

VoloTrade

Trading

Metal Exchange

Price Updates

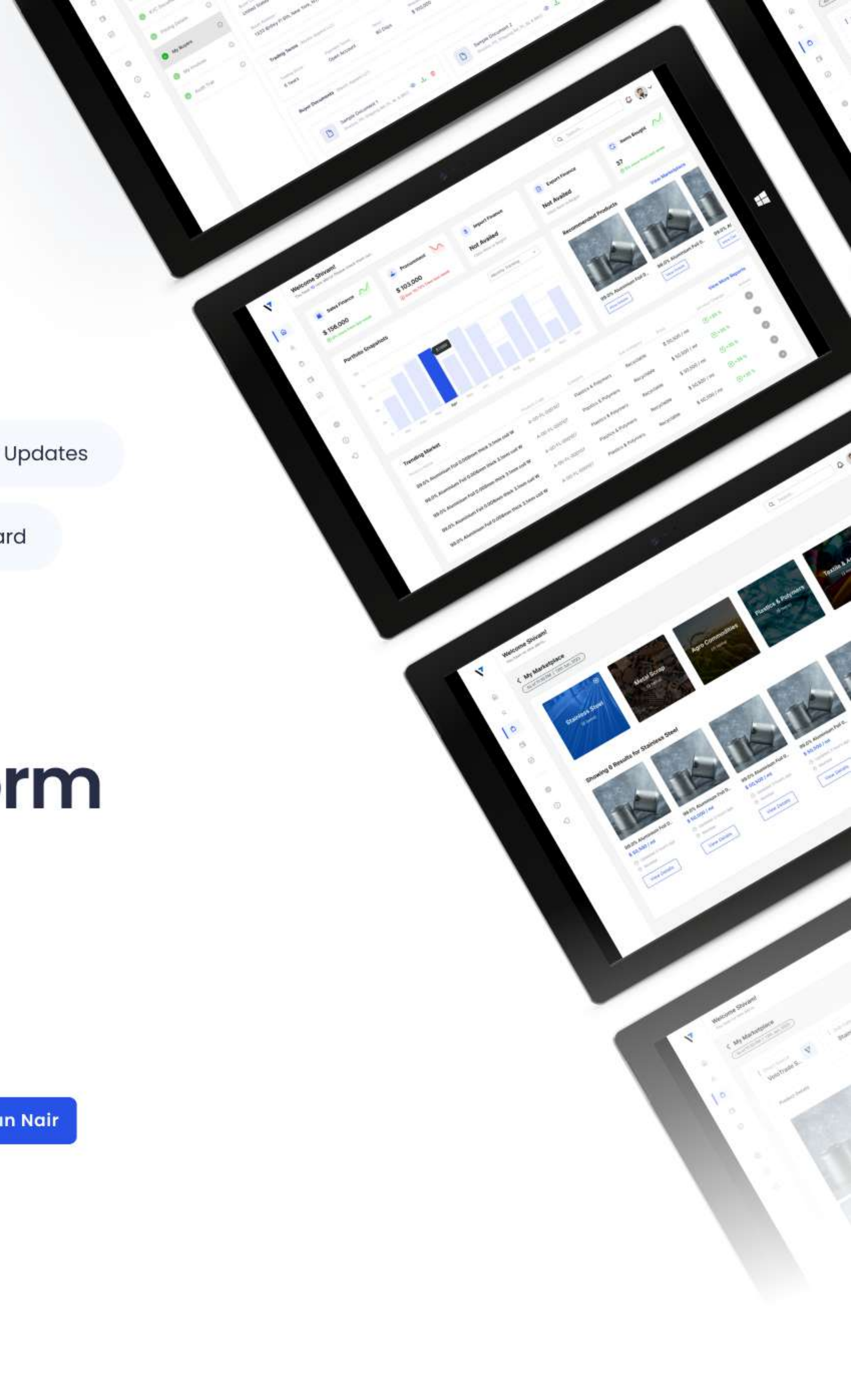
Wallet Management

Trading Dashboard

Supply Chain Finance Platform



Varun Nair

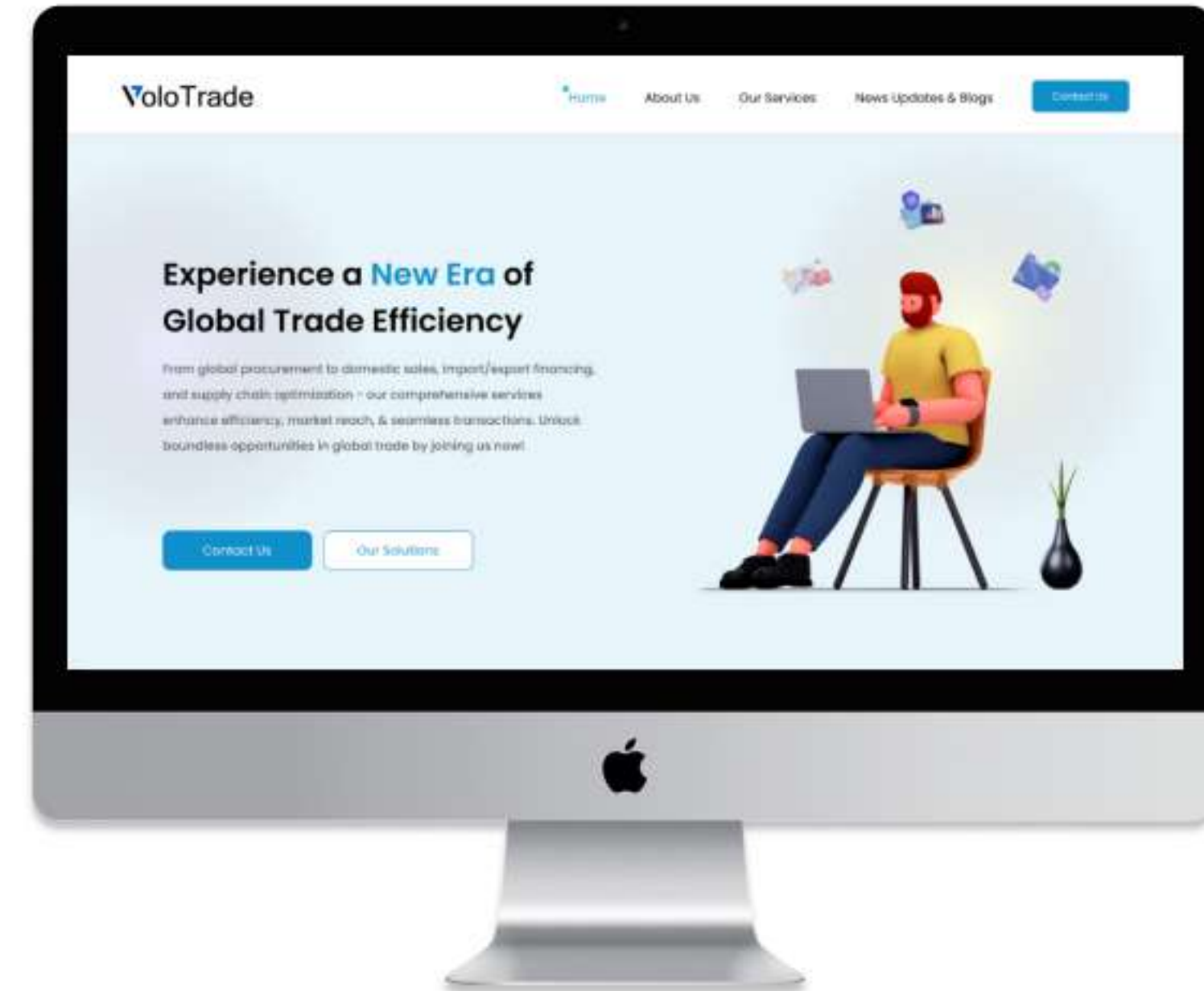


About VoloTrade

VoloTrade provides a comprehensive support throughout the supply chain process, including procuring raw materials, selling finished goods, secured financing for imports/exports, & offering supply chain finance for domestic needs.

The Platform Vision

The internal platform bridges the gap between customers looking for assistance in any of the supply chain stages with the VoloTrade internal team offering 4 key services namely:



**Supply Raw
Materials**



**Buy Finished
Products**



**Invoice
Financing**



**Supply Chain
Solutions**

Platform Features to Include

For Customers –

- Onboarding Module – Seamless onboarding for users with minimal requirements
- User Dashboard – Customer Profile Overview, Offer Listings, Portfolio Snapshots etc.
- Procurement Module – Listings of available raw materials to purchase, latest prices
- Invoice Financing – KYC documents, add buyers, upload invoices, reports, etc.
- Supply Chain Financing – Sales & Procurement financing transaction types

Internal Team –

- Sales Module – CRM system, lead generation, issue offers, onboard customers
- Credit Module – Supplier & buyer underwriting, setting limits, finalizing pricing terms
- KYC Module – Banking details, customer documentation, final approval for suppliers
- Operations Module – Addition of invoices, invoice-level underwriting, debt management
- Finance Module – Accounting statements, finance calculations, disbursement of funds
- Admin Module – Setting authorities, manual control over product listing, and pricings

Lender Module –

- Ability to view Customer Details, Credit Underwritings, and select relationships to fund
- Key points for them will be limit sanctioned, limit disbursed, Max credit days, overdue accounts, Customer ledgers

My Design Process



Understand

- Various User Requirements
- Competitor Analysis
- Primary User Personas



Ideate

- Pain Points of Existing Flow
- Solutions to Pain Points
- New Flow & Wireframes



Design

- New Design System
- High Fidelity Wireframes
- Interaction & Prototype

Users & their Requirements


1. Procurement Module

Non-Ferrous Metals	Steel & Stainless Steel	Metal Scrap
Agro Commodities	Plastics & Polymers	Textile & Apparel
Packaging	FMCG	Healthcare

2. Invoice Financing

Supplier Details	Buyer Details	KYC Documents
Pricing Terms	Invoice Details	Accounts & Reports


3. Supply Chain Financing

Working capital sanctioned	Working capital limit utilized	Capex limit sanctioned
Capex limit utilized	Max credit days	Max limit per customer 

4. Sales Module

Lead Generation	Preliminary Check	Offer Issuance
Supplier Onboarding	Buyer Addition	Sales CRM

5. Credit Module

Supplier Underwriting	Buyer Underwriting	Pricing Terms
Supplier & Buyer Limits	Credit Revisions / Renewals	Group Exposure Limits 

6. KYC Module

Supplier Documentation	Banking Details	
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7. Operations Module

Addition of Invoices	Invoice Level Underwriting	Exception Handling
Debt Management (Dunning)	Final Repayment of Funds	

8. Finance Module

Accounting & Reports	Financial Calculations	Disbursement of Funds
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9. Admin Module

Addition or Removal of Team	Manual Control for Products	Addition or Removal of Items
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Competitor Analysis

OfBusiness

OfBusiness is a prominent Indian fintech company that primarily focuses on solving working capital challenges for small and medium-sized enterprises (SMEs) in India.



Features :

- **Supply Chain Financing:** It provides SMEs with access to supply chain financing solutions, helping them manage their cash flow & procure essential materials.
- **Procurement Solutions:** The platform offers procurement services that enable businesses to source raw materials & other supplies at competitive prices.

GoodFellow

GoodFellow is a respected supplier of materials for research and industry, offering a wide range of materials, including metals, ceramics, and polymers.



Features :

- **Diverse Material Catalog:** GoodFellow boasts an extensive catalog of materials, making it a go-to source for researchers and manufacturers.
- **High-Quality Materials:** Known for its commitment to quality, providing customers with reliable & high-quality materials, ensuring consistency & performance.

User Persona



Sarah Mitchell
Supply Chain Manager

About

-  35
-  Chicago, Illinois
-  Bachelor's
-  Employee



Efficient supply chain management is the key to our company's success.

Description

Sarah is an experienced supply chain manager working for a medium-sized manufacturing company in Chicago.

Goals & Objectives

1. Improve Supply Chain Efficiency: Sarah aims to streamline the supply chain process, reduce lead times, and minimize inventory carrying costs.
2. Cost Reduction: She seeks ways to cut procurement costs while maintaining the quality of raw materials.

Pain points

- Often faces cash flow challenges when procuring raw materials in bulk, affecting her ability to negotiate.
- Coordinate with multiple suppliers & on-time deliveries



Rajesh Patel
Small Business Owner

About

-  42
-  Mumbai, India
-  Diploma
-  Employee



Managing my business's finances and supply chain is a constant juggling act.

Description

Rajesh owns a small manufacturing business in Mumbai, specializing in custom-made machinery parts.

Goals & Objectives

1. Secure Financing: Rajesh's primary goal is to secure reliable financing solutions to support his import of raw materials and expand his business.
2. Improve Inventory Management: He wants to optimize his inventory levels to reduce storage costs.

Pain points

- Challenges in obtaining affordable financing options to cover the costs of importing raw materials.
- Managing financial records is time consuming

Task Mapping (Customer)

	Step 1	Step 2	Step 3	Step 4
Task	Search for Raw Materials	Place an Order	Track Order Status	Manage Payment
Environment	Procurement Module	Product Details	Order Details	Invoice Details
Challenges	Finding reliable suppliers	Ensuring product availability	Monitoring shipment progress	Handling payment securely
Emotions	Frustration, uncertainty	Relief, satisfaction	Anxious, impatient	Trust, security
Thoughts	"Are there trustworthy suppliers?"	"Is the product in stock?"	"Where is my shipment now?"	"Is my payment safe?"
Design Opportunity	Supplier verification process	Real-time product availability	Shipment tracking feature	Enhanced payment security

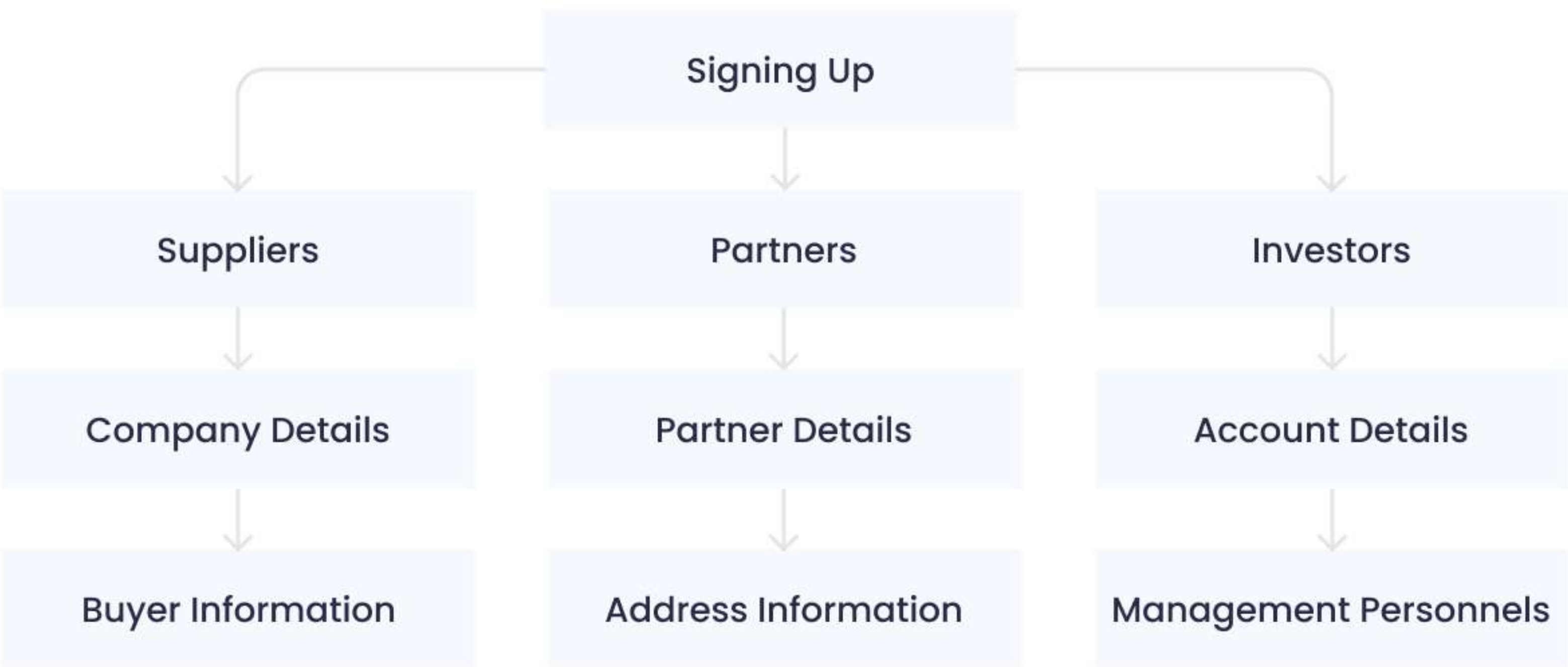
Task Mapping (Internal Team)

	Step 1	Step 2	Step 3	Step 4
Task	Verify Supplier Credentials	Monitor Order Queue	Coordinate with Suppliers	Manage Financial Records
Environment	Credit Module	Operations Module	Operations Module	Finance Module
Challenges	Supplier credibility checks	Prioritizing orders	Communication with multiple suppliers	Accurate financial tracking
Emotions	Due diligence, caution	Time management, multitasking	Collaboration, negotiation	Accuracy, compliance
Thoughts	"Is this supplier reliable?"	"Which orders need attention now?"	"Negotiate better terms."	"Ensure financial transparency."
Design Opportunity	Streamlined supplier verification	Order prioritization algorithm	Supplier communication tools	Enhanced financial reporting

Improved Task-flows

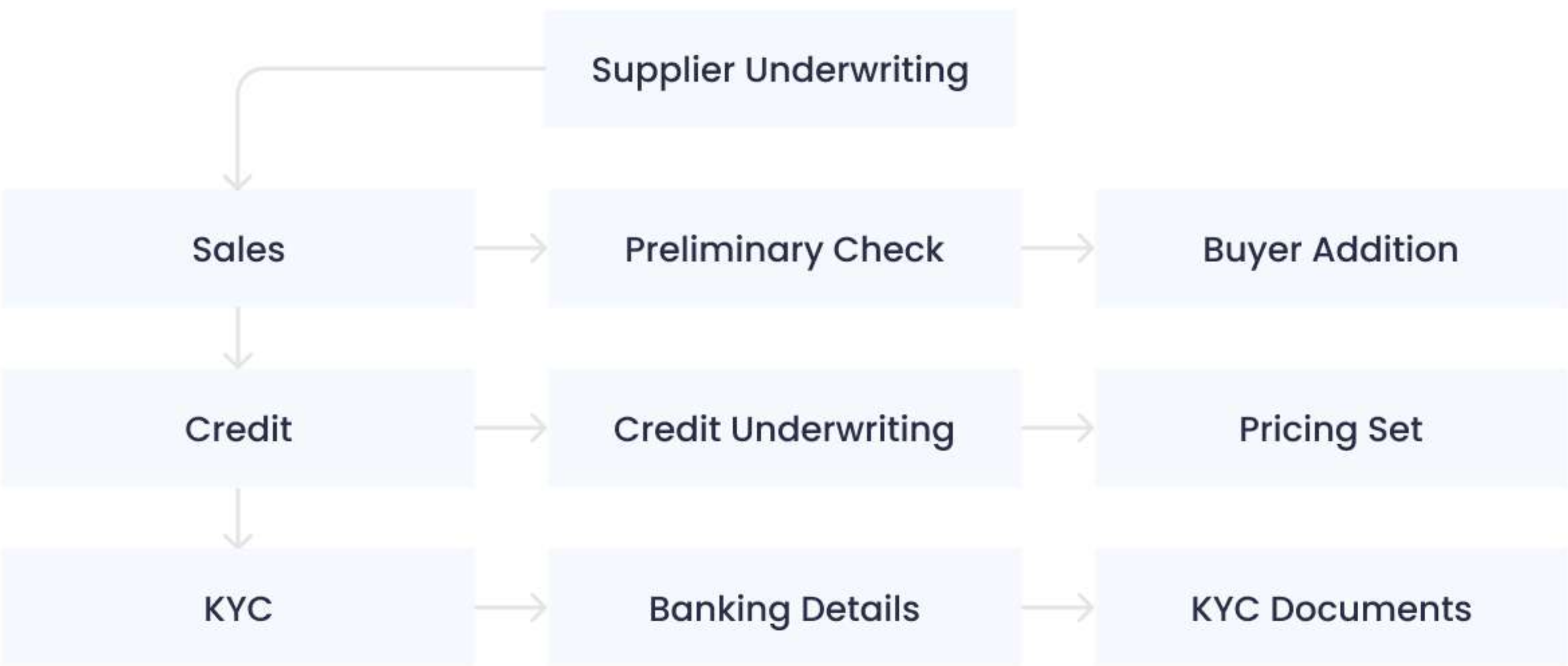
Scenario 1:

Onboarding for Suppliers, Partners & Investors



Scenario 2:

Supplier Underwriting, till its onboarded as an approved supplier in the system

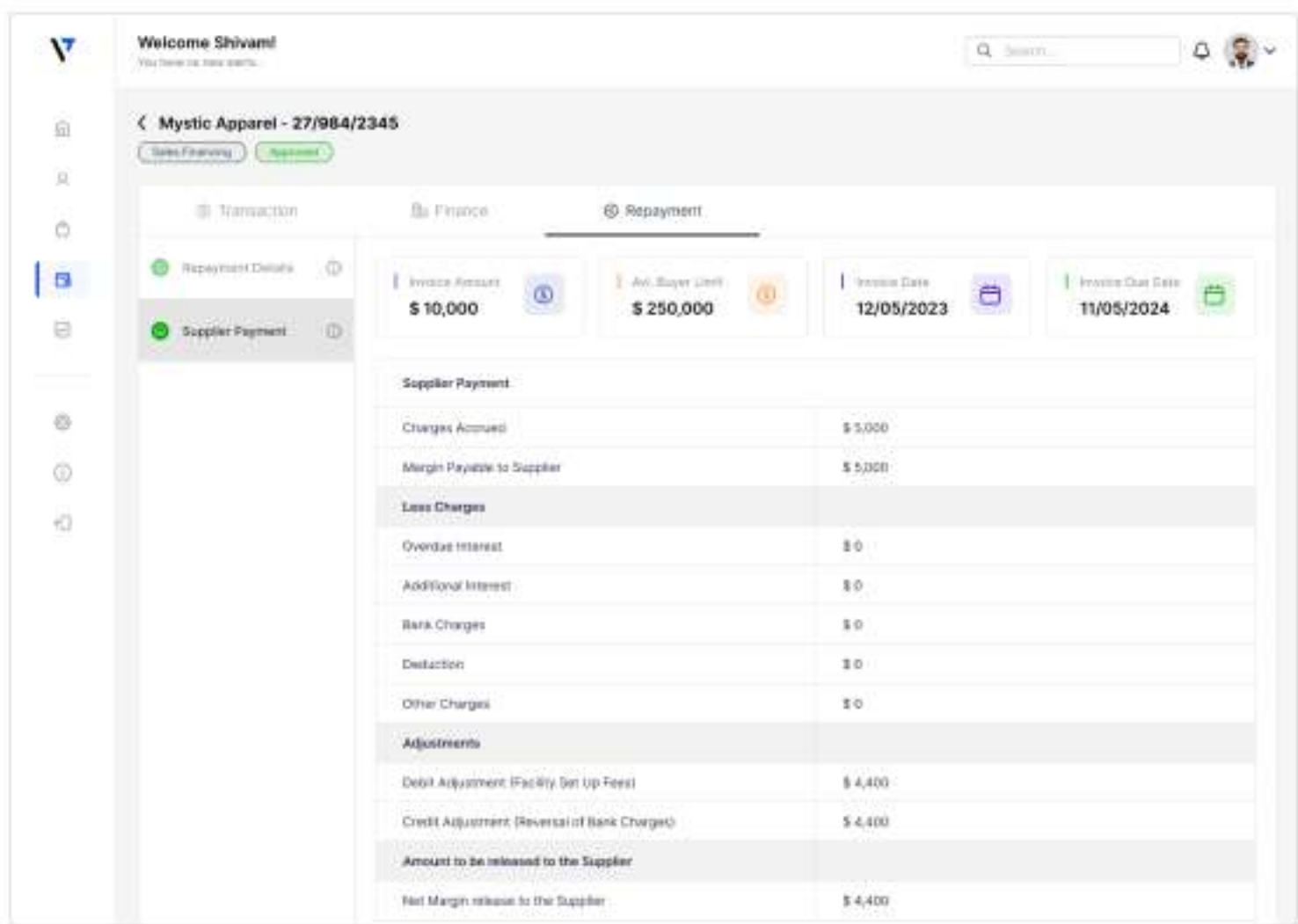
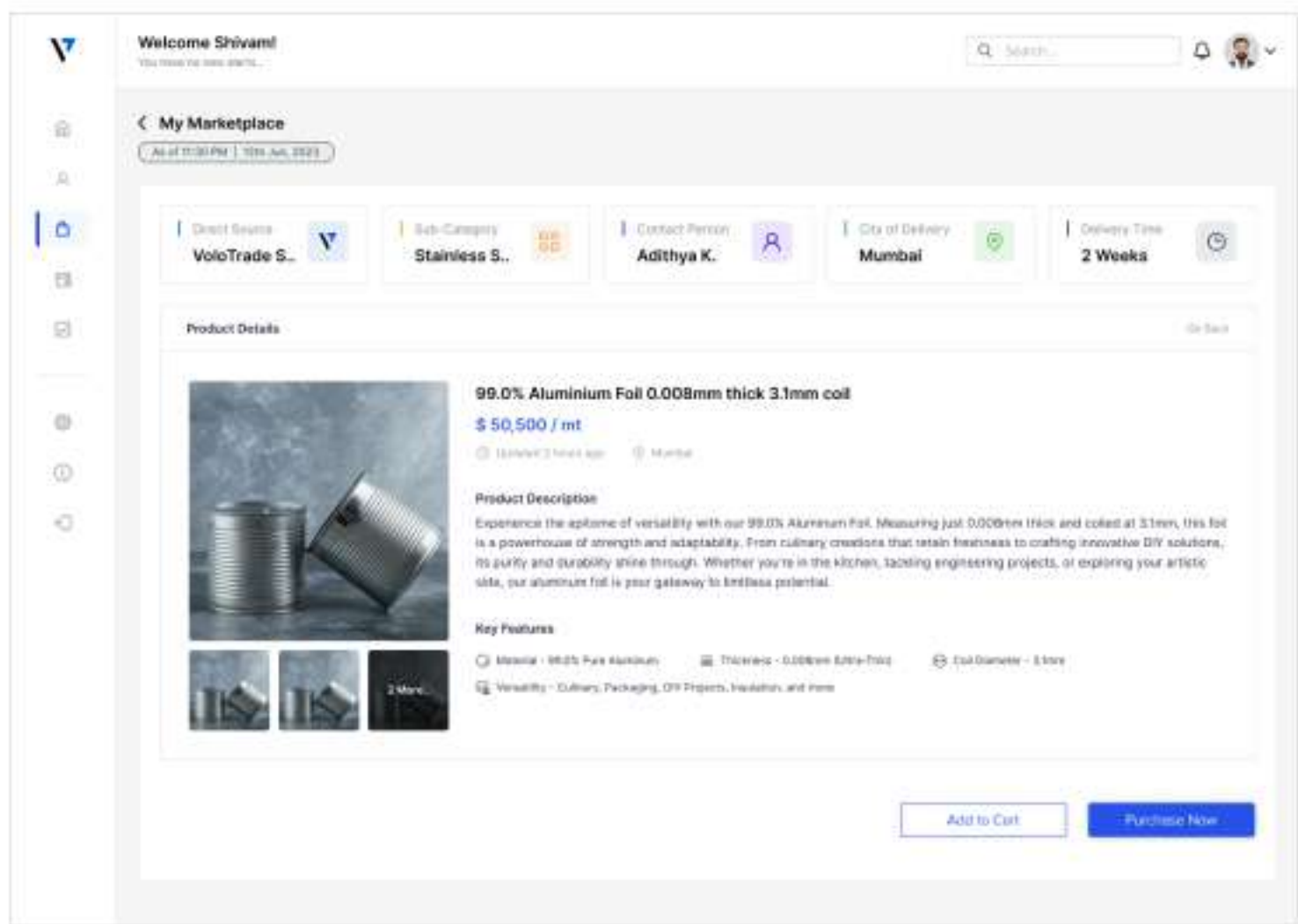
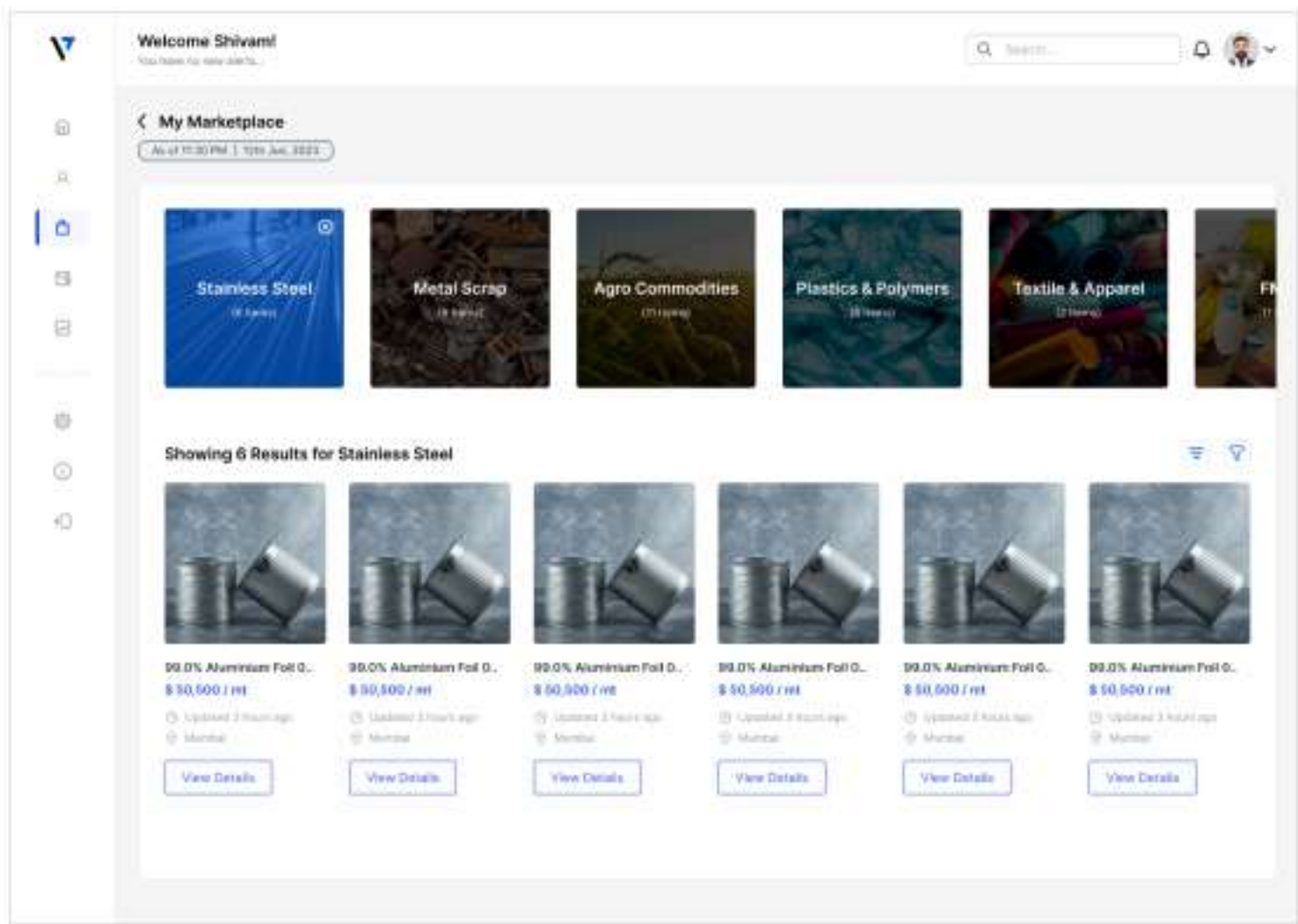
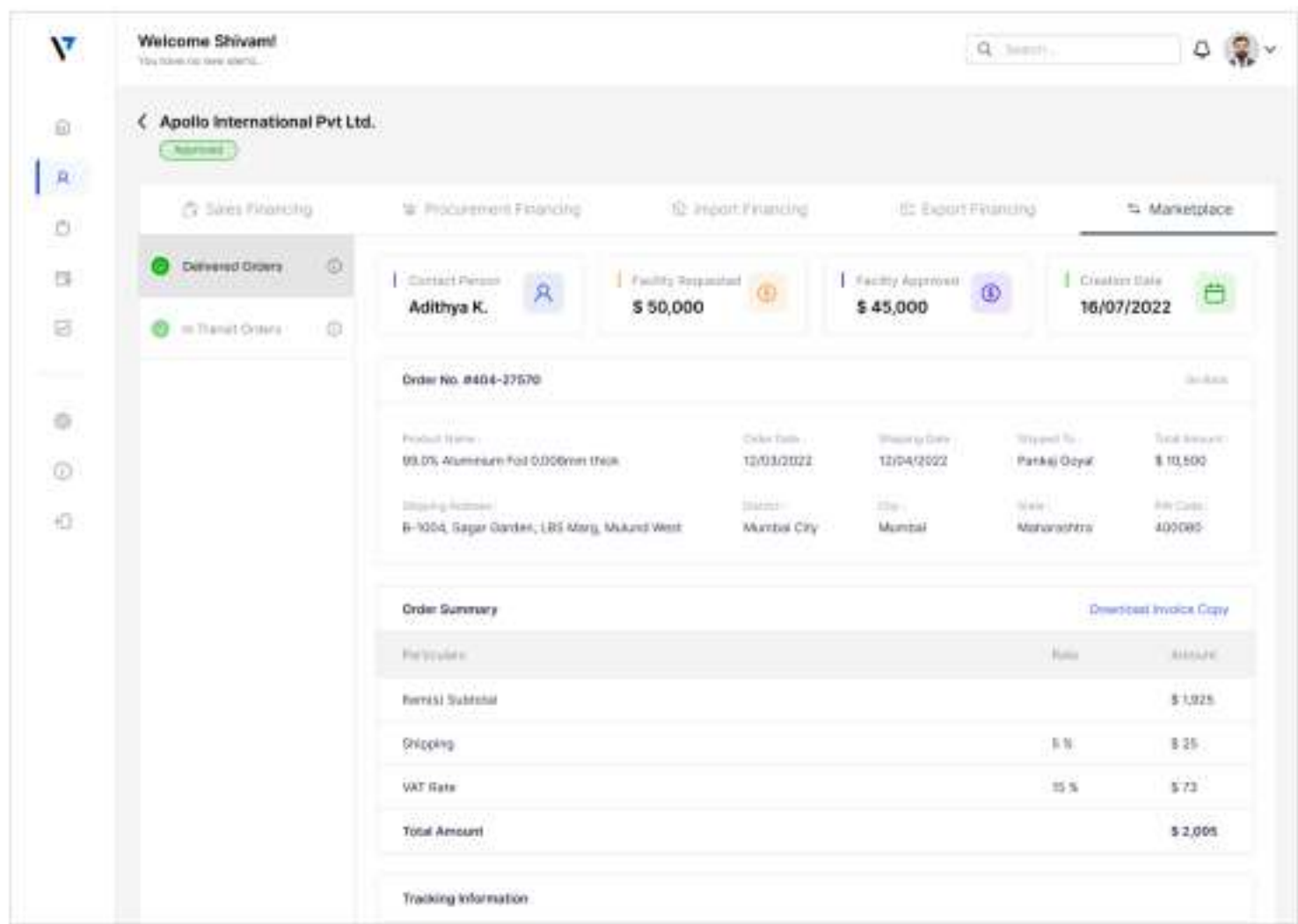
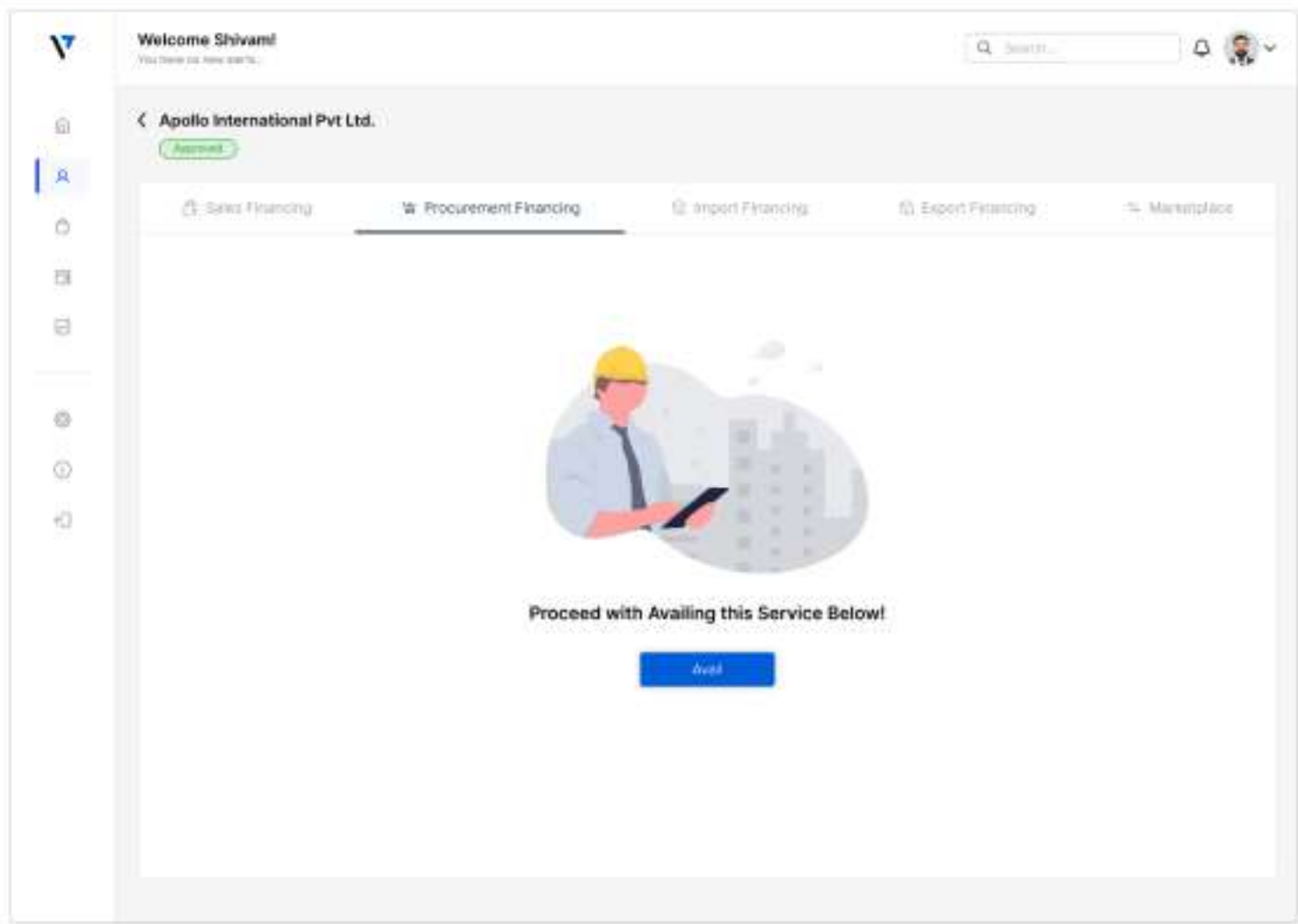
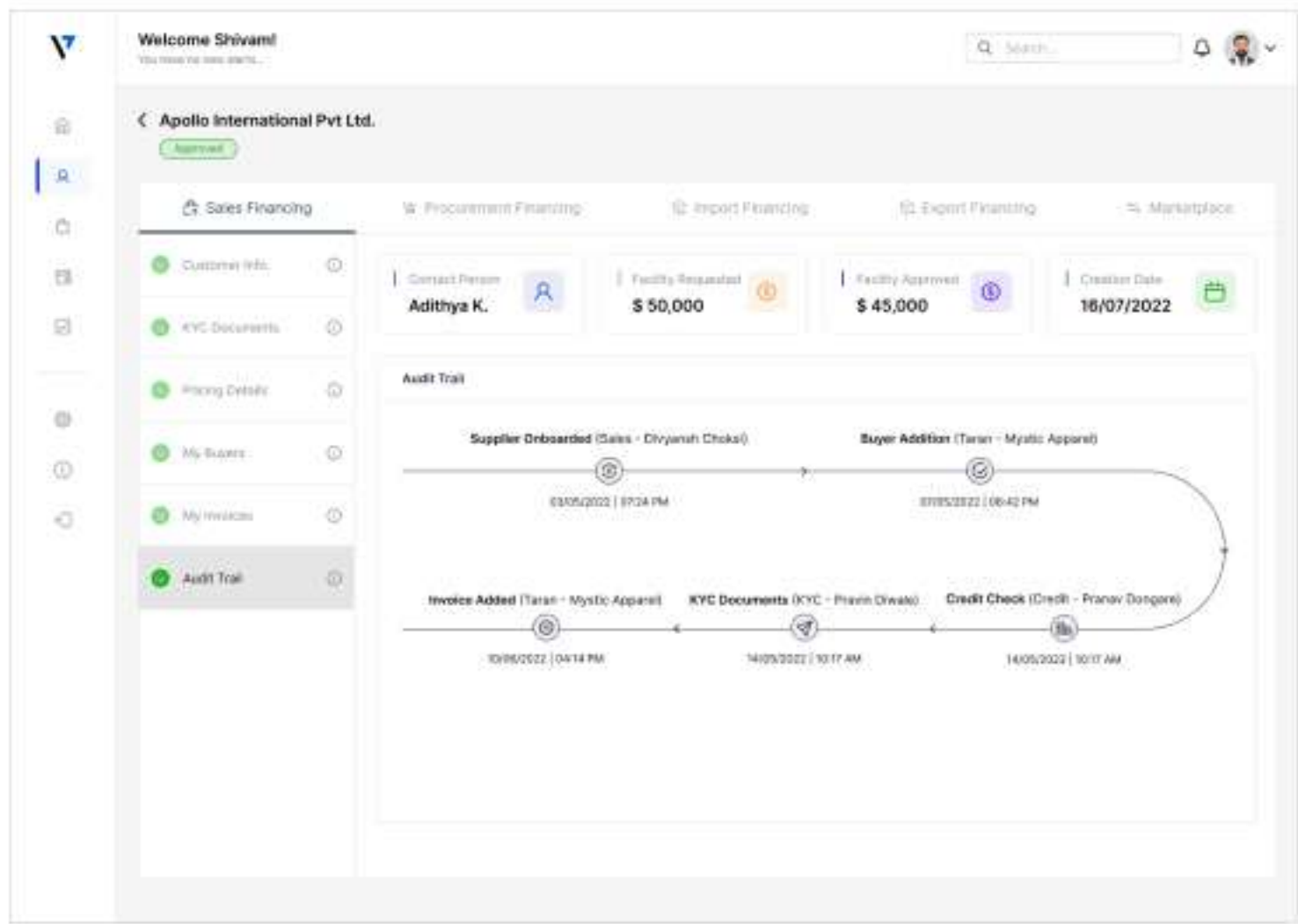
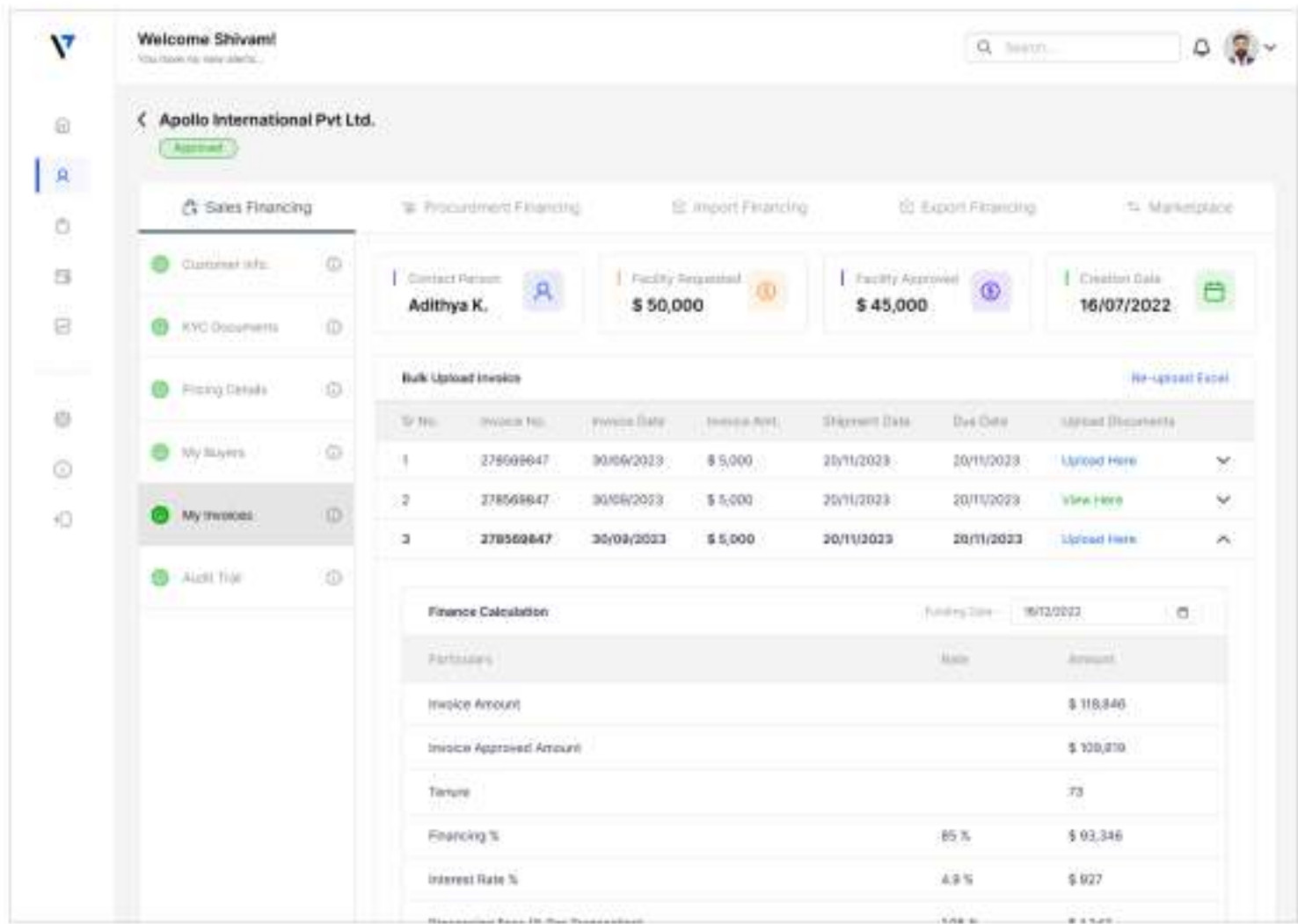
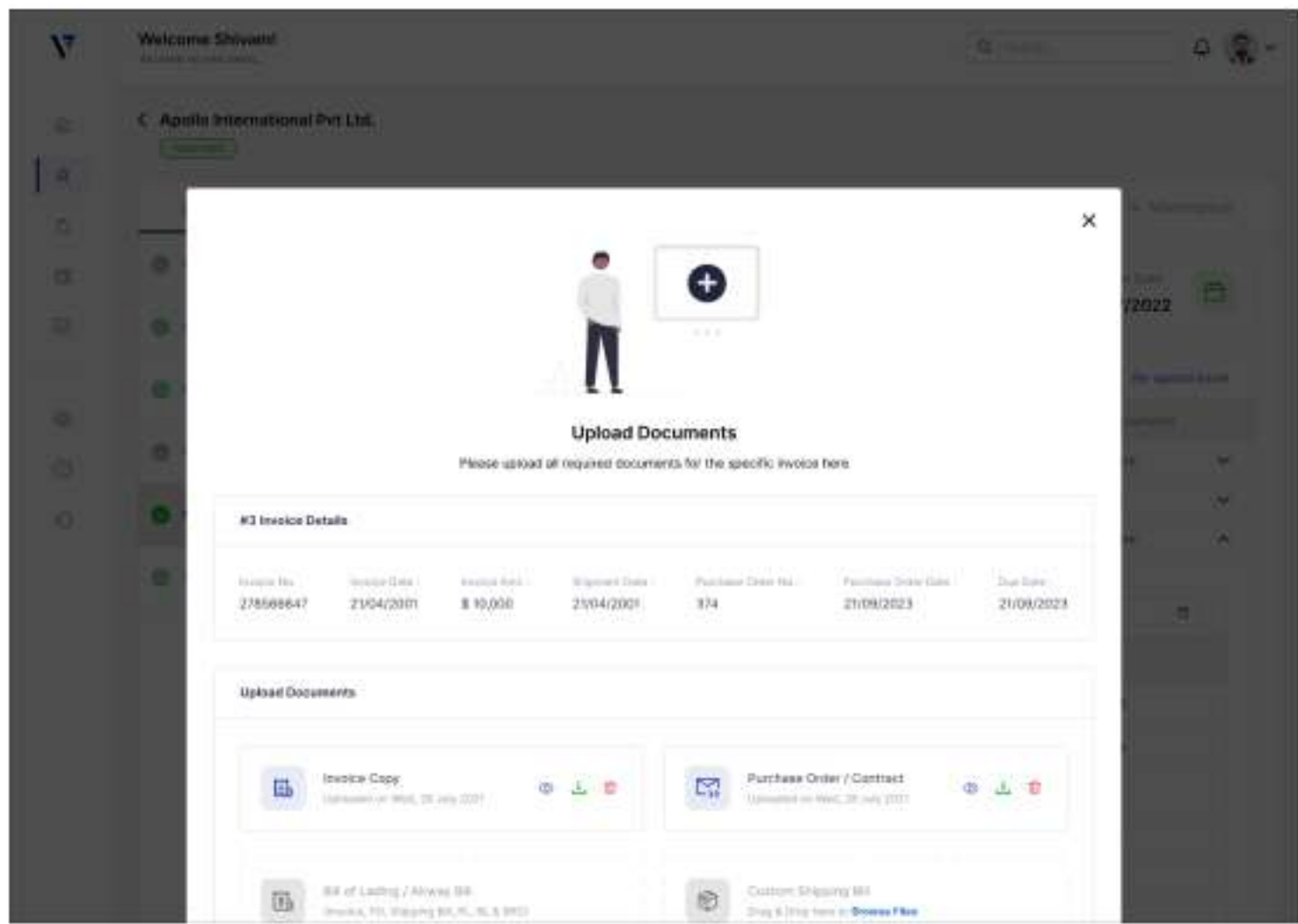
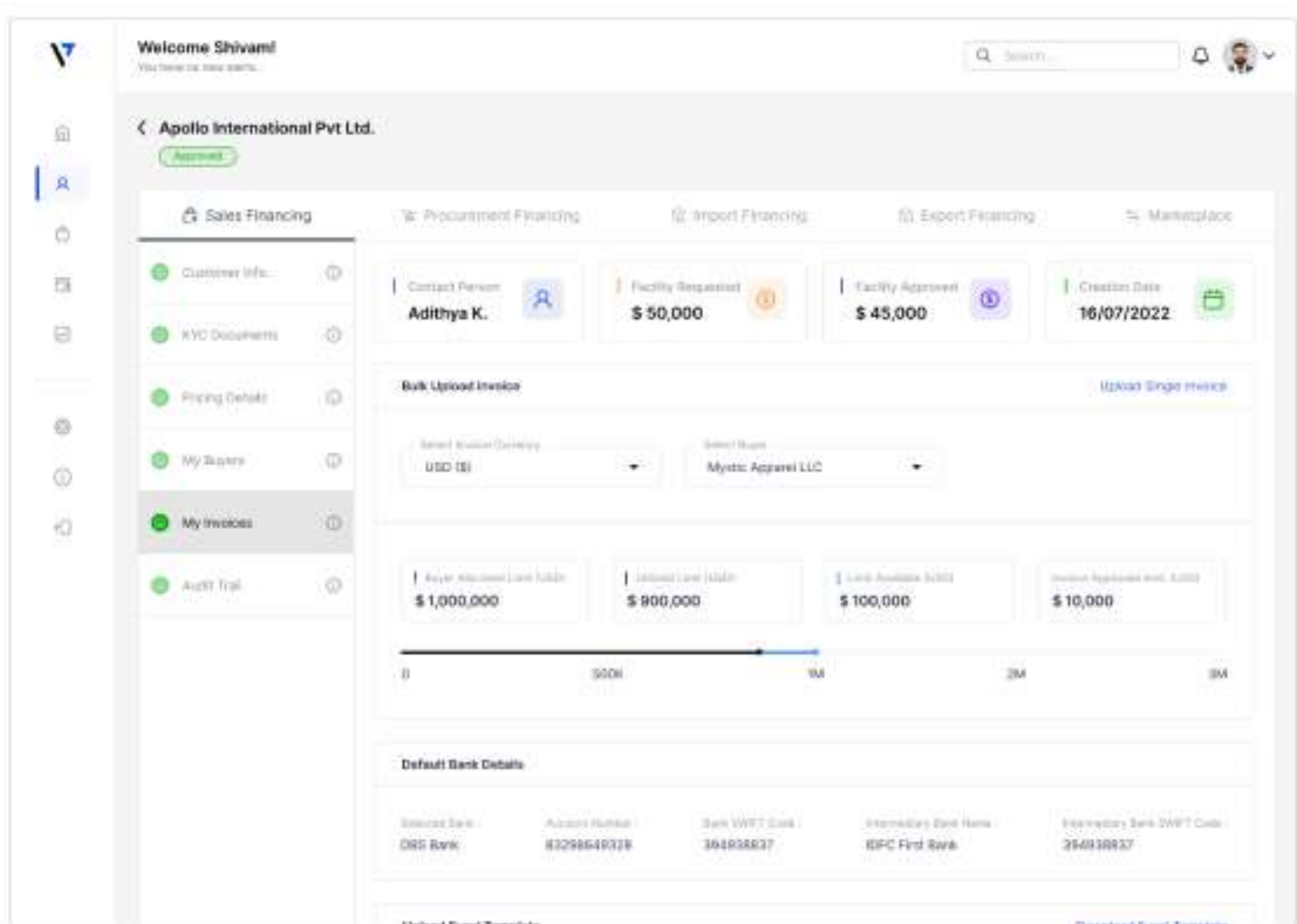
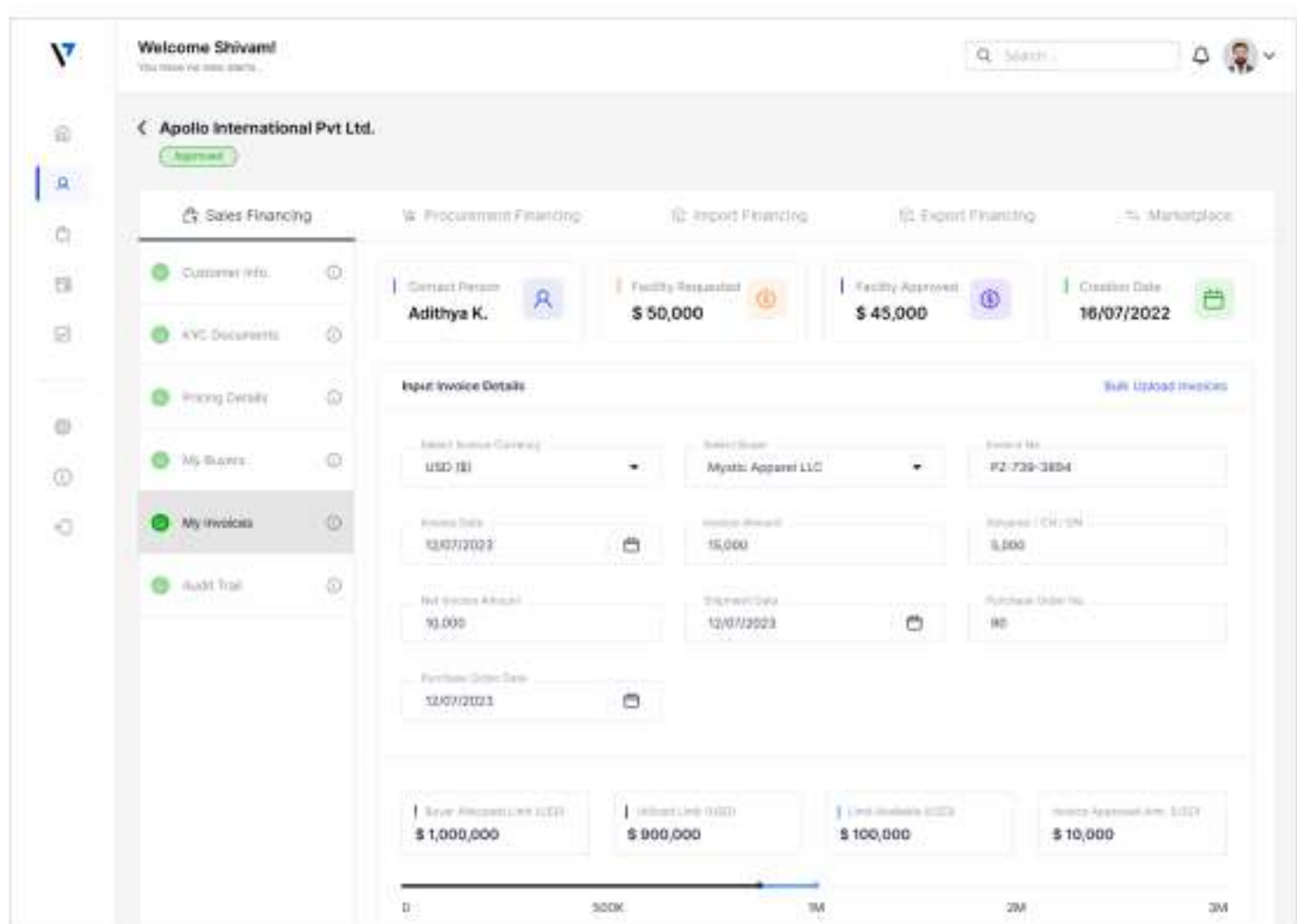
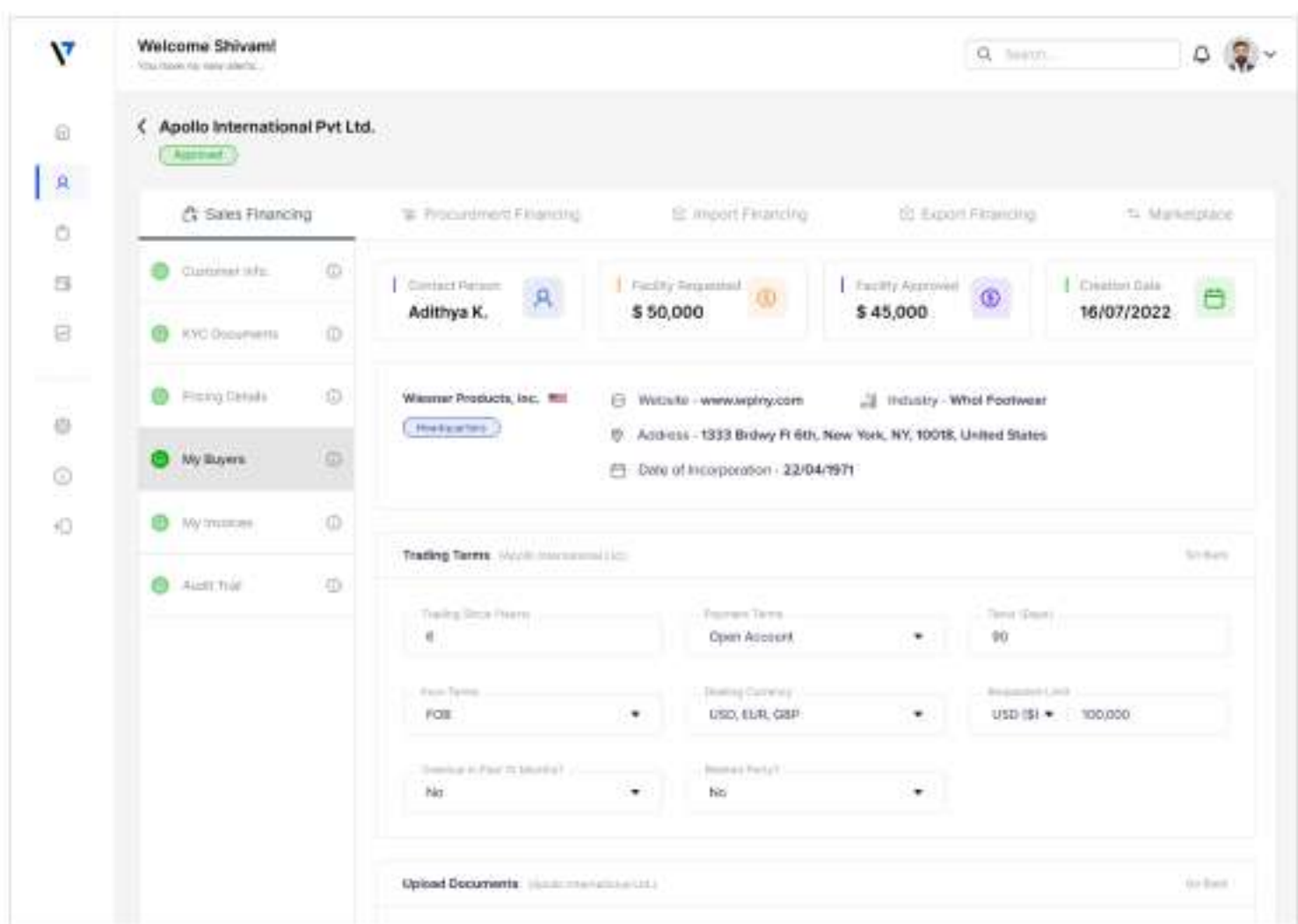
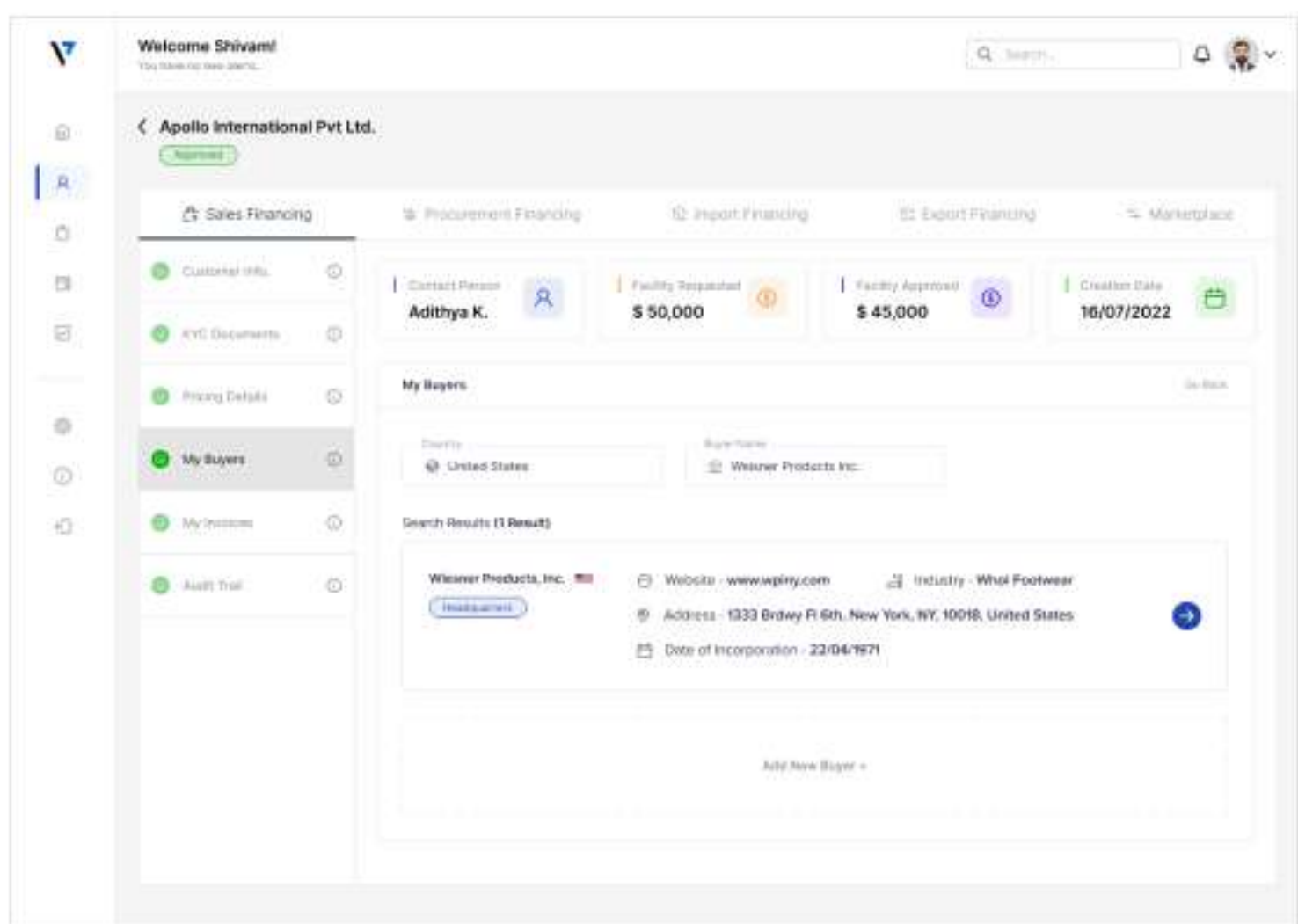
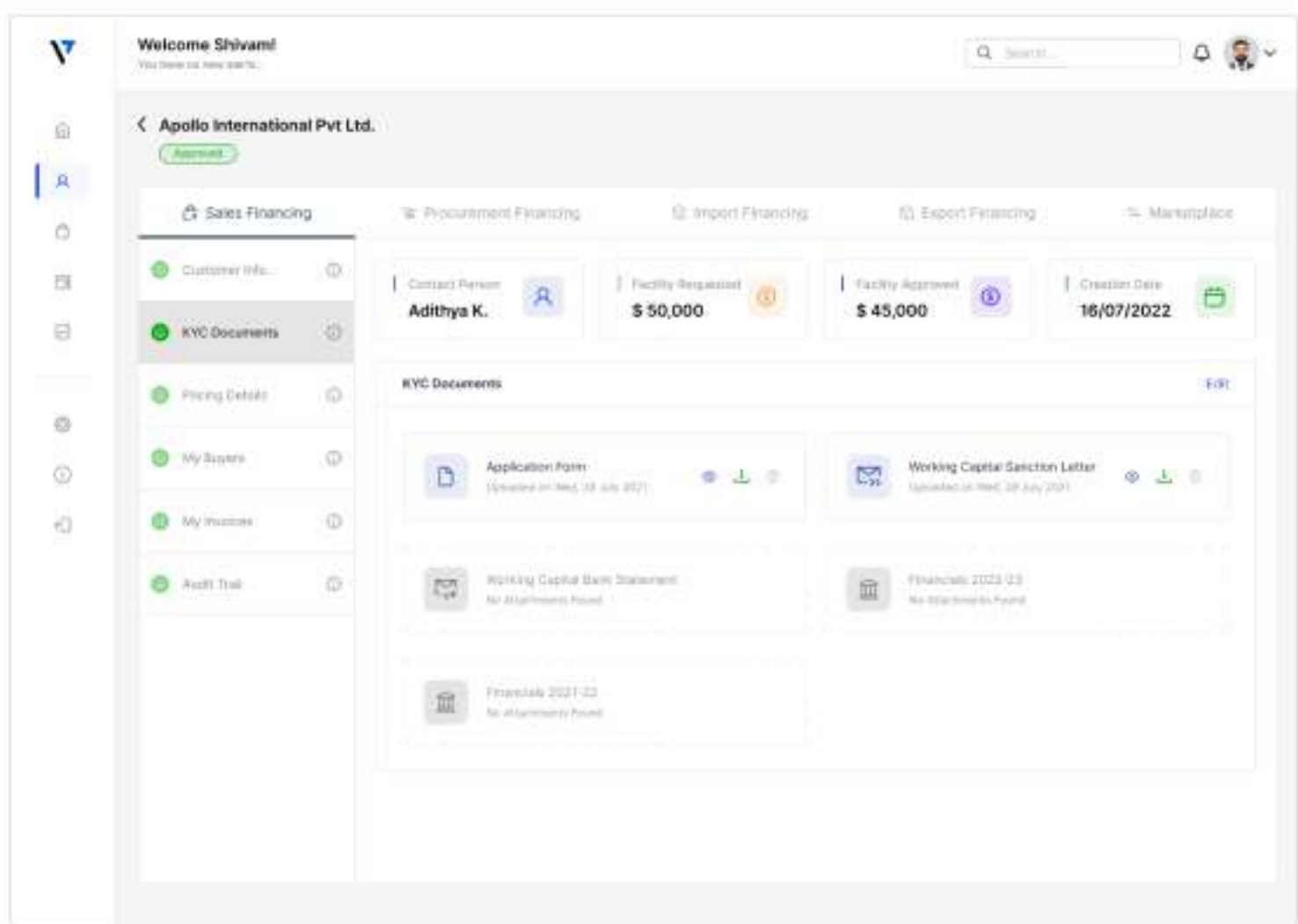
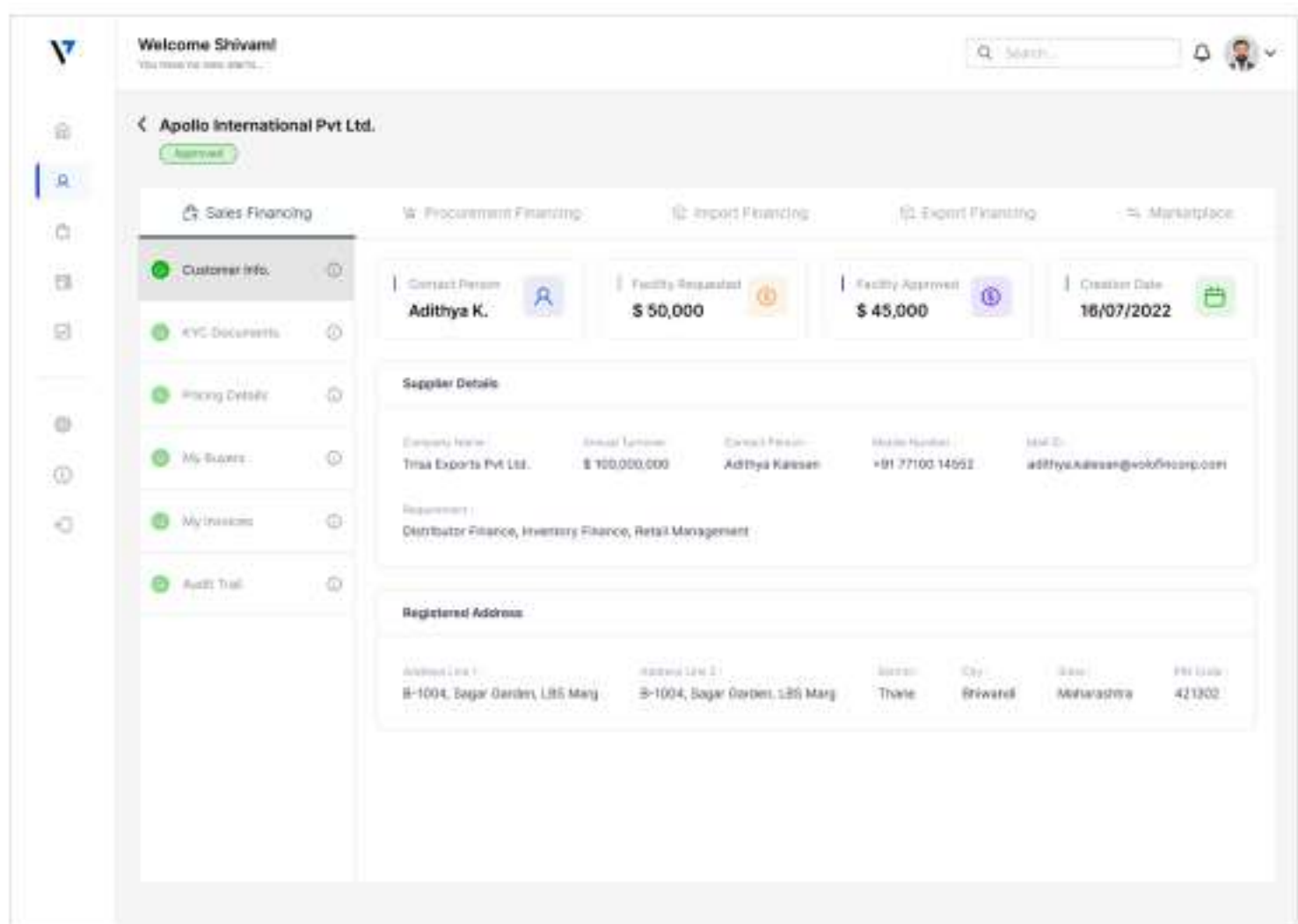
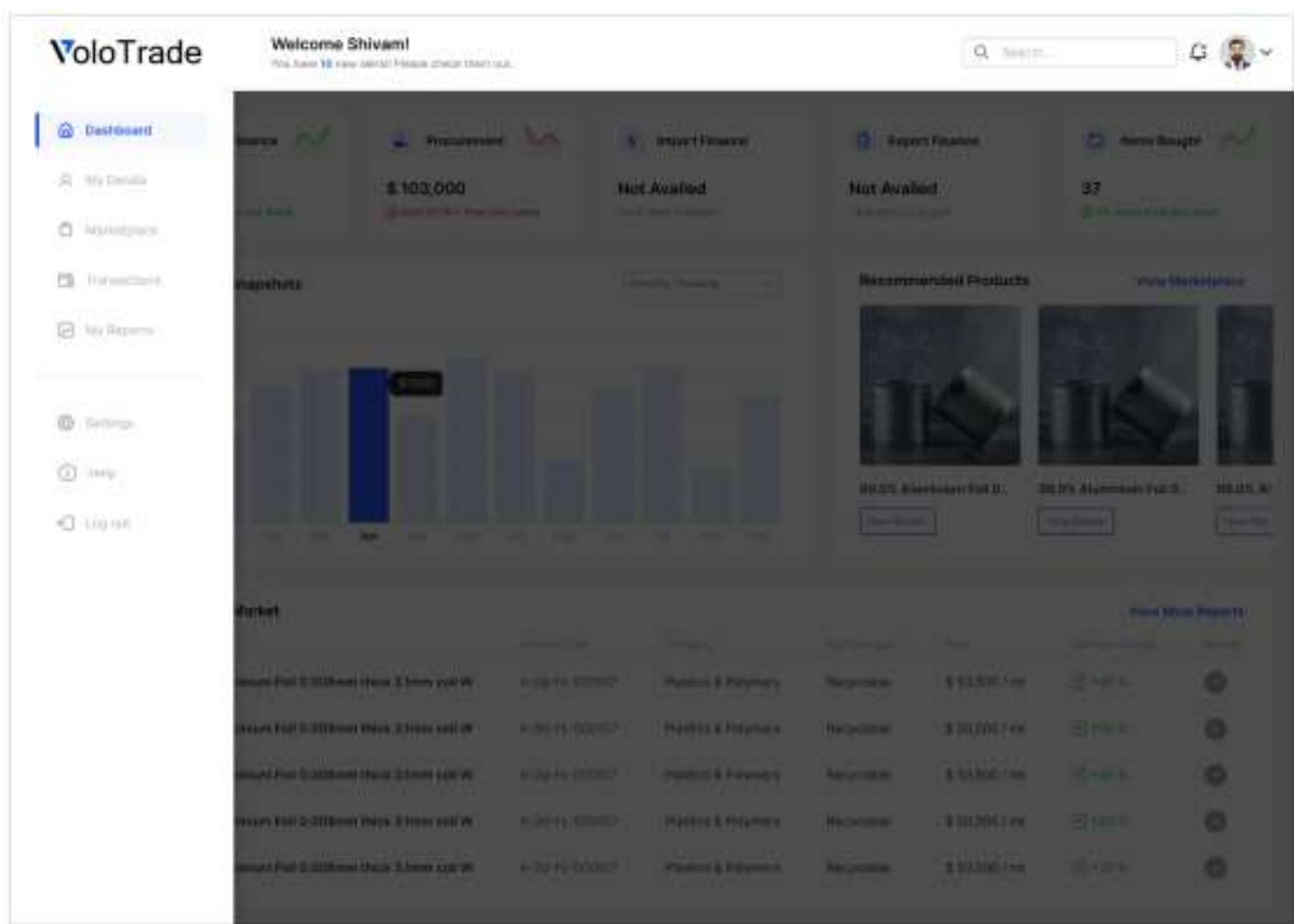
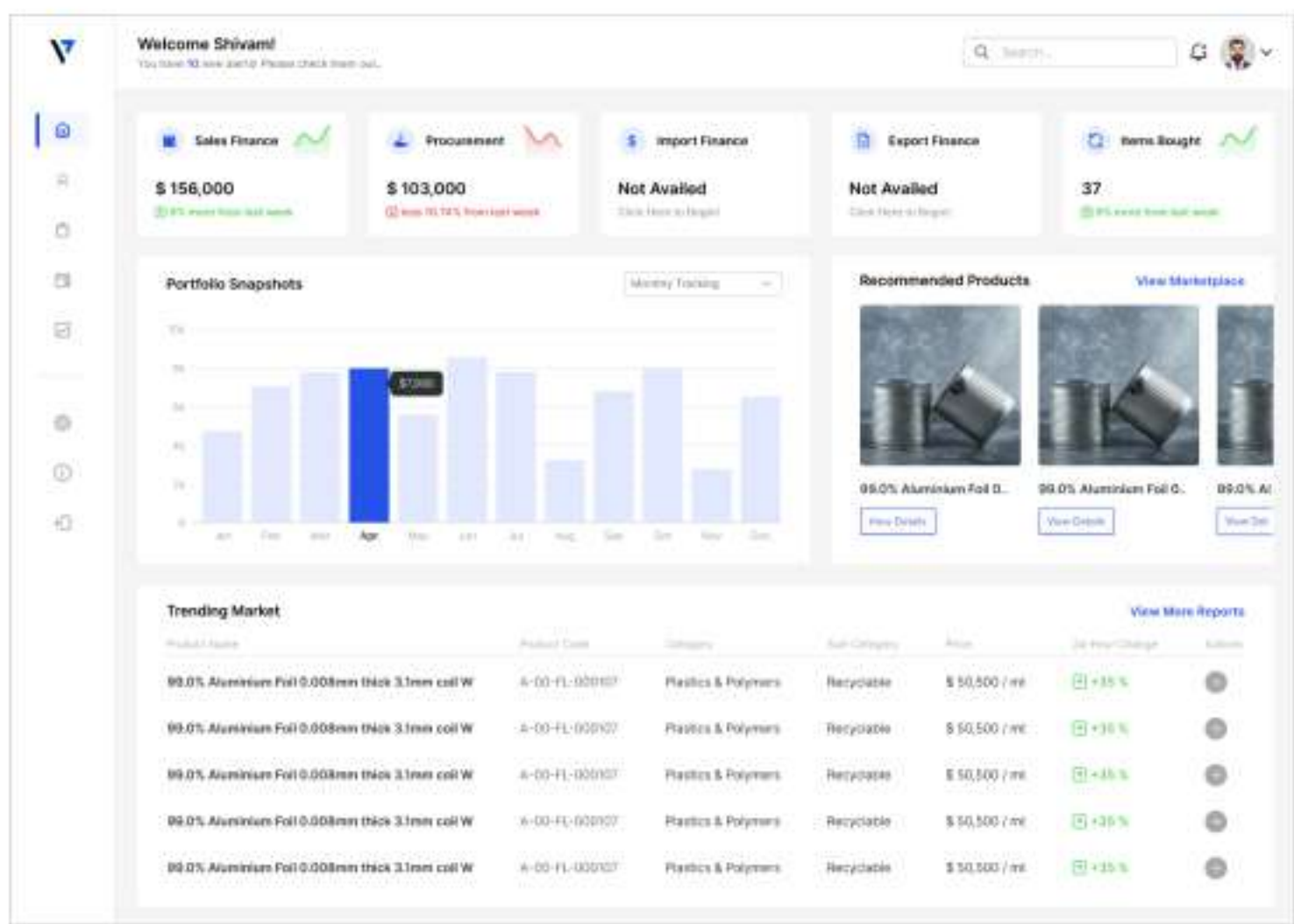


Scenario 3:

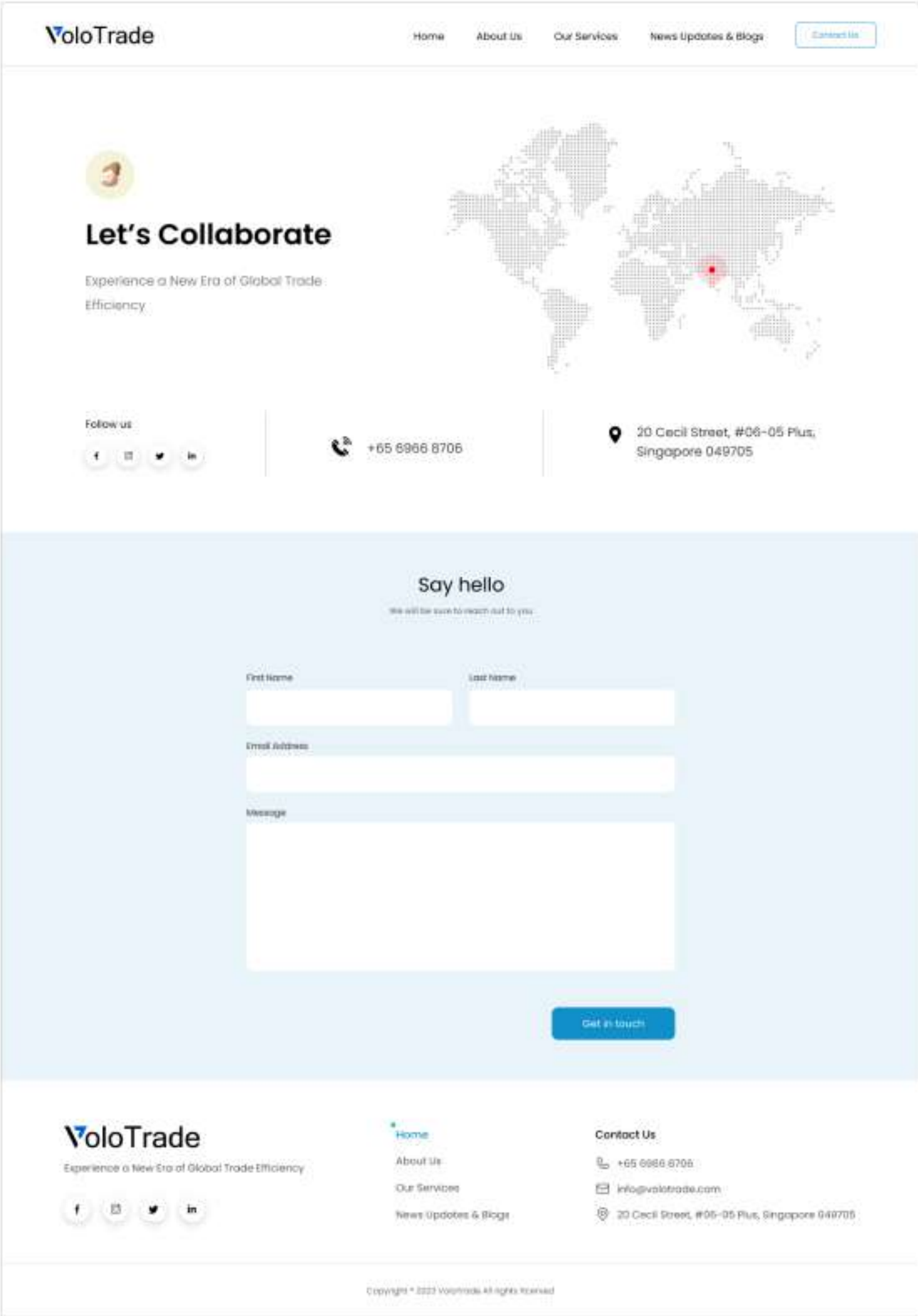
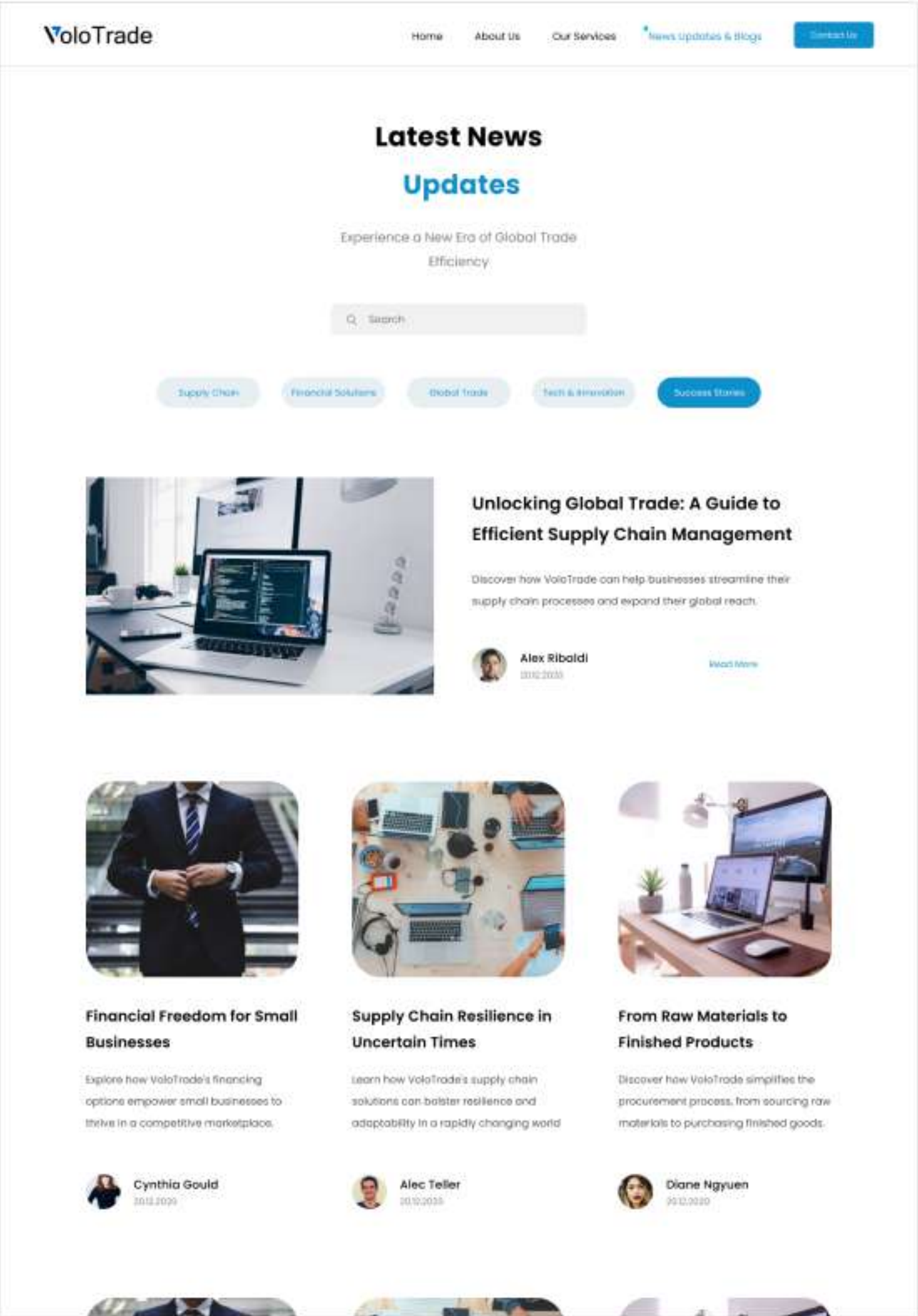
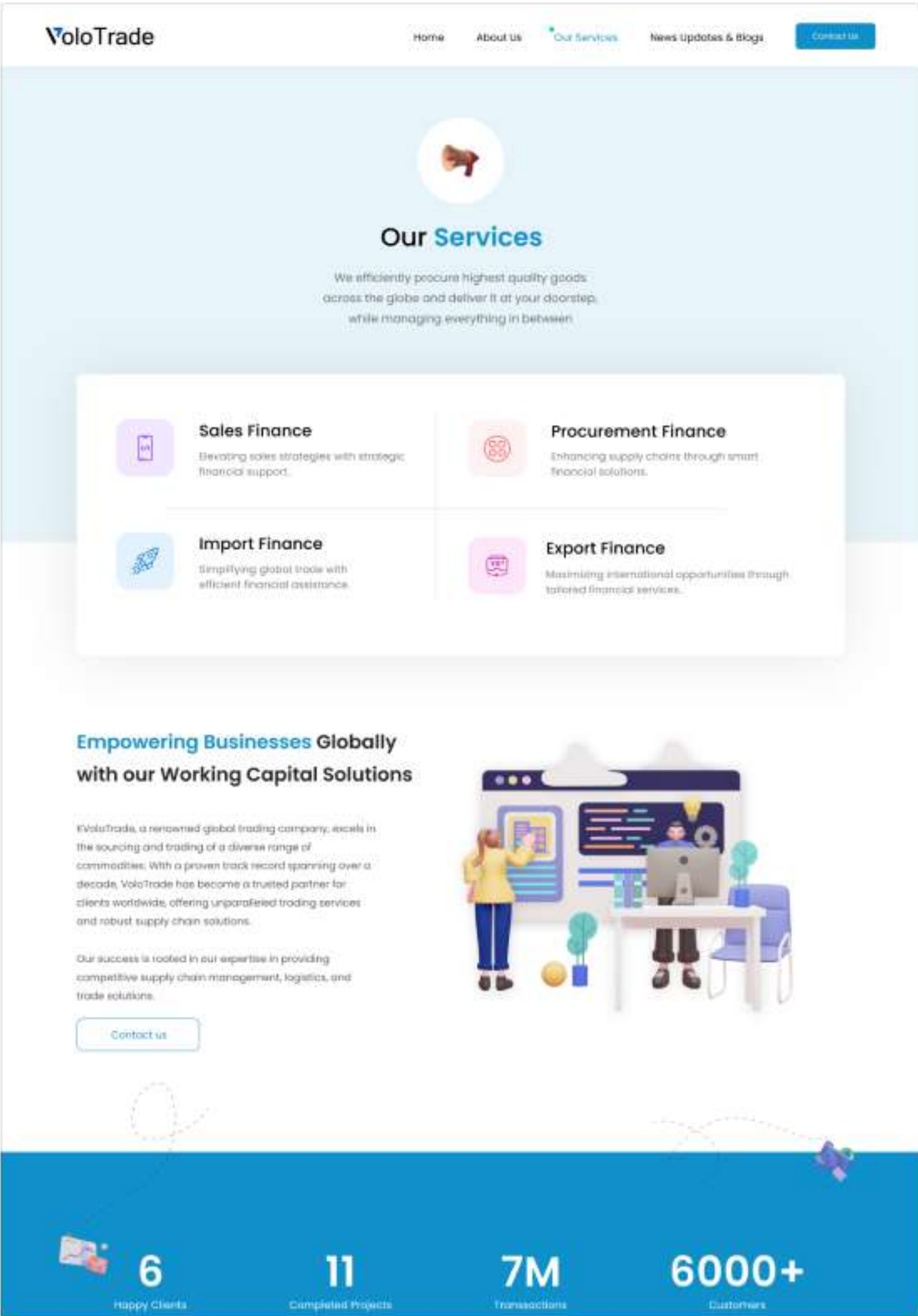
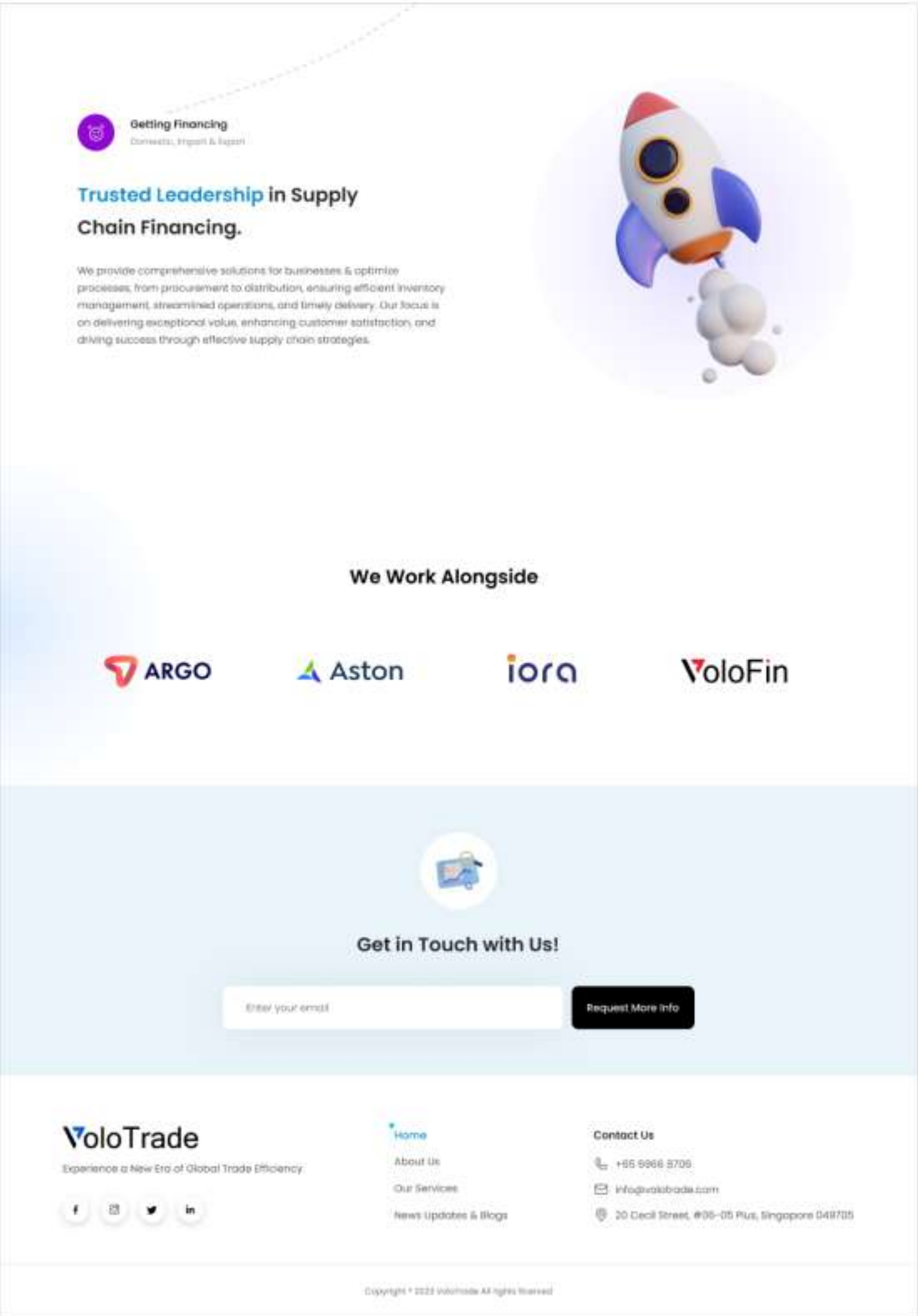
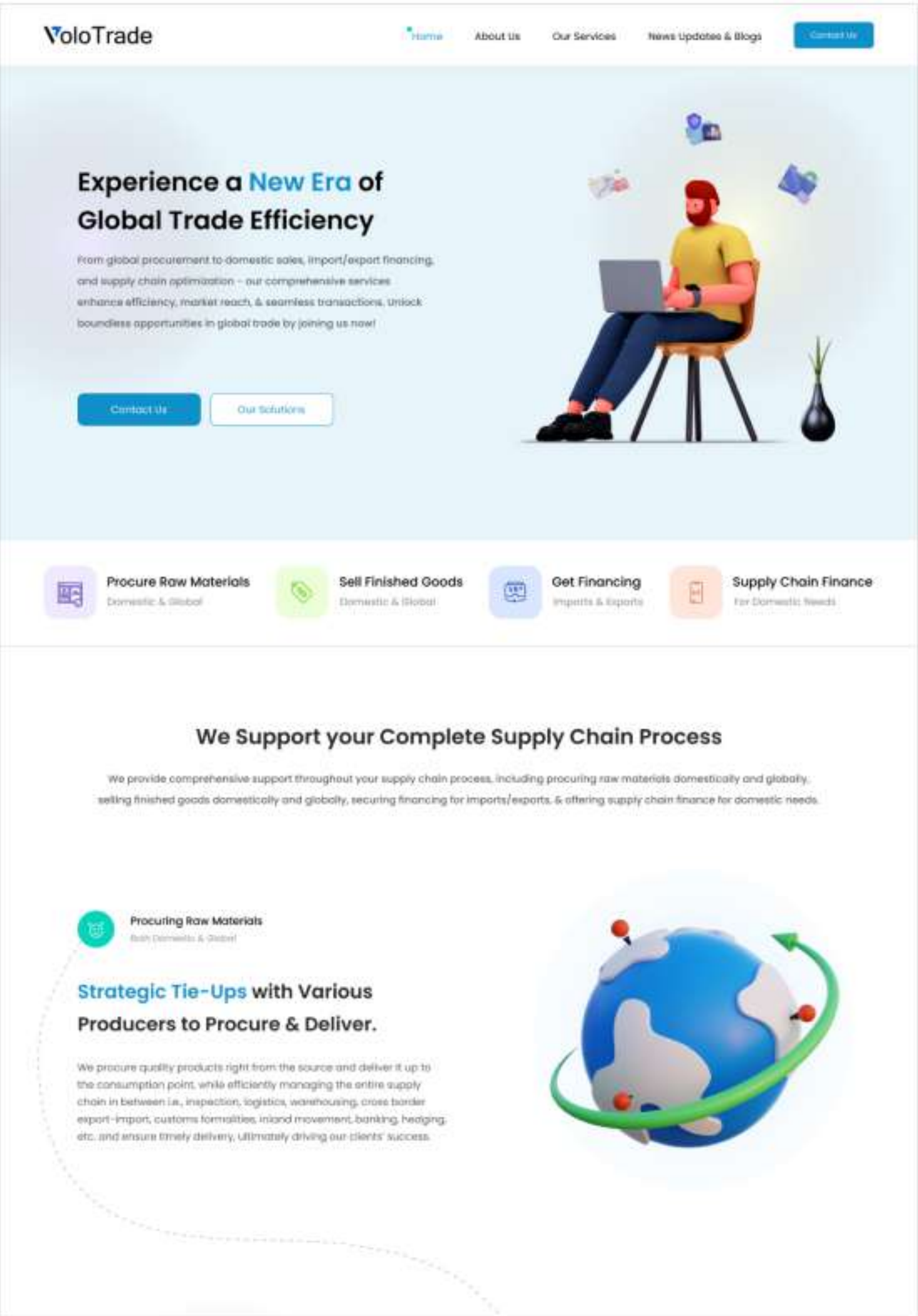
Invoice addition to the portal, its due diligence, and final repayment to close the account



Platform UI Screens



Website UI Screens





**Thank You
For Watching**

