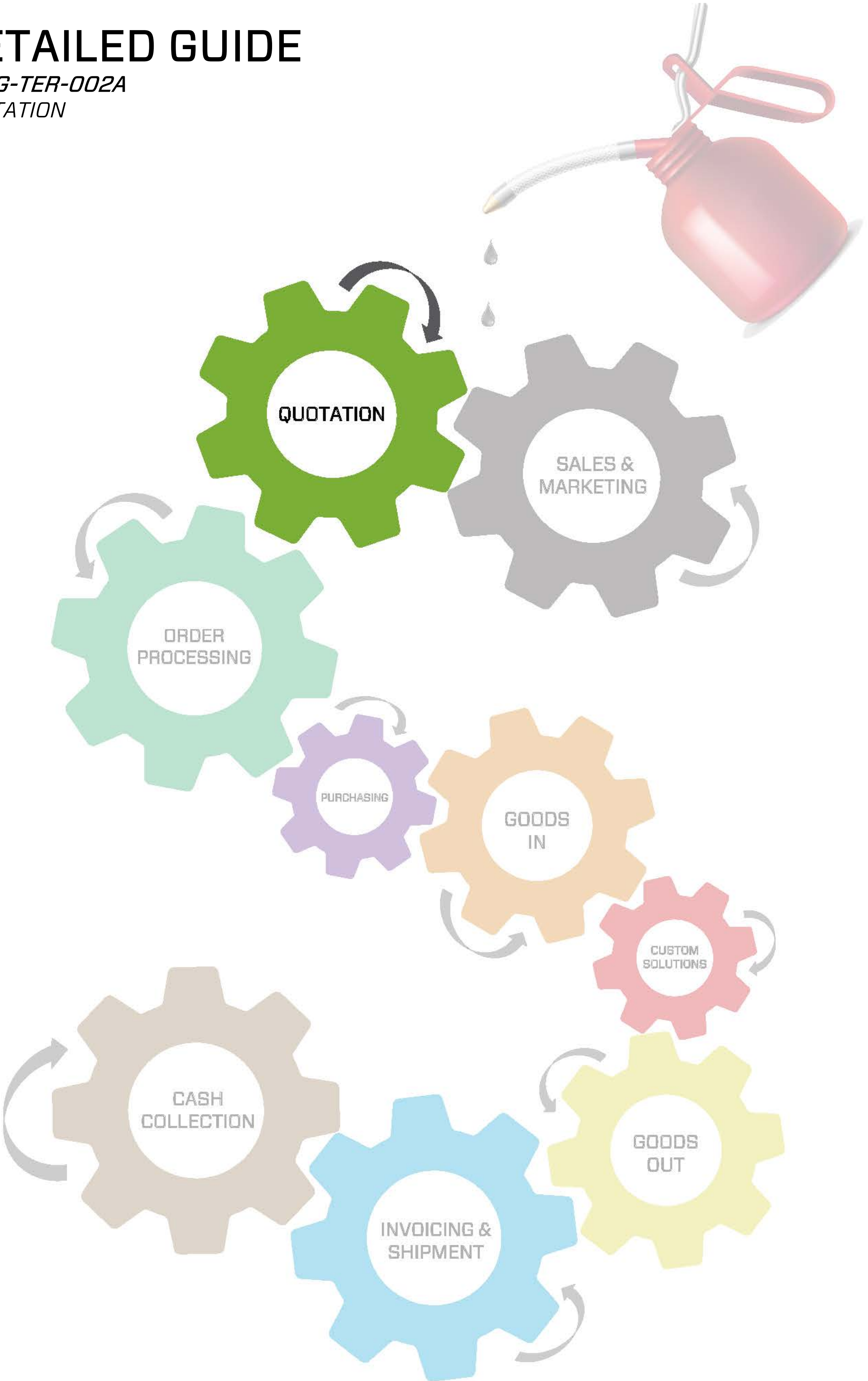
DETAILED GUIDE

SI-DG-TER-002A

QUOTATION



THE ENGINE ROOM

20th September 2016

Version 1.2

Swagelok

LIST OF CONTENTS

This document has been prepared in accordance with Indofluid System Technologies Pte Ltd Service Contract regarding Operational Optimization concerning deployment at PT Putranata Adi Mandiri on January 1st 2015. Although the businesses are independent and PT Putranata Adi Mandiri is the sole distributor for Swagelok products in Indonesia along with Indofluid System Technologies Pte Ltd as the overseas Swagelok principle, it is the intent of Swagelok that customers receive the same commensurate customer experience across the world.
This concept is known as One Swagelok and helps with consistent branding, image and customer interactions.

Indofluid System Technologies Pte Ltd
(Overseas Principle for Swagelok Products)
10 Ubi Crescent, #05-97
Ubi Techpark, Lobby E
Singapore 408564
Phone (+65) 6908 5300 | Fax (+65) 6908 5301
info@indofluid.swagelok.com
www.swagelok.com/indonesia

Process Owner Contact: Nahzlin Mohd Shariff

PT. Putranata Adi Mandiri
(Swagelok-authorized Representative for Swagelok Products)
Grand Slipi Tower, 22-24 Level 43
Jl. S. Parman Kav., Slipi
Jakarta Barat 11480, Indonesia
Phone (+62) 21 2902 2359 | Fax (+62) 21 2902 1936
info@indonesia.swagelok.com
www.swagelok.com/indonesia

Process Owner Contact: Yuliani Kasman

Process Document Author: Syazanawati

Revision Change Log (Content changes are denoted with ▌s)

Revision	Date	Revision to	Author
1.0	9th December 2014	N/A	Syazanawati
1.1	26th December 2015	Format	Syazanawati
1.2	20th September 2016	Format	Syazanawati

Document Approved by: Steven Sparkes
Date: 09/12/14

Signature:

SCOPE

The scope of this document refers to the utilization and management practices associated with the SAE program. It provides the standardized steps that INDOF and JKRTA must follow to process a quotation for their customers for regional items.

PURPOSE

The purpose of this document is to enable current and new associates of the organization to:

- Be familiar with the CSR process – 'making quotation'
- Have a standardized process of making quotations throughout the organization

1.0 CORE PROCESS FOR REGIONAL ITEMS

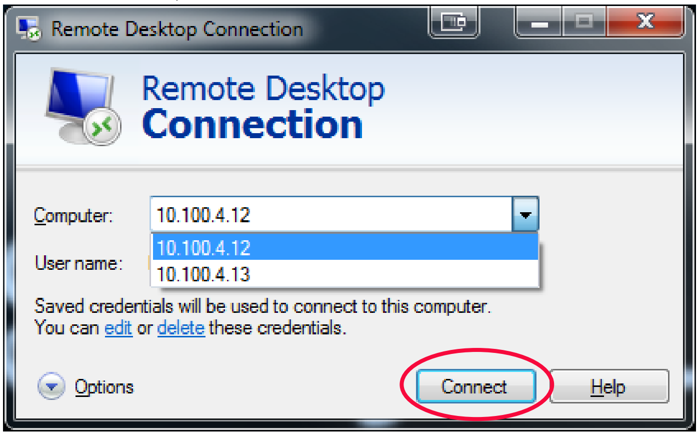
Open your **Swagelok Indonesia Dashboard** 

and **Outlook**  .
Both programs should be on throughout the process.
Doing so will create a dynamic link to the **Scala Advanced Edition (SAE)** program which is essential throughout this process.

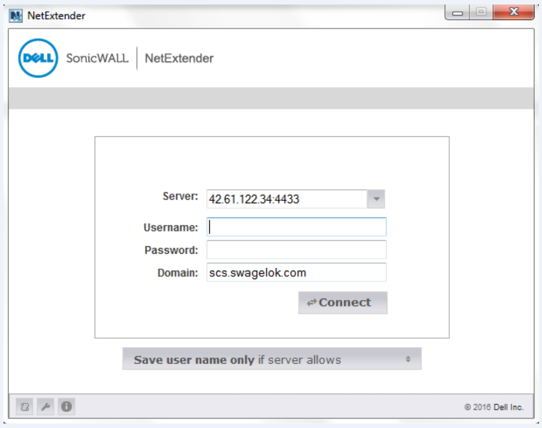
To begin:

1.1 Click the **Remote Desktop Connection icon** on your Window Taskbar**.** A window will appear.

1.2 Select the correct server (INDOF: **10.100.4.12** and JKRTA: **10.100.4.13**) and click **Connect**.
Usually, INDOF utilizes server 10.100.4.12 and JKRTA server 10.100.4.13.
Since the author of this process document is from INDOF, server 10.100.4.12 is selected.



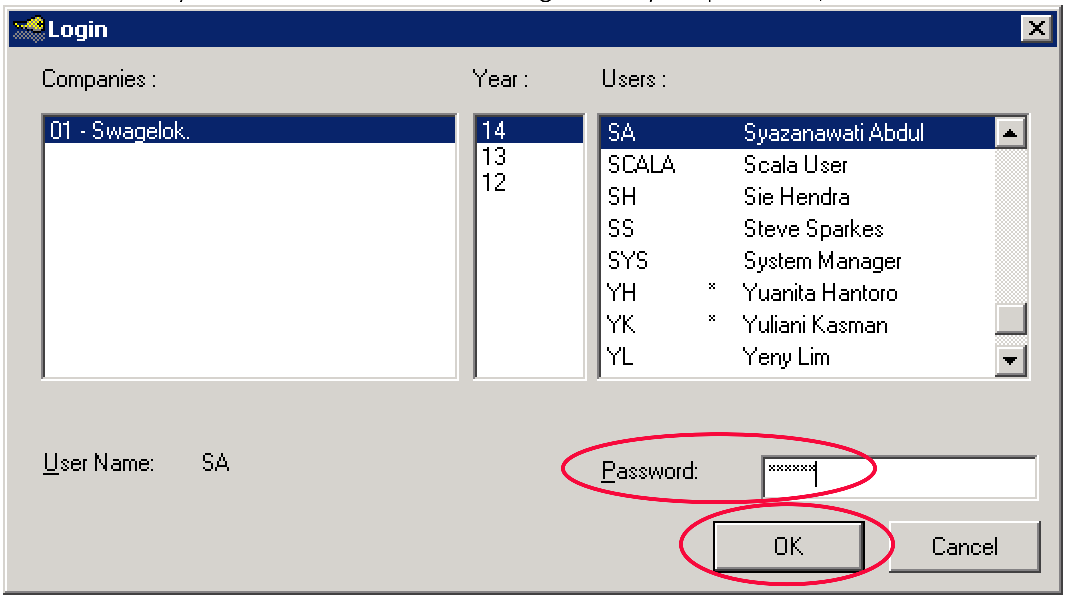
⚠
JKRTA associates need to first connect to the NET Extender (image below) in order to access into the server.



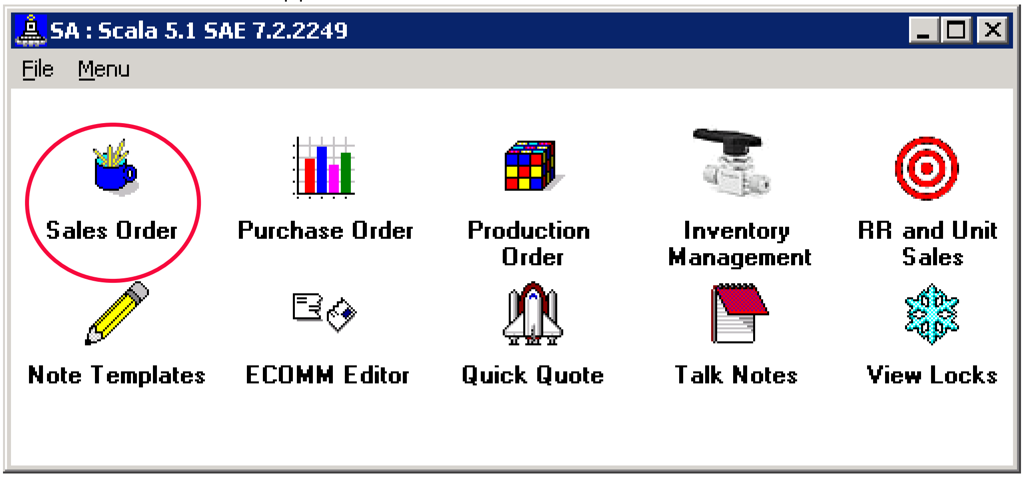
1.3 Log in using your account and password, then click **OK**

1.4 Double-click on the **SAE** icon

1.5 Select your name under **Users:** and log in with your password, then click **OK**



1.6 Double-click on the **Sales Order** icon.
A window will appear.



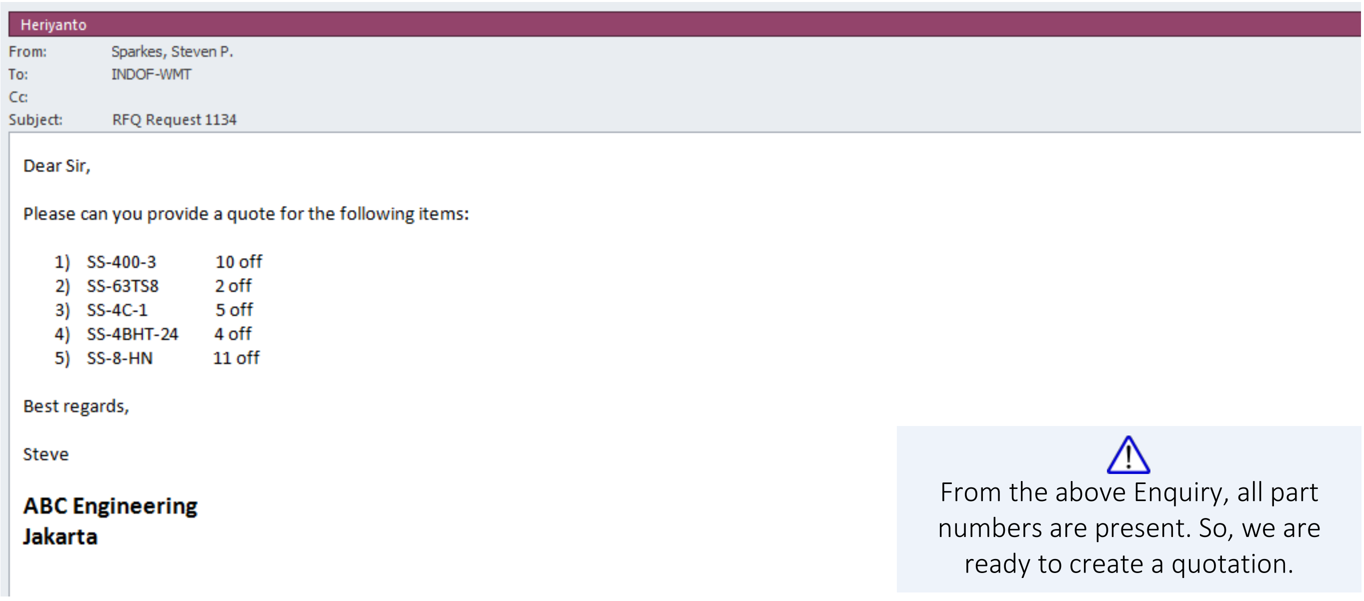
1.7 Keep the window below open throughout the process, for your own convenience

2.0 RECEIVING ENQUIRIES

The Quotation Process begins when you receive an Enquiry (e-mail categorized as **1. Enquiry**) from a customer in your WMT.
What follows an Enquiry is a Quotation generated by you to give the customer detailing the exact prices for the items enquired about.
A Quotation can be created only when you have the exact part numbers on hand.
For the purpose of a better understanding throughout this document, a dummy customer, ABC Engineering (I0234-1), has been created.

However, if the enquiry comes from a new, potential customer, the **New Account Opening Form** (**SI-FT-TER-002A** – For INDOF, or **SI-FT-TER-002B** – For JKRTA) should be filled in.
Next, go to Section 13.0 Determining the Type of Customer first before proceeding with the steps below.

A dummy Enquiry is created to serve as an example:



Heriyanto
From: Sparkes, Steven P.
To: INDOF-WMT
Cc:
Subject: RFQ Request 1134

Dear Sir,

Please can you provide a quote for the following items:

1) SS-400-3 10 off
2) SS-63TS8 2 off
3) SS-4C-1 5 off
4) SS-4BHT-24 4 off
5) SS-8-HN 11 off

Best regards,

Steve

ABC Engineering
Jakarta

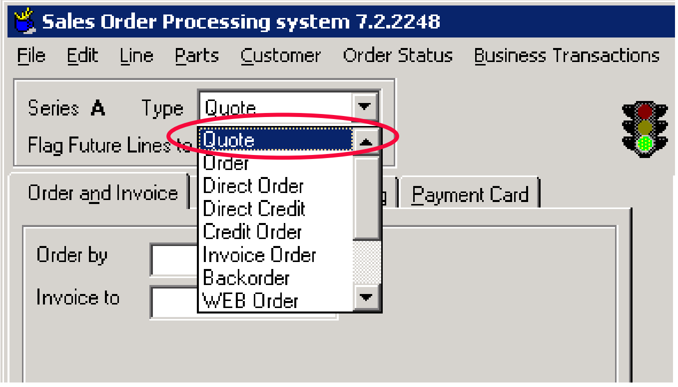
⚠
From the above Enquiry, all part numbers are present. So, we are ready to create a quotation.

3.0 CREATING A QUOTATION

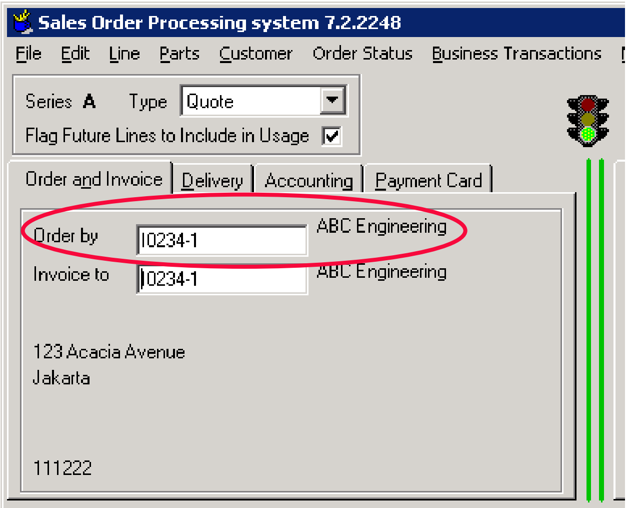
To quote ABC Engineering, proceed with the following:

3.1 Open **SAE**

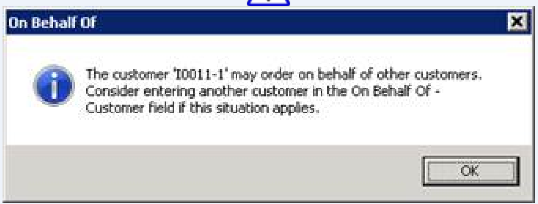
3.2 (Though by default) Ensure it is **Quote** under **Type**



3.3 Type Customer's Account Code in the blank next to **Order by** and hit Enter



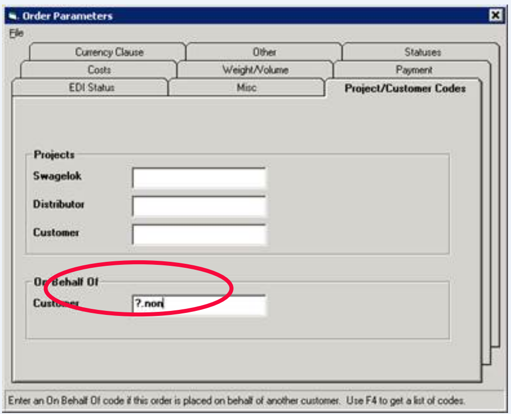
Type **?.** in the blank first, should you need to search from the list of all customers.



The window above will appear if customer is a non-end user.

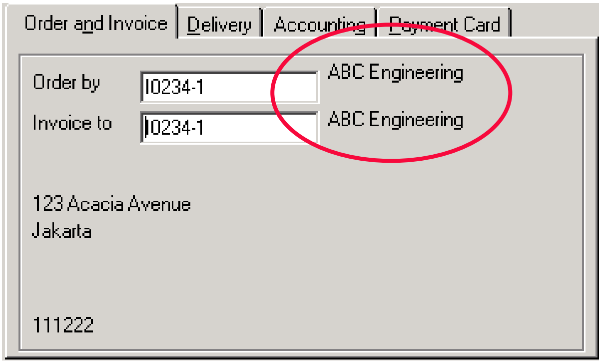
Proceed with the following steps:

1. Click **Ok**
2. Type **?.non** in the blank next to **Customer**



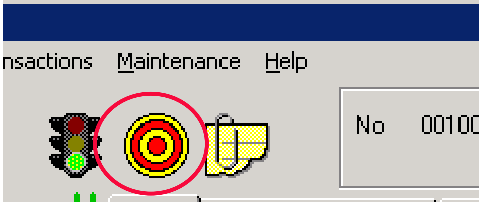
3. Double-click on **NON END USER**
4. Type **Ctrl + S**

3.4 Ensure the name of the customer is correct

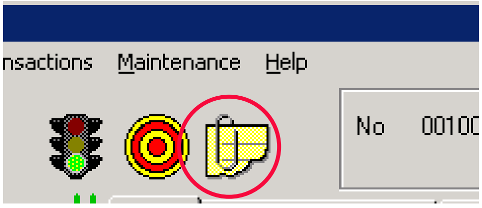


3.5 Read the customer's **Internal Note** and **Special Instruction** to take note of any necessary details of the customer before quoting them.
Two different methods are attributed to each of them:

For **Internal Note**:
Double-click on its Target icon (if any) next to the SOP No.



For **Special Instructions**:
Double-click on its Yellow-page-with-paperclip icon (if any) next to the SOP No.



Both **Internal Note (IN)** and **Special Instruction (SI)** contain information relevant to the customer. It may be regarding special handling or packaging of the customer's goods or finance-related methods like discounts to be given and etc.

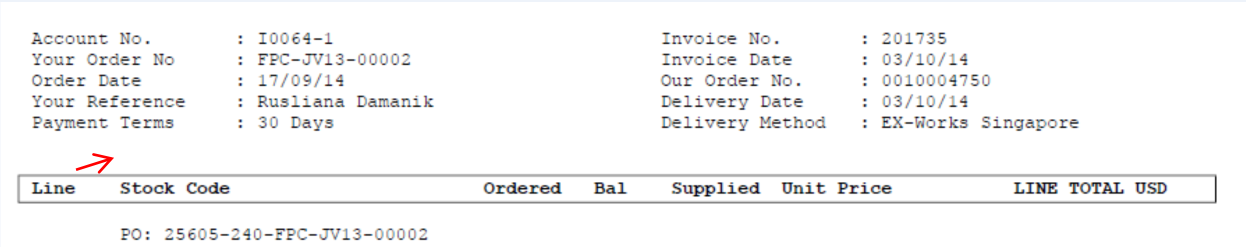
Differences between **Internal Note** and **Special Instruction**:

Internal Note: Notes on the customer/order that can only be read by anyone who can access SAE

Special Instructions: Notes on the customer/order that can be reflected in any document processed for the customer. Namely: Quotation, Order Confirmation, Invoice, etc.

CSR can select the documents they wish to have the notes be reflected on. A good example is having a long Customer's PO No. be reflected on the invoice.

Customer PO No. too long to be reflected next to Your Order No:



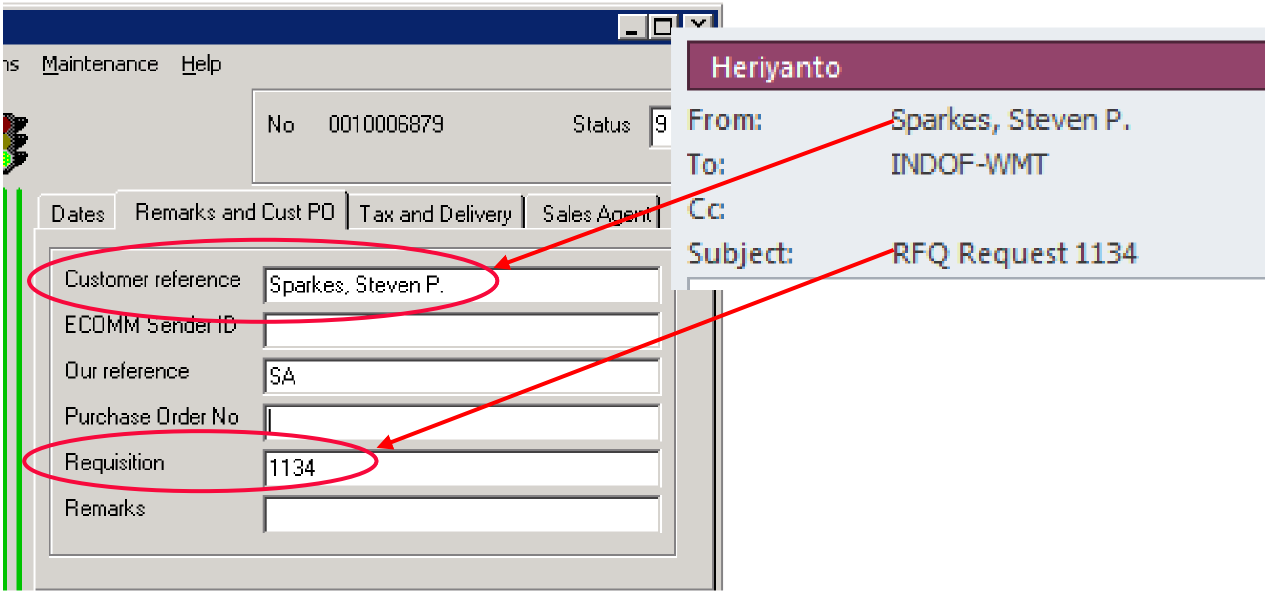
```
Account No.        : I0064-1                         Invoice No.        : 201735
Your Order No      : FPC-JV13-00002                  Invoice Date       : 03/10/14
Order Date         : 17/09/14                        Our Order No.      : 0010004750
Your Reference     : Rusliana Damanik                Delivery Date      : 03/10/14
Payment Terms      : 30 Days                         Delivery Method    : EX-Works Singapore

Line    Stock Code                      Ordered   Bal   Supplied  Unit Price          LINE TOTAL USD

        PO: 25605-240-FPC-JV13-00002
```

Long Customer PO keyed in as Special Instruction and reflected on Invoice

Click on the **Remarks and Cust PO** tab and fill in the two blanks below:

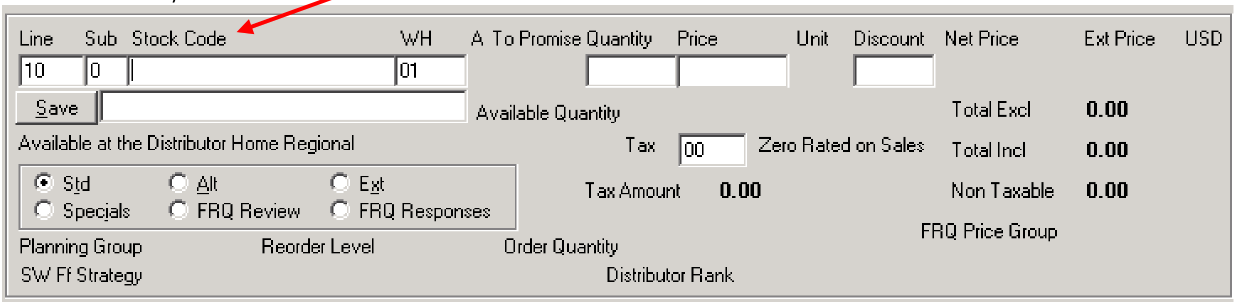


Customer reference: Full name of person enquiring the items / sender of e-mail

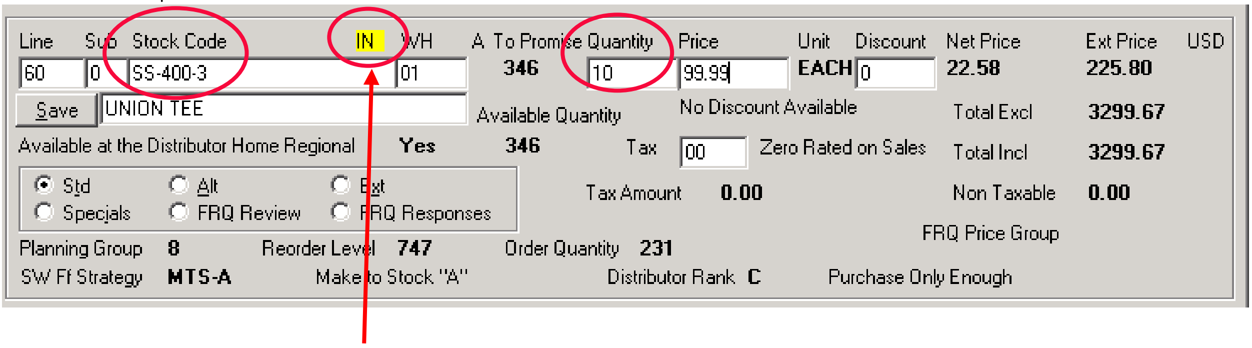
Requisition: RFQ No. (if given). If no RFQ No. is given, leave it blank. In this example, RFQ No. is given. So, in the space provided, type 1134.

3.6 Hit Enter

3.7 Move your cursor to the blank under **Stock Code**

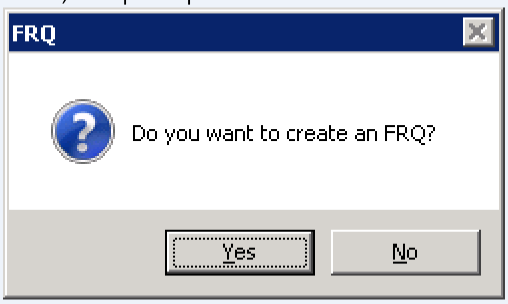


3.8 Key in each part number, along with their respective quantities. The first part number is keyed in as an example:



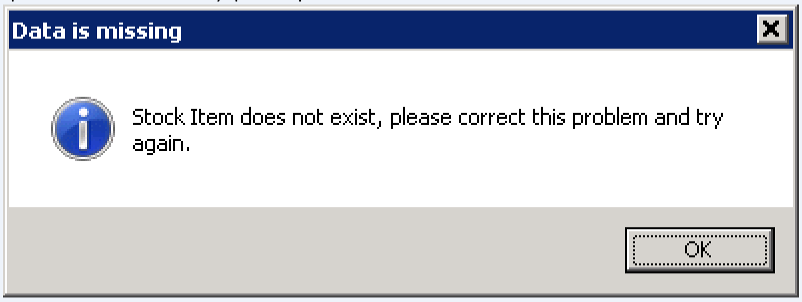
You may notice the letters **IN** highlighted in yellow on the same alignment as the **Stock Code**.
IN stands for Internal Note, which refers to notes about that part number that you have just keyed in.
There is also the initials **SI** and highlighted in green.
SI stands for Special Instruction, which refers to notes on the part number.
Like **IN** and **SI** for a particular order / customer, some part numbers have notes that we need to take note of too.
The difference between the two is that **IN** will not be reflected under the number line in any document printed, but any notes under **SI** will be reflected under the number line in the invoice or any selected documented.
A good point to take note is to double-click on any highlighted abbreviations next to the stock code to learn of any notes given to that part number.

For some part numbers, when keyed in, will prompt this window:



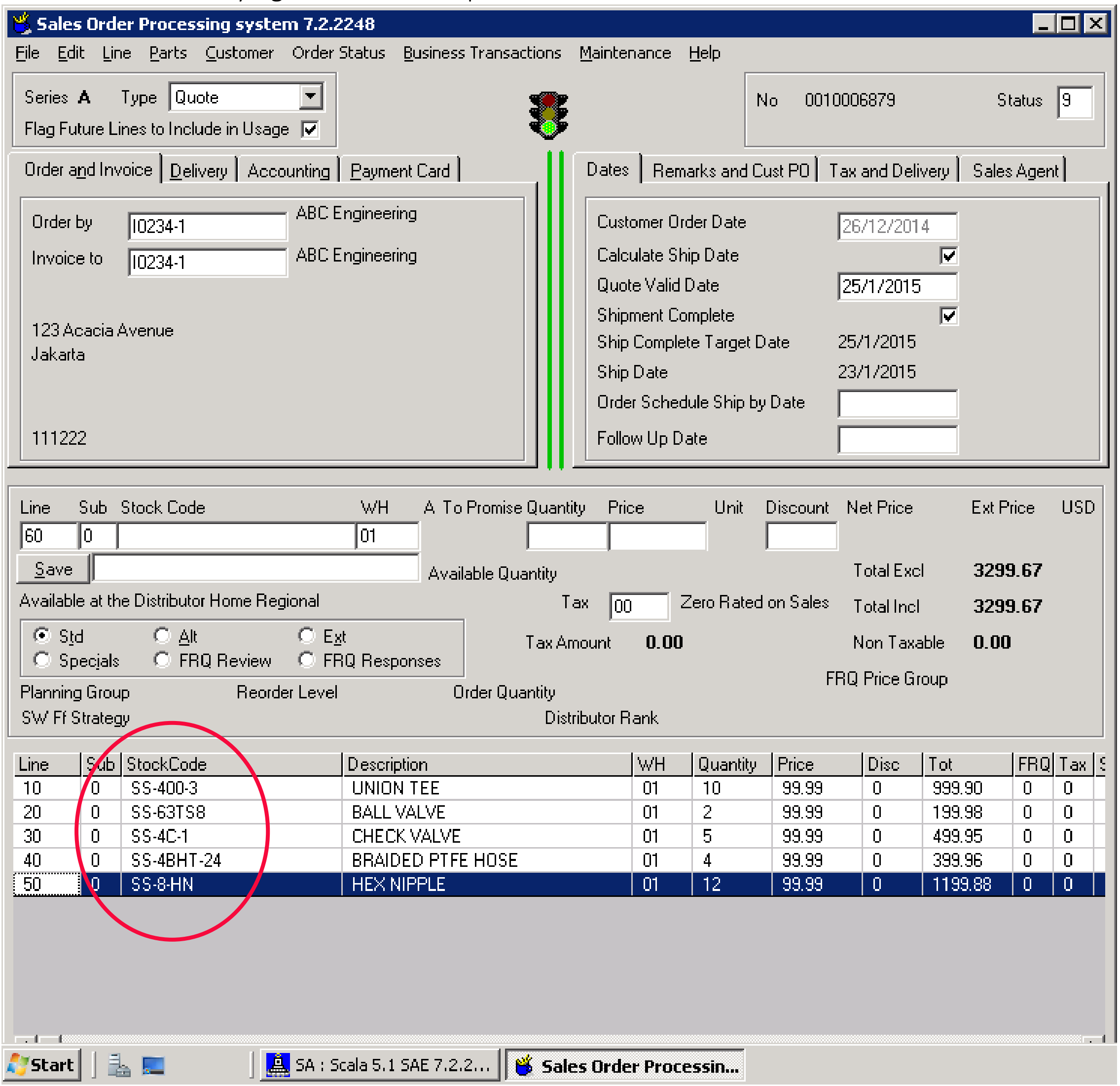
This indicates that the part number is a special from Swagelok Manufacturing Operations.
Please refer to DCN# **SI-DG-TER-002B** to learn how to quote non-regional items.

Also, keying in certain part numbers may prompt this window:



This indicates that the part number has not been quoted before and needs to be updated in the system.
Please refer to DCN# **SI-DG-TER-002C** to learn how to update part numbers.

3.9 Continue keying in all the other part numbers like below:



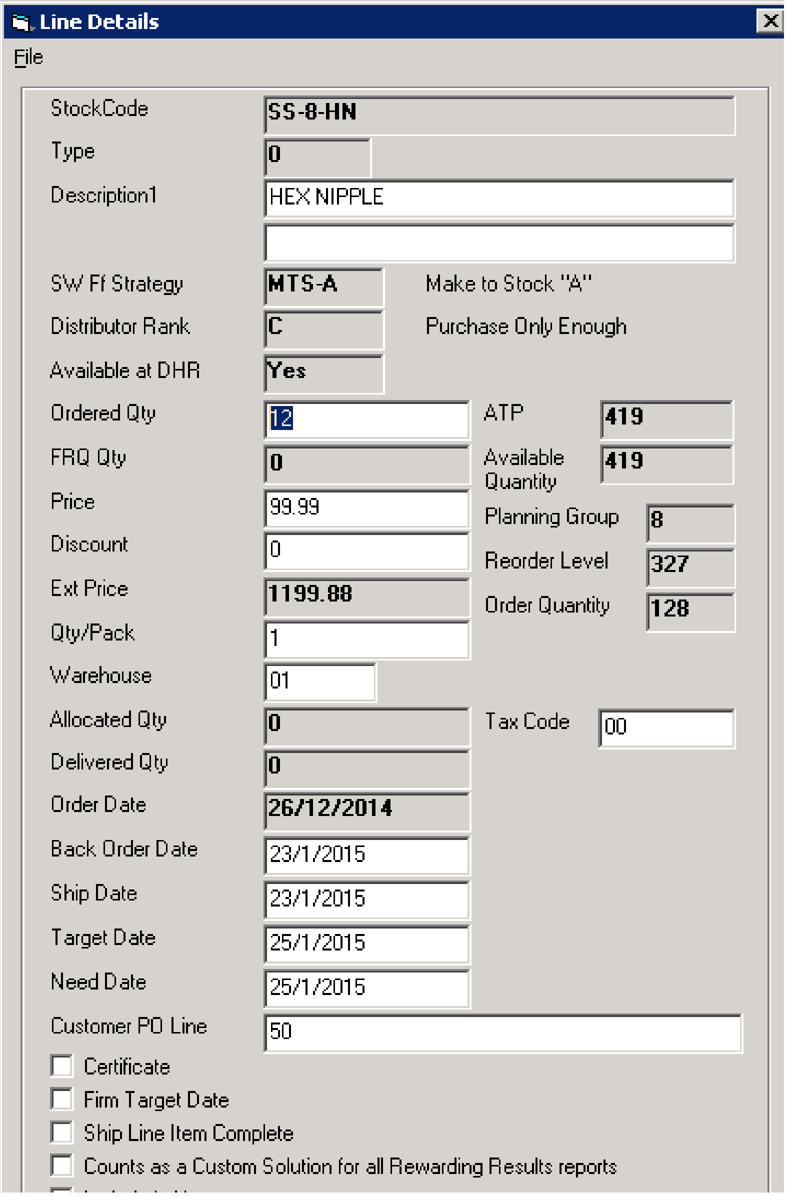
4.0 EDITING A LINE ITEM

From the above image, the quantity of the last item is wrong.

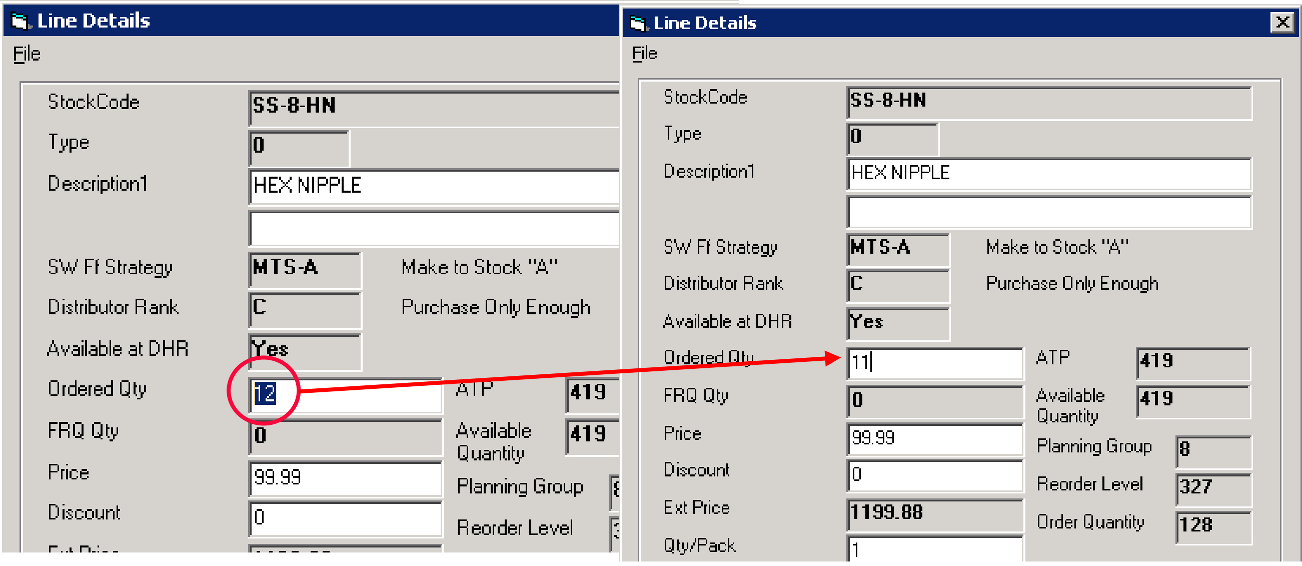
Line	Sub	StockCode	Description	WH	Quantity	Price	Disc	Tot	FRQ	Tax
10	0	SS-400-3	UNION TEE	01	10	99.99	0	999.90	0	0
20	0	SS-63TS8	BALL VALVE	01	2	99.99	0	199.98	0	0
30	0	SS-4C-1	CHECK VALVE	01	5	99.99	0	499.95	0	0
40	0	SS-4BHT-24	BRAIDED PTFE HOSE	01	4	99.99	0	399.96	0	0
50	0	SS-8-HN	HEX NIPPLE	01	12	99.99	0	1199.88	0	0

Steve only requested a quotation for 11 pieces of SS-8-HN.
Since the part number has already been keyed in, you may edit the line as follow:

4.1 Double-click on the line item. A window will appear.



4.2 Make the necessary changes and hit Ctrl+S to save the changes



5.0 RSC

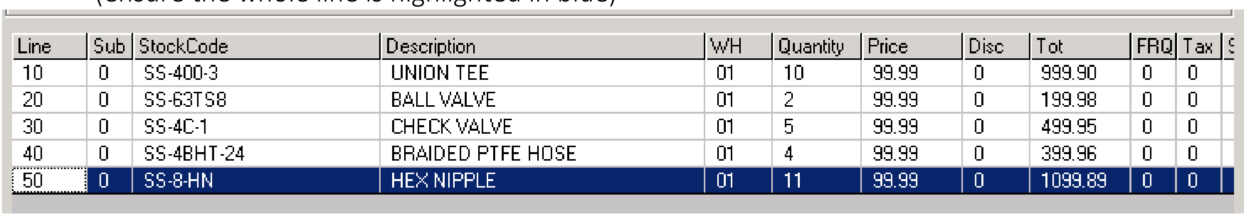
RSC stands for Regional Stock Check.
Sometimes, the part number (usually a regional item) you key in may be out of stock.
Such occurrence will be prompted by a new window – **ATP** window.
It will appear after you have keyed in the quantity of the part number.
It will prompt you on the parameter of the item, in which case, you need to click **Exit.**

After which, an RSC window will appear, indicating there is zero quantity of the item.
When this happens, you need to click **Yes** -> **OK**.
This will send a message to CENT (Central Swagelok, Cleveland), enquiring on how much stock is available for that particular part number.

⚠ JKRTA associates need to access the .12 server first to do an RSC on any item they are quoting.
Skip step 8.1 and read the next ⚠ box to proceed.

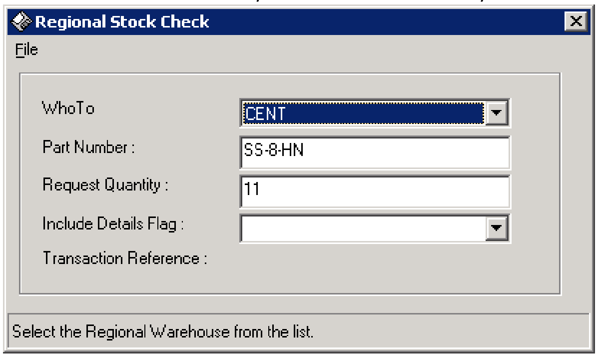
Another way you can check for the stock of a part number is by the following:

5.1 Click on the line of the part number you wish to enquire on (ensure the whole line is highlighted in blue)

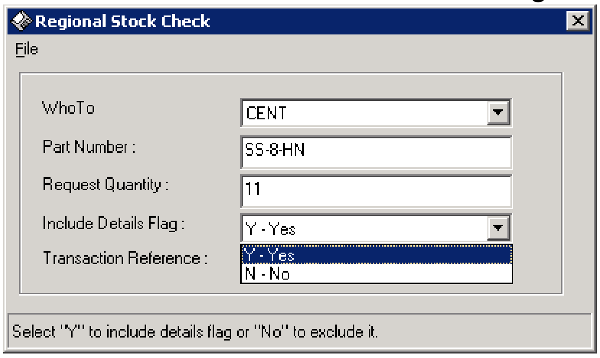


Line	Sub	StockCode	Description	WH	Quantity	Price	Disc	Tot	FRQ	Tax
10	0	SS-400-3	UNION TEE	01	10	99.99	0	999.90	0	0
20	0	SS-63TS8	BALL VALVE	01	2	99.99	0	199.98	0	0
30	0	SS-4C-1	CHECK VALVE	01	5	99.99	0	499.95	0	0
40	0	SS-4BHT-24	BRAIDED PTFE HOSE	01	4	99.99	0	399.96	0	0
50	0	SS-8-HN	HEX NIPPLE	01	11	99.99	0	1099.89	0	0

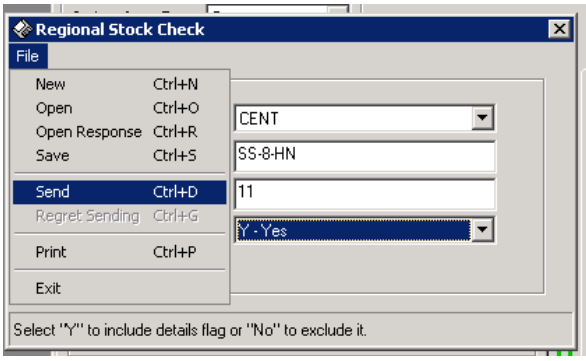
5.2 Hit Ctrl+R and a window will appear.
The necessary details will already be included.



5.3 Select **Y-Yes** under **Include Details Flag**:



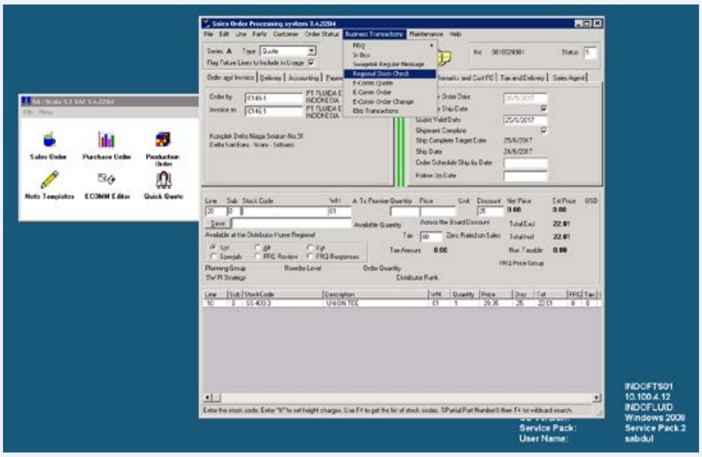
5.4 Click **File -> Send**.
You will be directed to the **RSC In box.**



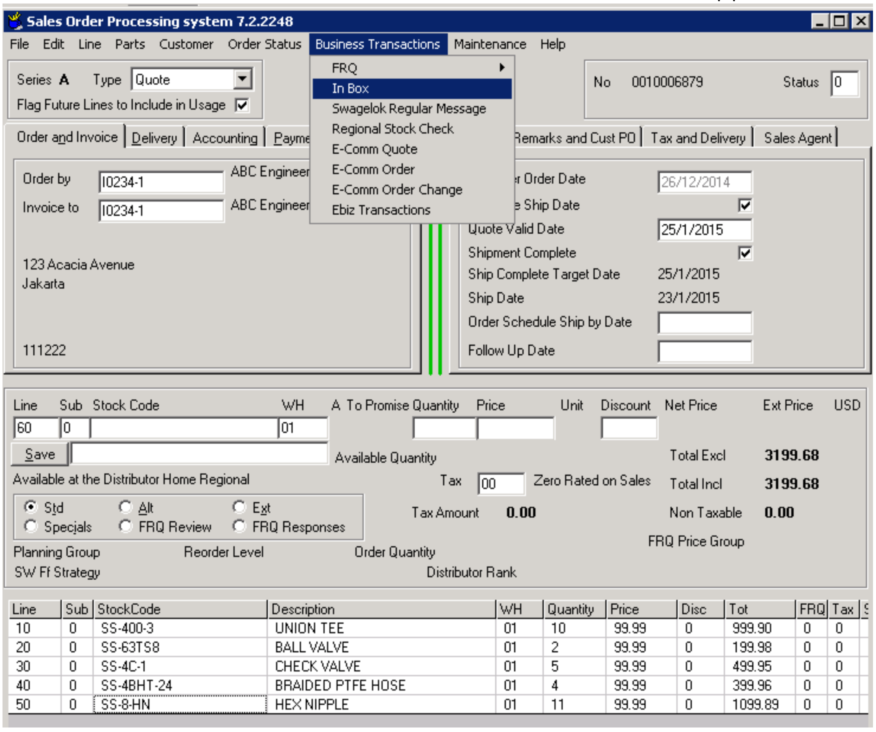
To read any notification sent by CENT on the part number you were enquiring from, simply:

⚠

1. In server .12, access **SAE**
2. Double-click **Sales Order**
3. Click **Business Transactions**
4. Click **Regional Stock Check**
5. Proceed to step 8.2

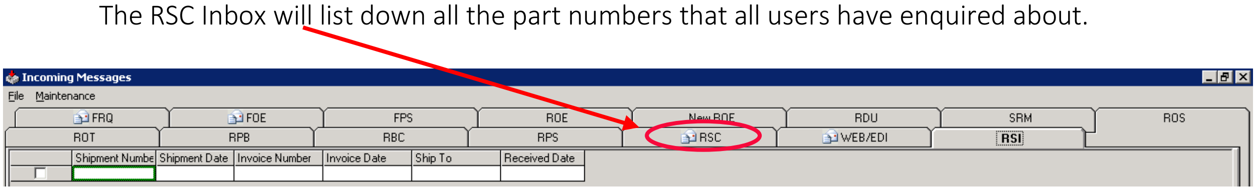


5.5 Click **Business Transactions -> In Box**. A window will appear.



5.6 Click on the **RSC** tab.

The RSC Inbox will list down all the part numbers that all users have enquired about.

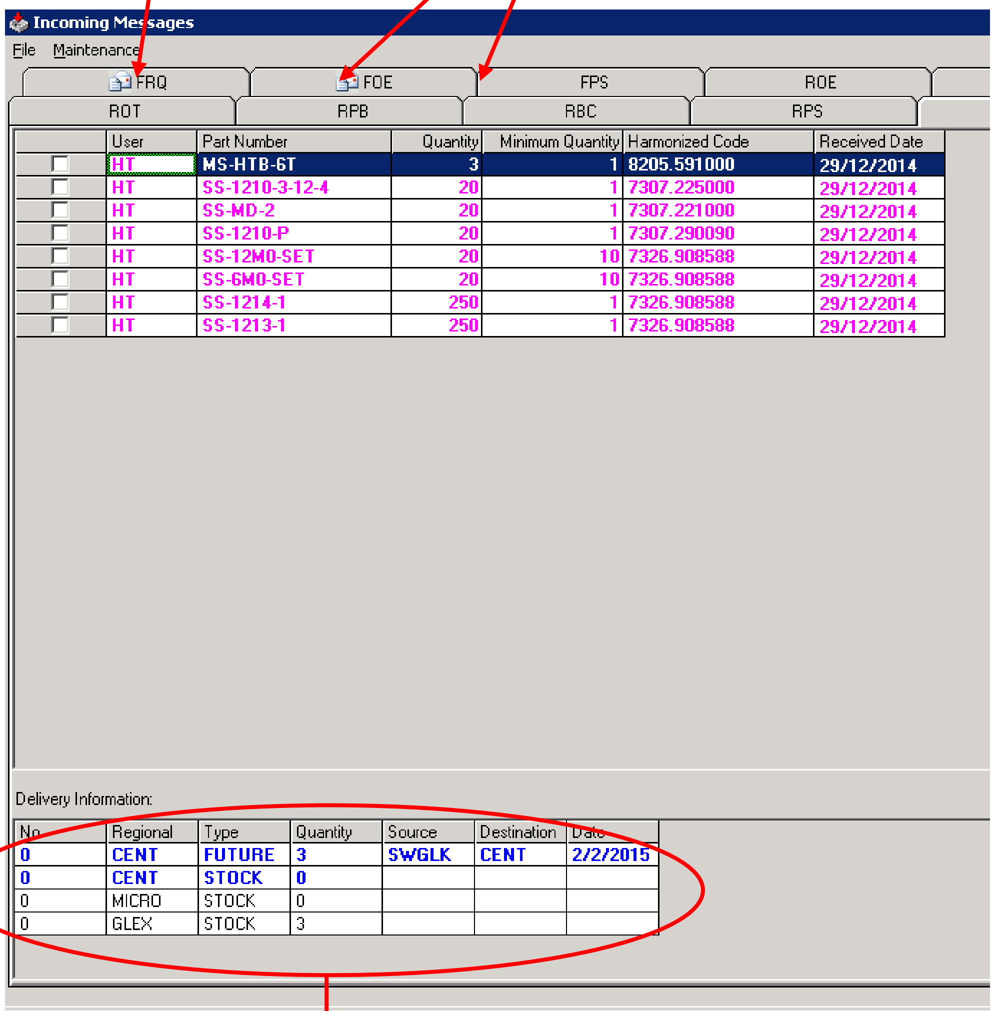


Private and Confidential. This document and information contained in it are the confidential property of Swagelok Indonesia. Neither may be copied, exhibited, or furnished to others in any form without the written consent of Swagelok Indonesia.

6.0 HOW THE RSC INBOX SHOULD BE READ

Initials of a CSR. In this example, HT stands for Heriyanto Tio.

The part number enquired, along with the quantity needed by INDOF.

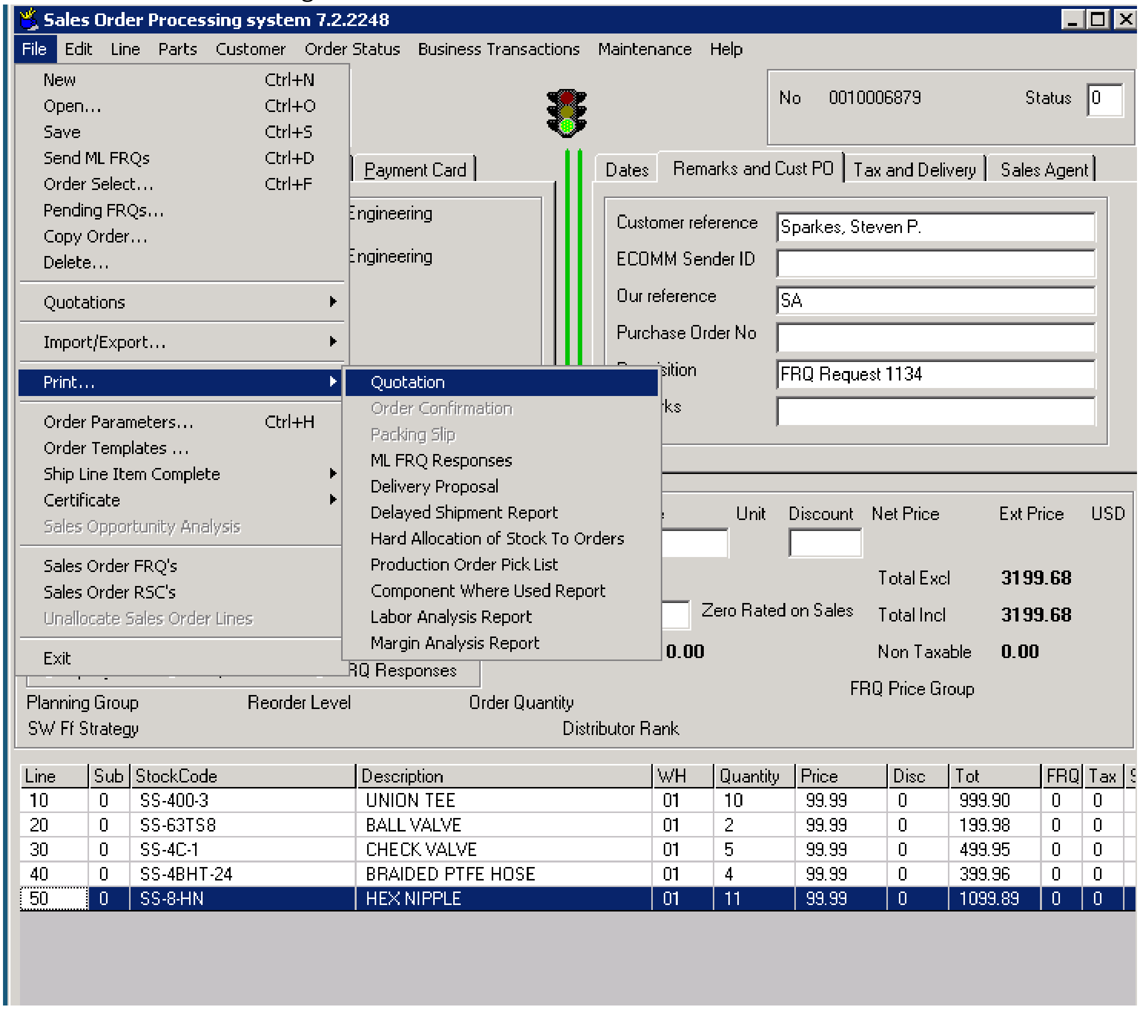


FUTURE: Quantity given next to it is the quantity the **Regional** will be getting in future
STOCK: Quantity given next to it is the quantity the **Regional** has in stock at that point of time
CONTACT: FLOWAN to be sent out

7.0 PRINTING A QUOTATION

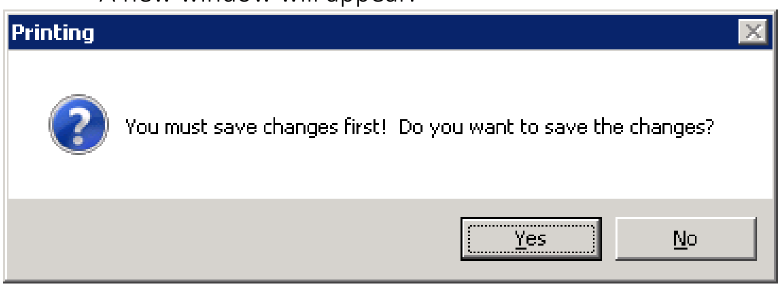
This step allows you to generate the quotation in PDF format so that you can send it to the customer.
This document contains all the necessary information for the customer.
The document features hyperlinks that connect the customer to details of the items they enquired about.
To attain the Quotation we just created in PDF format, continue with the following:

7.1 Click the following: **File** -> **Print** -> **Quotation**



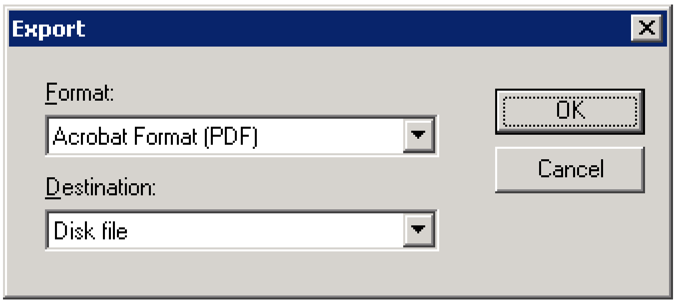
7.2 Click **Yes**.

A new window will appear.

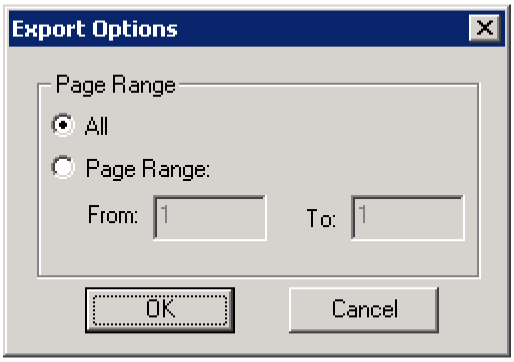


7.3 Click on the **Envelope Mail icon**.
A new window will appear.

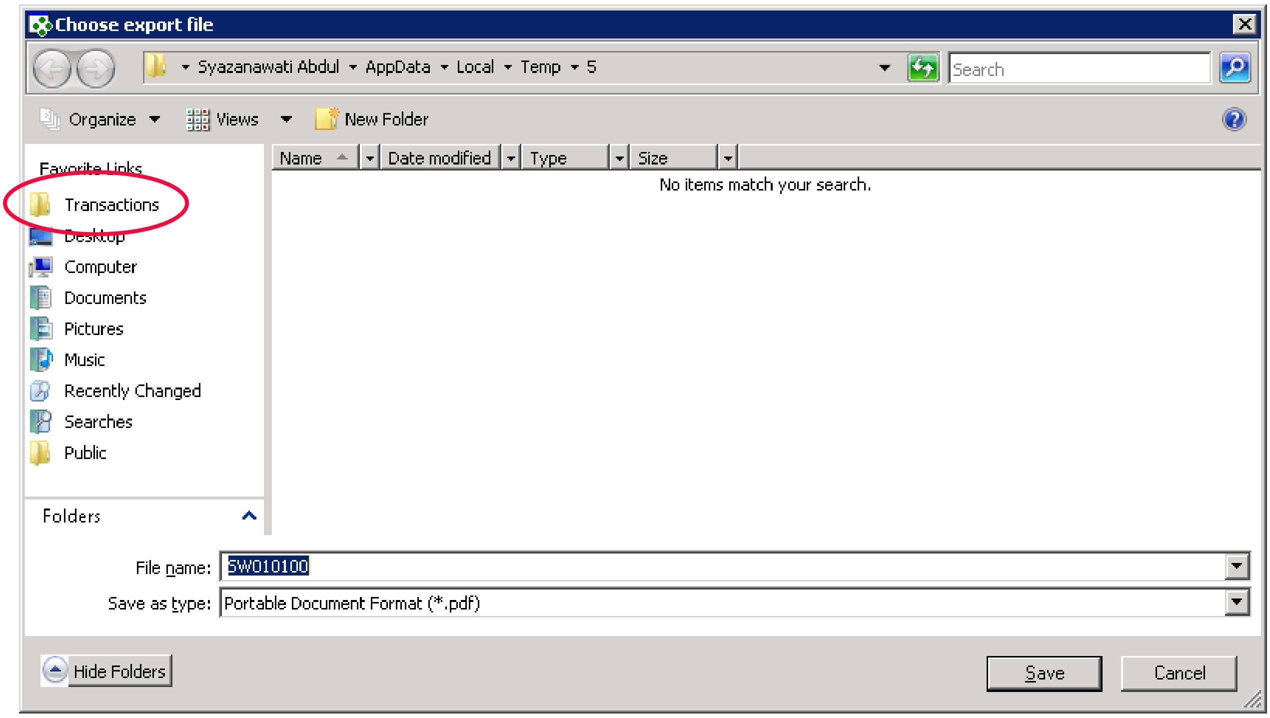
7.4 Select **Acrobat Format (PDF)** under **Format** and **Disk file** under **Destination.**
Click **OK.**



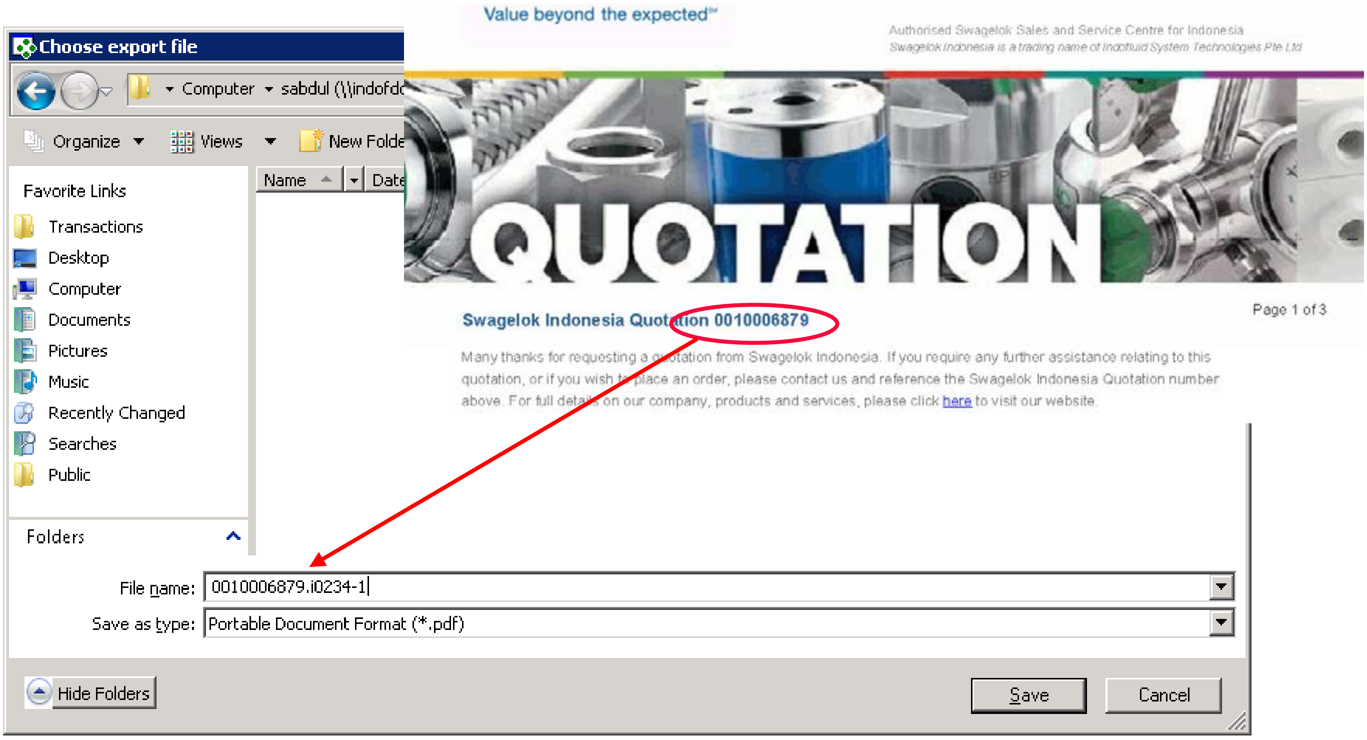
7.5 Select **All** and click **OK**



7.6 Click the **Transactions** folder

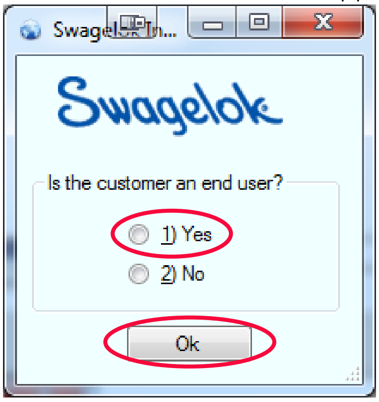


7.7 Save the file with the format: **SOP No(of the quote).Customer Code**.
In this example, it would be as follows:



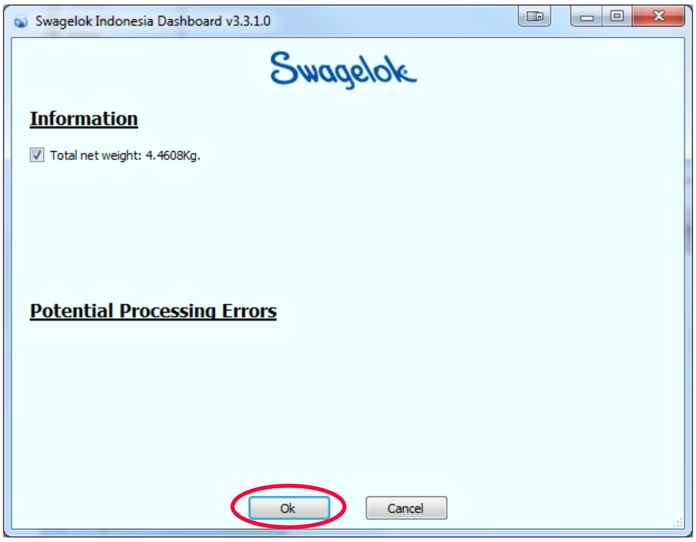
7.8 Select **1) Domestic** and click **Ok**

7.9 Select **1) Yes** and click **Ok.**
A new window will appear.

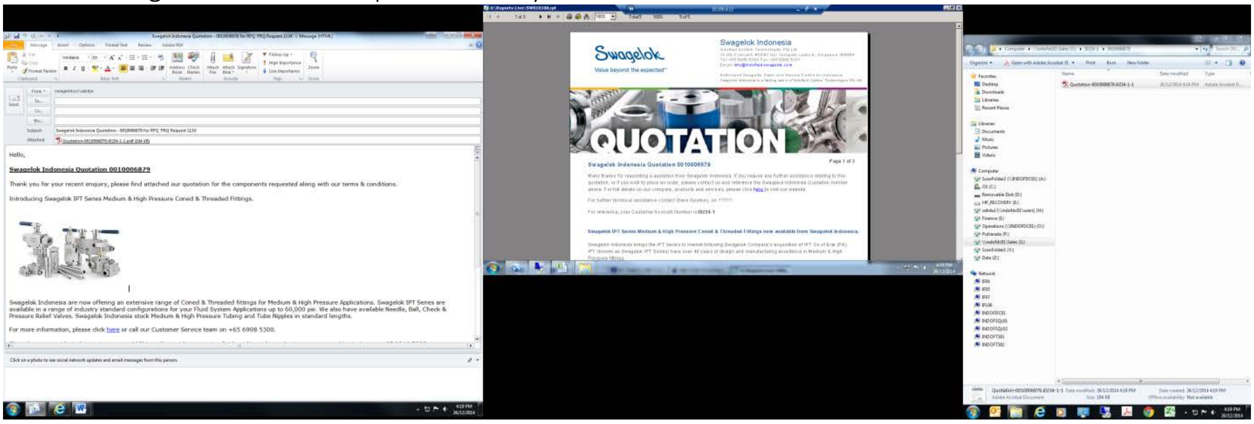


⚠
Select **No** if the customer is a Supply House.
Please refer to point 12.0 to differentiate a supply house from an end user.

7.10 Ensure the **Total net weight: 4.4608Kg** is checked.
Click **Ok**.



The following windows will be spread across your 3 monitors:



Quotation e-mail | **Quotation PDF** (shown in server) | Customer's SOP Folder **0010006879**

When making a quotation with Swagelok's internal system, the Quotation will automatically be saved in a folder bearing the SOP no., under the Customer's folder.

8.0 ARCHIVING & E-MAILING A QUOTATION

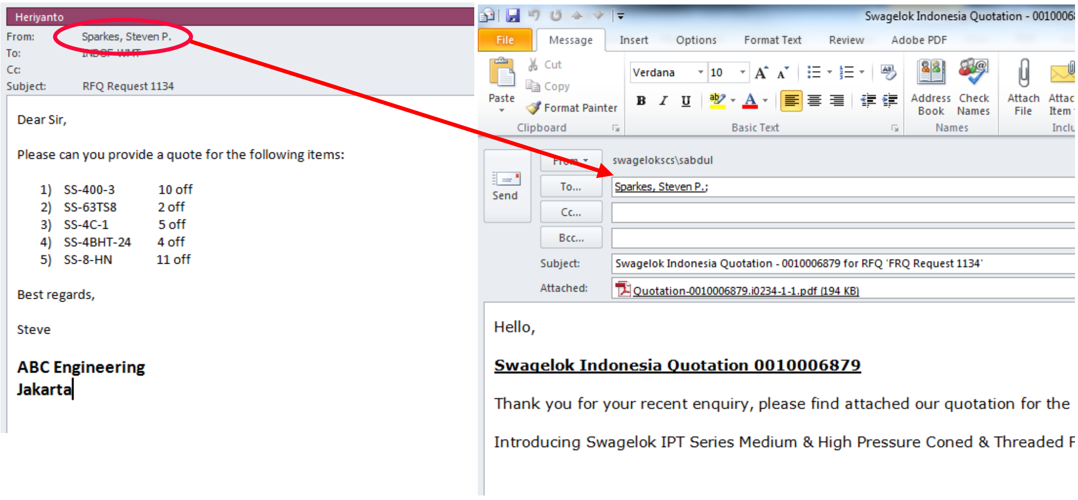
Documenting is an essential practice to be upheld within Swagelok Indonesia.
It serves well as a form of communication amongst all associates.
Associates can refer to the e-mails, PDF files and etc. in regards to that particular customer.

When making a quotation, you need to understand the importance of archiving important e-mails sent to or received from customer.
In this example, we need to ensure the following documents are in the SOP folder **0010006879**:

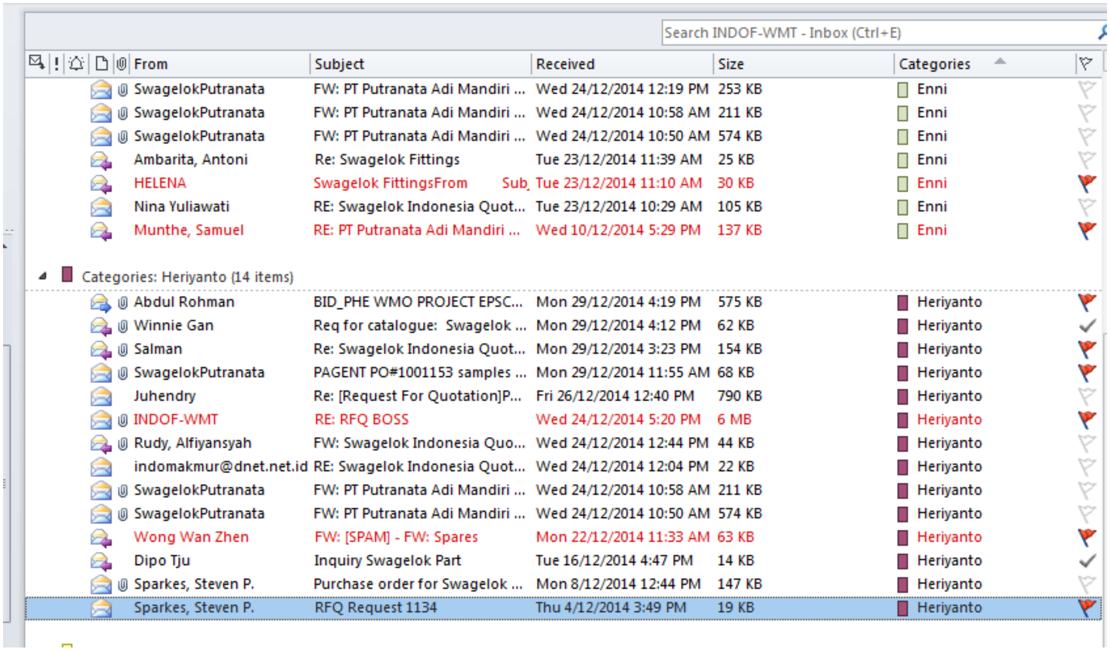
1. E-mail Enquiry from Customer
2. Quotation E-mail sent to Customer
3. Quotation PDF file
4. RSC
5. FRQ
6. PN provided by Sales
7. Any other communications

Before archiving the documents above, you need to e-mail the quotation to the customer.
Proceed as follows:

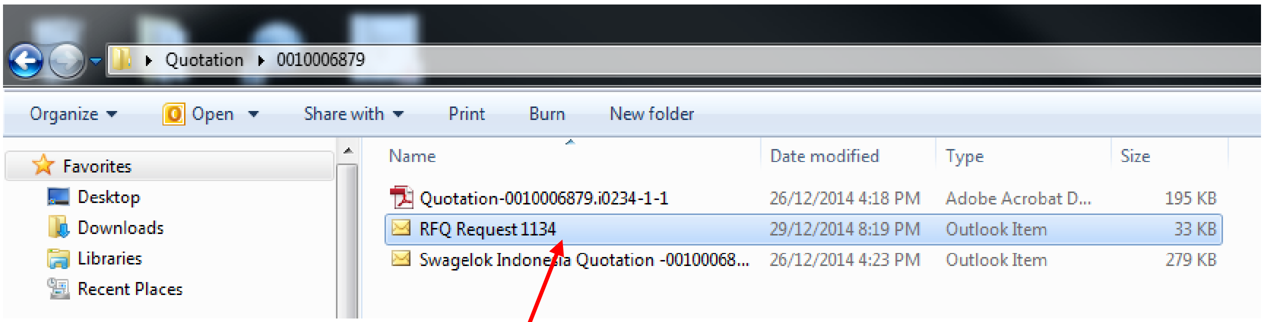
8.1 Drag the customer's e-mail address (from the Customer's Enquiry) to the **To...** box (in the Quotation e-mail). Drag the customer's enquiry e-mail to the e-mail too, so it becomes an attachment in the e-mail.



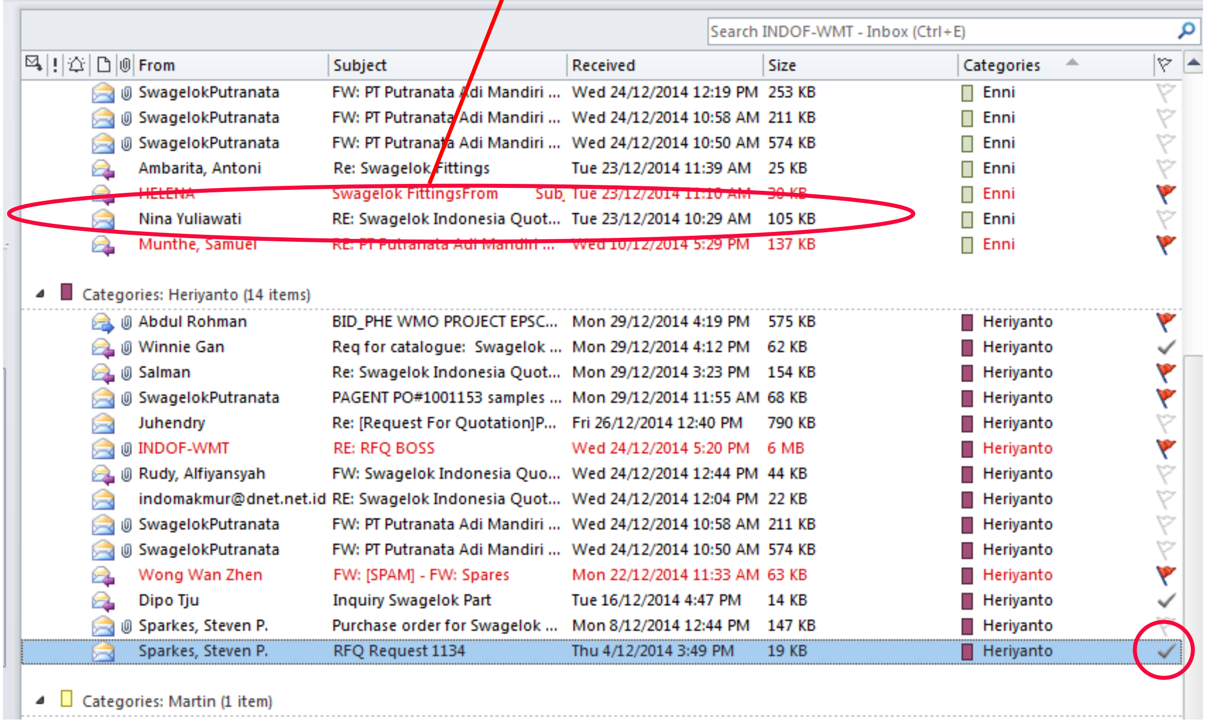
8.2 Type any additional message within the e-mail, if necessary, and hit **Send**. The sent e-mail will automatically be saved in the SOP folder.



8.3 Drag the customer's e-mail enquiry into the same SOP folder



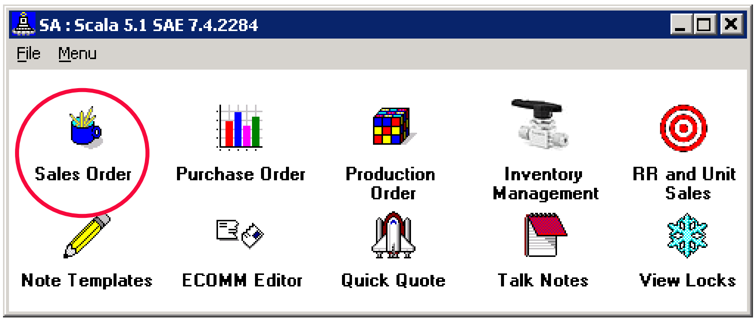
8.4 **Tick the e-mail enquiry in the WMT** to indicate that that customer's enquiry has been answered



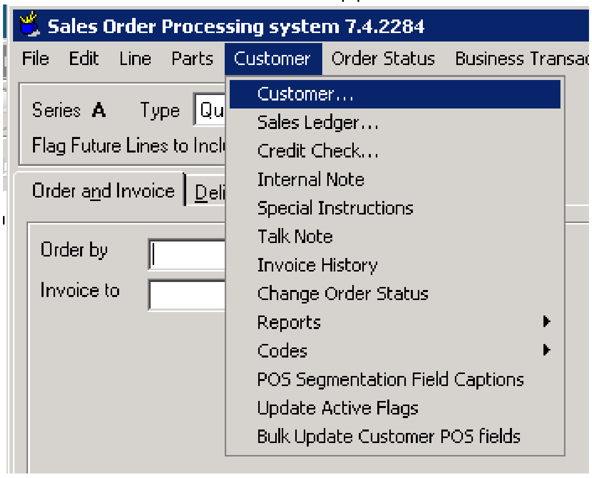
9.0 DETERMINING THE TYPE OF CUSTOMER

Before quoting a customer, it is good to check if the customer is an end-user or a supply house.
To know which is which, you need to check on the customer's price list.
Generally, supply houses will be given different discounts as compared to end-users.
If customer's price list is 01, means it is an end-user customer
If customer's price list is 03, mean it is a supply house.

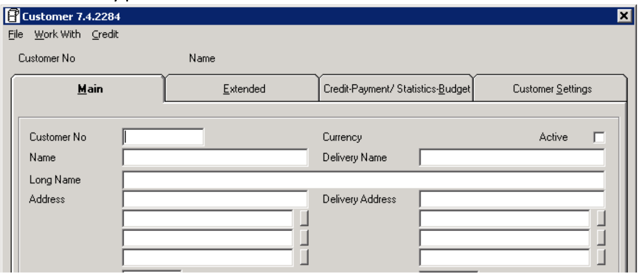
9.1 Click **Sales Order** in SAE



9.2 Click the tab **Customer** then **Customer**.
A new window will appear.

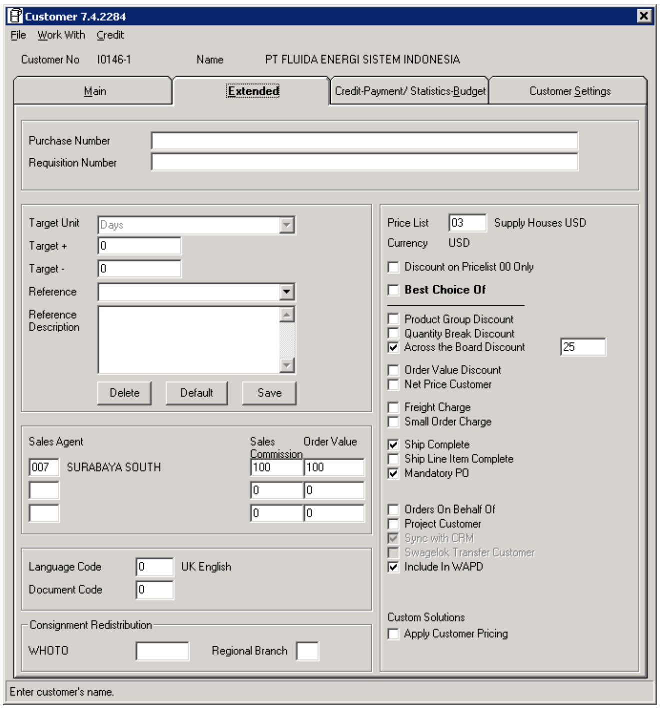


9.3 Type the customer account code in the blank next to **Customer No.**

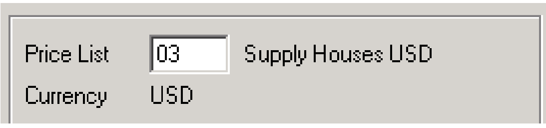


Key in **?.(Customer's short name)** if you are unsure of the customer code.
E.g. ?.fluida

9.4 Click the **Extended** tab



9.5 Refer to the **Price List** to determine if it is a supply house or end-user

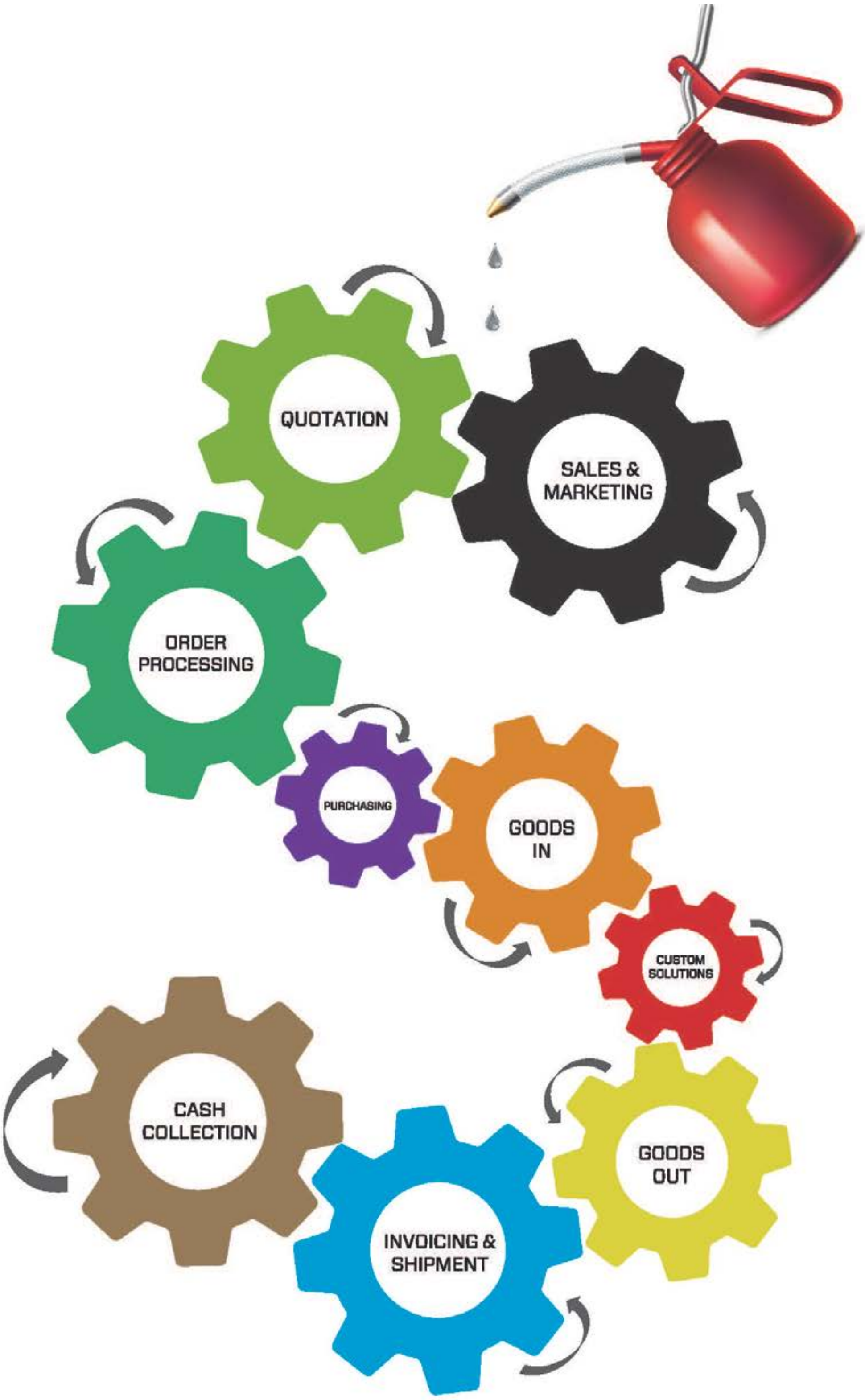


10.0 APPENDIX #1

Abbreviation or Acronym	What it Stands For	What it Means
CS	Customs Solutions	
CSA	Customer Services Associate	Associate who works in the Customer Services Department in INDOF or JKRTA
CSR	Customer Services Representative	The company department responsible for Customer Services within the operations
JKRTA	Putranata Agent	Another term for PT Putranata Adi Mandiri
RSC	Regional Stock Check	A step done to know how many stock available for a regional (common) item
SwagelokPutranata	PT Putranata Adi Mandiri's Workflow Management Tool	This is the WMT that is used by PT Putranata Adi Mandiri
WMT	Workflow Management Tool	This is the shared Outlook Inbox that is used to manage customer business and opportunities
FRQ	Factory Request Quote	

11.0 APPENDIX #2 – SHORTCUTS WITHIN SAE

Shortcut	What it Prompts	When it is used
Ctrl + B	Window to key in Special Note(s) of a line item	(Only for line items) When the line item is highlighted in blue and you wish to add some Special Note(s) for it
Ctrl + I(Capital i)	Window to key in Internal Note(s) of a line item	(Only for line items) When the line item is highlighted in blue and you wish to add some Internal Note(s) for it
Ctrl + R	Window to send enquiry to CENT for stock check on a regional item	When regional item is out of stock and you need to check how many is available in order to quote customer the delivery time for that item
Ctrl + S	N/A	When any changes are made in SAE



Document ends here.