

Q8 Globalize CRM

A supplier hierarchy you cannot draw in advance

Role	Lead UX/UI Architect on the contract. In practice an experienced individual contributor under a Design Lead, owning the most complex parts of every phase. No management function.
Team	About ten designers
Period	Eight months, 2023-2024
Context	Q8 Globalize - a B2B CRM platform for Kuwait Petroleum (Q8), a closed-loop oil and gas corporation. Built at DXC Technology / Luxoft.

50+

corporate clients at the MVP launch

4-6

levels of supply chain per branch, six at the deepest

50-100

subcontractors under each first-level client

Overview

The supplier hierarchy of a closed-loop corporation cannot be drawn in advance - it changes faster than design can describe it. So this case is about a mechanism instead of screens: a recursive multibranding system in which clients build their own structure, and the financial rails that let money cross branch and country borders. The complexity is not simplified away - it is handed to the user as a tool.

A hierarchy you cannot draw in advance

Kuwait Petroleum is a closed-loop corporation: from refining to a station on a European highway. Its business runs on a network of contractors, where every large client has its own subcontractors, and those have their own.

For close to twenty-five years this network lived in Excel. Databases, accounting, the contractor hierarchy, financial flows, discount cards. That is where I collected the pain points - from the files and from the practices that had grown around them.

The complexity was not in the number of screens. It was that the structure cannot be pinned down. In a business like this, the contractor network changes faster than design can describe it: three levels today, five in half a year, a different-looking branch in the neighbouring country. Any interface drawn for a specific hierarchy is obsolete before release.

The solution

I stopped designing the structure and started designing the mechanism that creates it.

A corporate client sets up its own space in the CRM: its users, its subcontractors. Every subcontractor gets the same right - to add its own users and its own subcontractors. And so on

down, with no limit on the number of levels.

Every node of this pyramid gets a full space of its own: its own documentation, its own colour system configured to its brand, its own discount cards branded for itself and its clients, its own financial flows, branches, mapping and transactions, and its own tree of subcontractors. The platform functions are available to it within its branch - not a cut-down version but the same tool.

The screenshot displays the Q8 Globalize CRM interface. The top navigation bar includes the Q8 logo, a dropdown for 'All Customers', a search bar, and links for 'Portal settings', 'Organisation management', a language selector (UK flag), a notification bell, and a user profile for 'Christy Immers KPI Business'. The left sidebar contains a vertical menu with icons for various functions: 360° View, Master data (selected), Customer hierarchy, Requests, ID/Cards and groups, Users and Groups, Drivers, Vehicle, Cost center, Program, Transactions, Invoices, Pricing, Limits, Credit management, Products and Services, Documents, and History of changes. The main content area is titled 'Customers / DXC Technology' and shows a card for 'DXC Technology' with an 'Inactive' status and an 'Edit' button. Below this, the 'Master Data' section is visible, with tabs for 'General info', 'Bank details', 'TAX number', and 'Addresses'. The 'General info' tab is active, displaying two panels: 'Personal info' and 'Contract'. The 'Personal info' panel lists fields such as Legal name (DXC Technology), Trading name (DXC Technology), Registration number (313787051), Customer type (GOV), External reference ID (-), Email (DXCTechnology@dxs.com), Country (Austria), Customer owner entity (704404), Customer number (XYZ123), Customer ID third party (950007), Validity period (2021/11/06 — 2025/11/06), and Customer role type (INDONE). The 'Contract' panel shows Contract number (XYZ123), Contract type (Small client), a button for 'Standart contract for small client', and a Validity period (2021/11/06 — 2025/11/06). Below the 'Contract' panel, there is a 'Contact' section with fields for Contact point (rozan), Email, Phone number, and Usage type (FINANCIAL).

A single node of the tree: its own contract, its own validity period, its own owner entity.

The visibility rule. A node sees the parent company one step up and its entire branch down. Sibling branches and levels more than one step up do not exist for it. One rule instead of an access-rights matrix that would otherwise have to be maintained by hand for every level.

Multibranding here is not decoration. It is the mechanism that implements the supply chain: a branded space is not drawn for the client - the client creates it themselves.

Q8 Globalize CRM - Kuwait Petroleum

IDS

Search

Adam Senkler Manager

Customers

Quick filters: by status **Active** Inactive Customer owner ISO code

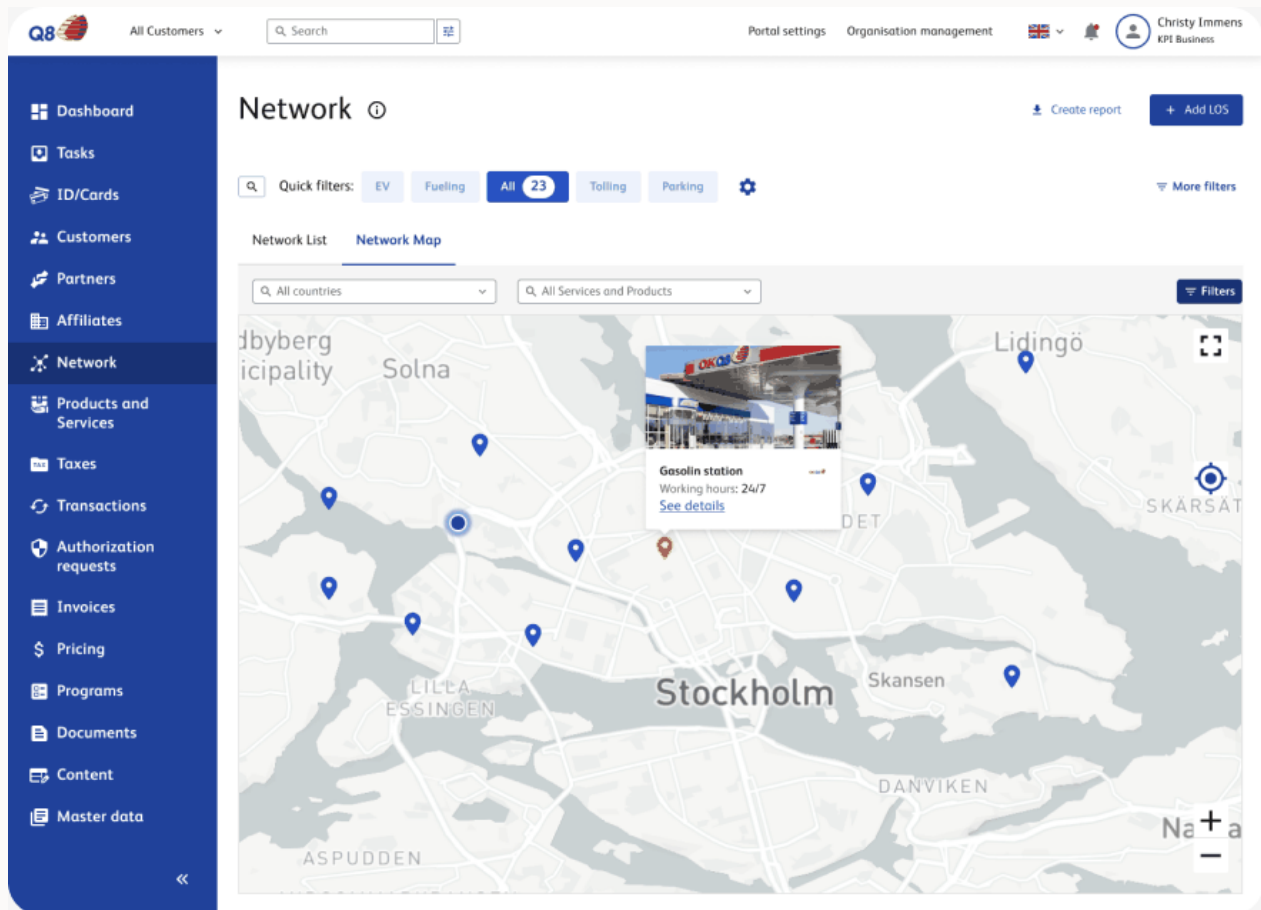
Customer name	Customer number	Status	Sub accounts	VAT number	Customer type	Customer country	Sales area
DXC Technology	9500024	Active	2	DE307881136	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1
Customer	9500022	Active	1	DE307881111	GOV	AT	ATO1-S-1

The customer list carries a Sub accounts column: how many subcontractors sit under each client.

What it delivered

At the MVP launch, the platform was taken up by more than fifty corporate clients. Each built a separate branch four to six levels deep; the maximum nesting I counted in the live database was six. The rollout was geometric: a first-level client has fifty to a hundred subcontractors, each of those has its own, and on down. Each branch led into its own set of countries.

A tree five levels deep does not read as a list. So alongside the subcontractor list I built a second view of the same network, on a map. A client sees every level of its branch at once, and which services are active at each node. The list answers who is in the network. The map answers where it stands.



The same branch as a map: every level at once, with the services active at each node.

This is not a speed metric. It is evidence that the mechanism was used the way it was designed: the recursion did not stay an architectural idea - it went to real depth, and users kept building the structure themselves, without me.

My role

I designed the mechanism: the information architecture, the structure of entities and documents, the flows and pipelines, the concepts. I did it under the guidance of a Design Lead - on this project I was an individual contributor, and I was handed the most complex parts of every phase. Wireframes, mockups and clickable prototypes I took on partially: two more designers joined at that stage.

Money that crosses branch borders

Transactions, reconciliation, billing and invoices were mine alone - the only part of the platform where responsibility was not shared with anyone. The financial part was deployed first, and I saw it working on live data.

The complexity of the financial part is in ownership. Every transaction has an address in the contractor tree: whose it is, which branch it passed through, who has the right to see it. The visibility rule that defines the structure also defines which numbers are shown to whom.

Q8

All Customers ▾

🔍

Portal settings

Organisation management

🇬🇧 ▾

🔔

Christy Immens

KPI Business

Dashboard

Tasks

ID/Cards

Customers

Partners

Affiliates

Network

Products and Services

Taxes

Transactions

Authorization requests

Invoices

Pricing

Programs

Documents

Content

Master data

Transactions / 1627455631585

Transaction ID:

1627455631585

Suspended

UNKNOWN

Reverse

Export

Category: RT

Created at: 2021-07-28T07:00:31.585Z (+01:00 GMT)

Customer: DXC Technology

Transaction overview

Supplier

Customer

Product

IDO

Supplier

920701

Customer

DXC Technology

Product

Diesel

IDO

950008

Country

DE

Number

950008

Code

103

IDO Number

123456

Site ID

45002

License Plate

122EU

Description

-

Site Town/Site Name

EW Brno 140 00

Driver Name

-

Card

Acquired Amounts

Unit Price

Amount

Card Product

Full Service Card

Quantity

10

Gross

28.1111

EUR ▾

Gross amount/VAT Rate

10/21

Card Type

-

External Product Name

Diesel

Net

626.241

Net

29.821

Suspension reason:

Wrong calculation details (unit price x quantity total price). Check the Gross in "Unit price"

Additional information

Key

Value

Total Time

135 min

Total Parking Time

6 min

Total Energy

59 kWh

Total Fixed Cost

0.0 EUR

Total Time Cost

2.40 EUR

Total Energy Cost

34.60 EUR

Total Parking Cost

2.40 EUR

Total Reservation Cost

1.20 EUR

Transaction chain

A transaction carries its address in the tree: supplier, customer, identification node, card, and the chain it travelled.

Orders in this tree flow bottom-up. A subcontractor at every level collects its subcontractors orders and passes them one level up. The number of nodes grows geometrically, and hundreds and thousands of line items gather at the top of a branch. The settlement for this pool has to come back down the same tree, and subcontractors on one level are tax residents of different countries: every node has to receive its amount, in its currency, at a rate taken at a clear moment - otherwise reconciliation between the levels will not add up.

The approach

I designed the settlement mechanism; the team built it. Collection runs in windows. A window closes, and the whole pool is computed in a single pass at one timestamp. The settlement runs top-down: all branches of the pool are computed simultaneously. The amount splits at every level by each node actual volume and converts into its currency. The formula of the mechanism: one timestamp, one rate per currency pair, an individual amount for every node.

Rates came from Fixer - 170 currencies, data from financial data providers and banks. The settlement cycle is synced to Fixer rate updates: sixty seconds. The synchronization is deliberate, so a rate change stays traceable. All transaction flow went through a blockchain and was tracked there; in the blockchain part, I took part.

The path every transaction repeats

A transaction has more than two states. The client handed over a fixed pipeline, and every transaction runs it end to end, from creation to archive, with no step skipped. Everything moves through it, including the creation of discount cards and the resale of oil and gas between contractors. The ten states in the list are that pipeline laid onto the interface as a filter. An operator opens a state, not a pile. I worked on this part together with two other designers.

The screenshot displays the 'Transactions' section of the Q8 Globalize CRM. The interface includes a sidebar with various navigation options and a main table of transaction records. The table is filtered to show 'Suspended' transactions, with 10 records displayed. Each record includes details such as Transaction ID, Created date, Customer Number, Customer Name, IDO, Country, Address, Product, and Status. The 'Status' column consistently shows 'SUSPENDED' for all entries. The table also features search and filter controls for each column. A notification at the bottom indicates that some missing fonts were replaced.

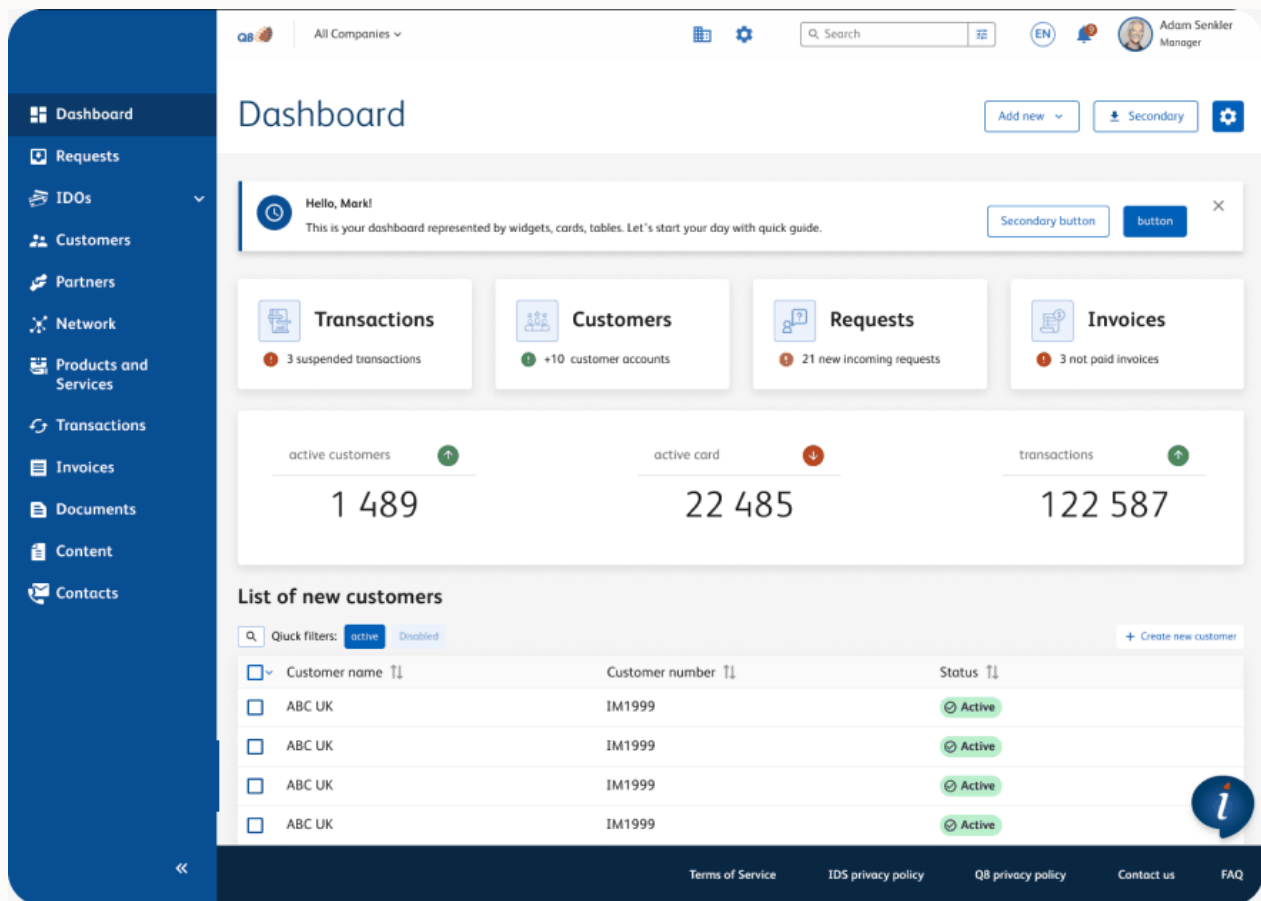
Ten states of the pipeline, used as filters over one table.

The rest of the financial part is large table tools, filtering and reporting - what a finance user spends the working day in. Pricing, invoicing and tax scenarios we described as journey maps, together with the team.

A dashboard the user assembles

The dashboard was not designed as one page. The client commissioned widgets for its own specific tasks, and they added up to more than fits on a screen at once. So the dashboard works as a kit: widgets switch on, switch off and change places, and the page stays usable in any combination. It is the same move as in the first section - instead of a fixed layout for a known set of tasks, a mechanism in which the user assembles the layout.

My part was the overall structure and some of the widgets. Several designers worked on the widget set.



The operator dashboard: status cards, counters and lists, each a widget that can be switched off or moved.

How it was done

I conducted the interviews with end users personally. I ran the stakeholder workshops myself. Usability testing took place before feature releases. How many interviews, workshops and test participants there were - there are no confirmed numbers, and I name none. We built twenty-four personas; the ten core ones went into the portfolio.

The Q8 design system consisted of six artifacts: Foundation, Tokens, Layouts, UI KIT, UX Patterns, Page Templates. The team split the artifacts among themselves, and every designer worked through their parts inside each artifact. I took part in building it and, together with the Design Lead, provided an additional layer of control over that distribution. The authorship belongs to the team; my part is participation plus the control function.

The platform front end was built on PrimeNG.

Result

Multibranding went into the MVP early and worked - I saw it in the live system and counted the nesting depth myself. Platform functions were deployed in stages, each confirmed by test runs after deployment. The platform as a whole, with all its functions, I never saw in its final state, and this case does not call it finished.

- 50+ corporate clients, branches four to six levels deep. Method: my own observation on the MVP and a review of the live database. This is adoption, not efficiency.

- Transaction time down 30%, request processing time down 25%. According to the client analytics team. The client did the measuring: the methodology stayed on their side, and the figures were handed to me as results.

The honesty line. My own factual base ends where my observation ends: the MVP, multibranding in operation, a live database with contractor trees. What the platform showed after all deployment phases is known to the client, not to me.

The screenshots in this document are real production screens of Q8 Globalize, published with the client agreement. Service annotations left in the source mockups were removed; no part of any interface was redrawn or invented.