Enter your message Allowed File types: jpeg.png.pdf,doc,docx,jpg,xls,xlsx	
	Note: If you accept the quote, then you cannot accept any other	quote on this lead
	Note: If you accept the quote, then you cannot accept any other	quote on uns leau.