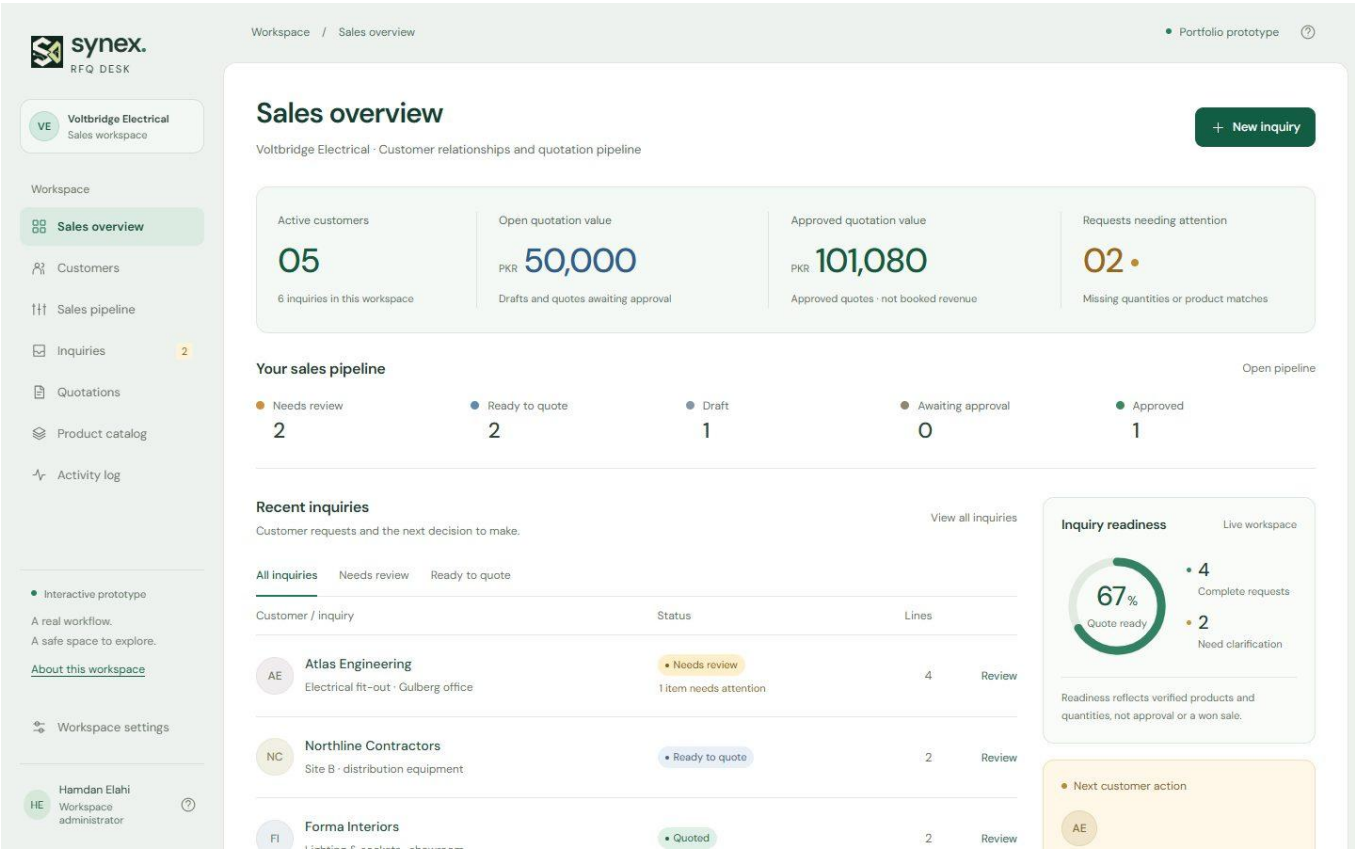
Synex RFQ Desk
Client Workflow Guide

Customer relationships and wholesale quotations

Prepared for a wholesale or distribution sales team. Voltbridge Electrical is the fictional example workspace used in this guide. Version 1.0 | 2 November 2026.

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This guide explains what the sales workspace does, how an inquiry becomes a reviewed quotation, and where a person remains responsible for a decision. Use it to understand the prototype and agree the requirements for a connected business system.



Sales overview showing calculated quote values, the request pipeline and inquiry readiness.

What is available now

The current prototype supports customer account views, relationship notes, inquiry review, catalog selection, pricing, simulated approval, quotation PDF downloads and browser-local activity history. It uses synthetic business records and does not send customer messages.

Make will run in its cloud. The prototype is not connected to Make, live AI, a mailbox or a production database. A hosted live system requires those integrations and proper user permissions before real customer use.

From inquiry to quotation

A sales representative prepares the request and pricing. A manager checks the final commercial decision. Each step below has an explicit result so the team knows what can happen next.

1 Receive the request

Open New inquiry, enter the customer and subject, then paste the inquiry or upload a text file. The original request stays visible during review. The current prototype accepts text; connected email intake and PDF parsing are planned backend capabilities.

2 Check the requested products

Review the proposed catalog product beside each source line. Confirm the rating, brand, dimensions and selling unit. Exact sample SKU codes can be recognized locally. Unknown descriptions require a person to choose a verified match.

3 Resolve missing information

A missing quantity or unknown product blocks quotation preparation. Ask the customer for the missing detail, then update the request. Do not guess a quantity or silently replace a product. A relationship note can record the context for the next conversation.

4 Prepare the commercial draft

Choose Prepare quotation. Review quantities, catalog prices and the trade discount on each line. The prototype permits whole quantities from 1 to 10,000 and discounts from zero to ten percent. It recalculates the totals whenever the draft changes.

5 Submit for approval

Submit the completed draft for manager review. The manager checks products, prices, discounts and terms. Current approval is simulated to show the workflow; production approval must use a signed-in manager with server-enforced permissions.

6 Generate the quotation document

After approval, download the PDF or print the quotation. The document includes the customer, quotation reference, revision, product lines, amounts, totals and terms. Downloading does not send it to the customer. The sales team controls external delivery.

7 Handle a requested change

Create a new revision when the commercial offer changes. The revision returns to draft and needs fresh approval. The production design must retain every previous approved version; the browser prototype is not a permanent revision archive.

Understanding your CRM workspace

The CRM keeps the customer relationship alongside the quotation work. The larger names and values help the team identify an account, understand its position and choose the next action. All figures below describe the initial sample workspace and change as you work.

Figure	Initial value	How to read it
Active customers	5	Distinct customers with an inquiry in this workspace. This is not a configured account lifecycle status.
Open quotation value	PKR 50,000	Current drafts and quotations awaiting approval. Unpriced requests are excluded.
Approved quotation value	PKR 101,080	Current approved quotation totals. This is not booked revenue, collected payment or a won order.
Requests needing attention	2	Inquiries with at least one unresolved product or missing quantity.
Inquiry readiness	67 percent	Four of six inquiries have complete product and quantity information, rounded to the nearest whole percent. Complete does not mean manager approved.

Customer accounts

Customers lists the primary contact, inquiry count and open and approved quote values for each account. Open an account to see its requests and quotations together. Add relationship notes for internal context such as delivery access, specification questions or the next conversation. Notes persist in the current browser.

Sales pipeline

Each request appears once, in Needs review, Ready to quote, Draft, Awaiting approval or Approved. A linked quotation takes precedence over the inquiry state. Stages change when the team completes an action; the board is not a drag-and-drop substitute for product checks or approval.

Other working pages

Inquiries supports customer search and status filters. Product catalog lists the sample SKU, specification, brand, unit, price and stock and can export CSV. Quotations lists the current quote revisions. Activity log records local actions. Settings controls supplier identity, standard terms and quote validity.

Color and circle meanings

Green identifies primary actions and approved or complete work. Amber identifies requests that need attention. Blue identifies preparation and catalog information. Circular customer initials identify accounts; the readiness ring measures completeness using the same records as the inquiry list.

Commercial controls and responsibilities

The system assists the sales team. It does not decide that a substitute is safe, that a price is commercially acceptable or that an order has been won. Those decisions remain with the business.

Role	Responsibility
Sales representative	Check the original inquiry, product match, quantity, unit and customer context. Prepare the commercial draft and record clarification.
Approving manager	Review final prices, discounts and terms. Approve the intended quotation revision or return it for changes.
Workspace administrator	Maintain supplier details, catalog versions and access permissions. Agree the live retention and backup requirements.
Hamdan and Synex Developers	Develop the agreed application and cloud integrations, verify the workflow and hand over configuration and operating guidance. Production scope is agreed separately.

Pricing and document checks

Money is calculated in integer paisa. The prototype rounds the discount on each line before summing the totals. Quantity and discount validation prevents incomplete or excessive values. Tax and freight are currently zero and clearly stated; this is not a tax configuration or compliance determination.

Example: the Atlas Engineering request totals PKR 197,260 after the missing junction-box quantity is set to 12. A five percent discount on the breaker line reduces that total to PKR 195,040. This is an illustrative calculation using synthetic prices, not a supplier offer.

Changes after approval

Approved quotations cannot be edited directly in the interface. Create new revision returns the quote to draft. A new approval is needed before another final PDF is available. Supplier details are captured for newly approved quotations. Permanent approved snapshots and historical retrieval belong to the production backend.

Duplicates and exceptions

Submitting identical inquiry text for the same customer reopens the existing request in the prototype. A connected system must also protect against repeated webhook deliveries and concurrent jobs. Unknown products and missing quantities require review; technical failures should appear as failed jobs with controlled retry rather than disappearing.

Responsible handling of client information

Use sample information in this prototype. Browser storage can be changed by the browser user and is not a secure multi-user record. Real customer documents need private storage, authenticated access, durable audit records and a retention policy before live operation.

Cloud operation and client handover

Make is a cloud service. The client does not need to install or host Make locally. In the planned connected system, the hosted application exchanges secure job events with Make while the team reviews requests inside the CRM.

Available in this prototype	Required for connected operation
Paste or text-file inquiry intake	Authenticated email or document intake with supported PDF parsing
Local exact-SKU parser and manual review	Cloud extraction with validated results and source evidence
Browser-local customer and quote records	Database, private document storage and durable audit history
Simulated manager approval	Real user sessions and server-verified approval permissions
Local PDF download and print	Approved-version rendering and stored artifacts with access control
Visible activity and duplicate text check	Reliable cloud jobs, idempotency, bounded retries and operator recovery

How the planned cloud jobs work

The first Make scenario retrieves the saved request, extracts the requested product details and returns the result for validation and catalog matching. It finishes before human review. Approval later starts a separate document job. No Make scenario needs to remain waiting while a person reviews a quote.

Make usage and any separate AI, hosting or storage costs must be measured in a small controlled pilot. No cost per quotation, processing-time promise or client saving has been validated by this prototype.

Client walkthrough and acceptance exercise

Open Atlas Engineering under Inquiries. Confirm the missing junction-box quantity with the fictional customer and enter 12. Prepare the quotation, check its PKR 197,260 total, submit it and use the simulated approval action. Download the PDF. Create a new revision and confirm that approval is required again. Open the customer account and add an internal note.

What the client should provide before live setup

Provide an approved product catalog and price list with units and effective dates; example inquiries cleared for testing; branding and commercial terms; named sales and manager roles; tax and freight rules; and the intended email, hosting and storage accounts. Agree permissions, retention, failure handling and acceptance criteria before enabling live workflows.

Delivery record

This guide accompanies an interactive portfolio prototype. The local checks cover pricing, validation, PDF structure, customer notes, the pipeline and responsive pages. They do not establish production security, live extraction accuracy, operating cost or business outcomes. Live connections, deployment and portfolio publication remain separate tasks.

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