PROCUREMENT SYSTEM

Workflow Guide

January 2026

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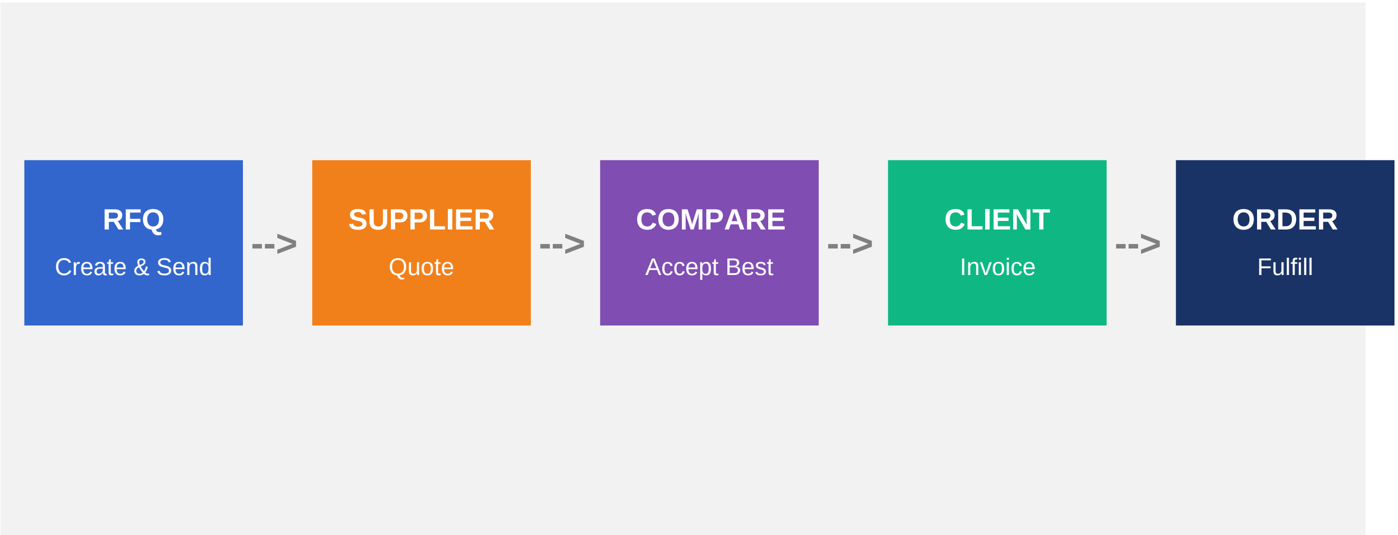
System Overview

The Procurement System manages the entire journey from requesting quotes from suppliers to placing orders. It serves as a bridge between your team, external suppliers, and clients.



KEY FEATURES:

- Automated RFQ number generation (RFQ-YEAR-0001)
- Secure supplier portal with token-based access
- AI-powered quote document analysis
- Side-by-side quote comparison
- Automatic markup calculation for client pricing
- Client portal for quote approval & payment
- Complete order tracking through delivery

SECTION 2

Step 1: RFQ Creation & Sending

Creating an RFQ

1. Go to Procurement Dashboard and click "New RFQ"
2. Select the Project this RFQ is for
3. Add a title and description for the request
4. Set the response deadline (when suppliers must respond by)
5. Add line items from your spec/FFE library
6. Select which suppliers to send the RFQ to

Sending the RFQ

When you click "Send to Suppliers", the system will:

- Generate a unique access token for each supplier
- Send a professional email with RFQ details
- Include a link to the Supplier Portal
- Track email delivery status
- Update RFQ status to SENT

TIP: Uploading Documents

You can attach spec sheets and PDF documents to the RFQ. These will be visible to suppliers in their portal under "Reference Documents".

SECTION 3

Step 2: Supplier Portal & Quote Submission

What Suppliers See

Suppliers receive an email with a secure link to their portal. No login is required - the link contains a unique token that grants access to only their RFQ.

The Supplier Portal shows:

- RFQ details (title, description, deadline)
- Ship To address (project location)
- Bill To address (your company)
- All requested items with images and specifications
- Reference documents you uploaded
- Response deadline countdown

How Suppliers Submit Quotes

Suppliers have two options to submit their quote:

Option 1: Upload Quote

Upload a PDF or image of their quote. AI automatically extracts and matches prices to items.

Option 2: Enter Manually

Enter prices, lead times, and availability for each item directly in the portal.

When a supplier submits, you receive an email notification with:

- Supplier name and total quote amount
- AI match analysis (if they uploaded a document)
- Link to review the quote in your dashboard

SECTION 4

Step 3: Quote Comparison & Acceptance

Comparing Quotes

Once suppliers submit their quotes, you can compare them side-by-side in the Quote Comparison view. The system highlights the best price for each item.

Item	Supplier A	Supplier B	Supplier C
Dining Chair (x6)	**$1,200**	$1,450	$1,380
Coffee Table	$850	**$780**	$920
Sofa	$3,200	$3,500	**$2,950**

Accepting a Quote

When you find the best quote, click "Accept Quote". A dialog will appear where you set the markup percentage:

MARKUP CALCULATION EXAMPLE

Supplier Cost: $1,000
Markup: 25%
Client Price: $1,250
Your Profit: $250

Formula: Client Price = Cost x (1 + Markup%/100)

SECTION 5

Step 4: Client Quote Creation

Creating the Client Invoice

After accepting supplier quotes, create a Client Quote (invoice) to send to your client. The system automatically applies your markups to calculate client pricing.

1. Click "Create Client Quote" from the RFQ page
2. System pulls in accepted supplier quotes with markups applied
3. Review line items and adjust if needed
4. Set validity period and payment terms
5. Add any additional notes or terms
6. Preview and send to client

What the Client Sees

The client receives an email with a link to their quote portal. They see:

- Professional itemized invoice with your branding
- Each item with name, description, and CLIENT price (not your cost)
- Subtotal, taxes (GST/QST), and total amount
- Payment options (credit card, wire transfer, e-transfer, check)
- Quote validity date
- Option to approve, request changes, or decline

IMPORTANT: Client Never Sees Your Cost

The client portal only shows the marked-up prices. Your supplier costs and profit margins

SECTION 6

Step 5: Payment & Order Creation

Client Approval & Payment

When a client approves and pays, the system tracks everything:

1. Client clicks "Approve" in their portal
2. Status changes to APPROVED
3. Client selects payment method and pays
4. Payment recorded (amount, method, reference)
5. You verify and reconcile payment
6. Status changes to PAID

Creating Purchase Orders

Once payment is received, create Purchase Orders to place with suppliers:

- System validates payment received >= required amount
- PO created with unique number (PO-YEAR-0001)
- Items pulled from client quote at SUPPLIER COST (not markup price)
- Shipping address from project or custom
- Send PO to supplier

Order Tracking

Track orders through their full lifecycle:

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PENDING_PAYMENT --> PAYMENT_RECEIVED --> ORDERED
ORDERED --> CONFIRMED --> IN_PRODUCTION
IN_PRODUCTION --> SHIPPED --> IN_TRANSIT
IN_TRANSIT --> DELIVERED --> INSTALLED --> COMPLETED
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SECTION 7

Status Reference Guide

RFQ Statuses

DRAFT	Being created, not yet sent
SENT	Sent to suppliers, awaiting responses
PARTIALLY_QUOTED	Some suppliers have responded
FULLY_QUOTED	All suppliers have responded
QUOTE_ACCEPTED	At least one quote accepted
EXPIRED	Response deadline passed
CANCELLED	RFQ was cancelled

Supplier Response Statuses

PENDING	RFQ sent, supplier hasn't opened yet
VIEWED	Supplier opened the portal link
SUBMITTED	Supplier submitted their quote
DECLINED	Supplier declined to quote

Client Quote Statuses

DRAFT	Being prepared internally
SENT_TO_CLIENT	Email sent to client
CLIENT_REVIEWING	Client has viewed the quote
APPROVED	Client approved the quote
REVISION_REQUESTED	Client requested changes
REJECTED	Client rejected the quote
PAID	Payment received

SECTION 8

Status Reference Guide (continued)

Order Statuses

PENDING_PAYMENT	Order created, awaiting payment
PAYMENT_RECEIVED	Payment confirmed
ORDERED	Order placed with supplier
CONFIRMED	Supplier confirmed order
IN_PRODUCTION	Items being manufactured
SHIPPED	Items left supplier
IN_TRANSIT	Items in transit
DELIVERED	Items received
INSTALLED	Items installed at project
COMPLETED	Order fulfilled and closed

QUICK TIPS

- Always set realistic response deadlines (7-14 days typical)
- Upload spec sheets to help suppliers quote accurately
- Compare at least 2-3 suppliers for best pricing
- Track activities in the log for audit trail
- Use notes fields to document decisions