

B2B catalog and quote request form

CHAPTER 01 / BEFORE YOU BEGIN

Prepare your materials. Define the deliverables.

Distributors, manufacturers, and B2B teams with technical catalogs or custom bidding processes.

Starting materials

- Product catalog and specifications are valid
- Repeated questions from procurement
- Flow of receiving requests by sales

What you will prepare

Category structure, standard product details, and relevant RFQ fields.

Use it as material for decisions and discussions, then adjust the work limits to your conditions.

Starting from one page, one process, or one most important need. Note unknowns as questions; Don't force answers just to make the worksheet look finished.

Work in a clear order.

Group catalogs based on how buyers choose

A company's internal categories may not necessarily help buyers. Ask if they choose from a specific application, material, size, capacity, or standard. Use categories that can be explained and managed. Avoid filters that do not have complete data; Empty filters give the impression of options being available even though they cannot be used.

Standardize the information that determines suitability

For a product group, define the specifications, units, documents, and application notes fields. Have the product owner check the numbers as well as the document version. Show if price or availability needs confirmation. Don't mention certification of decorative icons; link evidence that is available and may be published.

Design an RFQ that reduces repeat questions

Request product type, estimated quantity, delivery area, and usage requirements required for an initial response. Allow "don't know" when buyers need help with specifications. Separate optional uploads from required fields; limit file types and set protection. Labels and error messages must be clear.

Connect shipping to the sales process

Agree on the purpose of acceptance, person in charge, and follow-up rules. Test that product data is carried over when the RFQ is opened from the details page. Check the destination email or CRM as well as handling failed deliveries. Measure informed requests, not just the number of RFQ button clicks.

Connect steps to real decisions.

Industrial pump demand exercise: buyers don't know the final model yet, but know the application and capacity requirements. Forms help sales start discussions without forcing unknown specifications.

Information	How to request	Reason
Product/application	Choice of categories and short description	Determine the appropriate team or specialist
Capacity/size	Field with units or "don't know yet"	Avoid misinterpretation
Amount and sending destination	Estimated number and location of businesses	Prepare logistical discussions
Supporting documents	Optional as per upload policy	Provides technical context when available

Replace the example lines with your business conditions. Mark information that already has evidence, that is still an assumption, and that needs to be asked of the person in charge.

Avoid decisions that seem right, but have not been tested.

Copy the brochure as one large image

Important information needs to be readable, searchable, and usable on mobile.

Ask for all specifications before contact

Provide a pathway for buyers who don't know the details but have context for their needs.

If a decision impacts costs, access, data, or other teams' work, list the parties who need to approve it. Explain the evidence that is available and the extent of information that remains to be examined.

Make your plans here.

Fill in concisely and specifically. For information that is not yet available, write who needs to be asked for confirmation. These notes are not sent by the Playbook feature to Oura; download before the tab closes.

01 Categories and how to choose

02 Mandatory attributes per product group

03 Documents and data owners

04 RFQ fields and reasons

05 Purpose of acceptance and person in charge

06 The inquiry criteria are quite clear

Do not enter passwords, access tokens, or personal customer data. Temporary storage follows the browser tab session, not the Oura account.

Check your job readiness.

This checklist records the tasks you marked. It is not an audit score, certification, or automatic assessment of a website.

Categories according to how buyers choose

Unit specifications are consistent

Technical claims are checked by data owners

The RFQ field has a clear reason

Test request received by sales

Frequently asked questions

Ikuti model penjualan. If the price depends on specifications or quantities, explain the factors and how to request a quote.

No. RFQ is a request for discussion or quotation; Terms and confirmation of purchase follow business processes.

Referral & usage limits

- W3C: labels for forms ■

References checked on October 2, 2026. Steps, examples and worksheets are Oura editorial formulation with the help of AI and public references. Examples are not client results. The guide does not guarantee business results and does not replace a dedicated examination of your systems.