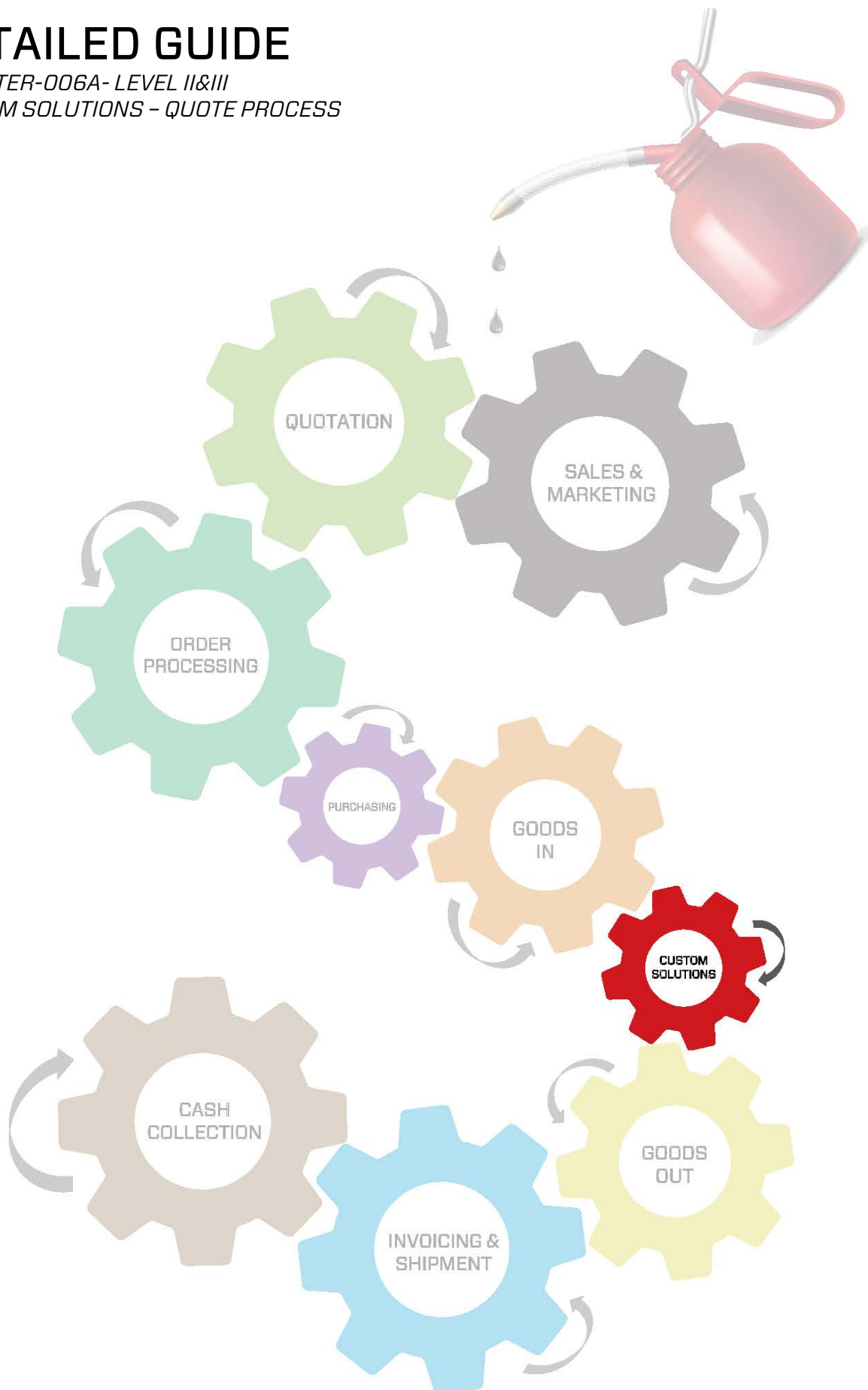


DETAILED GUIDE

SI-DG-TER-006A- LEVEL II&III

CUSTOM SOLUTIONS - QUOTE PROCESS



THE ENGINE ROOM



SI-DG-TER-006A

21st September 2017

Version 1.0

Swagelok®

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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.

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Revision Change Log (changes are denoted with **I** s)

Revision	Date	Revision to	Author

Document Approved by: Steven Sparkes

Date: 21/09/17

Signature: 

	CS QUOTE PROCESS - LEVEL II&III	DCN #SI-DG-TER-006A REVISION LEVEL 1.0 DATE OF REVISION 21/09/17 PAGE 1 OF 38
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SCOPE

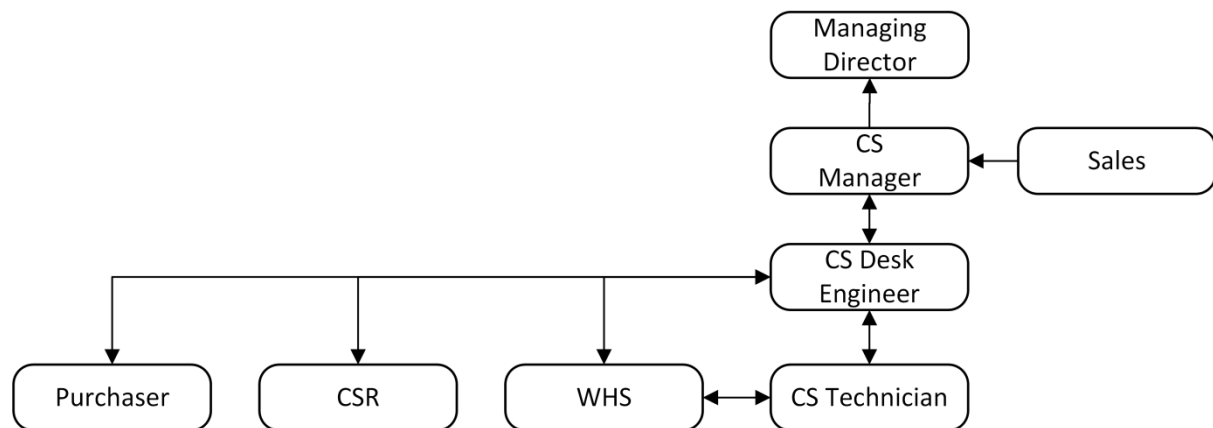
This document defines the planned and controlled activities needed to work with customers for Custom Solutions (CS) assemblies and is limited to identifying CS opportunities, verifying internal capabilities and our ability to fulfil in line with policies, quoting and processing orders.

LEVEL TYPE – NAME		DEFINITION			EXAMPLES		
Level II – Simple System		A set of components that require a Product & Instrumental Drawing (P&ID) or CAD drawing to define orientation or layout			Assemblies with Direction-Specific Flow Paths and High Energy Non-Swagelok Products.		
Level III – Complex System		In addition to Level II requirements, Level III Systems can be defined as systems that include any or all of the following: Close tolerances, typically defined as less than +/- .050”, Specific quality requirements called out in customer purchase order, Leak testing other than standard Snoop bubble test, Functional testing, Electrical, pneumatic, or hydraulic components (excludes ABVAs)			Large Panels, Complex Assemblies, Single system >USD 50K and Third-party Services.		
LEVEL	SCALA QUOTE	USE SCALA LONG DESCRIPTION	P&ID/VISIO SKETCH	SOLIDWORKS DRAWING	FULL WORD DOC QUOTE	OFF-LINE EXCEL COSTING	TARIFF CODE
II							TBC
III							TBC

RESPONSIBILITIES

- The Sales Associates (Internal & External) and Customer Service Representatives (CSR) identify a CS Opportunity and gather the customer's requirements.
- The CS Manager conducts the feasibility reviews and determines internal capabilities in order to meet the customer's requirements.
- The CS Manager obtains all the necessary approvals from Swagelok in accordance with the Swagelok Custom Solutions & Product Modification Policy.
- The CS Manager liaises with the Purchaser to purchase all items, including Third Party items from our Approved Vendor List.
- The CS Desk Engineer ensure the technical aspects of the order are met such as qualifying parts for quotation, gathering the resources to fulfil orders, preparing ProFITS for approval and other tasks delegated by the CS Manager.
- The CS Associates (i.e. Desk Engineer and Technician) build the assemblies and report to the CS Manager.
- Any matter requiring the Managing Director's approval will be reported to him.
- The chain of communication is illustrated below:

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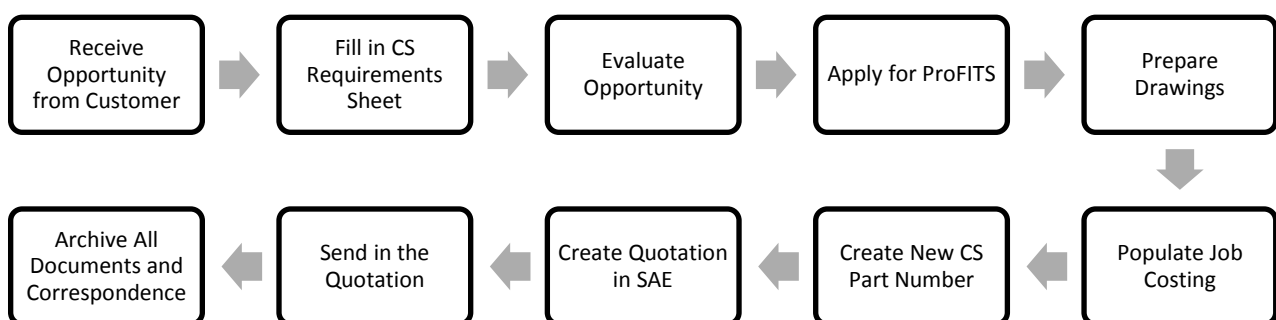
OBJECTIVE(S)

- To timely propose to customer a condition of sale that meets their requirements
- To evaluate product configurations that matches the design and specs as defined by the clients and to grade them to the appropriate level
- To ensure the quotation is compliant to our service level and scope
- To ensure all product input requirements are correctly identified so we can seek Swagelok's approval and equip ourselves fully to achieve all customer's requirements
- To provide the proposal(s) that would potentially lead to the conversion of the quotation within our target metrics
- To provide the proposal(s) that would potentially lead to the conversion of the quotation within our target metrics

SWAGELOK DISTRIBUTOR POLICIES

- Swagelok Custom Solutions & Product Modification Policy
- Distributor Sourcing of Non-Swagelok Products Policy

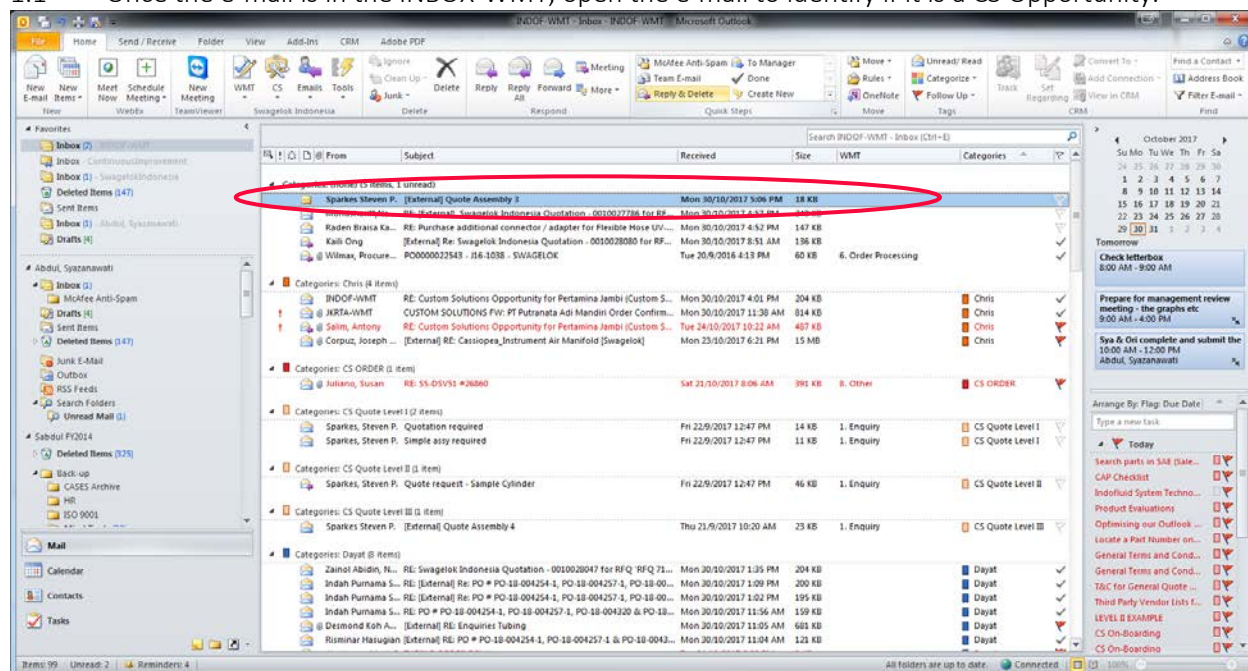
PROCESS FLOW



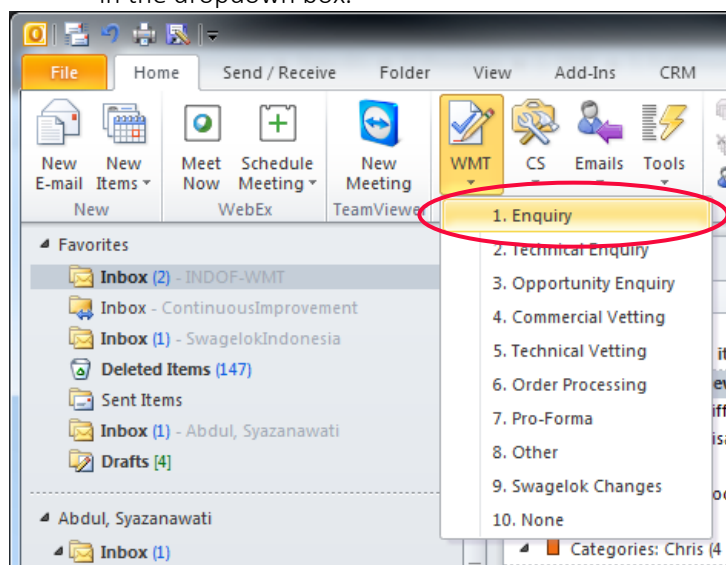
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1.0 RECEIVE OPPORTUNITY FROM CUSTOMER

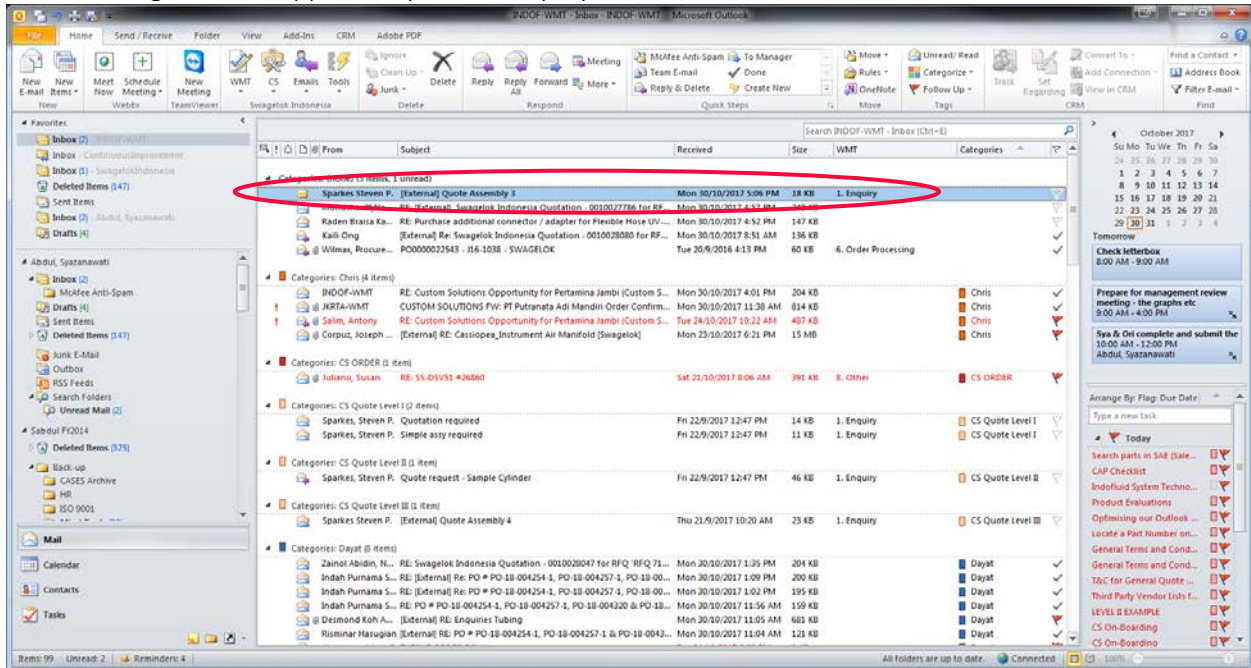
1.1 Once the e-mail is in the INBOX-WMT, open the e-mail to identify if it is a CS Opportunity.



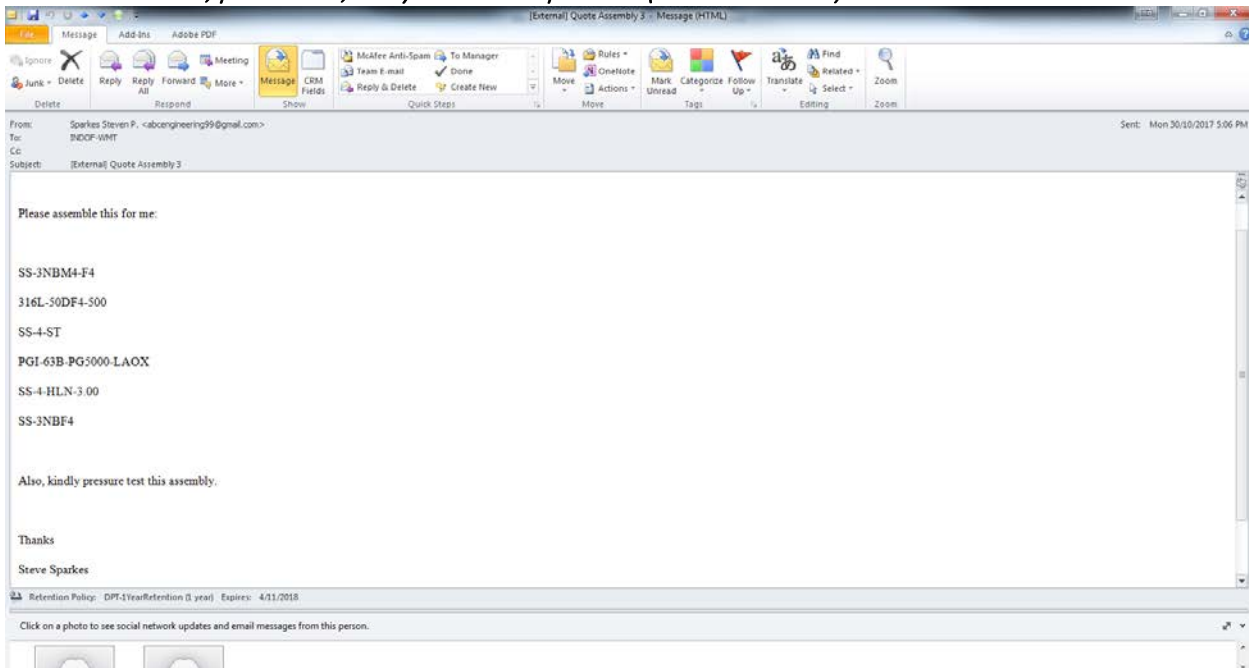
1.2 Under the **Swagelok Indonesia** ribbon, click on **WMT** and select the correct type of Opportunity listed in the dropdown box.



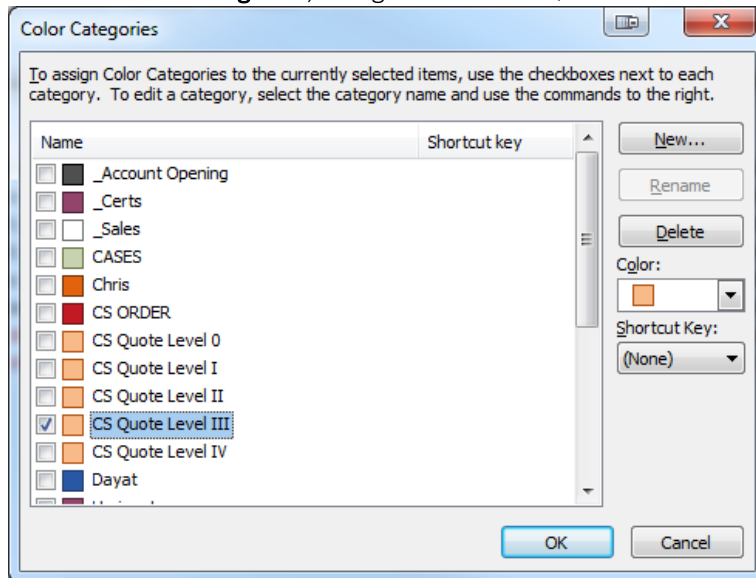
1.3 Categorize the Opportunity under Enquiry



- 1.4 Open the e-mail and identify if the potential assembly falls under Assembly Level II or III.
- Assembly Level II** is a set of components that require a Product & Instrumental Drawing (P&ID) or CAD drawing to define orientation or layout.
- Level III Systems** can be defined as systems that include any or all of the following:
Close tolerances, typically defined as less than $\pm .050"$, Specific quality requirements called out in customer purchase order, Leak testing other than standard Snoop bubble test, Functional testing, Electrical, pneumatic, or hydraulic components (excludes ABVAs)



1.5 Under **Categories**, categorize it as **CS Quote Level II or III**: - in this example, it is Level III



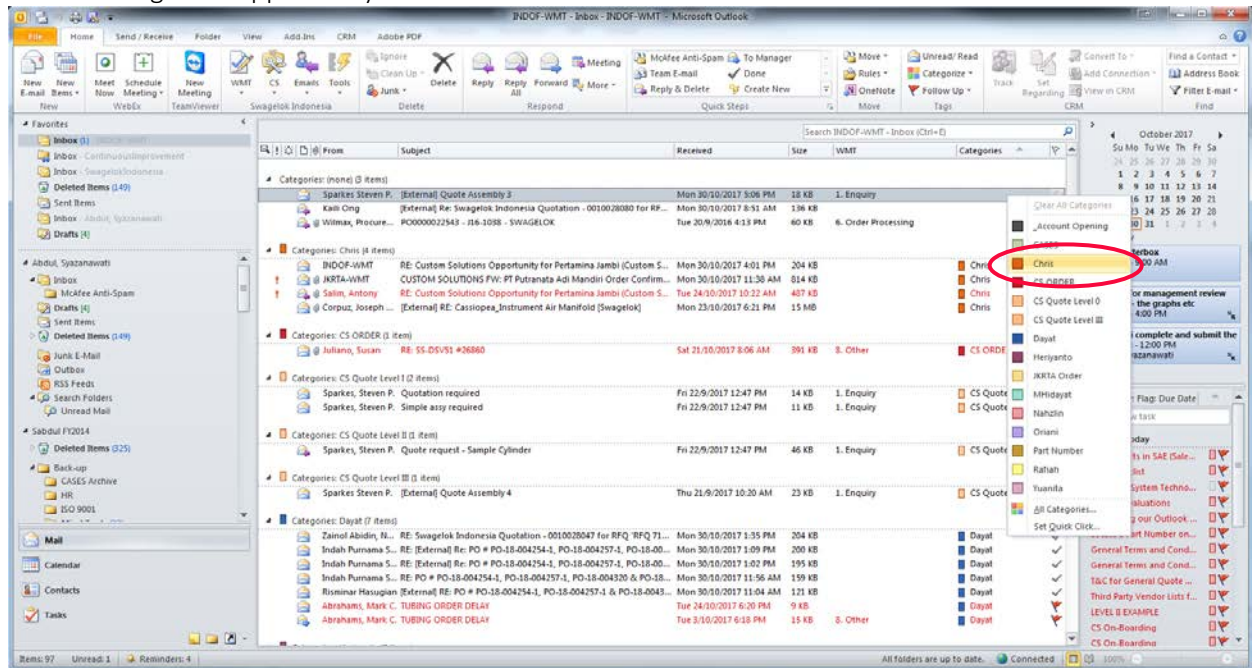
Assign the perceived CS level for the enquiry.
If the opportunity is assigned to the wrong level, the
CS Manager can reassign it.

1.6 Refer to the **Associate Skills Matrix**. Click on the image above for the latest Skills Matrix.

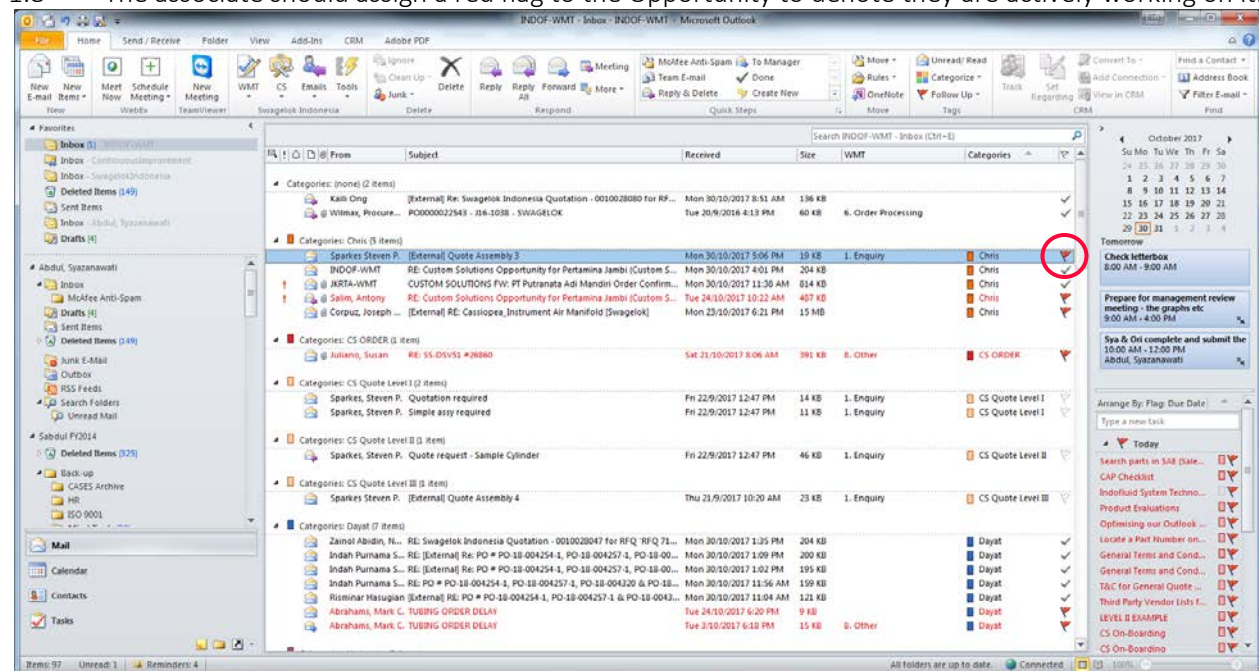
ASSOCIATE SKILLS MATRIX - QUOTE

	Antony Salim	Nahzin Shariff	Yuanita Hantoro	Syazanawati	Oriani	Chris Dixon	Heriyanto	Hidayat Zainol	Monn	Nicole Draper	Fiesta Saraswati	Hendra Sie	Irfan Nofa	Joel Sallagan	Kevin Fajri	Ribalai Wau	Rifky Ballas	Rizkiah	Sahat Panjaitan	Yuliani Kasman
Primary																				
Secondary																				
Backup																				
☒ Trained																				
Generate a Quotation in SAE																				
LEVEL 0	X	X				X	X													
LEVEL I	X	X				X	X													
LEVEL II	X					X														
LEVEL III						X														
LEVEL IV						X														

1.7 Assign the Opportunity to the correct associate.



1.8 The associate should assign a red flag to the Opportunity to denote they are actively working on it.



2.0 FILL IN CS REQUIREMENTS SHEET

- 2.1 Ensure that a completed CS Requirements sheet in the CS Opportunity Workbook (DCN# SI-FT-TER-006A) is attached to the e-mail enquiry.
Make sure all information in the CS Requirements is provided.

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CS REQUIREMENTS (Level II to IV)

DCN #SI-FT-TER-006B
REVISION LEVEL 1.0
DATE OF REVISION
31/03/17
PAGE 1 OF 1

Customer & Opportunity Details		BOM - Swagelok Parts		BOM - 3rd Party	
Item	Part Number	Qty	Item	Part Number	Qty
1			1		
2			2		
3			3		
4			4		
5			5		
6			6		
7			7		
8			8		
9			9		
10			10		
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25					
26					
27					
28					
29					
30					

Assembly & Product Requirement	
Quantity of Assemblies	
Material (Standard is 316 st/st)	
Media Type	
Oxygen Concentration (if applicable)	
Max Working Pressure - PSI	
Max Temperature - Media	
Temperature - Ambient	
Electrical Components	
3rd Party On-Site Installation	
Standard Pressure Test Required?	
Please Detail Other Testing / Certification	
Drawing	

ONLY FOR CS MANAGER	
Feasibility Assessment	
Outcome:	Not yet assessed
ProFITS Requirement	
Outcome:	Level Assembly Assessment
Outcome:	Not yet assessed

Notes on 3rd Party Products
1. All 3rd Party products are to be specified by Customer only.
2. Wherever possible, Swagelok components should be substituted.
3. Please confirm if parts are Free Issued from client or have to be sourced.
4. Customer has to be made aware that the Swagelok Lifetime Warranty does NOT apply to 3rd Party products.

- 2.2 Should there be any missing information, return the worksheet to the sales representative or assist them to get it completed.

3.0 EVALUATE OPPORTUNITY

The assessments to be conducted to evaluate the Opportunity are: CS Requirements, ProFITS Requirements and Feasibility Assessment.

- 3.1 The CSM then conducts a ProFITS Requirement assessment to know which considerations require his team to get ProFITS.



PROFITS REQUIREMENT TABLE

Please answer the following questions Y or N to determine if ProFITS approval is required								
Is my distributorship SQS qualified.	Is the system pressure over 260barg or 3750psig?	Is the test pressure over 10 barg or 150psig?	Does the assembly use any Competitive Products, whether purchased by the distributor or free issued from the customer?	The customer specifies compliance or certifications to external standards that are not part of the distributor quality system?	Is the system for Oxygen use that has >23.5% concentration of oxygen?	Is the system media considered hazardous (HMIS rating 3 or 4) or GHS rating 'Dangerous' for any one of the categories of health, flammability, or physical?	Is the end destination Out of territory?	Is there any electrical work required?
ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N	ANSWER Y or N
If ANY of the ABOVE are indicated in RED then you MUST submit a ProFITS request via. iSwagelok prior to requesting a quotation								

- 3.2 If ProFITS are required, do one by referring to [section 4.0](#) (shown as an example)
- 3.3 If the Feasibility Assessment says **Proceed**, the CSM enters it in the **CS Management Tool**.

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If it says **Decline**, contact the customer and inform them we cannot quote and provide them with the reasons.

FEASIBILITY ASSESSMENT			
SCOPE: This document is set up as a guideline for the Custom Solutions (CS) Manager to assess the feasibility of a customer's CS opportunity. REVIEW FEASIBILITY: The following list (not intended to be inclusive) identifies major questions that should be considered in performing a feasibility assessment. This information should be used as a basis for analyzing your ability to meet all the specified requirements.			
NO.	CONSIDERATION	OPTION	REMARKS
1.0	Requirements specified by the customer, including the requirements for delivery and post-delivery activities		
1.1	Is product adequately defined (Assembly & Product Requirement in the CS FRQ Check Sheet) to enable feasibility evaluation?		
1.2	Is statistical process control required on the product?		
1.3	Have Contract or order requirements differing from those previously expressed been resolved?		
2.0	Requirements not stated by the customer but necessary for specified or intended use, where know		
2.1	Is there enough information present to be able to produce this product?		
2.2	Can you meet all specified requirements at the projected volume levels? Adequacy of capacity?		
2.3	Are there applicable statutory / regulatory requirements?		
3.0	Any additional requirements determined by us		
3.1	Does certification need to be sent back to the customer?		
3.2	Is there adequate controls/processes in place to handle, trace and package the product?		
3.3	Is a record system in place to ensure traceability?		
3.4	Are there Country of Origin requirements?		
4.0	Our ability (capabilities) to meet the defined requirements		
4.1	Are we trained/certified?		
4.2	Do you have the appropriate equipment (testing/welding) and processes (drawings/procedures) needed?		
4.3	Can you meet the Engineering Specifications and testing requirements as specified?		
4.4	Can product be manufactured to tolerances specified on drawing?		
4.5	Are suppliers identified and their capabilities known?		
4.6	Do you have the material (components) needed?		
4.7	Is there adequate capacity to produce product (physical room/time)?		
4.8	Are there special cleaning requirements (SC-01/SC-11) specified by the customer and can you meet them?		
5.0	Determine and implement effective arrangements for communicating with customers product information, enquiries, contracts or order handling, including amendments		
5.1	Does the design allow the use of efficient material handling techniques?		
5.2	Are the shipping and freight requirements addressed?		
5.3	Is there a system to send the proper paperwork to the customer? (i.e. signed drawing/contract, certification)		
6.0	Is it Feasible to build the assembly?	Not yet assessed	

3.4 For any assembly that is either not feasible to be built or rejected by Swagelok, record the enquiry as a rejected enquiry in the **CS Management Tool** excel book.

3.5 After the associate finalizes the CS Opportunity Workbook (sections 1-3) and sends to the CSM / approver for the latter to approve it – the CSM does the final approval.

4.0 APPLY FOR PROFITS

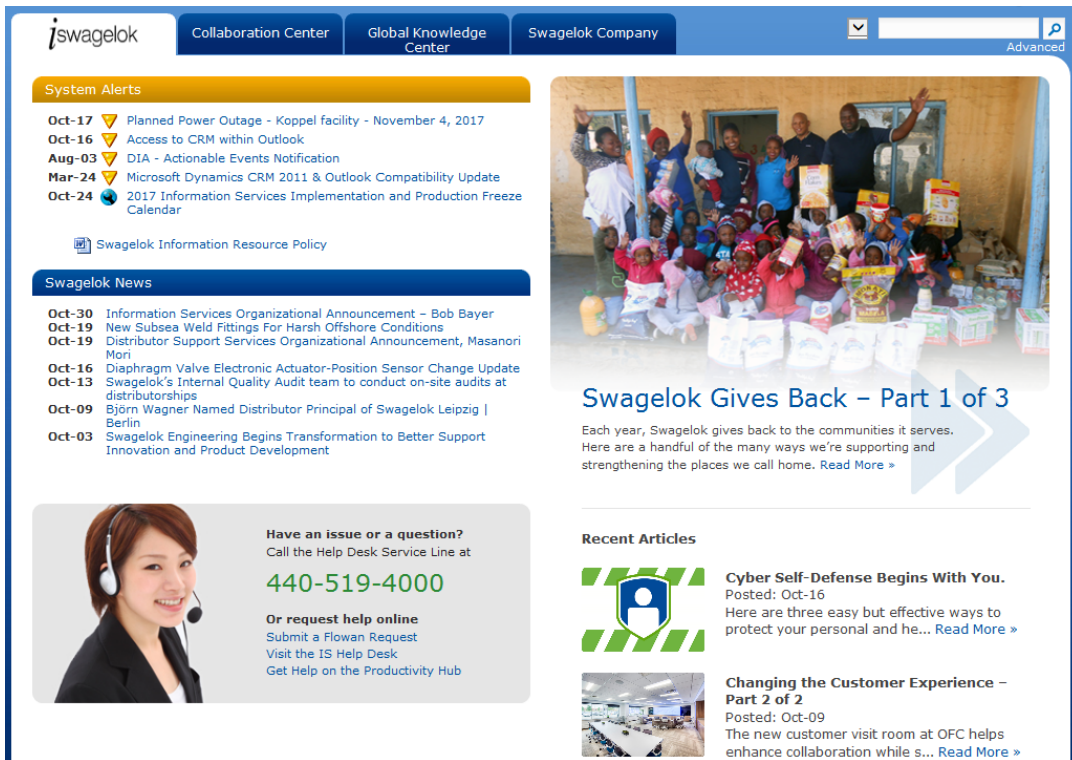
Only those granted access to apply ProFITS are able to apply one.

If you have the authority to apply ProFITS, follow the general steps below.

Contents vary from one type of Custom Solutions to another.

4.1 Log on to iswagelok.

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System Alerts

- Oct-17 Planned Power Outage - Koppel facility - November 4, 2017
- Oct-16 Access to CRM within Outlook
- Aug-03 DIA - Actionable Events Notification
- Mar-24 Microsoft Dynamics CRM 2011 & Outlook Compatibility Update
- Oct-24 2017 Information Services Implementation and Production Freeze Calendar

Swagelok News

- Oct-30 Information Services Organizational Announcement - Bob Bayer
- Oct-19 New Subsea Weld Fittings For Harsh Offshore Conditions
- Oct-19 Distributor Support Services Organizational Announcement, Masanori Mori
- Oct-16 Diaphragm Valve Electronic Actuator-Position Sensor Change Update
- Oct-13 Swagelok's Internal Quality Audit team to conduct on-site audits at distributorships
- Oct-09 Björn Wagner Named Distributor Principal of Swagelok Leipzig | Berlin
- Oct-03 Swagelok Engineering Begins Transformation to Better Support Innovation and Product Development

Swagelok Gives Back - Part 1 of 3

Each year, Swagelok gives back to the communities it serves. Here are a handful of the many ways we're supporting and strengthening the places we call home. [Read More »](#)

Recent Articles

Cyber Self-Defense Begins With You.
Posted: Oct-16
Here are three easy but effective ways to protect your personal and he... [Read More »](#)

Changing the Customer Experience - Part 2 of 2
Posted: Oct-09
The new customer visit room at OFC helps enhance collaboration while s... [Read More »](#)

4.2 Click the tab **Global Knowledge Center**.



Global Knowledge Center

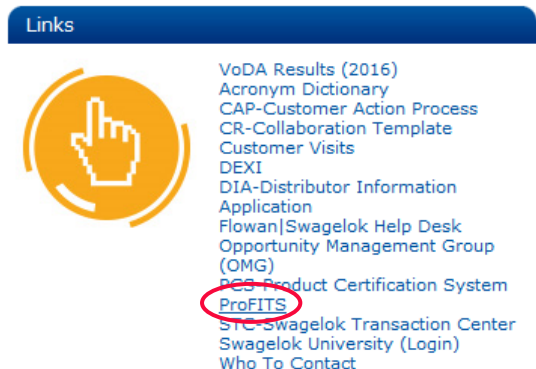
- Communities**
 - CRM
 - GCN
 - Business Intelligence
 - Custom Solutions
 - Sales Leaders
 - How to Subscribe
- Associate Info**
 - Swagelok U Login
 - Distributor Job Postings
 - Distributor Addresses
- Common Tools**
 - Sales Tools
 - Sales Library
 - Tube Fittings
 - GCN Application Content Library
 - Technical Info Center
 - Compliance and Certifications
 - Distributor Marketing Engine
- Resources**
 - Agile Communications
 - Events Calendar
 - KC Support
 - Org Charts

Swagelok Gives Back - Part 1 of 3

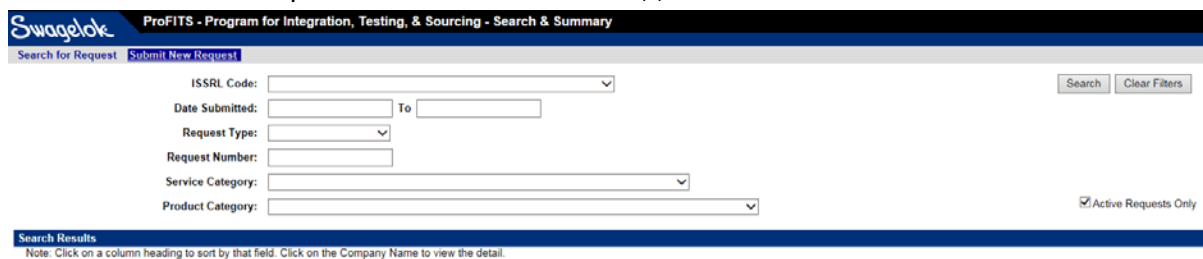
Each year, Swagelok gives back to the communities it serves.

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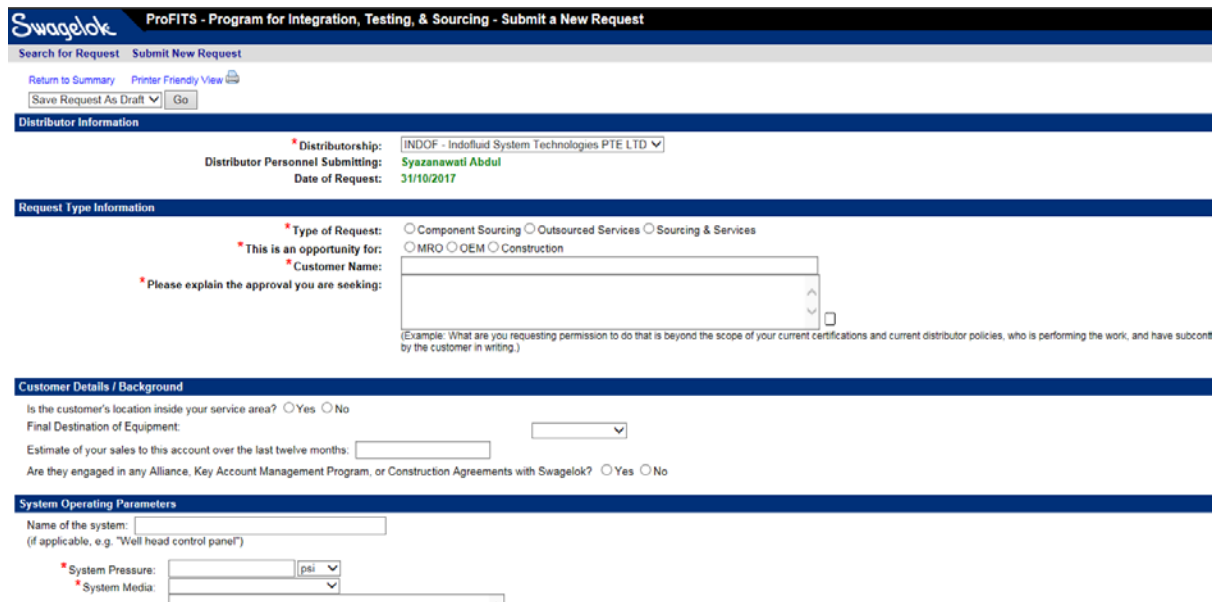
4.3 Under the tab **Links**, click on **ProFITS**.



4.4 Under the **ProFITS – Program for Integration, Testing, & Sourcing - Search & Summary** screen, click on **Submit New Request** and a new window will appear.



4.5 Populate information to fill in each section.



4.6 Select the correct **Type of Request**. In most cases, we seek approval for Third Party products so we select **Component Sourcing / Service**.
Ensure all sections with asterisks are filled in.

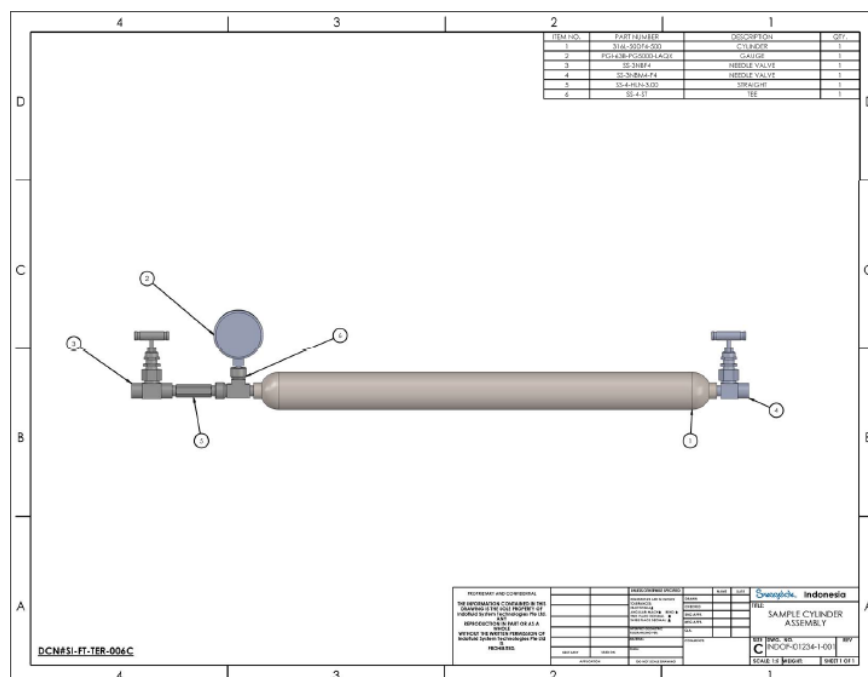
4.7 Refer to the [ProFITS User Guide](#) for more guidance.

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5.0 PREPARE DRAWINGS

- 5.1 The CS team prepares a Process & Instrumentation Drawing (P&ID) on Visio to verify and confirm the client's system.
All drawings are saved in the [allocated folder](#).
- 5.2 A Solidworks drawing can be done depending on the complexity of the Opportunity and saved in the [allocated folder](#).
Only associates who have been certified to use Solidworks can perform this.
Below is an example of the drawing for the order given in this document:



6.0 POPULATE JOB COSTING

The tool is used to develop the end price for the customer.

- 6.1 Access the [folder](#) where all job costings are archived.
Populate job costing and save the document in the format **<CS Part No. – Job Costing>** in the sales folder and the [master folder](#) containing all job costings.
It is password protected – consult the CSM.
- 6.2 The associate is required to populate the CS Job Costing for the enquiry:

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No	Swagelok Part Number	Qty	Buying Price	Total
1	SS-3NBM4-F4	1	\$ 99.99	\$ 99.99
2	316L-50DF4-500	1	\$ 99.99	\$ 99.99
3	SS-4-ST	1	\$ 9.99	\$ 9.99
4	PGI-63B-PG5000-LAOX	1	\$ 9.99	\$ 9.99
5	SS-4-HLN-3.00	1	\$ 9.99	\$ 9.99
6	SS-3NBF4	1	\$ 99.99	\$ 99.99
7			\$ -	\$ -
8			\$ -	\$ -
9			\$ -	\$ -
10			\$ -	\$ -
11			\$ -	\$ -
12			\$ -	\$ -
13			\$ -	\$ -
14			\$ -	\$ -
15			\$ -	\$ -
16			\$ -	\$ -
				\$ 329.94
Specify INDOF Margin (%)			1	\$ 333.27
Labour \$75 per hour			1	\$ 0.99
Ex Works Selling Price				\$ 334.26
Actual INDOF Margin \$				4.32
Packaging			\$ -	\$ -
Carriage, Insurance, Freight			\$ -	\$ -
Total Selling Price (without customer discount)			\$	334.26

(selling price to JKRTA)

This Price Excludes any Customer Discounts - Do these Manually as per Customer Requirements (See Tab)

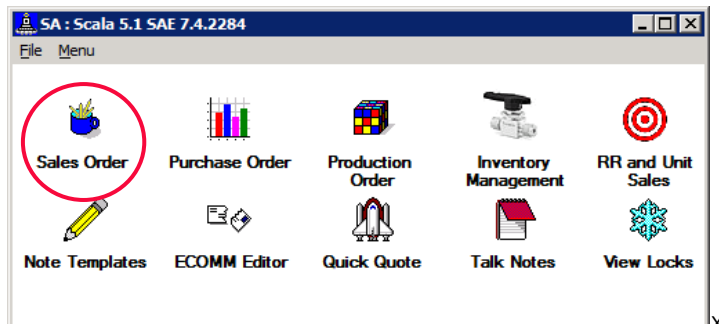
We took the margin off as prices are confidential.

- 6.3 Input the price in Green in the SAE quotation, off-line Quotation document and CS Management Tool.
- 6.4 Input price in Yellow in "" if selling to Putranata Adi Mandiri.
- 6.5 Input the calculated delivery date as the Fulfilment Strategy in SAE.

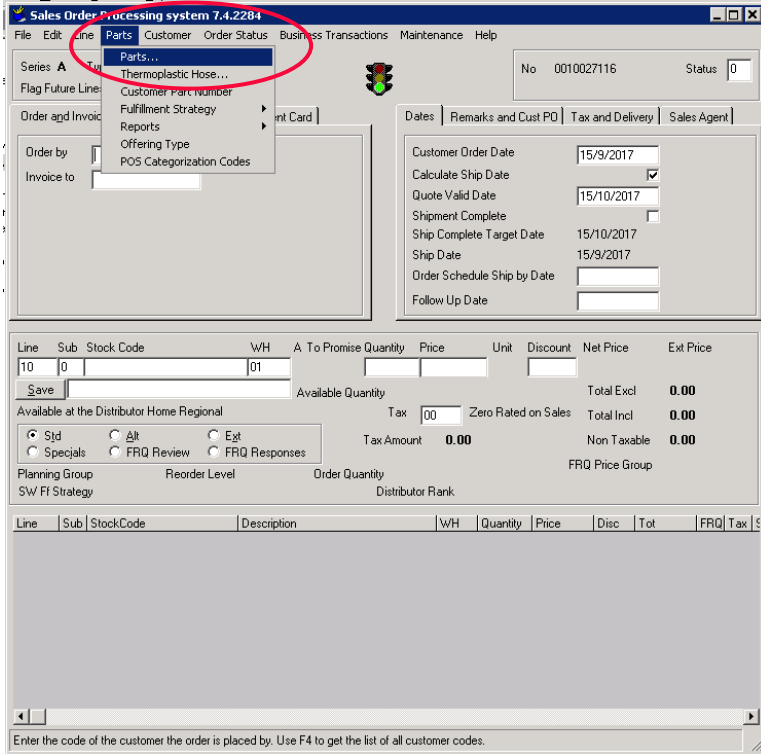
7.0 CREATE NEW CS PART NUMBER

Creating Part Number as A Stock Item

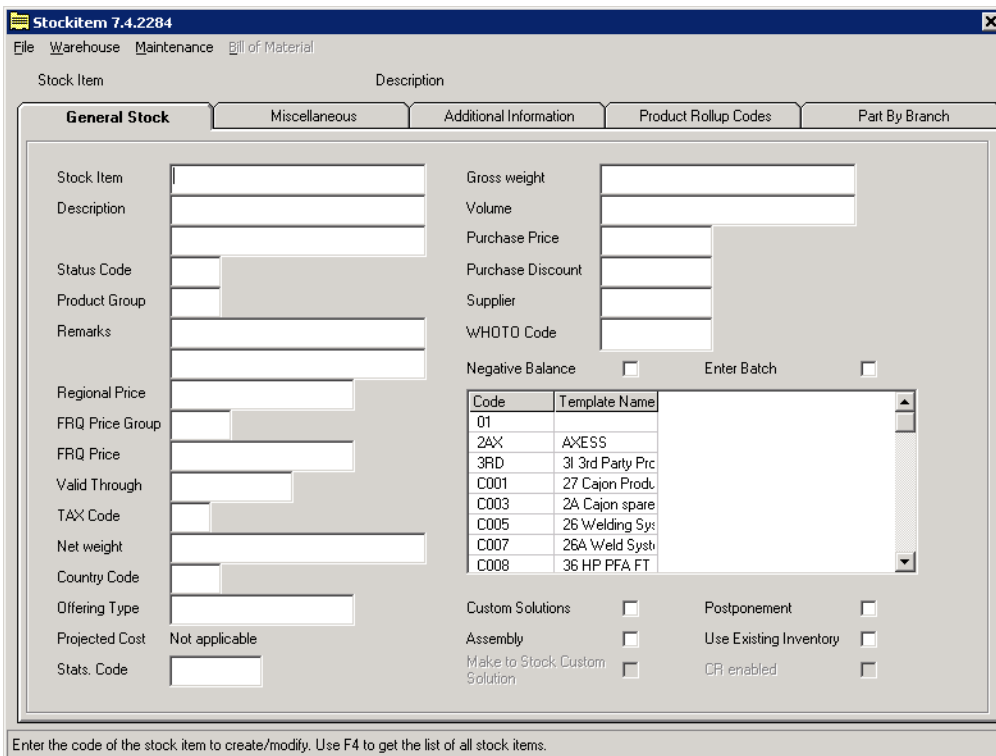
- 7.1 Access into **SAE** -> **Sales Order** and a new window will appear



7.2 Click the tab **Parts** -> **Parts** and a new window will appear.



New window:



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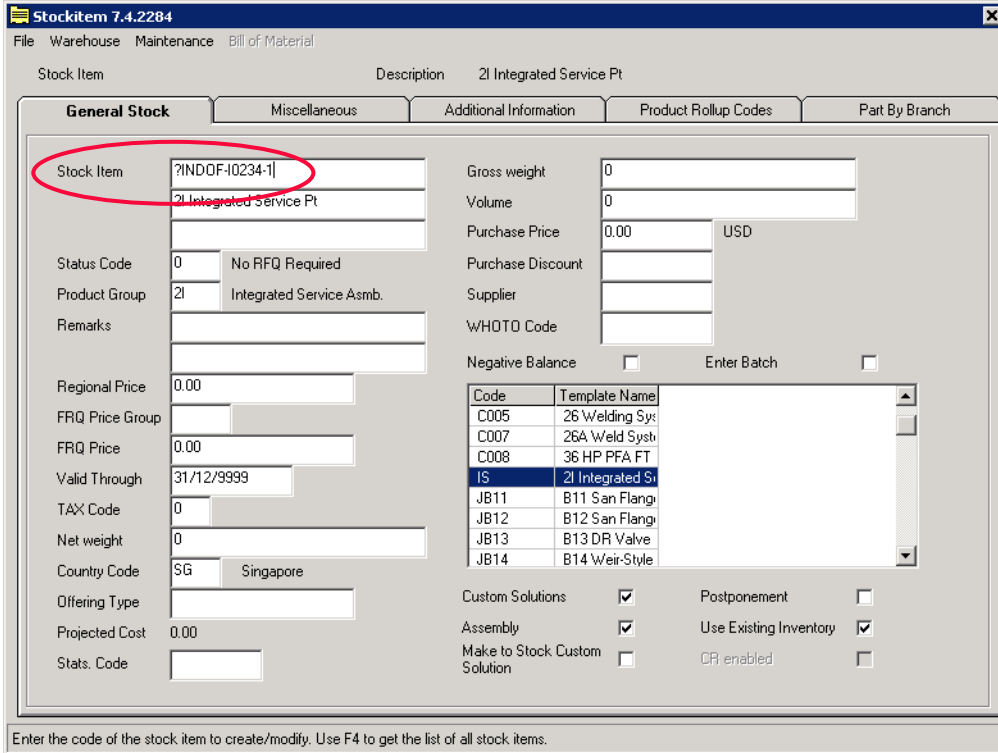
7.3 Select **Code IS** with the **Template Name: 2I Integrated Service Pt** to begin with a Custom Solutions template

Code	Template Name
C005	26 Welding Sys
C007	26A Weld Syst
C008	36 HP PFA FT
IS	2I Integrated S
JB11	B11 San Flangi
JB12	B12 San Flangi
JB13	B13 DR Valve
JB14	B14 Weir-Style

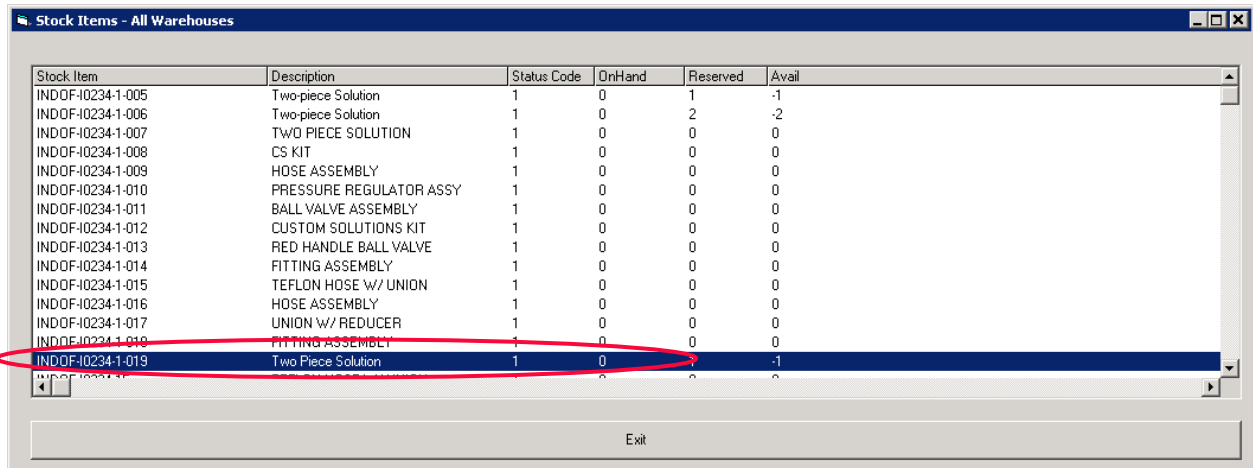
7.4 Tick the following boxes:

Custom Solutions	☒	Postponement	☐
Assembly	☒	Use Existing Inventory	☒
Make to Stock Custom Solution	☐	CR enabled	☐

- 7.5 Fill in the blank next to **Stock Item** with your CS part number.
If you are unsure of the subsequent part number to create, you can check for the preceding ones by typing **?INDOF<CUSTOMER'S ACCOUNT NO.>** and hit **Enter** and a new window will appear.



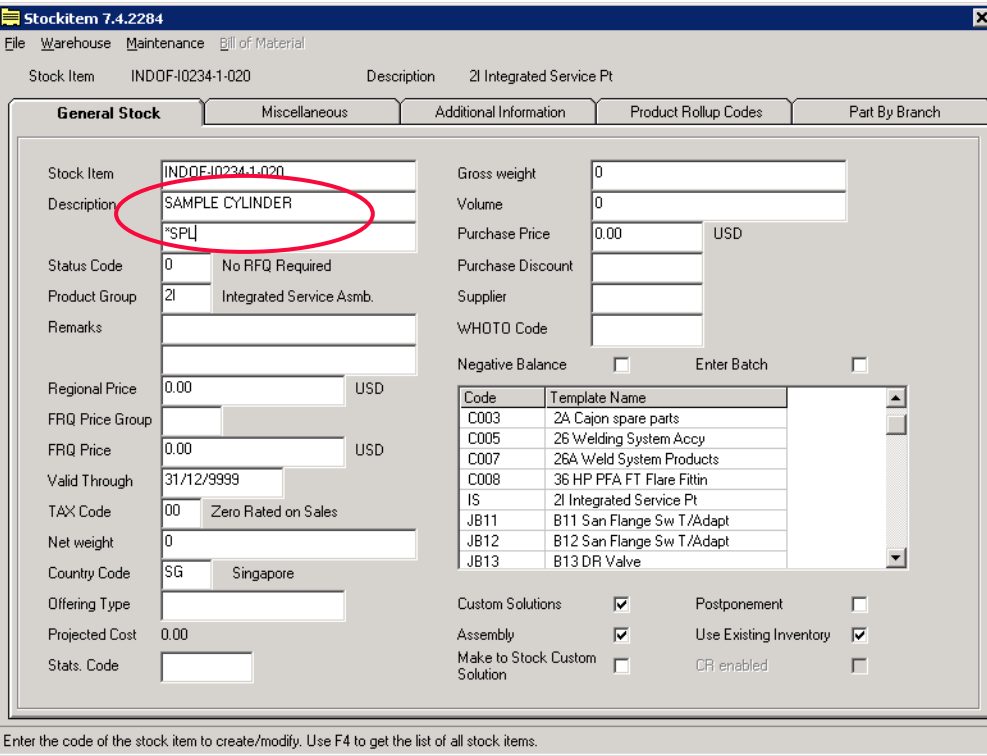
New window:



Stock Item	Description	Status Code	OnHand	Reserved	Avail
INDOF-10234-1-005	Two-piece Solution	1	0	1	-1
INDOF-10234-1-006	Two-piece Solution	1	0	2	-2
INDOF-10234-1-007	TWO PIECE SOLUTION	1	0	0	0
INDOF-10234-1-008	CS KIT	1	0	0	0
INDOF-10234-1-009	HOSE ASSEMBLY	1	0	0	0
INDOF-10234-1-010	PRESSURE REGULATOR ASSY	1	0	0	0
INDOF-10234-1-011	BALL VALVE ASSEMBLY	1	0	0	0
INDOF-10234-1-012	CUSTOM SOLUTIONS KIT	1	0	0	0
INDOF-10234-1-013	RED HANDLE BALL VALVE	1	0	0	0
INDOF-10234-1-014	FITTING ASSEMBLY	1	0	0	0
INDOF-10234-1-015	TEFLON HOSE W/ UNION	1	0	0	0
INDOF-10234-1-016	HOSE ASSEMBLY	1	0	0	0
INDOF-10234-1-017	UNION W/ REDUCER	1	0	0	0
INDOF-10234-1-018	FITTING ASSEMBLY	1	0	0	0
INDOF-10234-1-019	Two Piece Solution	1	0	0	-1

This means the next CS PN# should be INDOF-10234-1-020.

7.6 Under the first blank, type in a short description of the PN# in capital letters.

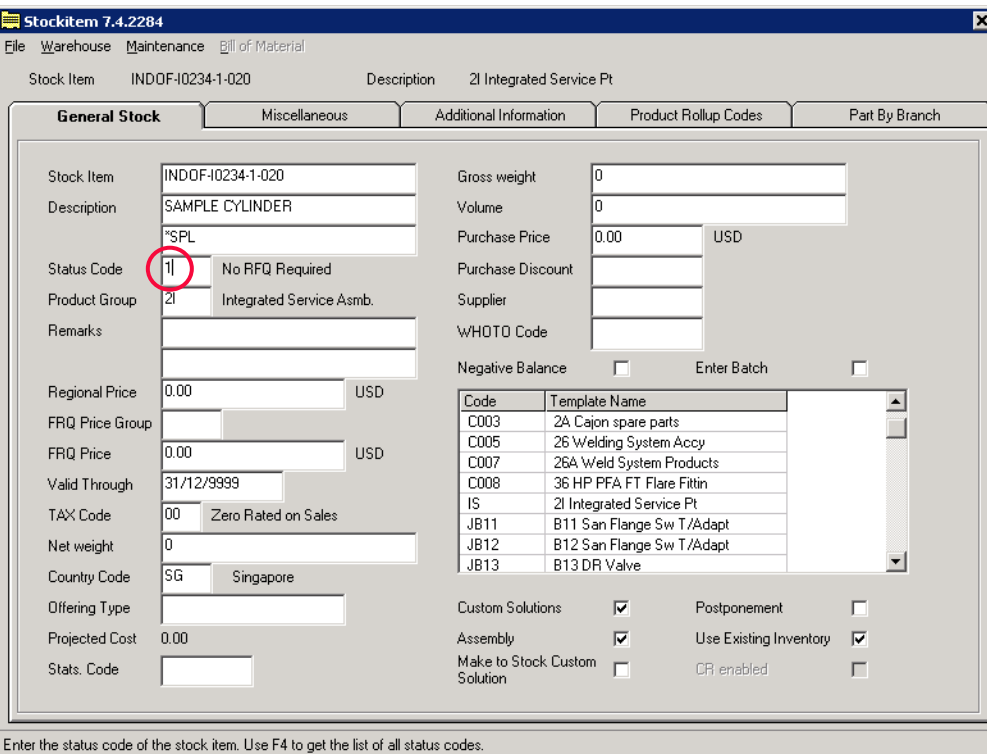


Enter the code of the stock item to create/modify. Use F4 to get the list of all stock items.



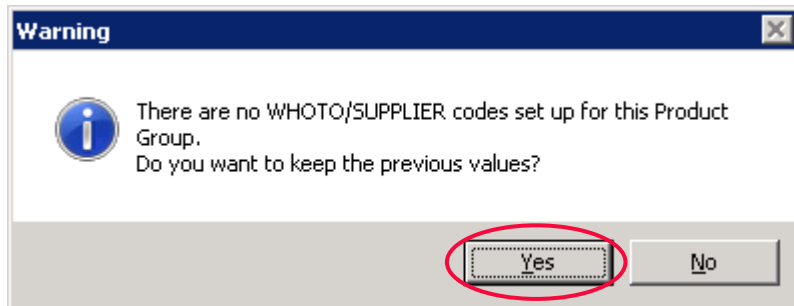
Type ***SPL** on the second blank as it is a special item.

7.7 Select **1** next to **Status Code** and hit **Enter**

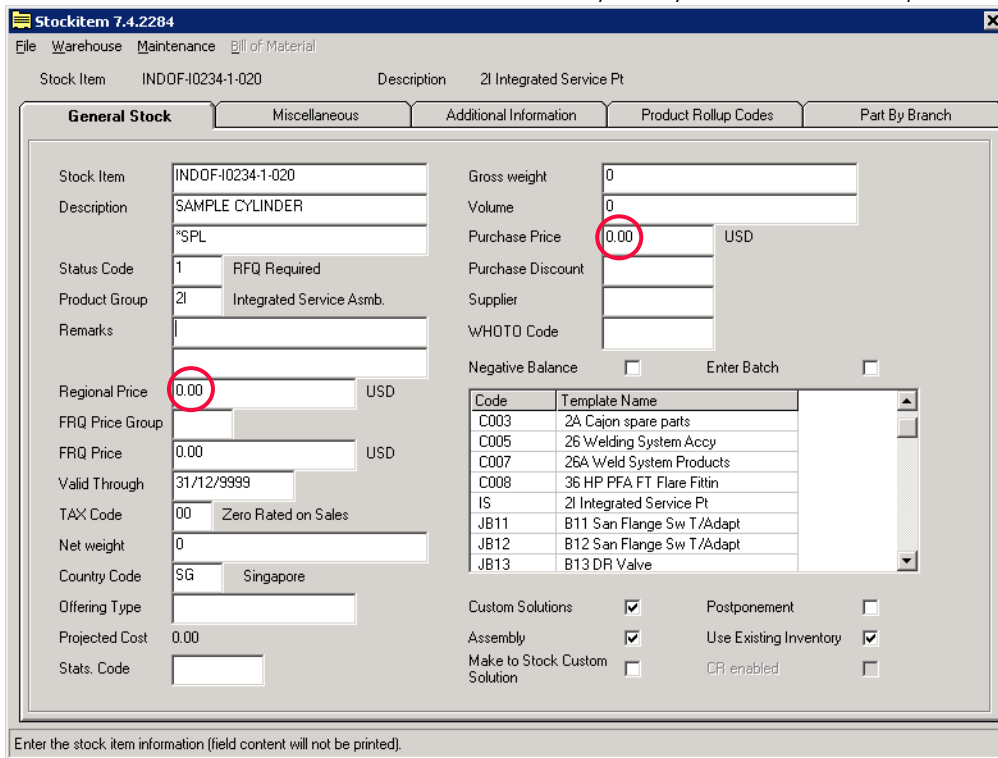


Enter the status code of the stock item. Use F4 to get the list of all status codes.

7.8 Hit **Enter** again and a new window will appear.
Click **Yes**.



7.9 Leave the **Regional Price** and **Purchase Price** to be **0.00**.
Amount of the CS Part will be calculated by the system – the sum of prices of all parts listed.



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF-10234-1-020 Description 21 Integrated Service Pt

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Stock Item INDOF-10234-1-020 Gross weight 0

Description SAMPLE CYLINDER Volume 0

*SPL Purchase Price 0.00 USD

Status Code 1 RFQ Required Purchase Discount

Product Group 21 Integrated Service Asmb. Supplier

Remarks WHOTO Code

Regional Price 0.00 USD Negative Balance ☐ Enter Batch ☐

FRQ Price Group FRQ Price 0.00 USD

Valid Through 31/12/9999

TAX Code 00 Zero Rated on Sales

Net weight 0

Country Code SG Singapore

Offering Type

Projected Cost 0.00

Stats. Code

Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	21 Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

Custom Solutions ☒ Postponement ☐

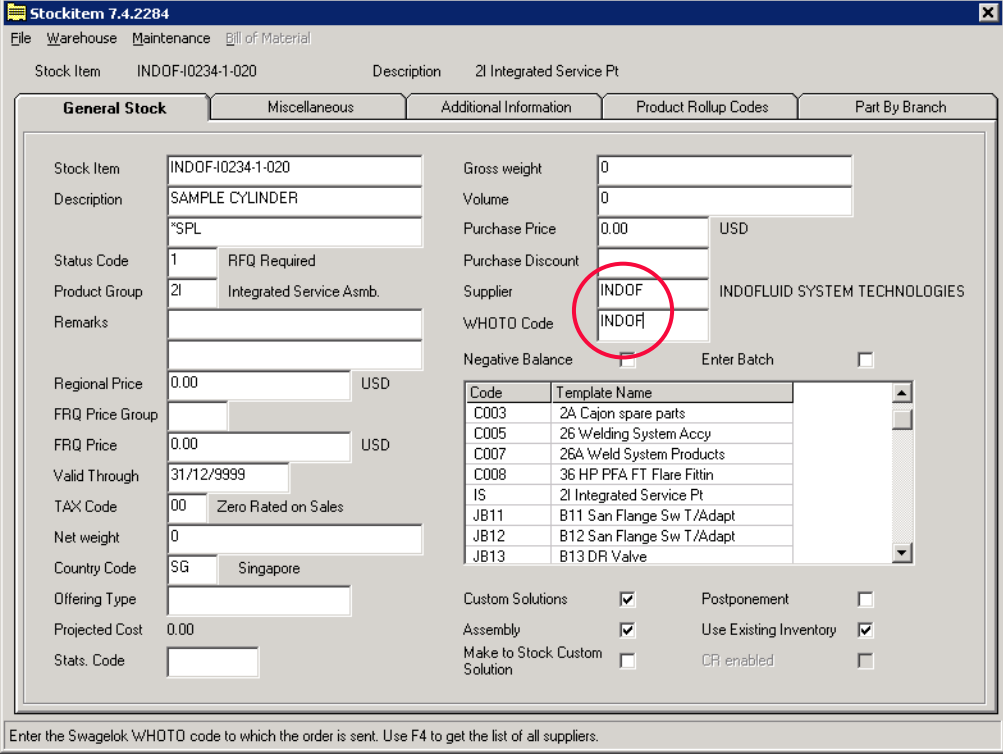
Assembly ☒ Use Existing Inventory ☒

Make to Stock Custom Solution ☐ CR enabled ☐

Enter the stock item information (field content will not be printed).

	CS QUOTE PROCESS - LEVEL II&III	DCN #SI-DG-TER-006A REVISION LEVEL 1.0 DATE OF REVISION 21/09/17 PAGE 18 OF 38
SWAGELOK INDONESIA	Printed copies are uncontrolled unless marked 'CONTROLLED'. Uncontrolled copies must be verified as current before use.	

7.10 Type **INDOF** in the blank next to **Supplier** and **WHOTO Code** then a new window will appear



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF-10234-1-020 Description 2l Integrated Service Pt

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Stock Item INDOF-10234-1-020 Description SAMPLE CYLINDER

Status Code 1 RFQ Required

Product Group 2l Integrated Service Asmb.

Remarks

Regional Price 0.00 USD

FRQ Price Group

FRQ Price 0.00 USD

Valid Through 31/12/9999

TAX Code 00 Zero Rated on Sales

Net weight 0

Country Code SG Singapore

Offering Type

Projected Cost 0.00

Stats. Code

Gross weight 0

Volume 0

Purchase Price 0.00 USD

Purchase Discount

Supplier INDOF INDOFLUID SYSTEM TECHNOLOGIES

WHOTO Code INDOF

Negative Balance ☐ Enter Batch ☐

Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	2l Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

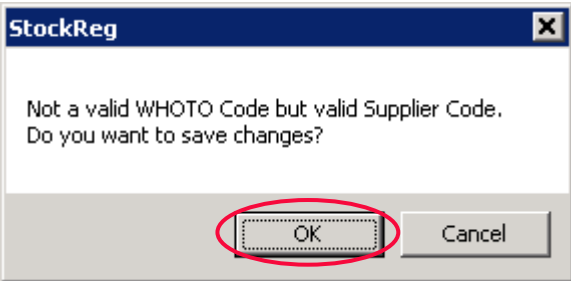
Custom Solutions ☒ Postponement ☐

Assembly ☒ Use Existing Inventory ☒

Make to Stock Custom Solution ☐ CR enabled ☐

Enter the Swagelok WHOTO code to which the order is sent. Use F4 to get the list of all suppliers.

7.11 Click **OK**



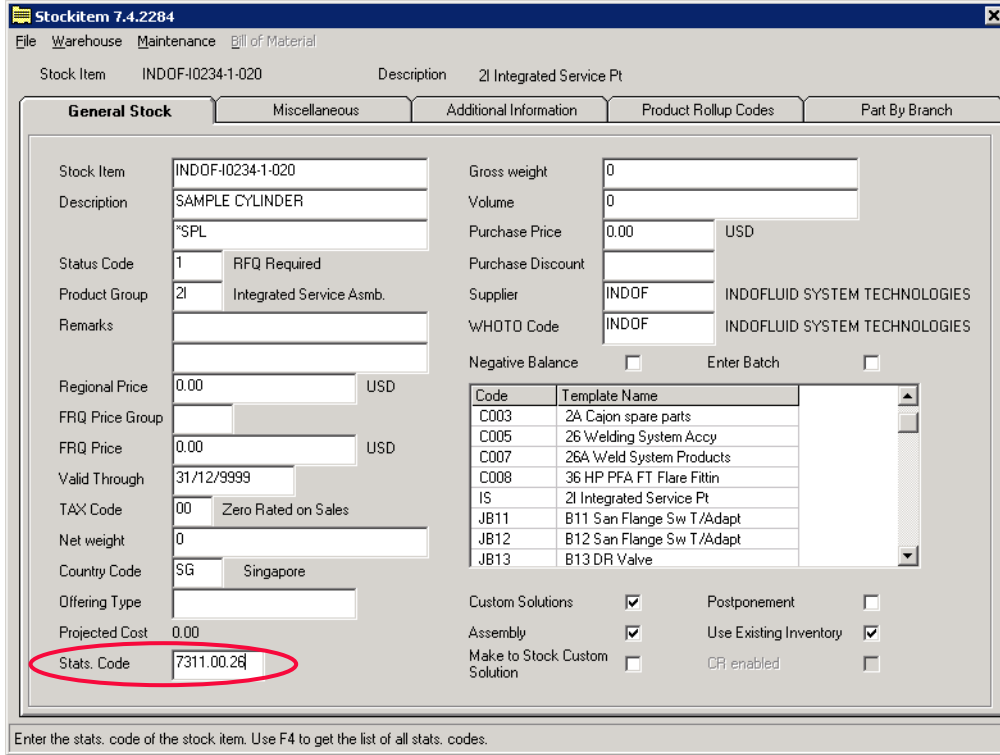
StockReg

Not a valid WHOTO Code but valid Supplier Code.
Do you want to save changes?

OK Cancel

7.12 Hit the **Tab** key until the cursor appears next to the **Stats. Code**.

Access the [CS HS Codes \(O:\2\) Custom Solutions](#) excel file and choose the appropriate HS Code based on the product in the Bill of Materials (BOM): - this file lists all the CS ordered and you can refer to one similarly described, for the HS Code.



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF-I0234-1-020 Description 2I Integrated Service Pt

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Stock Item INDOF-I0234-1-020 Gross weight 0

Description SAMPLE CYLINDER Volume 0

*SPL Purchase Price 0.00 USD

Status Code 1 RFQ Required Purchase Discount

Product Group 2I Integrated Service Asmb. Supplier INDOF INDOFLUID SYSTEM TECHNOLOGIES

Remarks WHOTQ Code INDOF INDOFLUID SYSTEM TECHNOLOGIES

Regional Price 0.00 USD

FRQ Price Group FRQ Price 0.00 USD

Valid Through 31/12/9999

TAX Code 00 Zero Rated on Sales

Net weight 0

Country Code SG Singapore

Offering Type

Projected Cost 0.00

Stats. Code 7311.00.28

Negative Balance ☐ Enter Batch ☐

Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	2I Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

Custom Solutions ☒ Postponement ☐

Assembly ☒ Use Existing Inventory ☒

Make to Stock Custom Solution ☐ CR enabled ☐

Enter the stats. code of the stock item. Use F4 to get the list of all stats. codes.



HS Code stands for Harmonized System which refers to the Harmonized Commodity Description and Coding System, is an international nomenclature developed by the World Customs Organization for the classification of goods.

Across all ASEAN member countries (that include Singapore and Indonesia), it is known as the ASEAN Harmonised Tariff Nomenclature (AHTN) code and is harmonised at the 8-digit level.

7.13 Click on the Miscellaneous tab

Stockitem 7.4.2284

File

Warehouse

Maintenance

Bill of Material

Stock Item

INDOF10234-1-020

Description

21 Integrated Service Pt

General Stock

Miscellaneous

Additional Information

Product Rollup Codes

Part By Branch

Order Parameters

Reorder Level

0

Rol %

0

E.O.Q

0

Package Quantity

0

Min qty customer

0

Min qty supplier

0

SBP Group

Units/Package Order

1

Units/package purchase

1

Cut Off Length

0

Cut off Length Units

0

EACH

Purchasing Unit of Measure

0

EACH

Selling Unit of Measure

0

EACH

ECOMM Unit of Measure

EA

EACH

Buy/Assemble

Accounting

Accounting Code

02

Unused

COST CENTER

Unused

PRODUCT

Unused

PROJECT

Unused

Unused

Unused

Fulfillment Strategy

SW/ Ft Strategy

Distributor Rank

EOQ Category

Purchase Group

Metrics

Qualifies for Invoiced Service Sales reports

Locally Assembled New/Commercialized Part

Enter the stats. code of the stock item. Use F4 to get the list of all stats. codes.

7.14 Ensure Accounting Code is 02

Accounting Code

Acc

Description

00

For Resale

02

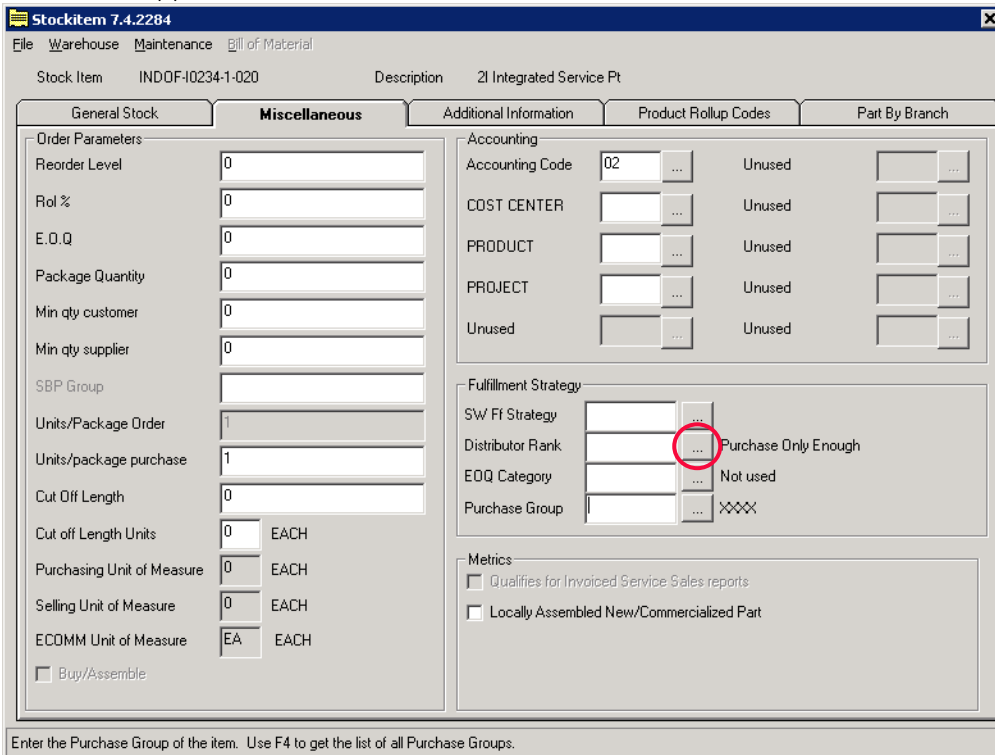
NOT For Resale

06

Non Stock

Exit

7.15 While the cursor blinks in the blank next to **Distributor Rank**, click on the ... button and a new window will appear



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF-I0234-1-020 Description 21 Integrated Service Pt

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Order Parameters

Reorder Level 0

Roll % 0

E.O.Q. 0

Package Quantity 0

Min qty customer 0

Min qty supplier 0

SBP Group

Units/Package Order 1

Units/package purchase 1

Cut Off Length 0

Cut off Length Units 0 EACH

Purchasing Unit of Measure 0 EACH

Selling Unit of Measure 0 EACH

ECOMM Unit of Measure EA EACH

☐ Buy/Assemble

Accounting

Accounting Code 02 Unused

COST CENTER Unused

PRODUCT Unused

PROJECT Unused

Unused Unused

Fulfillment Strategy

SW Ft Strategy

Distributor Rank ... Purchase Only Enough

EOQ Category ... Not used

Purchase Group ... XXXX

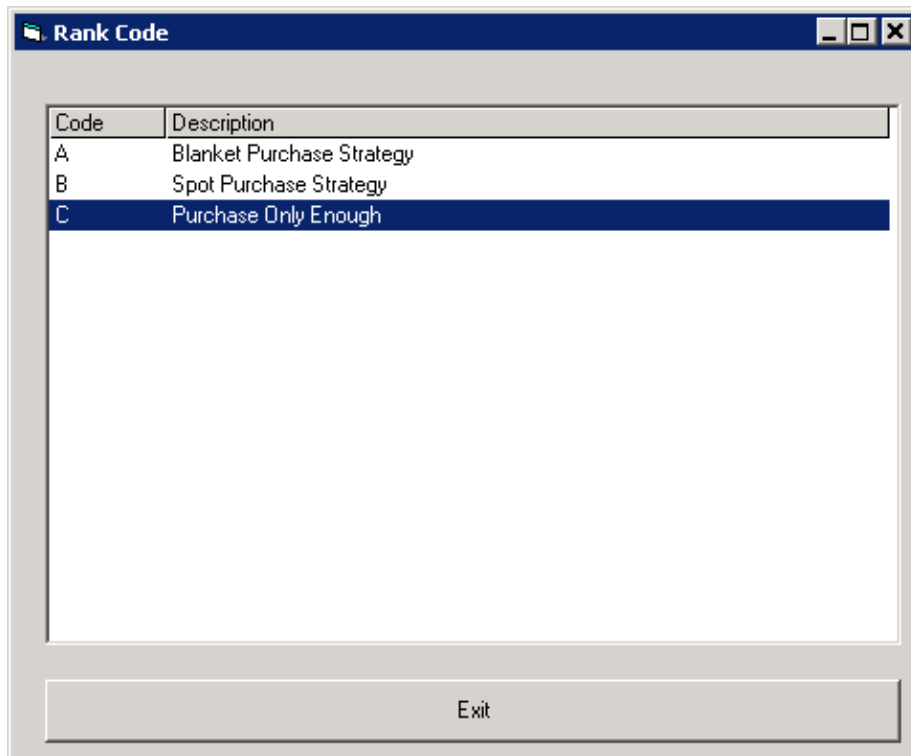
Metrics

☐ Qualifies for Invoiced Service Sales reports

☐ Locally Assembled New/Commercialized Part

Enter the Purchase Group of the item. Use F4 to get the list of all Purchase Groups.

New window:

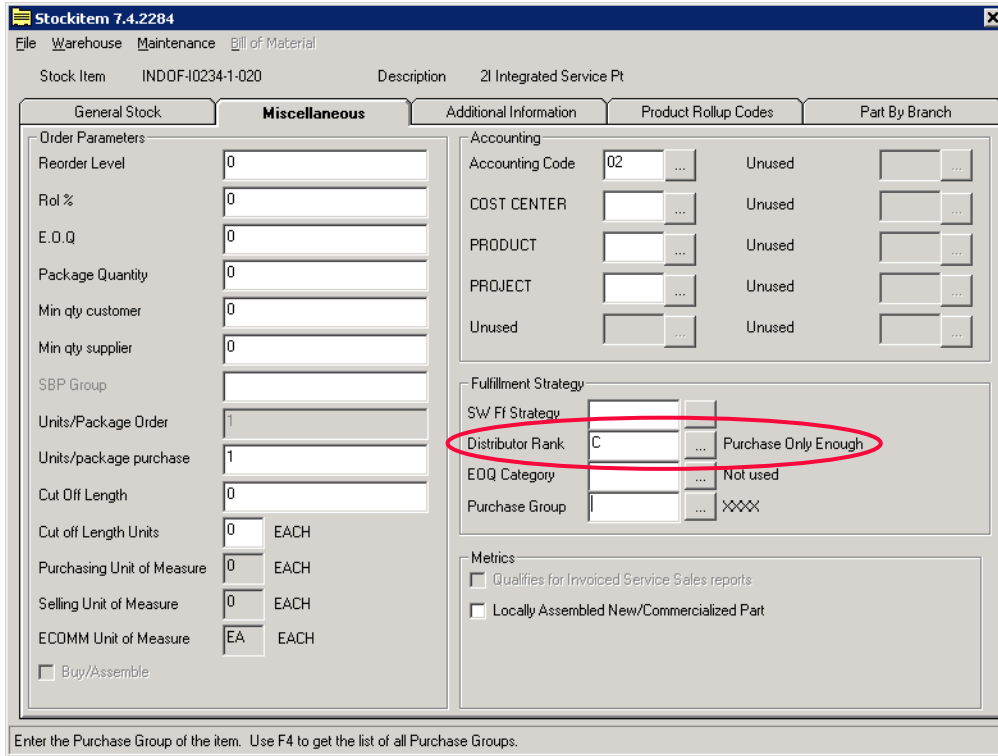


Rank Code

Code	Description
A	Blanket Purchase Strategy
B	Spot Purchase Strategy
C	Purchase Only Enough

Exit

7.16 Select C Purchase Only Enough option



Stockitem 7.4.2284

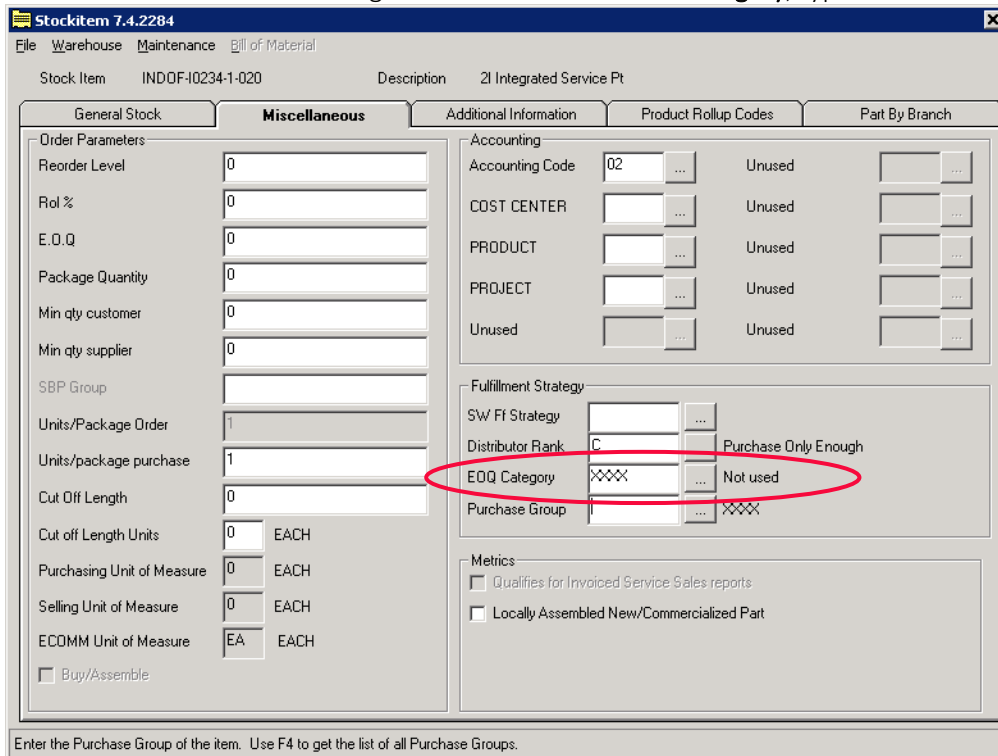
File Warehouse Maintenance Bill of Material

Stock Item INDOF-10234-1-020 Description 21 Integrated Service Pt

General Stock	Miscellaneous	Additional Information	Product Rollup Codes	Part By Branch
Order Parameters Reorder Level: 0 Rol %: 0 E.O.Q: 0 Package Quantity: 0 Min qty customer: 0 Min qty supplier: 0 SBP Group: Units/Package Order: 1 Units/package purchase: 1 Cut Off Length: 0 Cut off Length Units: 0 EACH Purchasing Unit of Measure: 0 EACH Selling Unit of Measure: 0 EACH ECOMM Unit of Measure: EA EACH ☐ Buy/Assemble				
Accounting Accounting Code: 02 Unused COST CENTER: Unused PRODUCT: Unused PROJECT: Unused Unused: Unused				
Fulfillment Strategy SW Ft Strategy: Distributor Rank: C Purchase Only Enough EOQ Category: Not used Purchase Group: XXXX				
Metrics ☐ Qualifies for Invoiced Service Sales reports ☐ Locally Assembled New/Commercialized Part				

Enter the Purchase Group of the item. Use F4 to get the list of all Purchase Groups.

7.17 With the cursor blinking in the blank next to EOQ Category, type XXXX and hit Enter



Stockitem 7.4.2284

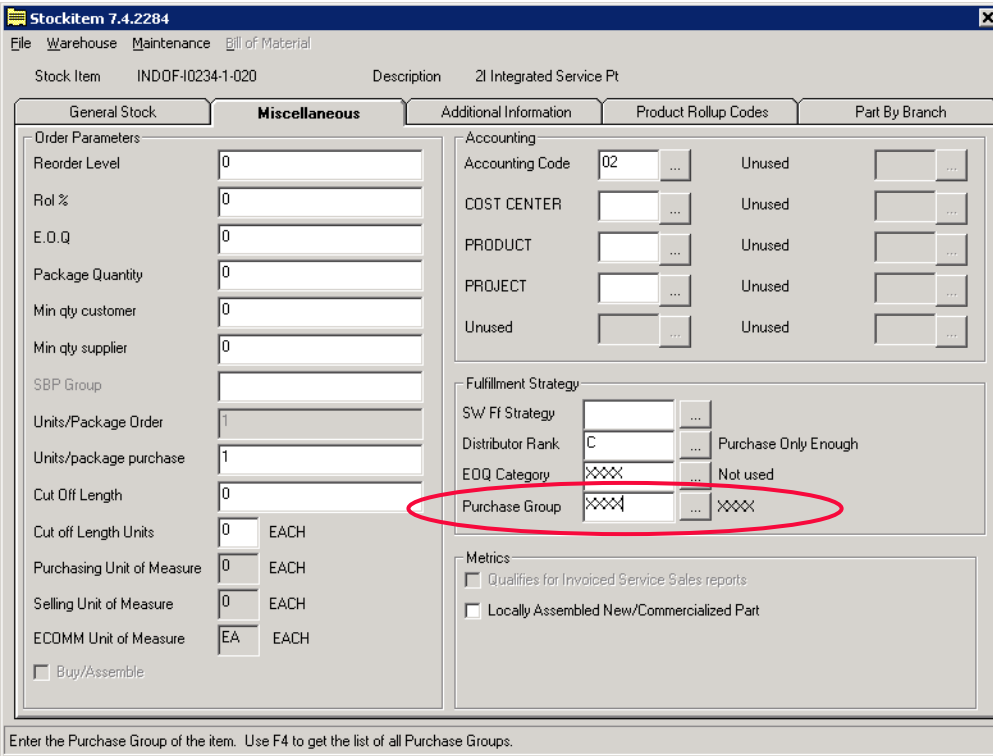
File Warehouse Maintenance Bill of Material

Stock Item INDOF-10234-1-020 Description 21 Integrated Service Pt

General Stock	Miscellaneous	Additional Information	Product Rollup Codes	Part By Branch
Order Parameters Reorder Level: 0 Rol %: 0 E.O.Q: 0 Package Quantity: 0 Min qty customer: 0 Min qty supplier: 0 SBP Group: Units/Package Order: 1 Units/package purchase: 1 Cut Off Length: 0 Cut off Length Units: 0 EACH Purchasing Unit of Measure: 0 EACH Selling Unit of Measure: 0 EACH ECOMM Unit of Measure: EA EACH ☐ Buy/Assemble				
Accounting Accounting Code: 02 Unused COST CENTER: Unused PRODUCT: Unused PROJECT: Unused Unused: Unused				
Fulfillment Strategy SW Ft Strategy: Distributor Rank: C Purchase Only Enough EOQ Category: XXXX Not used Purchase Group: XXXX				
Metrics ☐ Qualifies for Invoiced Service Sales reports ☐ Locally Assembled New/Commercialized Part				

Enter the Purchase Group of the item. Use F4 to get the list of all Purchase Groups.

7.18 Repeat the same step while the cursor is blinking in the blank next to **Purchase Group**



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

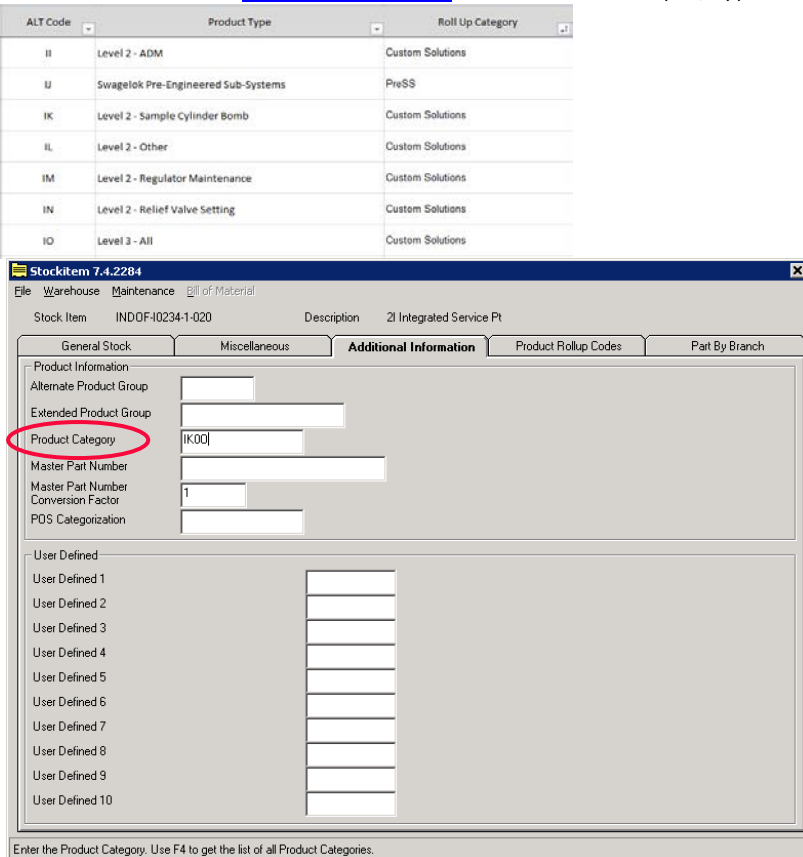
Stock Item INDOF10234-1-020 Description 2I Integrated Service Pt

General Stock	Miscellaneous	Additional Information	Product Rollup Codes	Part By Branch
Order Parameters Reorder Level 0 Rol % 0 E.O.Q 0 Package Quantity 0 Min qty customer 0 Min qty supplier 0 SBP Group Units/Package Order 1 Units/package purchase 1 Cut Off Length 0 Cut off Length Units 0 EACH Purchasing Unit of Measure 0 EACH Selling Unit of Measure 0 EACH ECOMM Unit of Measure EA EACH ☐ Buy/Assemble				
Accounting Accounting Code 02 Unused COST CENTER Unused PRODUCT Unused PROJECT Unused Unused Unused				
Fulfillment Strategy SW Ft Strategy Distributor Rank C Purchase Only Enough EQQ Category Not used Purchase Group (highlighted)				
Metrics ☐ Qualifies for Invoiced Service Sales reports ☐ Locally Assembled New/Commercialized Part				

Enter the Purchase Group of the item. Use F4 to get the list of all Purchase Groups.

7.19 Click on the **Additional Information** tab.

Refer to the [Product Database](#) and for this example, type IG00 in the blank next to **Product Category**.



Stockitem 7.4.2284

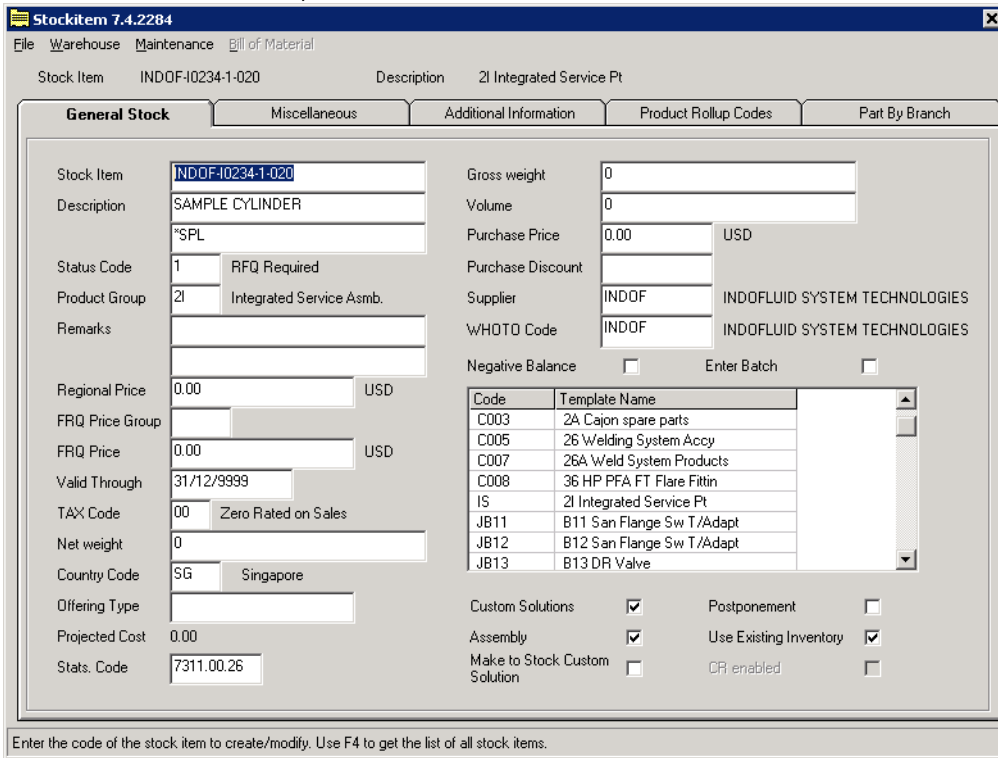
File Warehouse Maintenance Bill of Material

Stock Item INDOF10234-1-020 Description 2I Integrated Service Pt

General Stock	Miscellaneous	Additional Information	Product Rollup Codes	Part By Branch
Product Information Alternate Product Group Extended Product Group Product Category (IG00) (highlighted) Master Part Number Master Part Number Conversion Factor 1 POS Categorization				
User Defined User Defined 1 User Defined 2 User Defined 3 User Defined 4 User Defined 5 User Defined 6 User Defined 7 User Defined 8 User Defined 9 User Defined 10				

Enter the Product Category. Use F4 to get the list of all Product Categories.

7.20 Return to the **General Stock** tab then highlight and copy (**Ctrl+C**) the CS PN#. Hit **Ctrl+S** to save your work.



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF10234-1-020 Description 2I Integrated Service Pt

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Stock Item INDOF10234-1-020

Description SAMPLE CYLINDER

*SPL

Status Code 1 RFQ Required

Product Group 2I Integrated Service Asmb.

Remarks

Regional Price 0.00 USD

FRQ Price Group

FRQ Price 0.00 USD

Valid Through 31/12/9999

TAX Code 00 Zero Rated on Sales

Net weight 0

Country Code SG Singapore

Offering Type

Projected Cost 0.00

Stats. Code 7311.00.26

Gross weight 0

Volume 0

Purchase Price 0.00 USD

Purchase Discount

Supplier INDOF INDOFLUID SYSTEM TECHNOLOGIES

WHOTO Code INDOF INDOFLUID SYSTEM TECHNOLOGIES

Negative Balance ☐ Enter Batch ☐

Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	2I Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

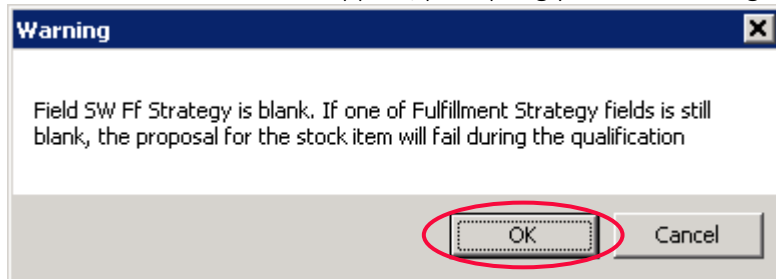
Custom Solutions ☒ Postponement ☐

Assembly ☒ Use Existing Inventory ☒

Make to Stock Custom Solution ☐ CR enabled ☐

Enter the code of the stock item to create/modify. Use F4 to get the list of all stock items.

7.21 A new window will appear, prompting you the following:



Warning

Field SW Ff Strategy is blank. If one of Fulfillment Strategy fields is still blank, the proposal for the stock item will fail during the qualification

OK Cancel

Click OK.

	CS QUOTE PROCESS - LEVEL II&III	DCN #SI-DG-TER-006A REVISION LEVEL 1.0 DATE OF REVISION 21/09/17 PAGE 25 OF 38
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Input the Bill of Materials

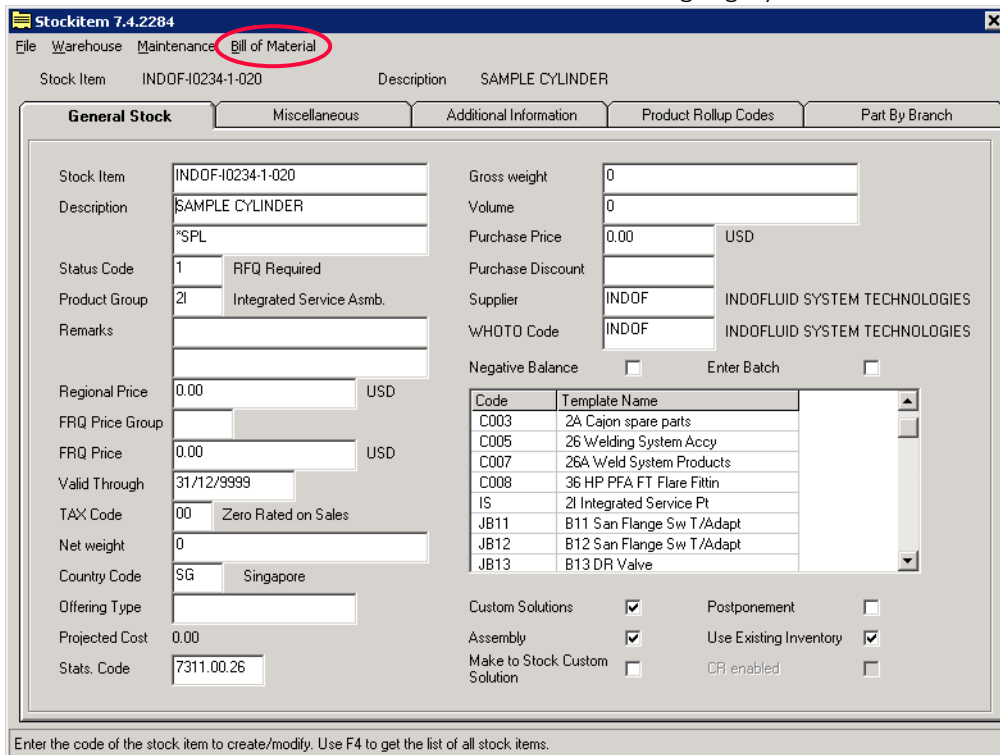
Once you have the BOM ready, you need to do a complete stock check to get the lead time of the respective parts.

A complete stock check requires you to do a:

- Regional Stock Check (RSC) on regional parts and,
- Factory Request Quotation (FRQ) on non-regional parts to get the lead times, and
- Enquiry on lead time and prices for non-swagelok parts.

7.22 Once you are on a new window, paste (**Ctrl + V**) the PN# you copied and hit **Enter**.

You would notice that the **Bill of Material** is no longer greyed out.



Stockitem 7.4.2284

File Warehouse Maintenance **Bill of Material**

Stock Item INDOF10234-1-020 Description SAMPLE CYLINDER

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Stock Item INDOF10234-1-020 Gross weight 0

Description SAMPLE CYLINDER Volume 0

*SPL Purchase Price 0.00 USD

Status Code 1 RFQ Required Purchase Discount

Product Group 21 Integrated Service Asmb. Supplier INDOF INDOFLUID SYSTEM TECHNOLOGIES

Remarks WHOTO Code INDOF INDOFLUID SYSTEM TECHNOLOGIES

Regional Price 0.00 USD Negative Balance ☐ Enter Batch ☐

FRQ Price Group FRQ Price 0.00 USD

Valid Through 31/12/9999

TAX Code 00 Zero Rated on Sales

Net weight 0

Country Code SG Singapore

Offering Type

Projected Cost 0.00

Stats. Code 7311.00.26

Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	2I Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

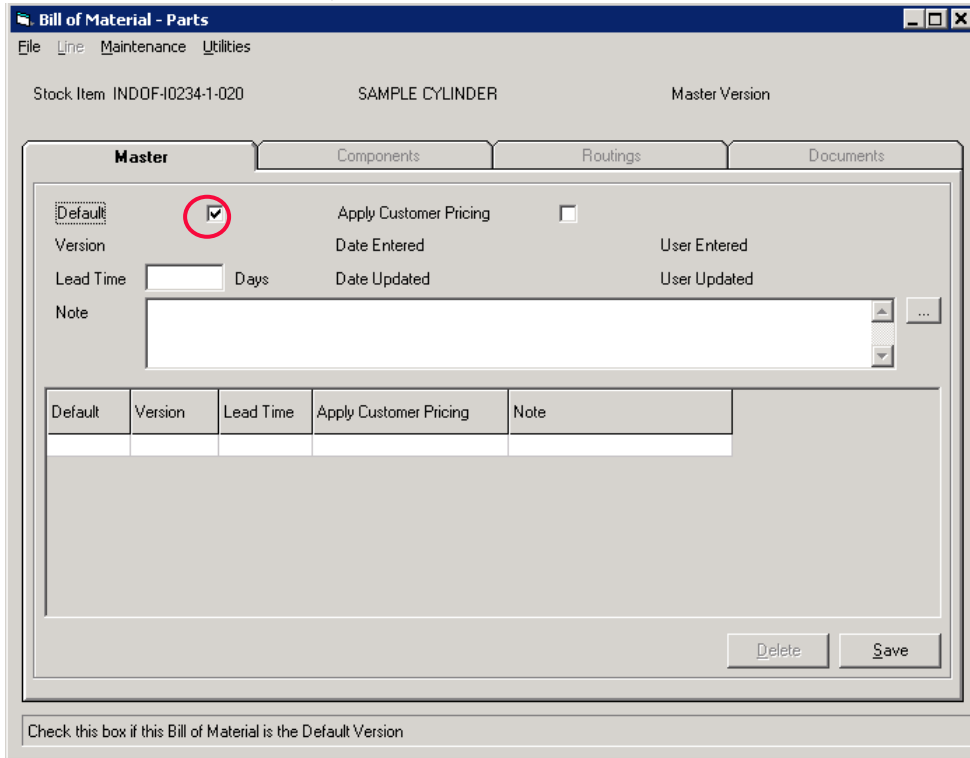
Custom Solutions ☒ Postponement ☐

Assembly ☒ Use Existing Inventory ☒

Make to Stock Custom Solution ☐ CR enabled ☐

Enter the code of the stock item to create/modify. Use F4 to get the list of all stock items.

- 7.23 Click on the tab **Bill of Material** and a new window will appear.
On the new window, check the box next to the **Default**.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item IND0F-I0234-1-020 SAMPLE CYLINDER Master Version

Master Components Routings Documents

Default ☒ Apply Customer Pricing ☐

Version Date Entered User Entered

Lead Time Days Date Updated User Updated

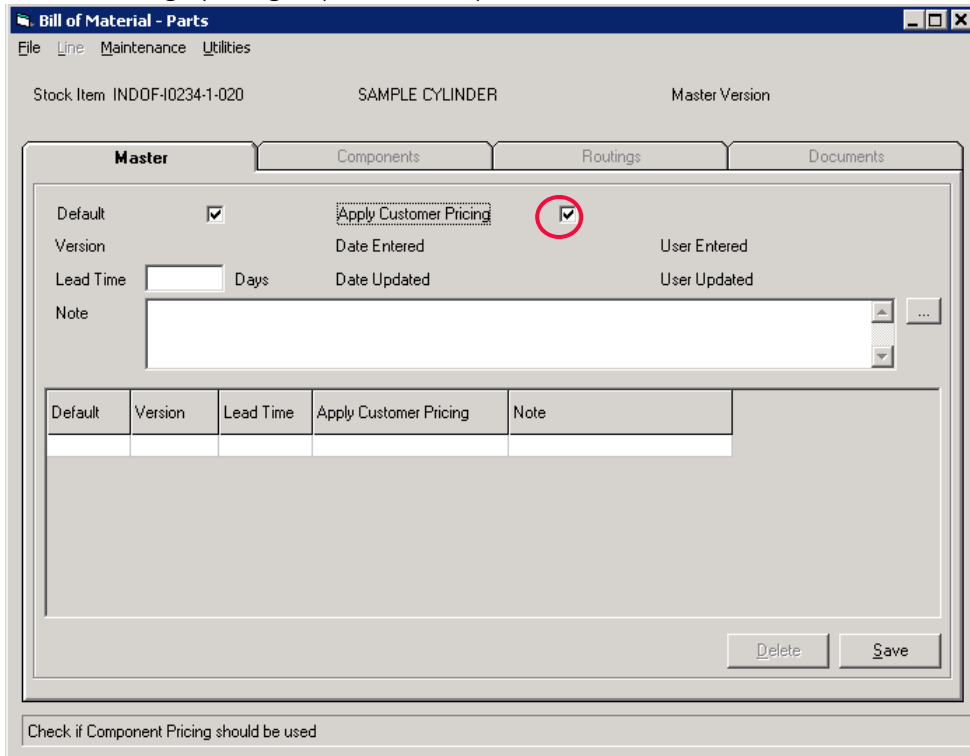
Note

Default	Version	Lead Time	Apply Customer Pricing	Note

Delete Save

Check this box if this Bill of Material is the Default Version

- 7.24 Check the box next to the **Apply Customer Pricing** option so that then system can populate the job costing by using all prices of the parts.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item IND0F-I0234-1-020 SAMPLE CYLINDER Master Version

Master Components Routings Documents

Default ☒ Apply Customer Pricing ☒

Version Date Entered User Entered

Lead Time Days Date Updated User Updated

Note

Default	Version	Lead Time	Apply Customer Pricing	Note

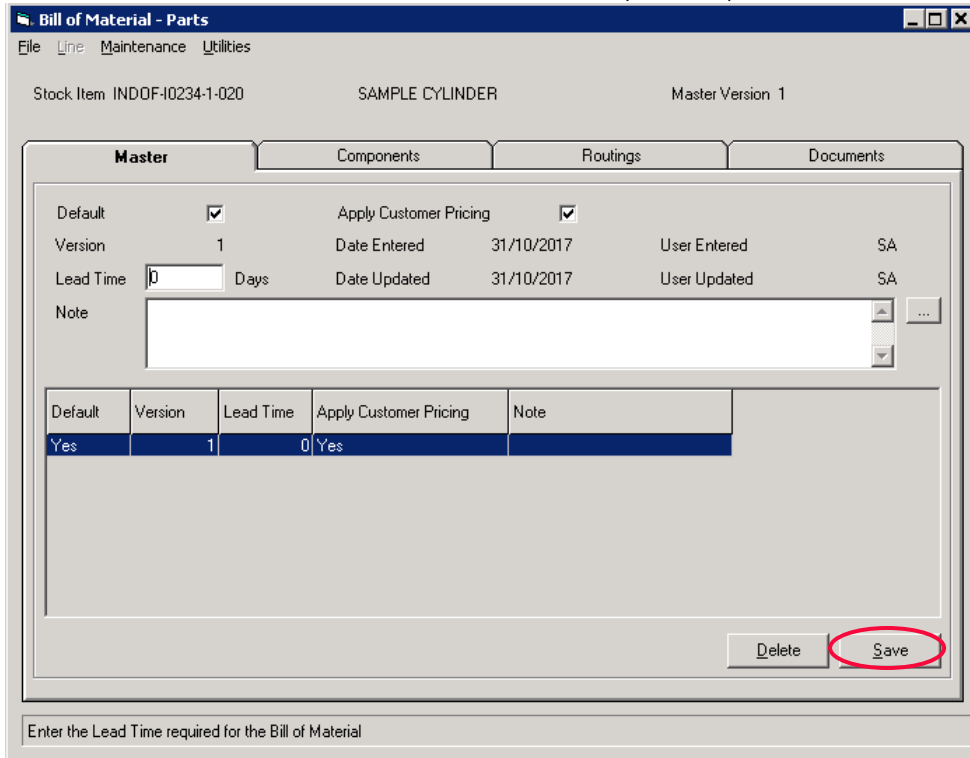
Delete Save

Check if Component Pricing should be used

	CS QUOTE PROCESS - LEVEL II&III	DCN #SI-DG-TER-006A REVISION LEVEL 1.0 DATE OF REVISION 21/09/17 PAGE 27 OF 38
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7.25 Click **Save** and a line will appear under **Default**.

Double-click on **Yes** to activate it in order for you to input the BOM in that particular PN#.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item IND0F-I0234-1-020 SAMPLE CYLINDER Master Version 1

Master Components Routings Documents

Default ☒ Apply Customer Pricing ☒

Version 1 Date Entered 31/10/2017 User Entered SA

Lead Time 0 Days Date Updated 31/10/2017 User Updated SA

Note

Default	Version	Lead Time	Apply Customer Pricing	Note
Yes	1	0	Yes	

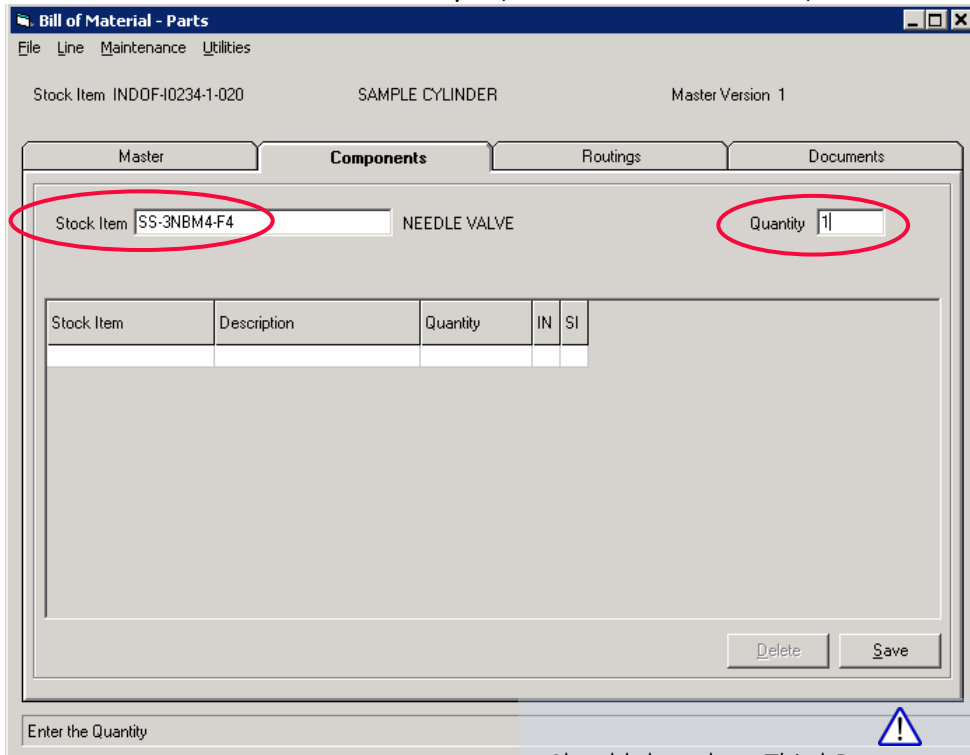
Delete Save

Enter the Lead Time required for the Bill of Material

7.26 Click on the tab **Components**.

Begin keying in each PN# and its Quantity.

Please ensure that the **Quantity** keyed in is for ONE assembly.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item IND0F-I0234-1-020 SAMPLE CYLINDER Master Version 1

Master Components Routings Documents

Stock Item SS-3NBM4-F4 NEEDLE VALVE Quantity 1

Stock Item	Description	Quantity	IN	SI

Delete Save

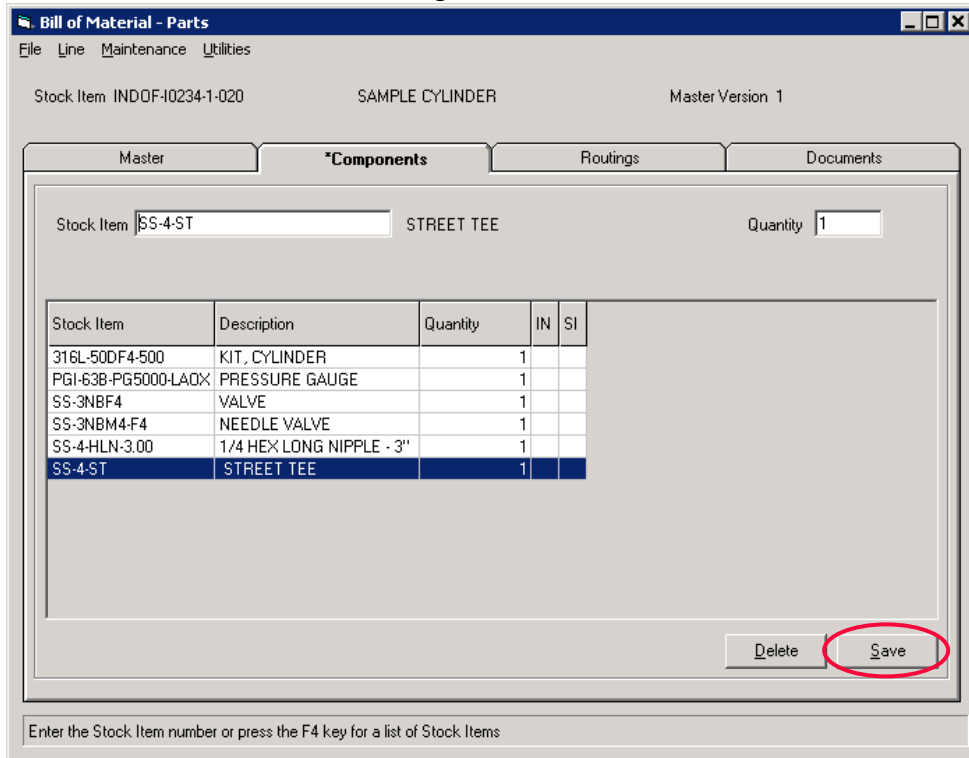
Enter the Quantity

!

Should there be a Third-Party component in the BOM, refer to DCN# **SI-QG-TER-006A** on including a third-party component into the BOM.

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- 7.27 Click **Save** to save the BOM.
Close the window after saving.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item: IND0F-I0234-1-020 SAMPLE CYLINDER Master Version: 1

Master ***Components** Routings Documents

Stock Item: SS-4-ST STREET TEE Quantity: 1

Stock Item	Description	Quantity	IN	SI
316L-50DF4-500	KIT, CYLINDER	1		
PGI-63B-PG5000-LA0X	PRESSURE GAUGE	1		
SS-3NBF4	VALVE	1		
SS-3NBM4-F4	NEEDLE VALVE	1		
SS-4HLN-3.00	1/4 HEX LONG NIPPLE - 3"	1		
SS-4-ST	STREET TEE	1		

Delete **Save**

Enter the Stock Item number or press the F4 key for a list of Stock Items

- 7.28 To make changes to the BOM, select the line(s) and click **Delete**, then repeat step 7.26 onwards

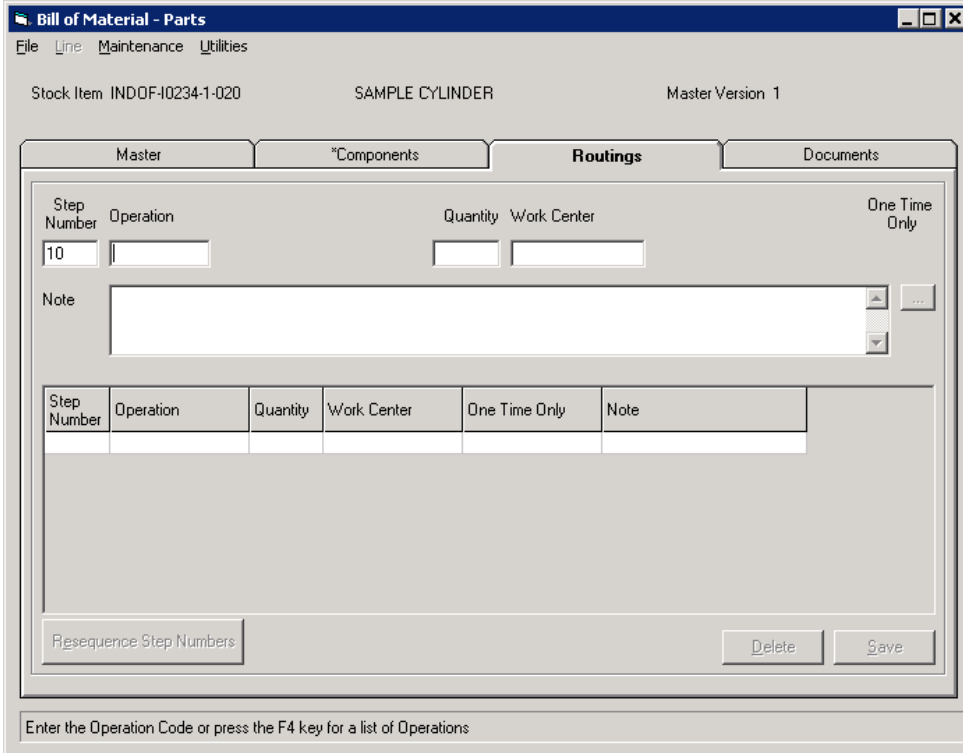
	CS QUOTE PROCESS - LEVEL II&III	DCN #SI-DG-TER-006A REVISION LEVEL 1.0 DATE OF REVISION 21/09/17 PAGE 29 OF 38
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Input Routings

Before begin routing, ensure we have the necessary customer information, drawing or sketch to pick out the right routings.

7.29 Click on the **Routings** tab.

With the cursor on the blank under **Operation**, hit the **F4** key and a new window will appear.



Bill of Material - Parts

File Line Maintenance Utilities

Stock Item INDOF-I0234-1-020 SAMPLE CYLINDER Master Version 1

Master *Components **Routings** Documents

Step Number Operation Quantity Work Center One Time Only

10

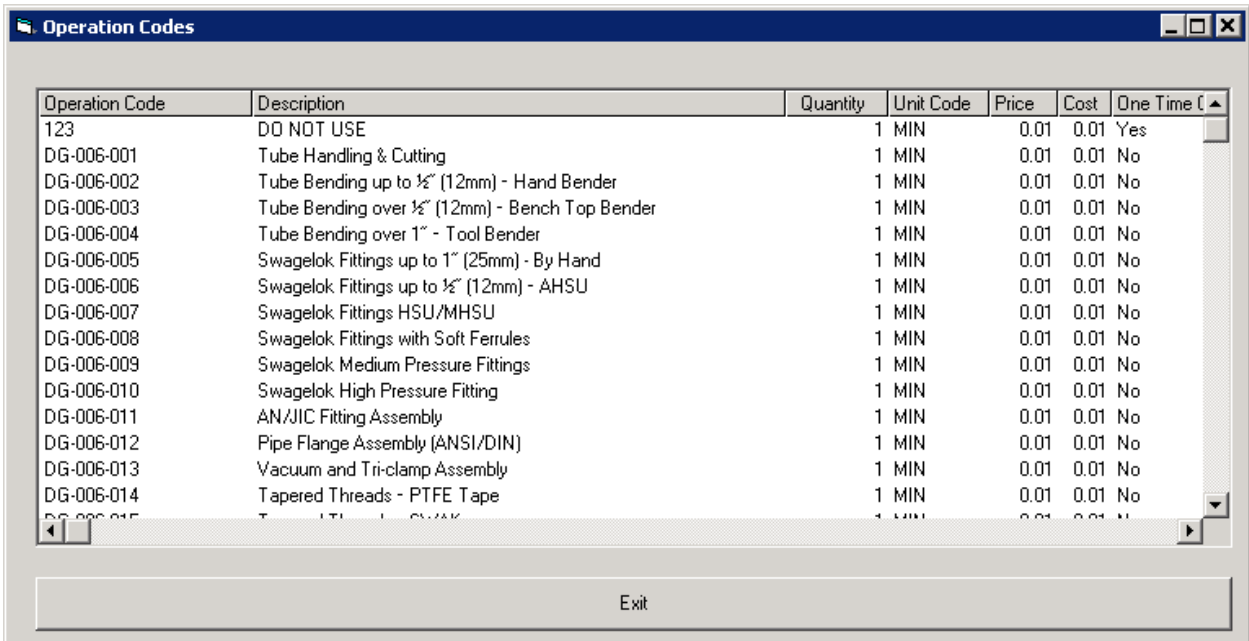
Note

Step Number	Operation	Quantity	Work Center	One Time Only	Note

Resequence Step Numbers Delete Save

Enter the Operation Code or press the F4 key for a list of Operations

New window:



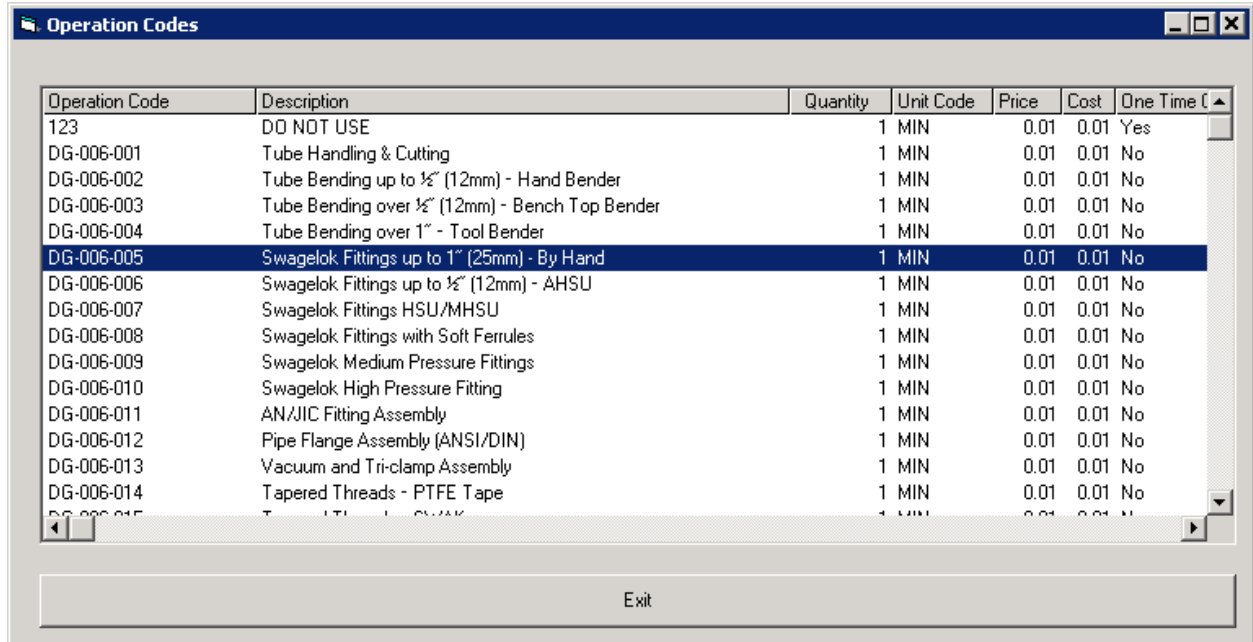
Operation Codes

Operation Code	Description	Quantity	Unit Code	Price	Cost	One Time Only
123	DO NOT USE	1	MIN	0.01	0.01	Yes
DG-006-001	Tube Handling & Cutting	1	MIN	0.01	0.01	No
DG-006-002	Tube Bending up to ½" (12mm) - Hand Bender	1	MIN	0.01	0.01	No
DG-006-003	Tube Bending over ½" (12mm) - Bench Top Bender	1	MIN	0.01	0.01	No
DG-006-004	Tube Bending over 1" - Tool Bender	1	MIN	0.01	0.01	No
DG-006-005	Swagelok Fittings up to 1" (25mm) - By Hand	1	MIN	0.01	0.01	No
DG-006-006	Swagelok Fittings up to ½" (12mm) - AHSU	1	MIN	0.01	0.01	No
DG-006-007	Swagelok Fittings HSU/MHSU	1	MIN	0.01	0.01	No
DG-006-008	Swagelok Fittings with Soft Ferrules	1	MIN	0.01	0.01	No
DG-006-009	Swagelok Medium Pressure Fittings	1	MIN	0.01	0.01	No
DG-006-010	Swagelok High Pressure Fitting	1	MIN	0.01	0.01	No
DG-006-011	AN/JIC Fitting Assembly	1	MIN	0.01	0.01	No
DG-006-012	Pipe Flange Assembly (ANSI/DIN)	1	MIN	0.01	0.01	No
DG-006-013	Vacuum and Tri-clamp Assembly	1	MIN	0.01	0.01	No
DG-006-014	Tapered Threads - PTFE Tape	1	MIN	0.01	0.01	No
DG-006-015	Tapered Threads - Swagelok	1	MIN	0.01	0.01	No

Exit

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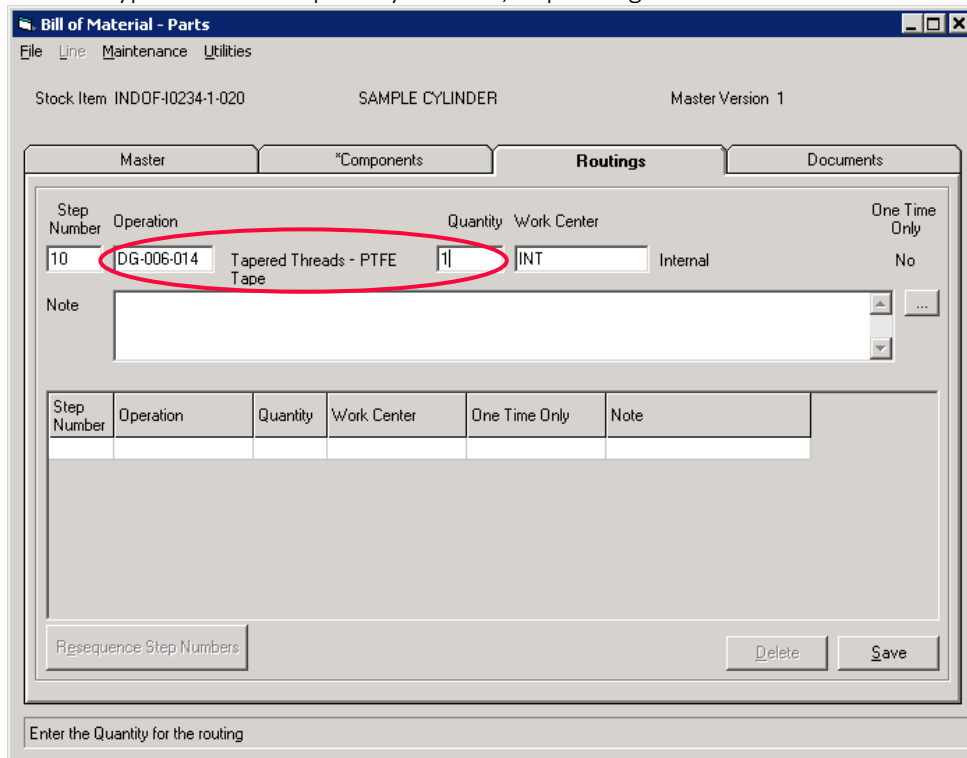
7.30 Select the sequential steps to assemble the custom solutions.



Operation Code	Description	Quantity	Unit Code	Price	Cost	One Time
123	DO NOT USE	1	MIN	0.01	0.01	Yes
DG-006-001	Tube Handling & Cutting	1	MIN	0.01	0.01	No
DG-006-002	Tube Bending up to ½" (12mm) - Hand Bender	1	MIN	0.01	0.01	No
DG-006-003	Tube Bending over ½" (12mm) - Bench Top Bender	1	MIN	0.01	0.01	No
DG-006-004	Tube Bending over 1" - Tool Bender	1	MIN	0.01	0.01	No
DG-006-005	Swagelok Fittings up to 1" (25mm) - By Hand	1	MIN	0.01	0.01	No
DG-006-006	Swagelok Fittings up to ½" (12mm) - AHSU	1	MIN	0.01	0.01	No
DG-006-007	Swagelok Fittings HSU/MHSU	1	MIN	0.01	0.01	No
DG-006-008	Swagelok Fittings with Soft Ferrules	1	MIN	0.01	0.01	No
DG-006-009	Swagelok Medium Pressure Fittings	1	MIN	0.01	0.01	No
DG-006-010	Swagelok High Pressure Fitting	1	MIN	0.01	0.01	No
DG-006-011	AN/JIC Fitting Assembly	1	MIN	0.01	0.01	No
DG-006-012	Pipe Flange Assembly (ANSI/DIN)	1	MIN	0.01	0.01	No
DG-006-013	Vacuum and Tri-clamp Assembly	1	MIN	0.01	0.01	No
DG-006-014	Tapered Threads - PTFE Tape	1	MIN	0.01	0.01	No

Exit

7.31 Type the correct quantity number, depending on the number of assemblies to be built.



Stock Item: INDOF-10234-1-020 SAMPLE CYLINDER Master Version 1

Master *Components **Routings** Documents

Step Number	Operation	Quantity	Work Center	One Time Only
10	DG-006-014 Tapered Threads - PTFE Tape	1	INT Internal	No

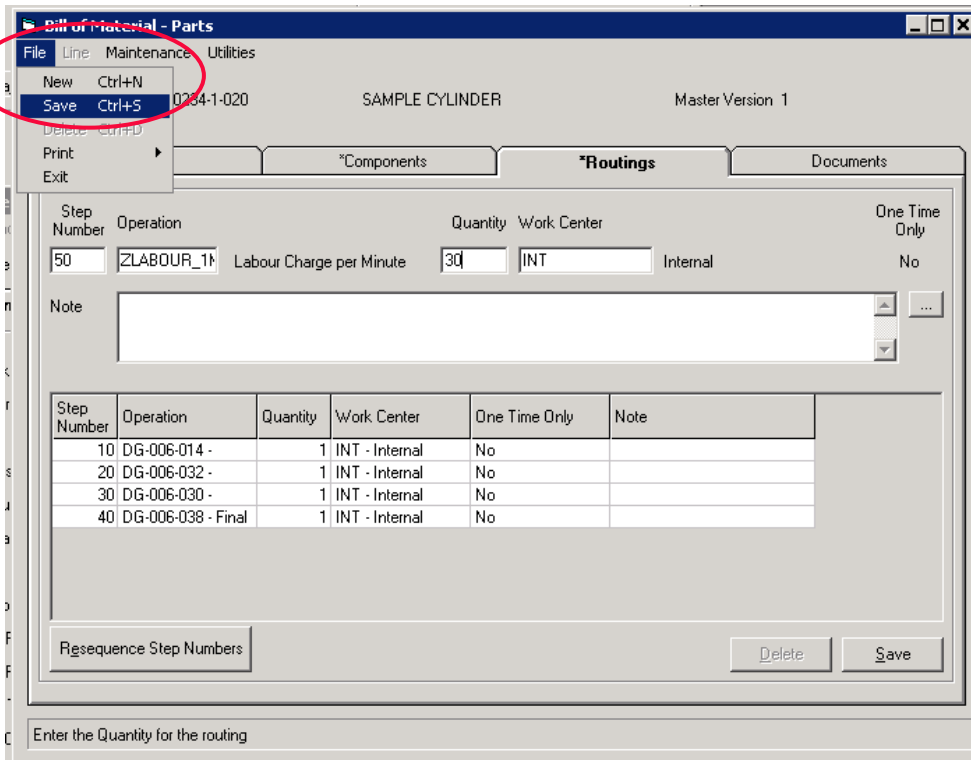
Note: [Empty text box]

Step Number	Operation	Quantity	Work Center	One Time Only	Note

Resequence Step Numbers Delete Save

Enter the Quantity for the routing

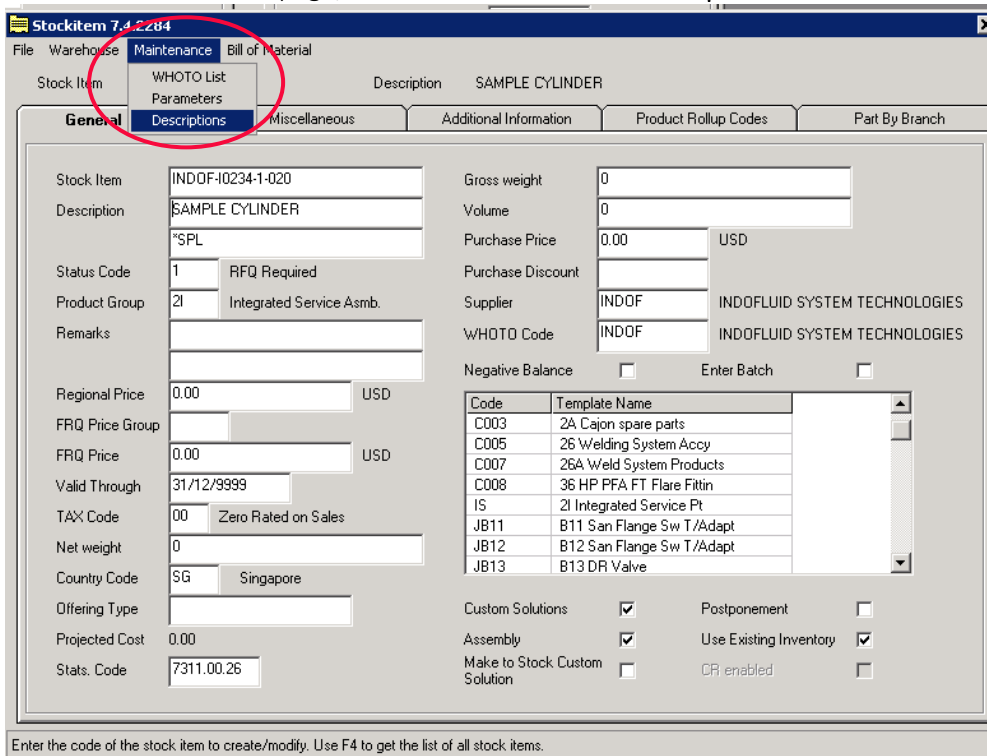
7.34 Hit **Ctrl+S** or click **File -> Save**.
Close the window.



Step Number	Operation	Quantity	Work Center	One Time Only	Note
10	DG-006-014 -	1	INT - Internal	No	
20	DG-006-032 -	1	INT - Internal	No	
30	DG-006-030 -	1	INT - Internal	No	
40	DG-006-038 - Final	1	INT - Internal	No	

Key in Long Description of CS Part Number

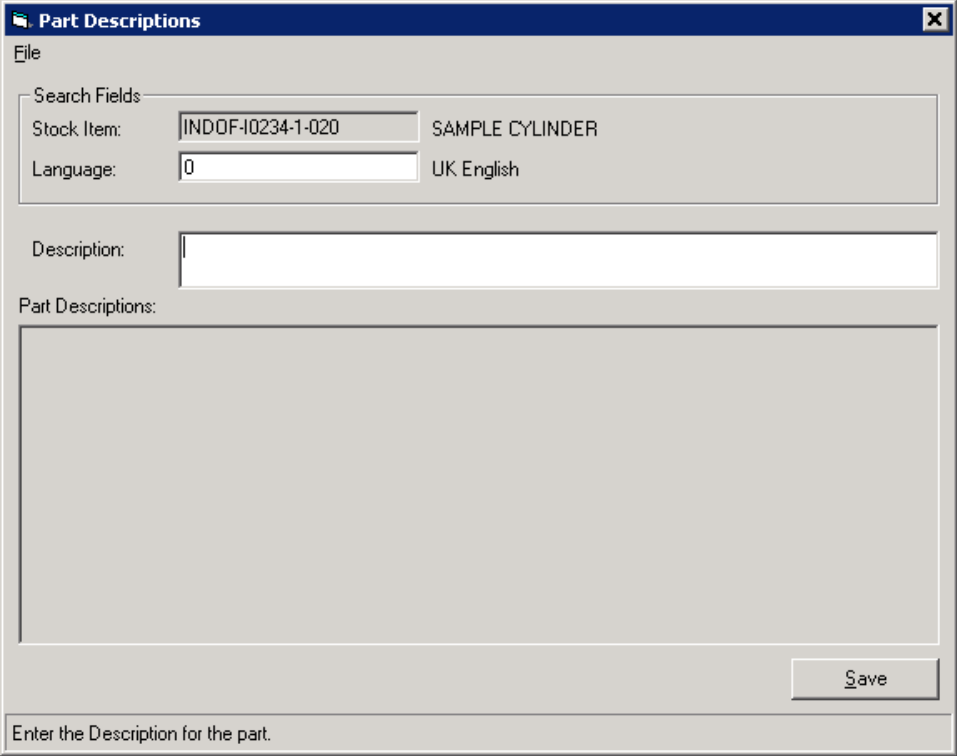
7.35 On the **General** page, click on **Maintenance -> Descriptions** and a new window will appear.



Code	Template Name
C003	2A Cajon spare parts
C005	26 Welding System Accy
C007	26A Weld System Products
C008	36 HP PFA FT Flare Fittin
IS	2I Integrated Service Pt
JB11	B11 San Flange Sw T/Adapt
JB12	B12 San Flange Sw T/Adapt
JB13	B13 DR Valve

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7.36 Create a long description for the CS part number by describing all the parts used to make up the assembly.



Part Descriptions

File

Search Fields:

Stock Item: INDOF-10234-1-020 SAMPLE CYLINDER

Language: 0 UK English

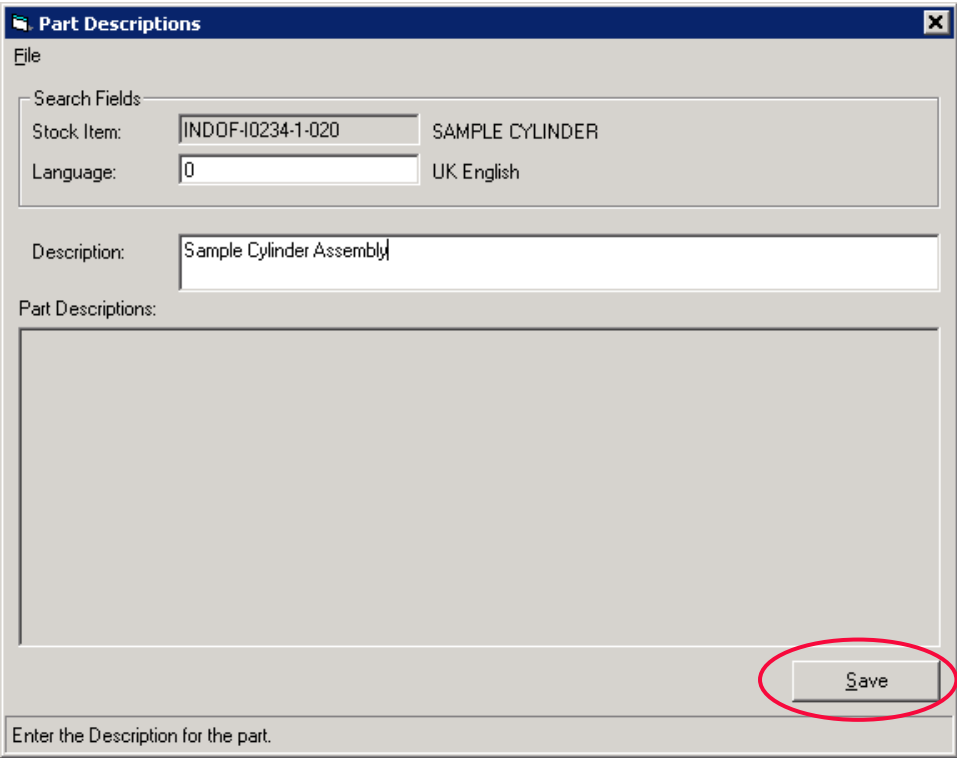
Description:

Part Descriptions:

Save

Enter the Description for the part.

7.37 Click **Save** once you have completed the long description then close the window.
Below is an example:



Part Descriptions

File

Search Fields:

Stock Item: INDOF-10234-1-020 SAMPLE CYLINDER

Language: 0 UK English

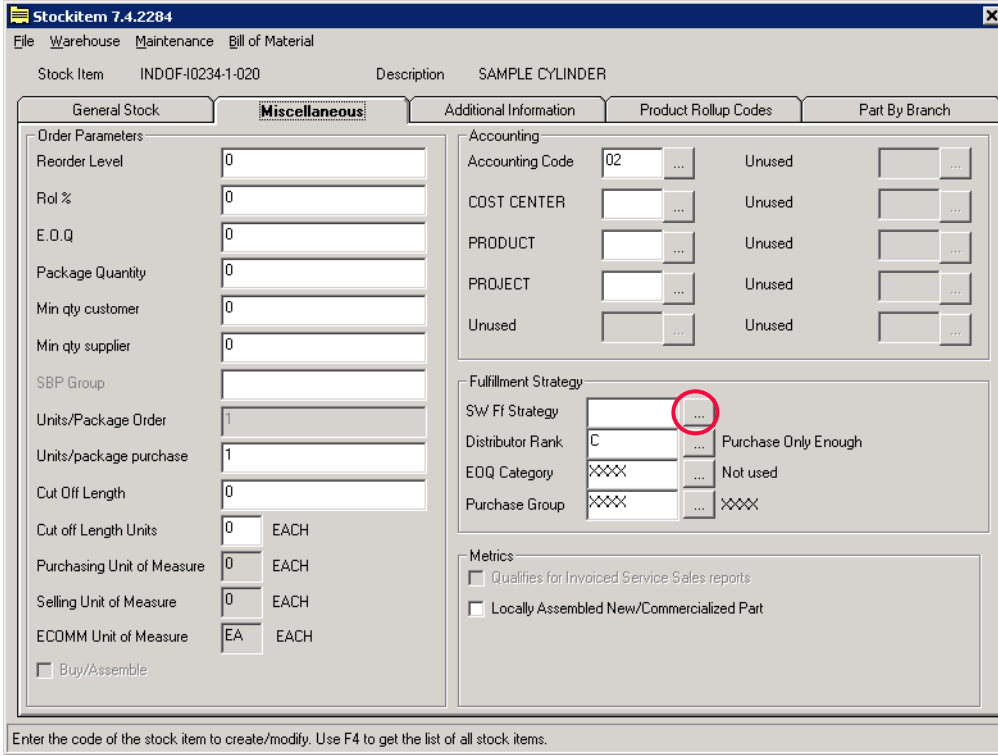
Description: Sample Cylinder Assembly

Part Descriptions:

Save

Enter the Description for the part.

- 7.38 Click on the **Miscellaneous** tab.
Under **Fulfilment Strategy** section, click on the ... button next to the blank that is next to **SW Ff Strategy**.
A new window will appear.



Stockitem 7.4.2284

File Warehouse Maintenance Bill of Material

Stock Item INDOF10234-1-020 Description SAMPLE CYLINDER

General Stock Miscellaneous Additional Information Product Rollup Codes Part By Branch

Order Parameters

Reorder Level 0

Pol % 0

E.O.Q 0

Package Quantity 0

Min qty customer 0

Min qty supplier 0

SBP Group

Units/Package Order 1

Units/package purchase 1

Cut Off Length 0

Cut off Length Units 0 EACH

Purchasing Unit of Measure 0 EACH

Selling Unit of Measure 0 EACH

ECOMM Unit of Measure EA EACH

☐ Buy/Assemble

Accounting

Accounting Code 02 Unused

COST CENTER Unused

PRODUCT Unused

PROJECT Unused

Unused Unused

Fulfilment Strategy

SW Ff Strategy ...

Distributor Rank C Purchase Only Enough

EOQ Category XXXX Not used

Purchase Group XXXX

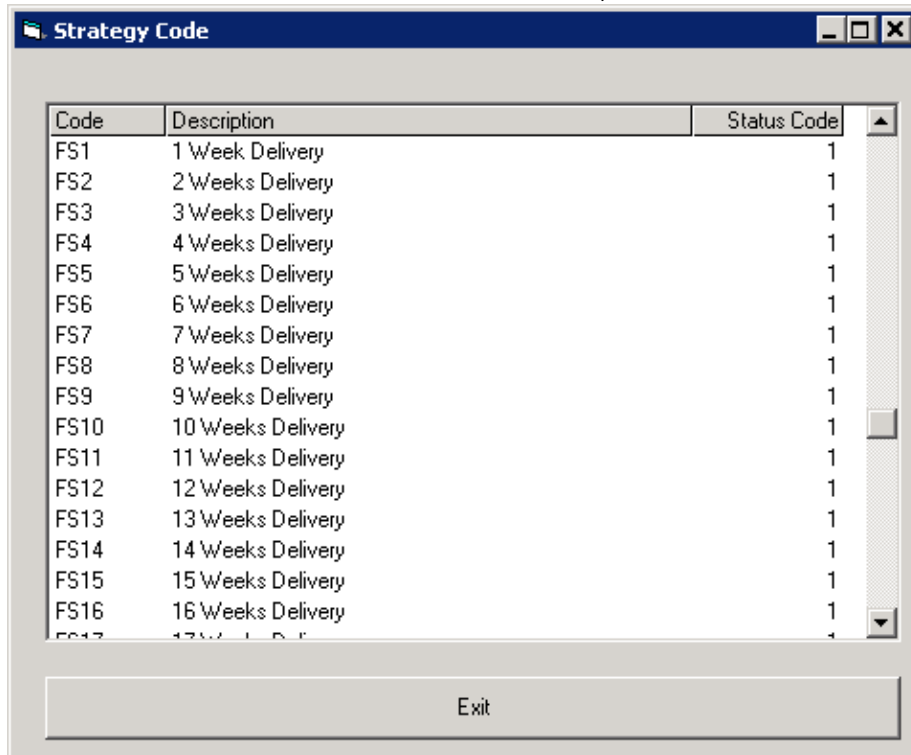
Metrics

☐ Qualifies for Invoiced Service Sales reports

☐ Locally Assembled New/Commercialized Part

Enter the code of the stock item to create/modify. Use F4 to get the list of all stock items.

- 7.39 Select the correct number of week delivery



Strategy Code

Code	Description	Status Code
FS1	1 Week Delivery	1
FS2	2 Weeks Delivery	1
FS3	3 Weeks Delivery	1
FS4	4 Weeks Delivery	1
FS5	5 Weeks Delivery	1
FS6	6 Weeks Delivery	1
FS7	7 Weeks Delivery	1
FS8	8 Weeks Delivery	1
FS9	9 Weeks Delivery	1
FS10	10 Weeks Delivery	1
FS11	11 Weeks Delivery	1
FS12	12 Weeks Delivery	1
FS13	13 Weeks Delivery	1
FS14	14 Weeks Delivery	1
FS15	15 Weeks Delivery	1
FS16	16 Weeks Delivery	1

Exit

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7.40 Click **File** -> **Save**



The number of week delivery is attributed to the lead time of different parts and the duration the team will take to assemble the parts.

8.0 CREATE QUOTATION IN SAE

8.1 Refer to **DCN#SI-DG-TER-002** to create the quotation in SAE.

8.2 Price to quote is based on what was populated in the job costing.

9.0 SEND IN THE QUOTATION

9.1 Refer to DCN# **SI-DG-TER-002** to print the quotation in SAE.

9.2 For Levels II and III, you need to complete a CS Quote template to provide a more comprehensive document of the assembly:



Swagelok Indonesia
Indofluid System Technologies Pte Ltd
10 Ubi Crescent, #05-07 Ubi Techpark Lobby E, Singapore 408564
Tel: +65 6908 5300 Fax: +65 6908 5301
Email: info@indofluid.swagelok.com

Authorized Swagelok Sales and Service Centre for Indonesia
Swagelok Indonesia is a trading name of Indofluid System Technologies Pte Ltd



Assembly Quotation Document
(In conjunction with Swagelok Indonesia Quotation 00100XXXXX)



CUSTOMER NAME
CUSTOMER ADDRESS

Date: XX/XX/XXXX

Re. DESCRIPTION OF ASSEMBLIES

Dear CONTACT,

Please find below our quotation for the assembled products as per your discussions with NAME OF SALES REP.

Official Quotation Number 00100XXXXX

In the event of an order being placed please quote the reference number(s) below:-

Item	Part Number	Description	Qty	Price	Sub Total
1					
2					
				Total USD	\$

Lead Times:

9 Weeks from receipt of order and / or approved drawing confirming design (subject to prior sale and workshop availability).
Actual delivery date will be confirmed within 10 days of design approval.

Quote Validity:

This quote is valid for a period of 30 days from the above date.

Scope of Works:

- The assembly & documentation as described.
- Supply all parts, labor and materials except free issue parts as listed*.
- Our standard contract applies.
- Our standard terms and conditions apply.

Please contact our Custom Solutions Department on +65 6908 5300
or e-mail us by clicking [here](#) for further help

www.swagelok.com/indonesia

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9.3 Ensure customer receives the following:

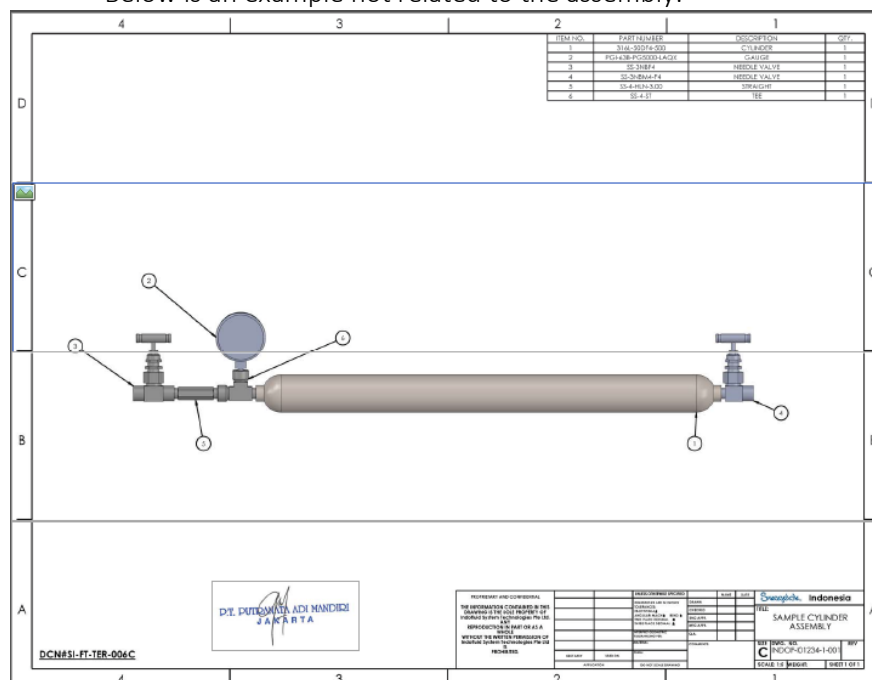
- Quotation E-mail
- Quotation PDF file
- Word Document Quotation
- Any P&ID / Visio Sketch
- Solidworks Drawing

9.4 E-mail the drawing to customer, requesting them to sign on the drawing as an approval

9.5 Ensure customer replies back with the signed drawing.

Do not proceed until this is done.

Below is an example not related to the assembly:



9.6 Save the signed copy in the customer's sales folder

10.0 ARCHIVE ALL DOCUMENTS AND CORRESPONDENCE

10.1 Save all customer documents and correspondence in the sales folder.

10.2 Update the **CS Management Tool** excel workbook under the following columns:



Under the column **Status**, you can put it as:

Quoted once quotation is done

Won once converted to order

Lost if we could not convert it to order

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11.0 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	

12.0 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

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