

Vurbis Interactive  
**Quote Module** for **PunchOut**

20th October, 2020

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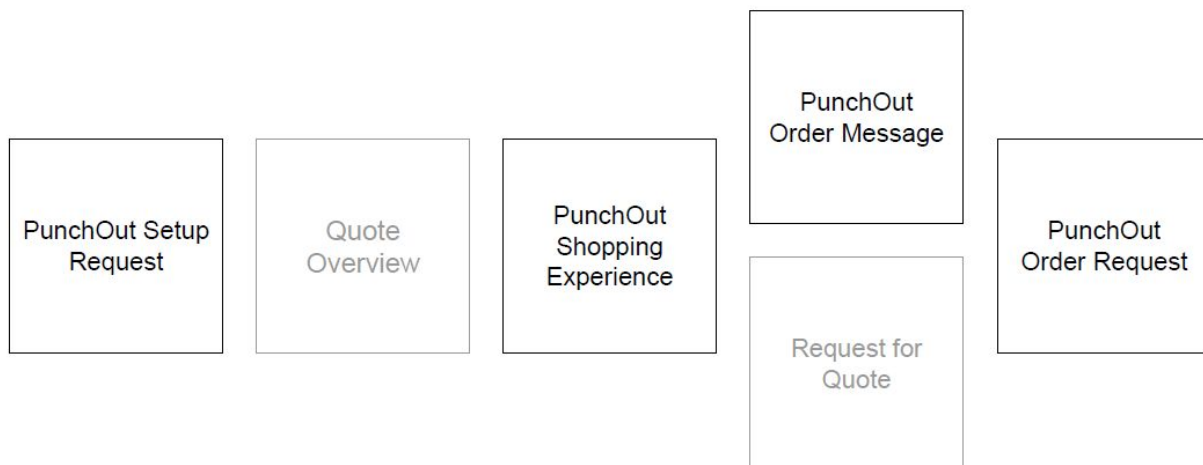
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## Basic Flow

This document outlines the functionalities needed to integrate the existing Vurbis Marketplace Quote Module into the PunchOut process. One of the main goals is to create a universal solution rather than using eCommerce platform specific functionalities. Example of this is that Shopify has a way to create carts and price specific rules per account, through API. This feature cannot be used, since it doesn't exist in Woocommerce. The most basic view of the quote mechanisms is shown in the image below.



### 1. Punchout Setup Request

During this step we will check if there are any active quotes in the Vurbis Marketplace for the user that is attempting to login. If there are quotes, we will redirect the user to the Quote Overview page. If there are no quotes they will login to the eCommerce platform as usual.

### 2. Quote Overview

This overview should be a minimalistic page, with the suppliers logo at the top. The functional drawing below should be self explanatory. It would be best if this page is manageable within the Vurbis Marketplace in the form of a mapper, so if a customer wants a distinct design we can deliver.



**Welcome {{first\_name}} {{last\_name}} here are your quotes:**

Quote #1
Quantity x NameSKU Price Total Quantity x NameSKU Price Total Quantity x NameSKU Price Total Quantity x NameSKU Price Total

Quote #2
Quantity x NameSKU Price Total Quantity x NameSKU Price Total Quantity x NameSKU Price Total Quantity x NameSKU Price Total

Once a user clicks on one of the quotes we should show a loading indicator that states we are preparing their cart. Once the necessary calls have been made we redirect them to the eCommerce platform cart page. From here they can either add other items to the cart or send the cart back to their procurement platform for further processing.

The universal solution for converting a Vurbis Marketplace to a cart in any eCommerce platform is to use a temporary sku. An example would be {{sku}}-{{incremental}}. This would prevent us from editing prices of existing products, affecting other customers. Once the PunchOut Order Message is sent back to procurement we will remove the -{{incremental}} part so it will continue the rest of the flow without matching issues.

Quote should be deactivated once the PunchOutCartSuccess event triggers for the round trip.

Note that it might be interesting to show previously used quotes somewhere in this interface, but we can wait until a customer asks us for this. This could be managed from VIM based on the quote status.

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### 3. Shopping + Cart Experience

Depending on the customer needs there are multiple ways to handle quotes on the eCommerce side. In general there are probably three main scenarios as to when someone wants to use the quote module:

1. Some products are only purchasable on request
2. All products in the catalog are only purchasable on request
3. Products are missing from the catalog

#### Case 1

When this is the case we should employ frontend modifiers to replace the button for these products to open up a modal. This modal will be a way for them to confirm they want to receive a quote. Optional fields are for beneficiary email and remarks. This request will then be sent to Vurbis Marketplace and our Notify service will handle the communication. It will also be sent to our Quote service, which will create the basis of the quote based on the product parameters we can gather from the eCommerce platform.

#### Case 2

For this type of a store, the buyer will use the punchout for both quotes requests and quote retrieval. To make this work we need two buttons on the cart page. Next to the punchout button we will add a Request Quote button. This will communicate the cart to our Quote service, which will create the basis of the quote based on the product parameters we can gather from the eCommerce platform. Optionally we can also send out the cart back to the procurement platform if the platform supports this. Jaggear for example has a quick quote feature, which we could tie into.

#### Case 3

These will be requests for products that are not currently in the eCommerce platform. This can be done through a product request form, which we can add with the use of frontend modifiers or use the existing one on the eCommerce platform. Information will be communicated to the Vurbis Marketplace as the previous 2 cases. Alternatively the buyer can input these values in a free form PunchOut Order Request. This will be an order request without a SupplierPartAuxiliaryID, which would be considered a quote.

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## 4. PunchOut Order Request

This part will be left unaffected.

# Implications for the Vurbis Marketplace

## 1. Quote module

We can use our existing quote module interface to create and manage quote requests. The only difference will be that all the product parameters need to remain editable until the quote has been activated.

### Product Information

Once products have been added to the quote module, we should store that information in our product management module. Next time a quote is created those products can be added quicker by adding a combo box for the title and sku inputs.

Note if a customer has a large catalog we could also pre populate all their items in the Vurbis Marketplace.

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## Website information: Quotes & PunchOut

In our experience there are wild variations as to what someone considers to be a quote and it takes a truly universal solution to handle each and every one of them. First let's paint some scenarios for you, which we've encountered over the years and to which we have an existing solution.

### Free form

Free form orders aren't part of what we consider to be a quote, but we have seen it being mentioned as such. A free form order will come from your buyers procurement platform, but does not have a PunchOut session prefacing it. These types of orders are manually input by users of the procurement platform and sent over as if it was just a regular order. Of course our validation service will catch on to that quick enough and is able to throw a warning, holding the order and notifying you by email.

Next you can inspect the order and either process it or let the customer know that the information on the free form order is not sufficient to process further. Main reasons are usually wrongly formatted SKU values or mistyped pricing information. Of course we can allow free form orders to automatically pass through to eCommerce, but we would advise against that. You really don't want to be sending out that Apple Macbook for a mere \$10.


### Quotes only

One area where quotes are common ground is in the customized branding industry. There are ways to add prices to predefined products, but when the buyer is given a choice to add their own logo, a lot of the time the quote module is chosen to handle the pricing aspect of it. Most likely due to the high amount of variables to come to a good price (eg. number of colors, amount of products, urgency, delivery location etc.). Usually the entire store platform is zero priced.

What we do to handle this scenario is activate our quote module. This module is managed completely by our cloud platform and if you have our PunchOut extension installed, you don't even have to add anything else to your eCommerce platform. How cool is that?

From the buyers perspective there are now two steps to their PunchOut process. Step one is starting a roundtrip, adding the required products to the cart and placing the quote request. Once the supplier has added the correct product parameters (eg. mock up images, pricing information, shipping cost etc.) the buyer will be notified that a quote is ready. Once a quote is active and

ready to be picked up the buyer will be redirected to a quote overview page, the next time they Punchout.

  
**VURBIS**

**Welcome Ruurd Zwart (ruurd.zwart@vurbis.com)**  
Please click 'Add to Cart' to add each quote to your shopping cart. Multiple quotes can be added to a single shopping cart. Once you've added the quotes, click 'Continue to Cart' at the bottom of the page. Please be sure to check the product mockup before proceeding to the cart.

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**Quote #107** [Cancel](#) [Edit Quote](#) [Add to Cart](#)

Qty	Product	Sku	Unit Price	Total price
3	Triblend T-Shirt - Black / XSMALL Preview: <a href="https://vurbis.sharepoint.com/:b/g/EZ50jasAlkjasd8u23jA">https://vurbis.sharepoint.com/:b/g/EZ50jasAlkjasd8u23jA</a> <a href="https://vurbis.sharepoint.com/:b/g/EZ50jasAlkjasd8u23jA">SDljWd0_6jrGw?e=kndhP1</a>	33792822804617	2.00	6.00
<b>Total</b>				USD 6.00

[Continue to Cart](#) [Continue Shopping](#)

From there they can choose to either create more quotes or add the, previously requested, quote to the cart. Once they do that they are logged into a regular PunchOut session and able to return the cart to their procurement platform. Thus continuing the PunchOut flow towards a well formatted invoice.





## Mixed store

Another scenario we see a lot is a mixed store, where only some of the products are purchasable on request. This is seen across a multitude of branches, but the three major ones, based on our experience, would be Laboratory Equipment, Books and Technology.

To solve this puzzle we use the same trifecta of products; the Vurbis Marketplace, it's Quote Module and our PunchOut extension. Even if you don't have any quote procedure in place we've got you covered. Using our frontend modifiers, we can adjust your web shop, just for users in a PunchOut session. Let's say they encounter a product with a status of "On Request".



Showing 1-22 of 2574 item(s) 1 default Quantity, high to ▾ 22 ▾

 <p><b>VURBIS</b></p> <p>Ethanol 96 % v/v (Ph. Eur., BP) pure, pharma grade 2.5L (Plastic) POA CA1615.2500PE</p> <p>1 <a href="#">Request a price</a></p>	 <p><b>VURBIS</b></p> <p>Ethanol absolute (Ph. Eur., USP) pure, pharma grade 1L (Glass) POA CA4230.1000GL</p> <p>1 <a href="#">Request a price</a></p>	 <p><b>VURBIS</b></p> <p>Ethanol absolute (Ph. Eur., USP) pure, pharma grade 2.5L (Plastic) POA CA4230.2500PE</p> <p>1 <a href="#">Request a price</a></p>	 <p><b>PanReac AppliChem</b> ITW Reagents</p> <p>Glycerol (USP, BP, Ph. Eur.) pure, pharma grade 1000ml €78.80 CA141339.1211</p> <p>1 <a href="#">Add to cart</a></p>
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1 2 3 117 >

We can dynamically add a script to that button which will open up a modal. In there they will see the products that are currently on their quote request and any extra fields, which can be defined on demand. From there the buyer can choose to add more products to the request or simply send it over to you for further processing.

### Product Request ✕

If you cannot find the requested product in our catalog, you can request it by completing the form below. We will respond within 1 workday.

*SKU	*TITLE	*AMOUNT	
CA4230.2500PE	Ethanol absolute (Ph. Eur., USP) pure, pharma grade 2.5L (Plastic)	1	<a href="#">Remove</a> 🗑️

[Add another product](#) +

GENERAL REMARKS

[Send](#) ▶

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Once the buyer hits 'Send' the request will be sent over and picked up by our quote module. It will notify you that there has been a quote request and you can add a price and other information to your heart's desire. From here on out it will continue the same flow as outlined in the previous 'Quotes only' block.

## **Mini procurement**

Lastly there are cases where the buyer doesn't have a procurement system at all. All they want are some rudimentary procurement features so they can manage and approve purchases across different departments and users.

For this we have a module which we refer to as Mini Procurement. Again, this uses the same core set of products to accomplish an entirely different feat. The buyer will be able to initiate a PunchOut session straight from our Vurbis Marketplace portal, towards your shop. The shopping process will be unaffected, but on the cart page they will create a quote in the Mini Procurement portal. This quote can then be approved or denied either by an admin in the interface directly or by email based on a predefined list of mandated approvers. Simple, yet very effective and combinable with any of the earlier outlined features.