Overview of lists

(visual information)

Client (full)

Company information:

1. **ID (XXXX/XXXX)**
2. **Company Name**
3. **Company Address (Street, number, ZIP, City, Country)**
4. **Bank Account number**
5. **VAT Number**
6. **Company email**
7. **Company telephone**
8. **General fax**
9. **Commission rate**

Contact person information (List view for search):
(Add/Edit/Delete)

1. **Last name**
2. **First name**
3. **Function**

Contact information (full)
1. **Last Name**
2. **First Name**
3. **Email**
4. **Telephone**
5. **Function**

Client (list view short for search)

1. **ID (XXXX/XXXX)**
2. **Company Name**
3. **Primary contact**
4. **City**
5. **Sector**
6. **Country**

Features:
– **View related orders (link to order summary+data)**
– **Make**
– **Edit**
– **Delete**

Supplier (full)

Company information:

1. ID
2. Company Name
3. Company Address
   (Street, number, ZIP, City, Country)
4. Bank Account number
5. VAT Number
6. Company email
7. Company telephone
8. General fax
9. Commission rate
10. Sector

Contact person information (List view for search):
(Add/Edit/Delete)

1. Last name
2. First name
3. Function

Contact information (full)
1. Last Name
2. First Name
3. Email
4. Telephone
5. Function

Supplier (list view short for search)

1. ID
2. Company Name
3. Primary contact
4. City
5. Sector
6. Country

Features:
– **View related orders**
(link to order summary+data)
– **Make**
– **Edit**
– **Delete**

Orders (full)

Order information:

1. **Order reference number (TBC)**
2. **Clients (via dropdown)**
3. **Supplier 1 (via dropdown)**
4. **Supplier 2 (via dropdown)**
5. **Supplier 3 (via dropdown)**
6. **Status (See status chart)**
7. **Date of entry (automatic)**
8. **Order detail:**
    1. **Product**
    2. **Amount**
    3. **Price**
    4. **…**
9. **Commission rate**

Orders (list view short for search)

1. **Order reference number**
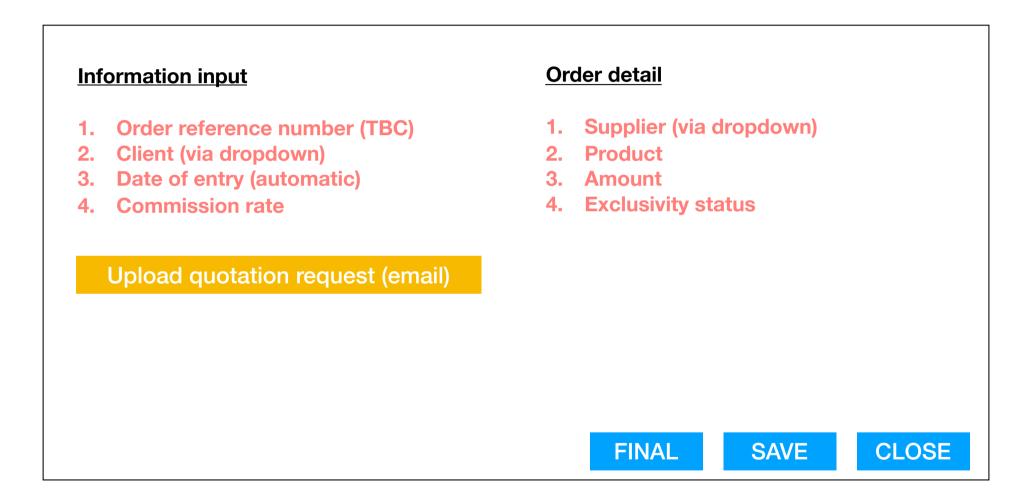2. **Client**
3. **Status**

Status Chart + PDF

1. **QUOTE RECEIVED: Request for quotation received from client (automatic)**
2. **QUOTE REQUEST: Request for quotation from supplier(s) (can be multiple)**
3. **QUOTE SUP RECEIVED (PARTIAL/FULL): Request(s) received from supplier(s)**
4. **QUOTE SENT: Quotation sent to client**
5. **QUOTE ACCEPTANCE - CONFIRMATION**
6. **SEND CONFIRMATION TO SUPPLIER**
7. **UPLOAD CONFIRMATION SUPPLIER DOC**
8. **GENERATE CONFIRMATION TO CLIENT DOC**
9. **(if accepted) GOODS RECEIVED: Goods to be treated received from client**
10. **GOODS SENT SUP: Goods sent to supplier**
11. **GOOD RECEIVED SUP: Goods received from supplier (Depending on Exclusivity)**
12. **GOODS SENT: Goods sent to client (Depending on Exclusivity)**
13. **INVOICE RECEIVED**
14. **INVOICE SENT**
15. **INVOICE PAID**

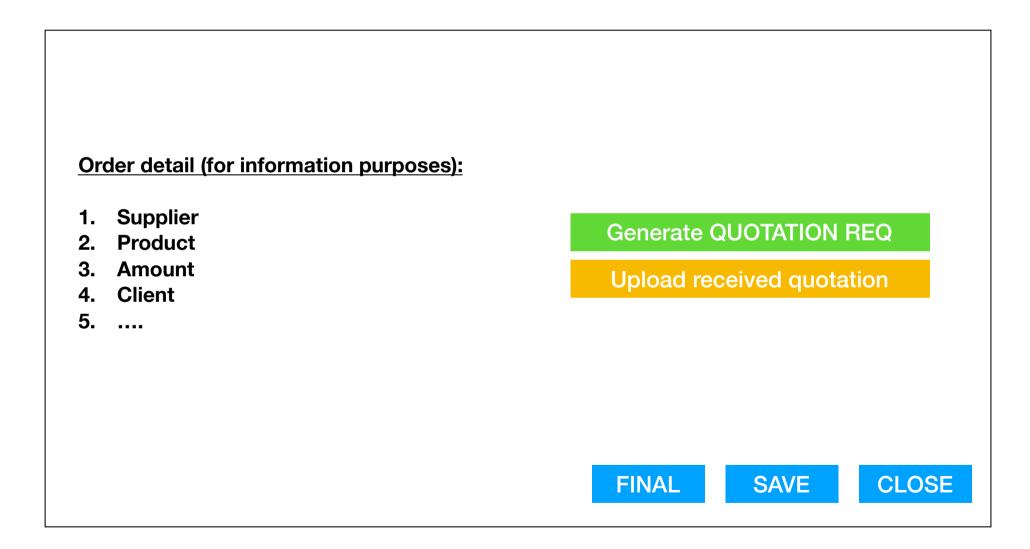**Orange: PDF generated**

Workflow

(visual)

1. **QUOTE RECEIVED: Request for quotation received from client (automatic)**

    1. *Click New Order in Order view*
    2. *Click final (next status level)/Save/Click close (without saving)*

Information input

1. Order reference number (TBC)
2. Client (via dropdown)
3. Date of entry (automatic)
4. Commission rate

<div>Upload quotation request (email)</div>

Order detail

1. Supplier (via dropdown)
2. Product
3. Amount
4. Exclusivity status

| FINAL | SAVE | CLOSE |

Pink= Information to complete or select

2. QUOTE REQUEST: Request for quotation from supplier(s) (can be multiple)

3. QUOTE SUP RECEIVED (PARTIAL/FULL): Request(s) received from supplier(s)

1. *Click Order in list*
2. *Click final (next status level)/Save/Click close (without saving)*

<u>Order detail (for information purposes):</u>

1. **Supplier**
2. **Product**
3. **Amount**
4. **Client**
5. **….**

Generate QUOTATION REQ

Upload received quotation

FINAL   SAVE   CLOSE

Pink= Information to complete or select

4. QUOTE SENT: Quotation sent to client
5. QUOTE ACCEPTANCE

1. *Click Order in list*
2. *Click final (next status level)/Save/Click close (without saving)*

Order detail (Consolidated from Supplier)

1. **Product**
2. **Amount**
3. **Price received from SUP**
4. **Commission (standard linked to initial input, but adaptable for negotiation)**

Quotation detail

1. **Language**
2. **Addressee at Client (Primary contact/...) (Drop-down)**
3. **Other**

<div style="color:green">GENERATE QUOTATION</div>

(PLEASE NOTE: PDF ADAPTABLE for not standard options (like a word document))

UPLOAD CLIENT CONFIRMATION

LOST

FINAL   SAVE   CLOSE

Pink= Information to complete or select

6. SEND CONFIRMATION TO SUPPLIER
7. UPLOAD CONFIRMATION SUPPLIER DOC
8. GENERATE CONFIRMATION TO CLIENT DOC

1. *Click Order in list*
2. *Click final (next status level)/Save/Click close (without saving)*

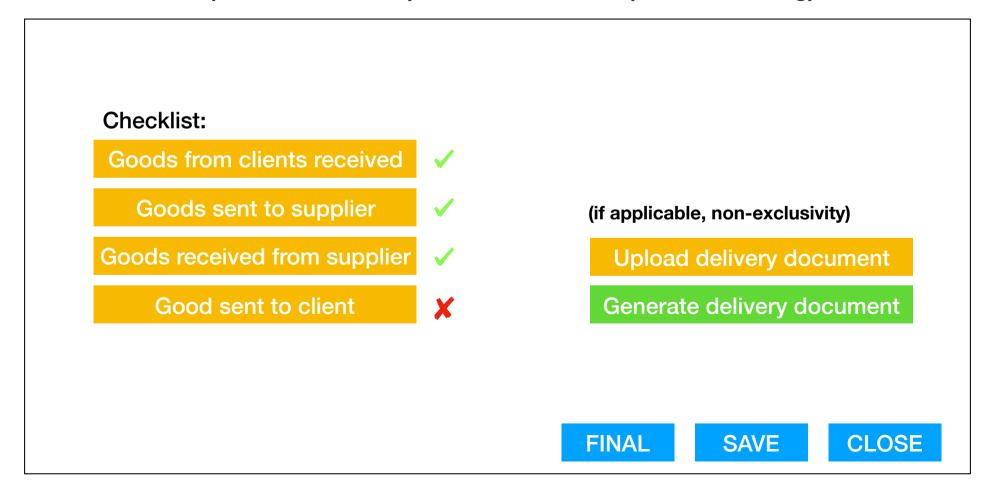**Order detail (for information purposes):**

1. Supplier
2. Product
3. Amount
4. ...

(Can be standard message with received quotation under step 2 in copy, e.g. I accept your offer as referenced in the below quotation)

GENERATE SUPPLIER CONFIRMATION

UPLOAD SIGNED ORDER CONFIRMATION

GENERATE CLIENT CONFIRMATION

FINAL   SAVE   CLOSE

7. GOODS RECEIVED: Goods to be treated received from client
8. GOODS SENT SUP: Goods sent to supplier
9. GOOD RECEIVED SUP: Goods received from supplier (Depending on Exclusivity)
10. GOODS SENT: Goods sent to client (Depending on Exclusivity)

1. *Click Order in list*
2. *Click job progress in checklist*
3. *Click final (next status level)/Save/Click close (without saving)*

Checklist:

Goods from clients received	✓
Goods sent to supplier	✓
Goods received from supplier	✓
Good sent to client	✗

(if applicable, non-exclusivity)

Upload delivery document

Generate delivery document

FINAL   SAVE   CLOSE

11. INVOICE SENT
12. INVOICE PAID

1. *Click Order in list*
2. *Click final (next status level)/Click close (without saving)*

UPLOAD SUPPLIER INVOICE

GENERATE INVOICE

(all the information should be in the system + PDF
ADAPTABLE for not standard options (like a word document))

FINAL (=Paid)   CLOSE