

RFQ - Customer End

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

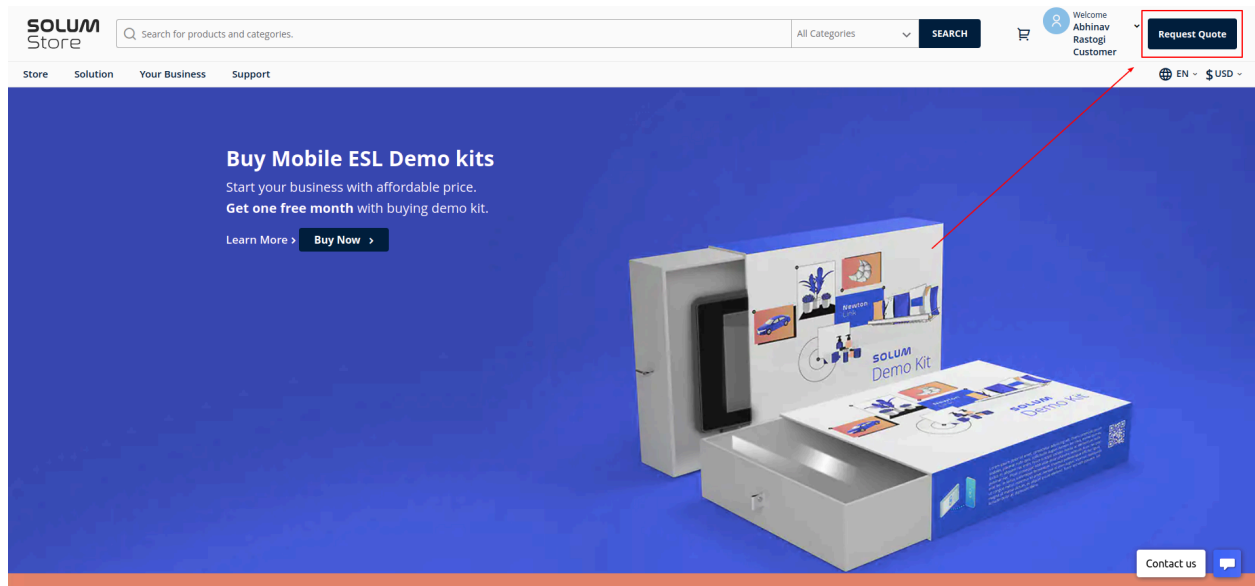
With this feature, the customer will get the ability to share a few details with sellers, and on the basis of these details, sellers can quote the products.

To know more about seller workflow, please check the below guide:

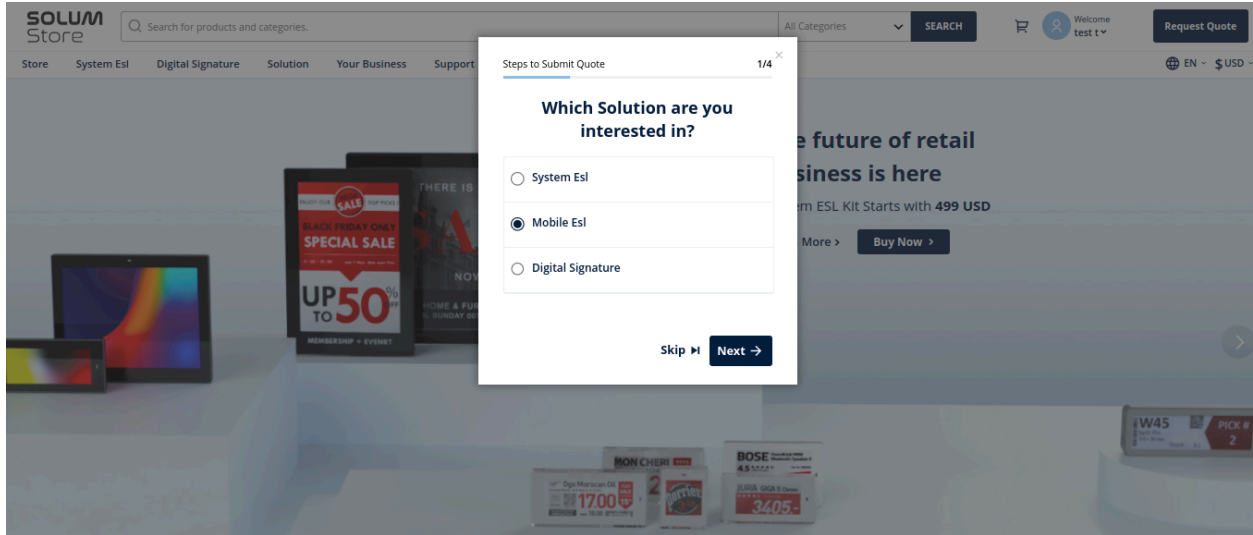
<https://docs.google.com/document/d/1oXzmqo5Wo11jDrhg-zVOU5mphW1v4WrWygklkfzHPRk/edit?usp=sharing>

Workflow

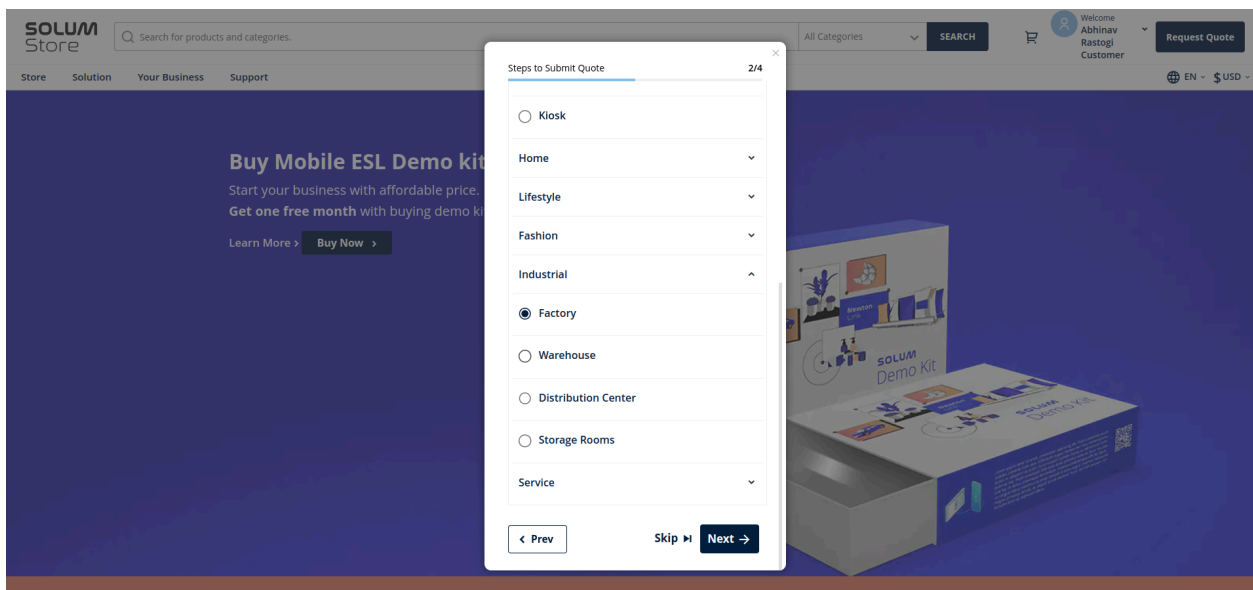
- Login as a customer, and click on the **Request Quote** button in the top right corner.



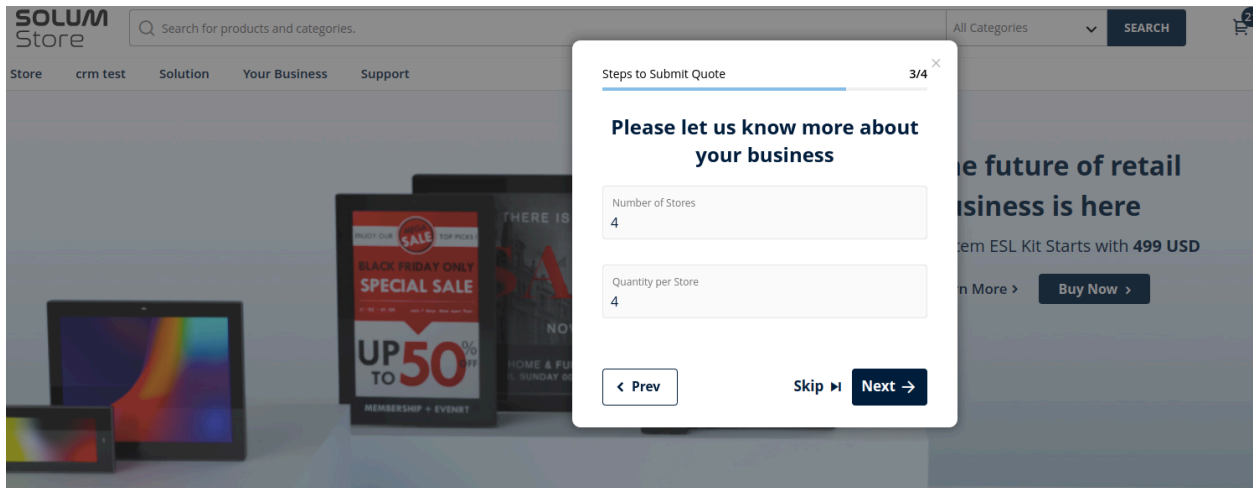
- When a customer clicks on the **RFQ Quote** button, the RFQ form will be displayed.
- In the first step, the customer has to select any desired category and click on the **Next** button.
- Customers can also skip any step if they want to.



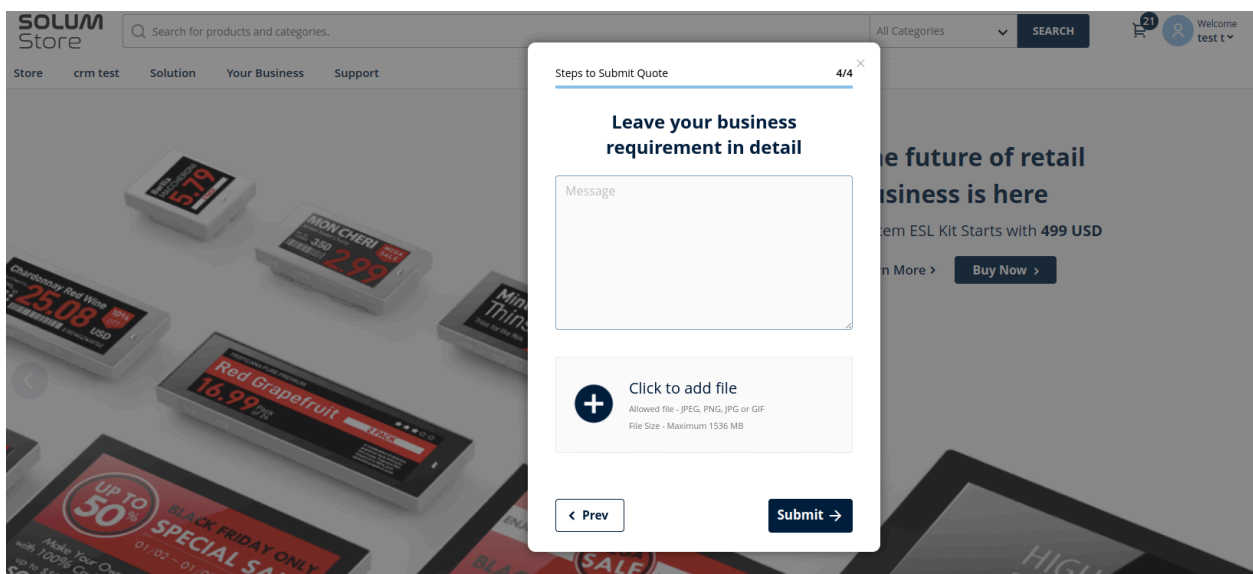
- **Step 2:** Customers can select the **Industry type** or **Business Type**.



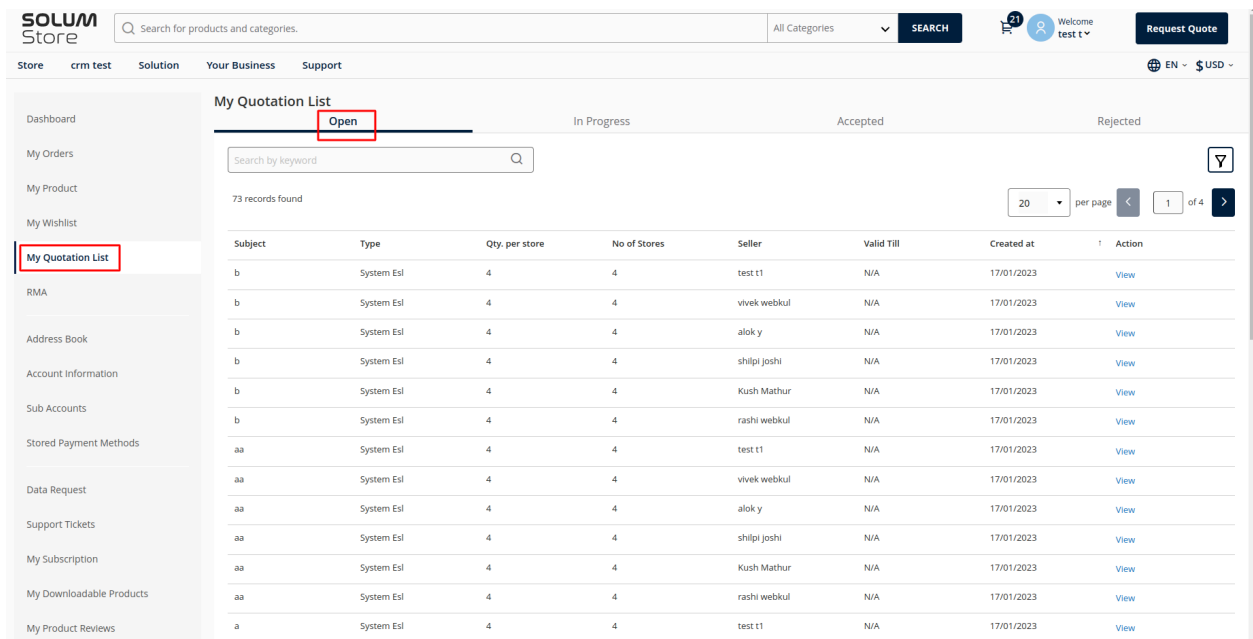
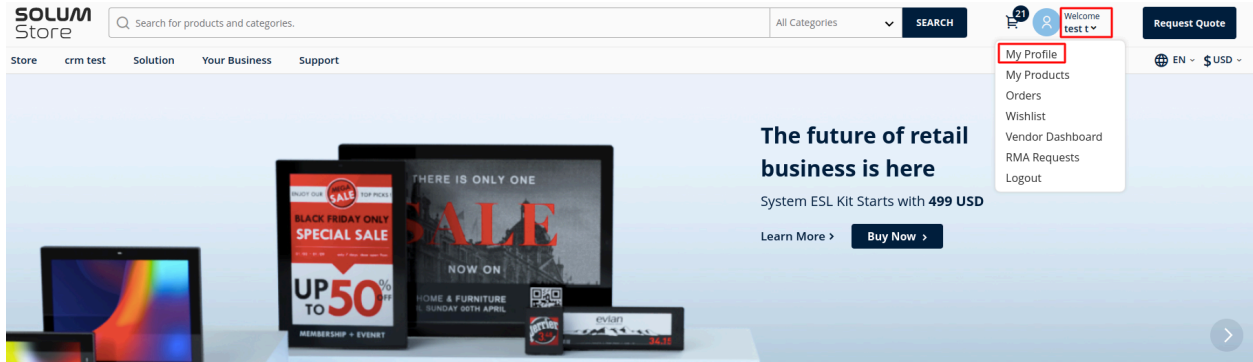
- **Step 3 -** Enter the **Number of Stores** and the **Quantity per Store**



- **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.



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: <https://docs.google.com/document/d/1oXzmqo5Wo11jDrhg-zVOU5mphW1v4WrWygkIkfzHPRk/edit?usp=sharing>

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**.

The screenshot shows the 'My Quotation List' page in the SOLUM Store. The page layout includes a top navigation bar with the store name, a search bar, and a 'Request Quote' button. A left sidebar contains navigation links, with 'My Quotation List' highlighted. The main content area is divided into two sections: a metadata section and a chat section. The metadata section lists details such as 'Source Page: My Account', 'Category: System ESL', 'Status: Answered', 'Business Type: Cafe and Bakery', 'No. of Stores: 50', 'Quantity per Store: 5000', 'Destination Country: India', 'Created At: 09/19/2023 19:31:06', and 'Message: User Manual'. The chat section, titled 'Quote Message', shows a message from 'You' at 09/19/2023 20:11:26 with the text 'Hello'. Below the chat, there is a text input field for a message and a 'Contact us' button.

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

The screenshot shows the SOLUM Store interface. At the top, there is a search bar and a navigation menu with options like 'Store', 'Solution', 'Your Business', and 'Support'. A user profile for Abhinav Rastogi is visible in the top right corner. The main content area displays quotation details: Source Page, Category (System ESL), Status (Pending), Business Type (Cafe and Bakery), No. of Stores (50), Quantity per Store (5000), Destination Country (India), Created At (09/19/2023 19:31:06), and Message (User Manual). Below this, a 'Quote Message' section shows a chat conversation. A message from 'Abhinav Rastogi' dated 09/19/2023 20:17:35 says 'Hello, let me share the quote with you'. The chat interface includes a text input field and a 'Contact us' button.

- 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.

This screenshot shows the same customer portal but with the quotation status updated to 'Answered'. The quotation details remain the same, but the 'Created At' date is now 09/20/2023. The chat message from Abhinav Rastogi, dated 09/19/2023 20:32:21, says 'Please find the Quotation.' and includes a 'View Quote-1695081600' button. A new chat message from the system is visible at the bottom right, with options to 'Accept', 'Accept & Add to Cart', and 'Reject'. The chat input field and 'Contact us' button are also present.