



ChandlerOS

From RFQ to cash, automated

How a customer's request becomes a delivery and a correctly paid invoice - and what changes for the people doing the work.

CatalystIQ · catalystiq.ae · info@catalystiq.ae · +971 58 599 7894

Contents

1. What ChandlerOS is
2. What operations teams face today
3. How ChandlerOS handles it - the whole journey on one page
4. Step by step
 - a. A request arrives
 - b. Understanding the request
 - c. Can we fulfil it from stock?
 - d. Asking suppliers
 - e. Comparing the quotes
 - f. Quoting the customer
 - g. The customer says yes - raising the purchase order
 - h. Goods arrive at the warehouse
 - i. The supplier's invoice arrives
5. Customer messages on WhatsApp
6. What always waits for a person
7. Where the system stops and asks
8. Why teams choose it
9. What changes for each role
10. How it all fits together (architecture sketch)

1. What ChandlerOS is

ChandlerOS is a system built by CatalystIQ for ship chandlers and marine suppliers. It runs the whole supply job from one place: a customer asks for something, the system works out whether it can be supplied from stock or has to be bought, gets supplier prices, quotes the customer, raises the purchase order, receives the goods, and checks the supplier's invoice before it is paid.

The idea is simple. The routine parts - reading requests, checking stock, sending supplier enquiries, comparing prices, matching invoices - happen automatically. The decisions that cost money or carry risk - approving a new supplier, sending a quote, paying an invoice - always wait for a person.

In one sentence: the system does the volume; your team keeps every decision that matters.

Who uses it:

- **Buyers** - see what needs sourcing, approve supplier enquiries, pick the best quote.
- **Warehouse** - see what is reserved, what is coming in, and what to release.
- **Sales desk** - see quotations waiting to go out and customer messages that need a person.

- **Finance** - see invoices that have been checked and are ready to approve, and the ones that failed a check.
- **Managers** - see everything waiting for approval in one list.

2. What operations teams face today

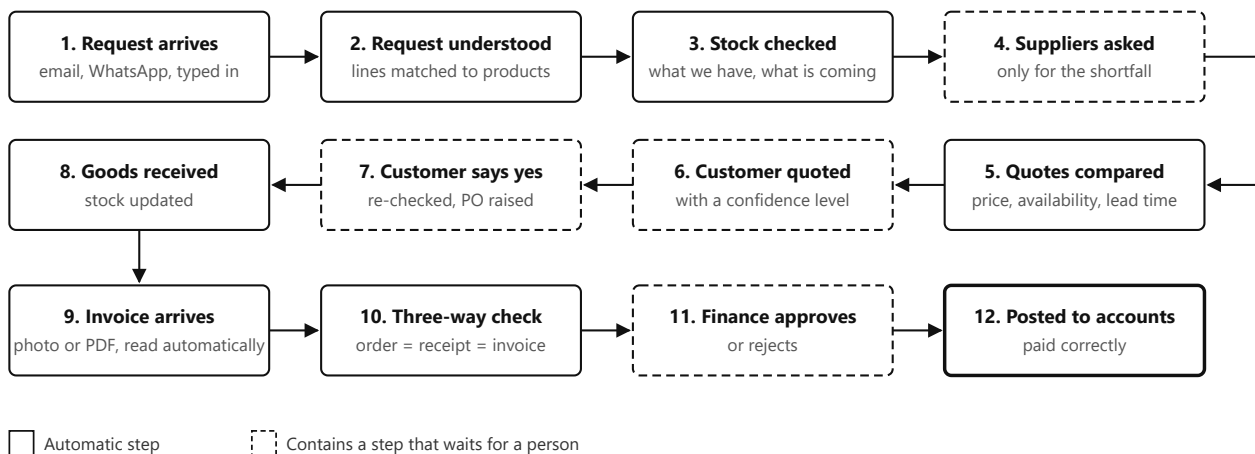
Most chandlers run this job across inboxes, WhatsApp, spreadsheets and phone calls. It works, but it depends on people remembering things. The usual problems:

What happens	Why it hurts
Requests arrive by email, WhatsApp and phone and are re-typed by hand	Items get mis-read, quantities get lost, and nobody can see the full list of open requests.
Stock is checked by walking to the warehouse or asking someone	The same stock gets promised to two customers. Incoming deliveries are forgotten.
Suppliers are emailed one at a time and chased from memory	Some never reply and nobody notices. Quotes land in personal inboxes and get lost.
Quotes are compared in a spreadsheet	Minimum order quantities and delivery dates are missed. The cheapest quote is not always the one that arrives in time.
The customer is quoted on a price nobody confirmed	Margin disappears when the real supplier price turns out higher.
The purchase order is typed again from the quote	Copy errors. The wrong supplier or the wrong quantity gets ordered.
The supplier's invoice is matched line by line by hand	Duplicate invoices get paid. Goods that never arrived get paid for.
A supplier emails "our bank details have changed"	This is the most common fraud in the industry. One wrong payment can cost more than a year of margin.

None of these are people problems. They are what happens when the work lives in five places at once.

3. How ChandlerOS handles it - the whole journey on one page

Every request follows the same path. The diagram below is the whole thing; the rest of this guide walks through it one step at a time.



Steps 4, 6, 7 and 11 each contain a point where a person approves before the flow continues. Section 6 lists them; the detailed diagrams show exactly where.

Figure 1 - The whole journey. Twelve steps, one record from start to finish.

4. Step by step

4a. A request arrives

A request can come in three ways: a customer or supplier **email**, a customer **WhatsApp message**, or a buyer **typing it in** from a phone call or a visit. Whichever way it arrives, the system creates one request record with the customer, the contact, the vessel and the list of items. Nothing is re-typed.

If the message relates to a request that is already open, it is attached to that request rather than creating a new one.

4b. Understanding the request

Each line of the request is matched to a product in the catalogue. Three things can happen:

- **Clear match** - the line is matched automatically and moves on.
- **Probable match** - the system shows its best guess and a buyer confirms it with one click.
- **No match** - the line is handed to a buyer to resolve.

The point is that the system never silently guesses a product. If it is not sure, it asks.

4c. Can we fulfil it from stock?

Before anyone contacts a supplier, the system checks four things on every line: what is physically in stock, what of that is already reserved for another customer, what is on a delivery already booked, and whether that delivery lands before the customer needs it. Only what is free to promise counts.

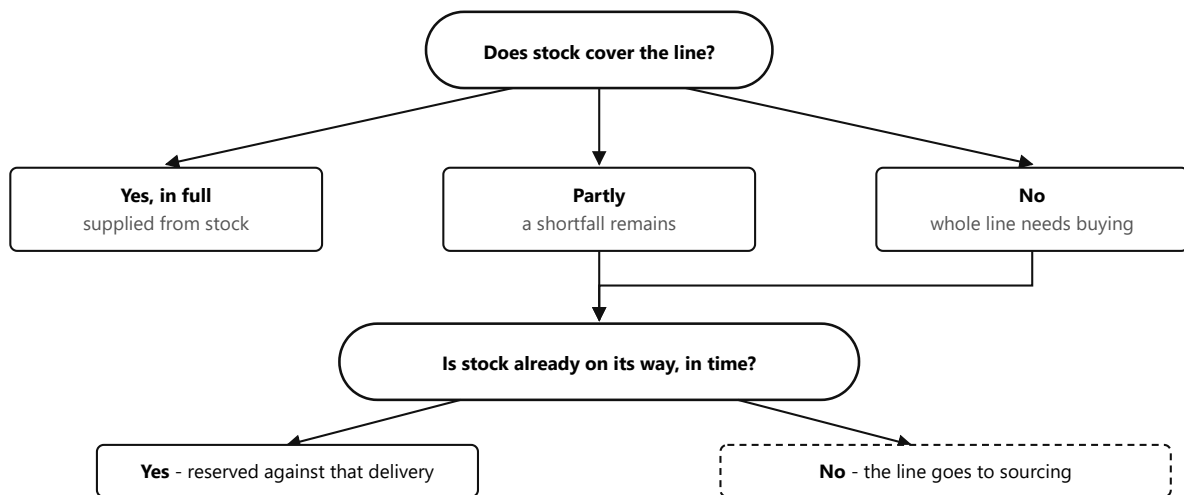


Figure 2 - Stock first, incoming deliveries second, a supplier only when neither answers the line.

If another branch's warehouse holds the item, the system shows that to the buyer - but it does not move stock between warehouses on its own. That stays a human decision.

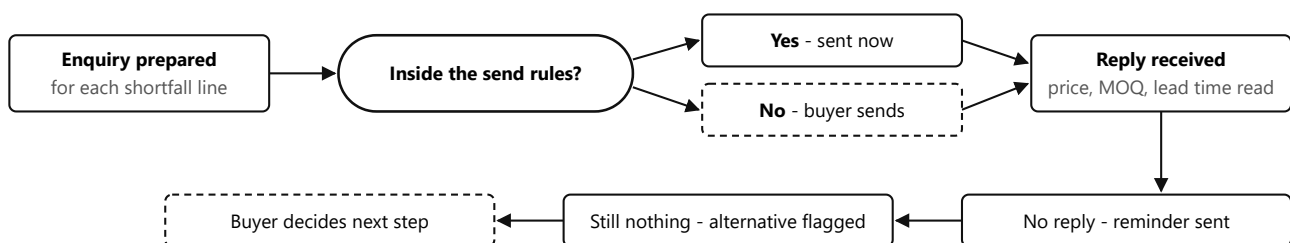
4d. Asking suppliers

For every line that needs buying, the system prepares a supplier enquiry. Whether it sends it straight away depends on simple rules your company sets:

- If the value is under an agreed limit **and** the cost is already known, the enquiry goes out automatically.
- Otherwise it waits for a buyer to look at it and send it.
- A supplier that has been blocked is never contacted - and the check is repeated at the moment of sending, in case something changed in between.

After sending, the system watches for the reply. If none comes, it sends a reminder. If there is still nothing, it flags an alternative supplier for the buyer - it does not chase forever.

When a reply arrives by email or WhatsApp, the price, currency, minimum order quantity, lead time and validity date are read out automatically. If a reply comes from a number or address the system does not recognise as a known supplier, it is held until someone confirms who it is.



Dashed boxes are where a person acts. Everything else happens on its own.

Figure 3 - Sending rules decide what is automatic. Nothing is chased forever.

4e. Comparing the quotes

Once quotes are in, the system ranks them on four things: **price**, **availability**, **lead time** and the **supplier's track record**. Two things are not ranked - they are pass or fail: the supplier's **minimum order quantity** must fit, and the goods must arrive **before the customer's required date**. A cheap quote that arrives late is not a valid quote.

The system also looks at how sure it is about the cost. A price confirmed by the supplier this week is solid. A price from six months ago, or an estimate, is not - and a line built on one of those is flagged so a person looks before it is quoted onward.

4f. Quoting the customer

The ranked quotes, the stock position and the incoming deliveries are combined into a customer quotation. Alongside the price, the quotation carries a **confidence level**: how sure the company is that it can deliver every line on time. A line from stock is high confidence; a line waiting on an estimated supplier price is lower. The sales desk sees this before the customer does.

The quotation waits in the approvals list until someone releases it. It does not leave the building on its own.

4g. The customer says yes - raising the purchase order

When the customer confirms, time has usually passed. So before anything is ordered, the system re-checks five things: is the stock still there, is the supplier's quote still valid, has the exchange rate moved, has the vessel's arrival changed, and is the customer still within their credit limit.

If a supplier quote has expired, the purchase order is **held** and the supplier is asked to reconfirm. Nothing is ordered on a dead price.

If everything still holds, the purchase order is created from the confirmed requirements - not re-typed. It carries the supplier, the exact lines and quantities the customer confirmed, the agreed price and currency taken from the quote that was accepted, the delivery date promised and where the goods have to arrive. Where the system can tell which supplier to use, it fills that in; where it cannot, the order is created without a supplier and a buyer assigns one.

4h. Goods arrive at the warehouse

When the goods are received, stock is updated. Any request lines that were waiting on that delivery are released so they can be fulfilled. The warehouse team sees what came in, what it was for, and what can now go out.

4i. The supplier's invoice arrives

Suppliers send invoices in every form - a photo on WhatsApp, a PDF by email, a scan. The system reads them all. It pulls out the supplier, invoice number, date, purchase order number, items, quantities, prices, tax, total, currency and bank details.

For each of those it scores how sure it is. Very sure - accepted. Fairly sure - flagged for a quick look. Not sure - someone corrects it by hand. Then the invoice goes through the **three-way check**: does the invoice match what was ordered, and does it match what was actually received?

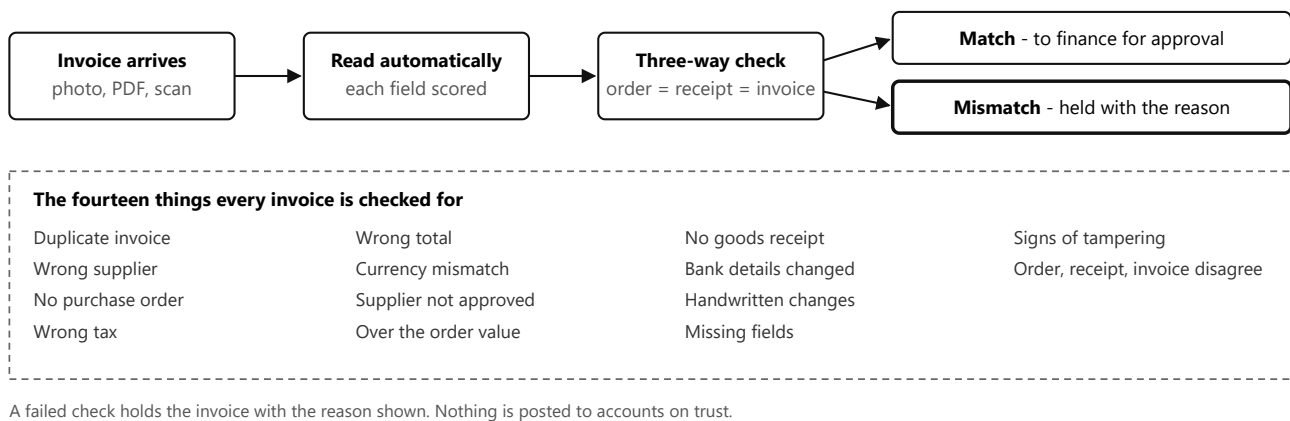


Figure 4 - Every invoice is read, scored and checked before finance sees it.

Bank details. If the bank details on an invoice differ from what is on file, the system does not update anything. It raises a hold, and the change is verified by phone, in person or through the supplier's portal before a single record is changed. This one rule closes the most common fraud in the trade.

Once the invoice passes, finance approves or rejects it in one place, and an approved invoice is posted to the accounting system. Rejected invoices go back with the reason attached.

5. Customer messages on WhatsApp

Customers message on WhatsApp all day. The system reads each message, works out who is writing - the customer, the contact, the vessel, and whether there is an open request - and then decides what kind of message it is:

Type of message	What the system does
"Do you have this in stock?"	Checks stock and replies with the answer.
"What's the status of my order?"	Replies from the live record - no one has to look it up.
"When will it be delivered?" when the date is not yet confirmed	Says honestly that it is not yet confirmed, and raises a task for a person to follow up. It never invents a date.
Price negotiation, a complaint, a payment dispute, or anything unclear	Handed to the sales desk or finance. The system does not negotiate and does not quote prices in chat.

The rule is the same as everywhere else: answer what is safe to answer from facts; pass anything commercial to a person.

6. What always waits for a person

Four decisions are never automated. They sit in one approvals list, so nothing is buried in an inbox and a manager can see at a glance what is waiting and for how long.

Decision	Who	Why it waits
Adding a new supplier	Buyer / manager	A supplier you have never used is a risk until someone has looked at them.
Sending a supplier enquiry outside the send rules	Buyer	High value or unknown cost deserves a human eye before it goes out.
Releasing a quotation to the customer	Sales desk	The quote is a commitment. Someone owns it.
Approving a supplier invoice for payment	Finance	This is where money leaves. It is never automatic.

7. Where the system stops and asks

Beyond the approvals, there are four situations where the system deliberately stops rather than guess. Each one is shown to a person with the reason.

1. **A delivery date is not yet known.** The customer is told "not yet confirmed" and a task is raised. No made-up date.
2. **A supplier reply comes from an unknown sender.** The conversation is held until someone confirms who they are.
3. **A supplier's quote has expired by the time the customer confirms.** The purchase order is held and the supplier is asked to reconfirm.
4. **A supplier's bank details have changed.** Nothing is updated until it has been verified outside the email.

8. Why teams choose it

Not because it is clever. Because it removes the silent failures - the ones nobody notices until a customer calls or an auditor asks.

What stops happening

- Requests lost in inboxes
- Stock promised twice
- Suppliers forgotten after the first email
- Quotes sent on a price nobody confirmed

What starts happening

- Every request is one record, visible to everyone
- Stock and incoming deliveries checked on every line

- Purchase orders with copy errors
- Duplicate invoices paid
- Payment to a changed bank account
- Suppliers reminded and alternatives flagged, automatically
- Quotes compared on the same criteria every time
- The customer sees a confidence level, not just a price
- Invoices matched to order and receipt before approval
- One list of everything waiting for a decision

A note on numbers. This guide deliberately quotes no percentages, hours saved or money recovered. Those figures come from a live pilot on your own data, measured against corrections your own team makes - not from a brochure.

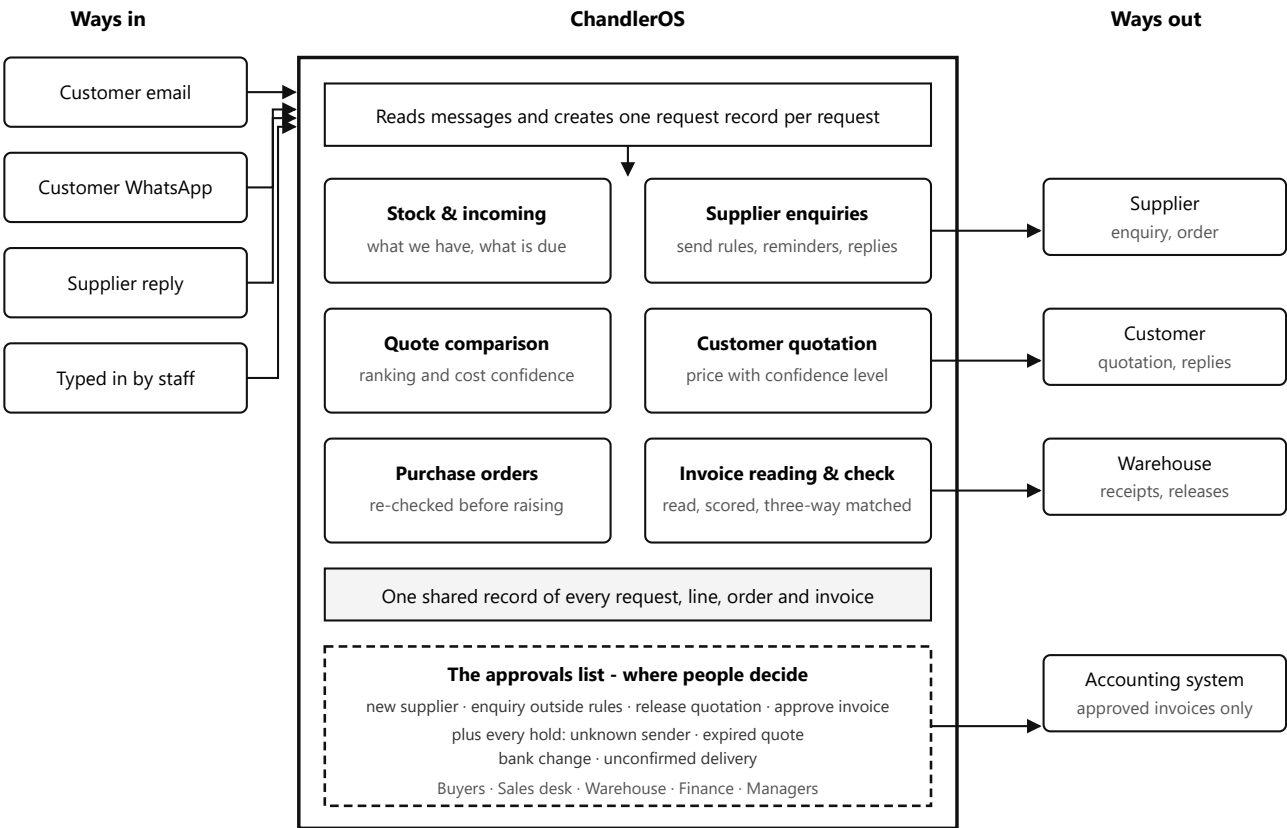
9. What changes for each role

Role	Before	With ChandlerOS
Buyer	Reads emails, checks stock by asking, emails suppliers one at a time, compares in a spreadsheet, types the PO.	Opens a list of lines that need sourcing. Confirms uncertain product matches. Approves enquiries outside the rules. Picks from ranked quotes. Assigns a supplier when the system could not.
Warehouse	Answers "do we have this?" all day. Finds out about incoming deliveries when they arrive.	Sees what is reserved, what is coming and when, and what to release once goods land. Sees stock in other branches without being asked to move it.
Sales desk	Builds quotes by hand. Answers every WhatsApp message personally. Chases delivery dates.	Reviews quotations with a confidence level and releases them. Only sees the WhatsApp messages that need a person - negotiation, complaints, disputes.
Finance	Matches invoices line by line. Trusts the bank details on the invoice.	Sees invoices that have already been read and checked, with any failed check named. Approves or rejects in one place. Bank changes are verified before they can be used.

Manager	Asks around to find out what is stuck.	One approvals list: what is waiting, who it is waiting on, for how long.
----------------	--	--

10. How it all fits together

This is the shape of the system, in plain terms. Requests come in on the left, decisions sit with people in the middle, and the result goes out to the warehouse, the customer and the accounts on the right. Everything in the centre works from one shared record of each request.



Solid boxes work on their own. The dashed box is where people decide. The accounting system only ever receives invoices a person has approved.

Figure 5 - The shape of the system. Messages in, one shared record, people in the middle, results out.

ChandlerOS is developed by CatalystIQ. This guide describes how the system works as designed; the exact screens and the send rules are set up with each company during implementation.