

Overview

This case study explores how **Red Vest Supply** partnered with a development team to design and implement a custom quote management solution tailored to streamline RFQ (Request for Quote) operations and enhance client communication. The platform integrates dynamic quoting, job management, and robust reporting features, creating an intuitive and centralized workflow.

Problem Statement

- Manual quoting processes often result in inefficiencies, lack of transparency, and errors, creating challenges in managing RFQs, tracking quotes, and maintaining financial data.
- Delays in generating and sharing accurate quotes with clients.
- Inadequate visibility into RFQ progress and staff performance.
- Inefficient workflows caused by disconnected systems and manual data management.

Solution

- The Custom Quote Management System provides a centralized platform for RFQ tracking, quote generation, invoice management, and reporting.
- Built using modern frameworks like .NET Core and Angular 16, the system integrates seamlessly with QuickBooks for financial workflows, enabling real-time updates and enhanced operational efficiency.

Core Features

★ Admin Features

- **Dashboard:** Overview of RFQs, quotes, and invoice metrics.
- **RFQ Management:** Assign, track, and prioritize RFQs.

★ Staff-User Features

- **RFQ Dashboard:** View assigned RFQs and their statuses.
- **Quote Generation:** Use predefined templates to create and send quotes efficiently.

Challenges

- ✓ **Dynamic Workflows:** Adapting workflows for real-time job assignment and reassignments.
- ✓ **QuickBooks Integration:** Ensuring seamless syncing of financial data.
- ✓ **Scalability:** Building a platform capable of handling high transaction volumes.
- ✓ **Data Security:** Protecting sensitive business and client information.

Solution

- 💡 **Workflow Automation:** Flexible job assignment and reallocation mechanisms to streamline RFQ tracking.
- 💡 **Real-Time Integration:** OAuth 2.0 implementation for secure and efficient syncing with QuickBooks.
- 💡 **Scalable Infrastructure:** Modular architecture for handling increased transactions during peak operations.
- 💡 **Advanced Encryption:** Ensuring data integrity and security compliance.

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Screenshots

Costs	Credit Card	Purchase Order	Customer Name
\$100.00	40.00 %	30.00 %	STATE OF PENNSYLVANIA
\$250.00	35.00 %	30.00 %	STATE OF PENNSYLVANIA
\$500.00	32.00 %	25.00 %	STATE OF PENNSYLVANIA
\$1,000.00	27.00 %	20.00 %	STATE OF PENNSYLVANIA
\$1,500.00	25.00 %	15.00 %	STATE OF PENNSYLVANIA
\$2,000.00	25.00 %	15.00 %	STATE OF PENNSYLVANIA
\$2,500.00	23.00 %	14.00 %	STATE OF PENNSYLVANIA
\$3,000.00	19.00 %	14.00 %	STATE OF PENNSYLVANIA
\$3,500.00	18.00 %	14.00 %	STATE OF PENNSYLVANIA
\$4,000.00	18.00 %	13.00 %	STATE OF PENNSYLVANIA
\$5,000.00	18.00 %	12.00 %	STATE OF PENNSYLVANIA
\$6,000.00	16.00 %	12.00 %	STATE OF PENNSYLVANIA

Customer Information

Customer Name: STATE OF PENNSYLVANIA | Contact Person: Wilson Bentley | Phone: | Email: | Zip Code: |

Item Details:

Quantity	Description	Unit Price	Vendor	Request	Unit Price After Markup	Total Price
25	Copies	\$ 100.00	Manual	%	\$ 100.00	\$ 2,500.00

Subtotal Amount: \$ 0.00
Sales Tax (0.1%): \$ 0.00
Net Amount: \$ 0.00

Vendor Quote Section:

Select Vendor: | Description: | Quantity: | Unit Price: | Shipping Cost: | Tax Price: | Last Time: | Note: |

Buttons: Save Quote, Cancel