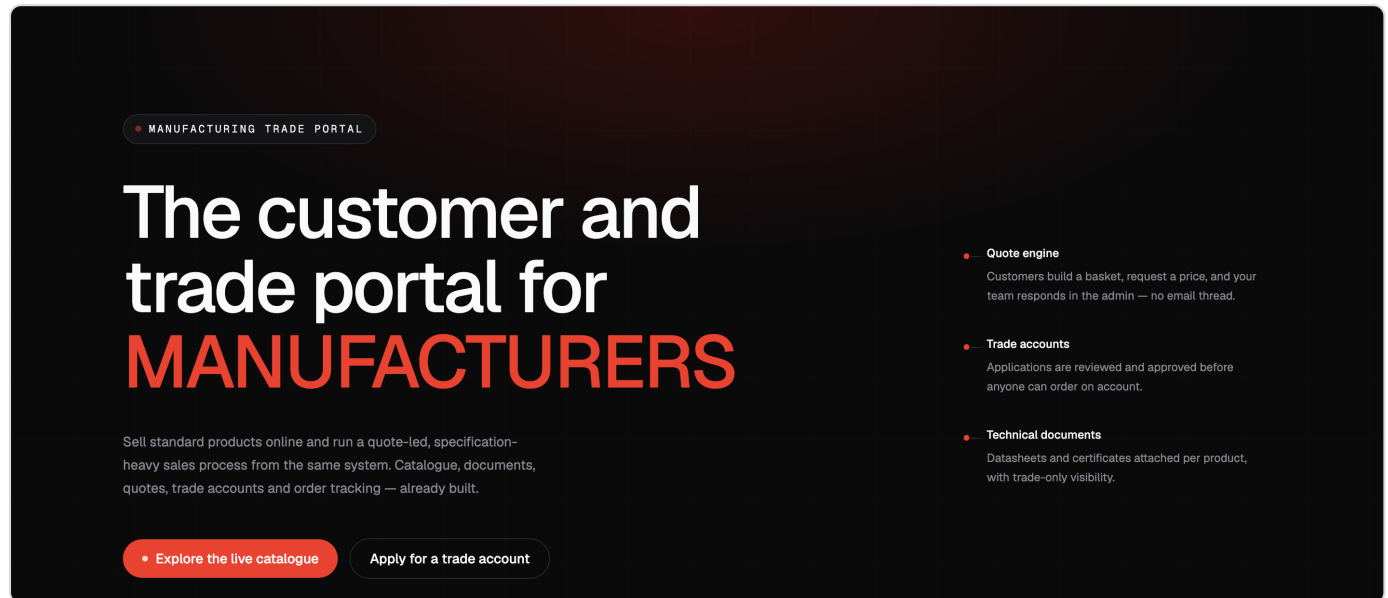




Removing the manual administration from **quoting and trade ordering**

A customer and trade portal for manufacturers. It replaces email- and spreadsheet-based quoting, order enquiries and account management with one system that customers can serve themselves from — and that measures its own performance.



The live portal. A working demonstration with real catalogue data is linked below.

THE BUSINESS CHALLENGE

- Quotes are produced by hand across email and spreadsheets, with no record of how long each one took.
- The same order details are re-keyed between enquiry, quote, order and invoice.
- Technical documents are emailed on request, with no control over who receives what.
- Order-status questions are answered person-to-person, absorbing customer-service time daily.
- Trade customers cannot self-serve: pricing, documents and history sit with individual staff.
- There is no reliable baseline, so process improvement cannot be evidenced.

WHAT THE PORTAL PROVIDES

Catalogue and technical documents

Datasheets, certificates, drawings and safety data sheets attached per product, each one public, trade-only, or scoped to a single company.

Trade account approval

Applications are reviewed before anyone can order or request a quote. Approve or decline with a reason; the applicant is emailed either way.

Negotiated pricing

Each company is linked to a customer group, so agreed price lists apply automatically at checkout and on quotes.

Enquiry handling

Public enquiry and contact forms arrive with an owner and a status instead of in a shared inbox.

Quote requests

Customers turn a basket into a priced request. Staff edit lines and pricing and send it back for one-click acceptance.

Companies and people

Multiple employees per company, company administrators, per-person spending limits and internal order-approval thresholds.

Orders and re-ordering

Full order history and status, a purchase order reference against every order, and one-click repeat of a previous order.

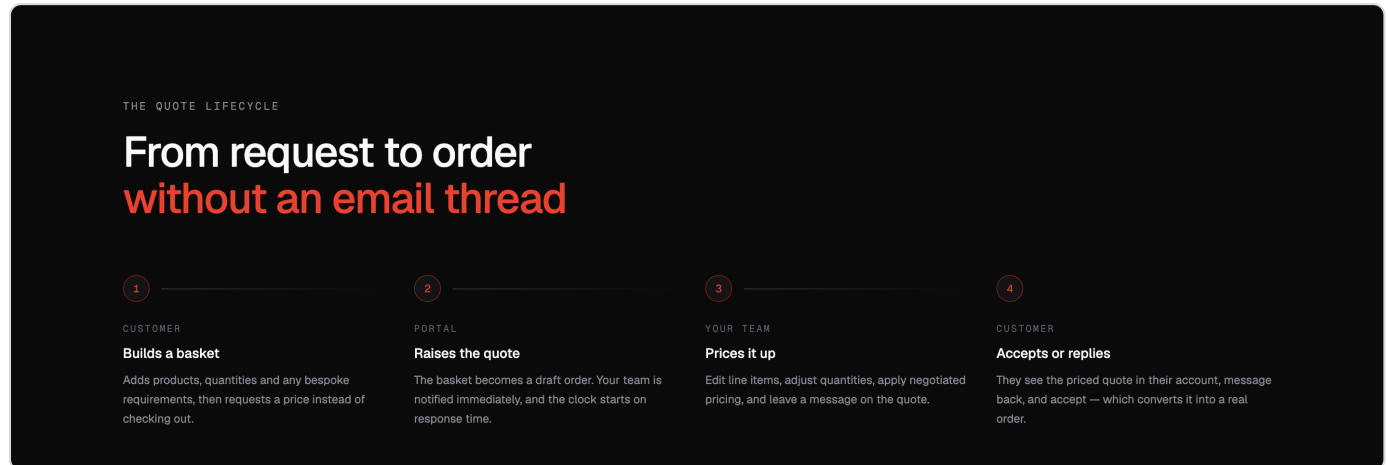
Payment on account

Direct Debit mandates via GoCardless, so a returning customer is collected against an existing mandate.



HOW A QUOTE FLOWS

The quote is the process that carries most of the administrative load. In the portal it runs as a tracked object rather than a thread, so the response clock starts automatically and the priced result returns to the customer's account for acceptance.



TRADE ACCOUNTS ARE APPROVED BEFORE ANYONE CAN TRADE

Applications capture company registration, VAT and trade references, then sit in an internal review queue. Ordering and quoting stay locked until staff approve the account; the applicant is emailed the decision either way.

MEASURED, NOT ASSERTED

Response times, quote-to-order conversion and enquiry volumes are computed from live records on an internal dashboard, so both the baseline and the improvement come from the system itself rather than from estimates.

MEASURE	BASELINE	TARGET
Average quote response time	3 working days	1 working day
Order-status enquiries handled manually	80%	30%
Repeated data entry points per order	5	2
Trade orders submitted digitally	10%	60%
Quote-to-order conversion	20%	28%
Customer-service administration per order	20 minutes	8 minutes

Baseline and target figures above are illustrative. Real baselines are captured from the manufacturer during the discovery phase and then measured by the portal itself.

DELIBERATE SCOPE

IN SCOPE

Catalogue, documents and specifications
Quoting and quote-to-order conversion
Trade accounts, permissions and pricing
Ordering, PO references and re-ordering
Enquiry capture and response tracking
Integration with ERP, accounting and CRM

NOT IN SCOPE

Production planning and scheduling
Machine connectivity and shop-floor data
Quality management systems
Product lifecycle management
Replacement of an existing ERP

Live demonstration

b2b-template.storefactory.shop

Delivery

Piranha Studios

Approach

Reusable core product, configured per manufacturer after a short discovery and mapping phase.