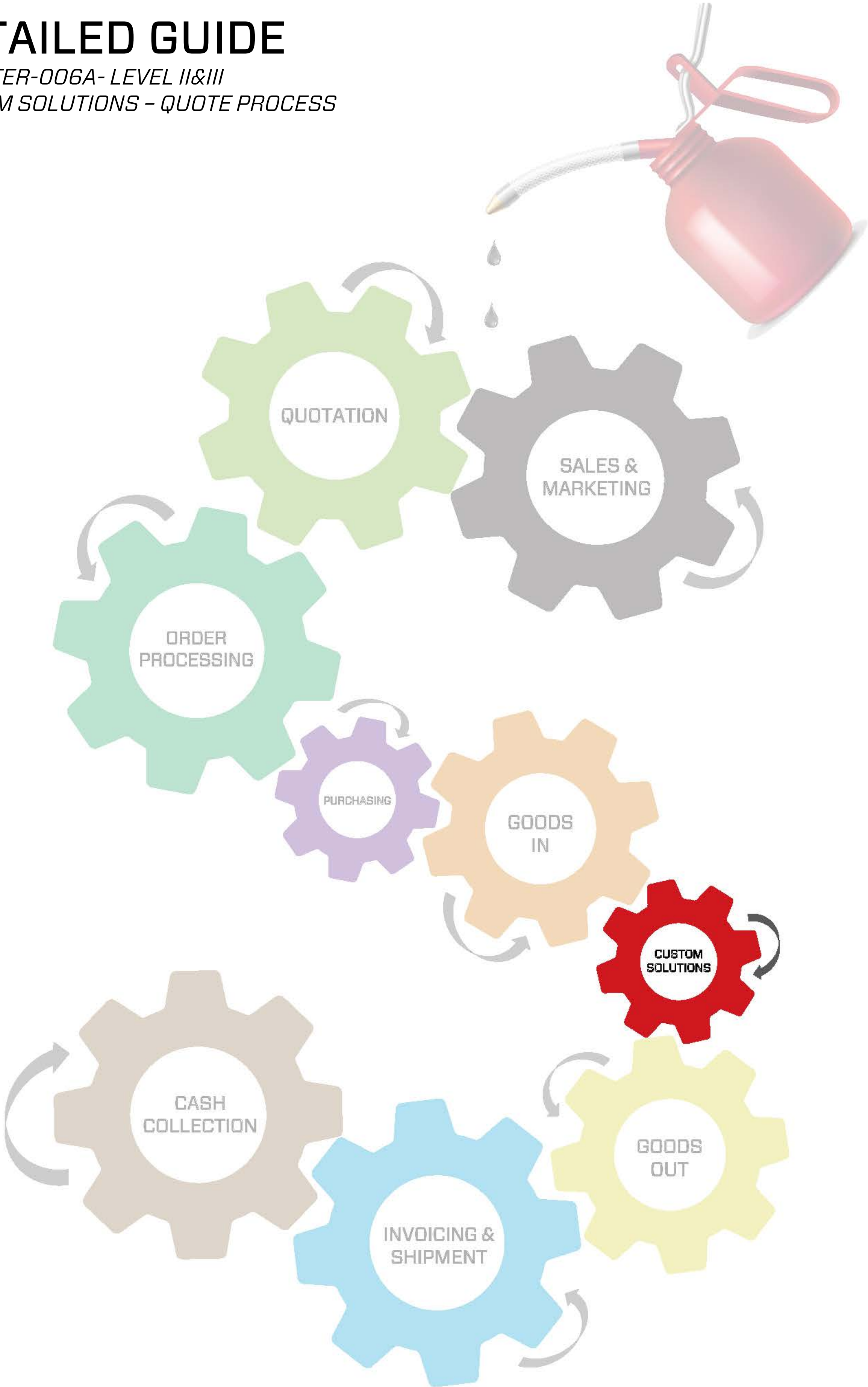
DETAILED GUIDE

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

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: Chris Dixon

PT. Putranata Adi Mandiri
(Sole Agent for Swagelok products in Indonesia)
Jl. Kartini 8 No. 9
Jakarta, 10750
Indonesia
Phone (+62) 21 2902 2359 | Fax (+62) 21 2902 1936
info@indonesia.swagelok.com
www.swagelok.com/indonesia

Process Owner: Chris Dixon

Process Document Author: Syazanawati

Revision Change Log (changes are denoted with ▌ s)

Revision	Date	Revision to	Author

Document Approved by: Steven Sparkes
Date: 21/09/17

Signature: 

SCOPE

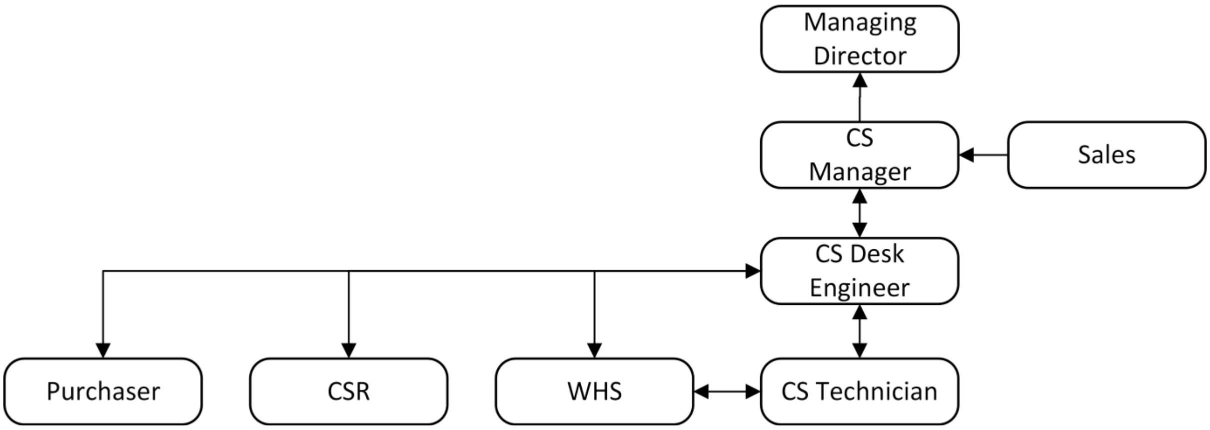
This document defines the planned and controlled activities needed to work with customers for Custom Solutions (CS) assemblies and is limited to identifying CS opportunities, verifying internal capabilities and our ability to fulfil in line with policies, quoting and processing orders.

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:



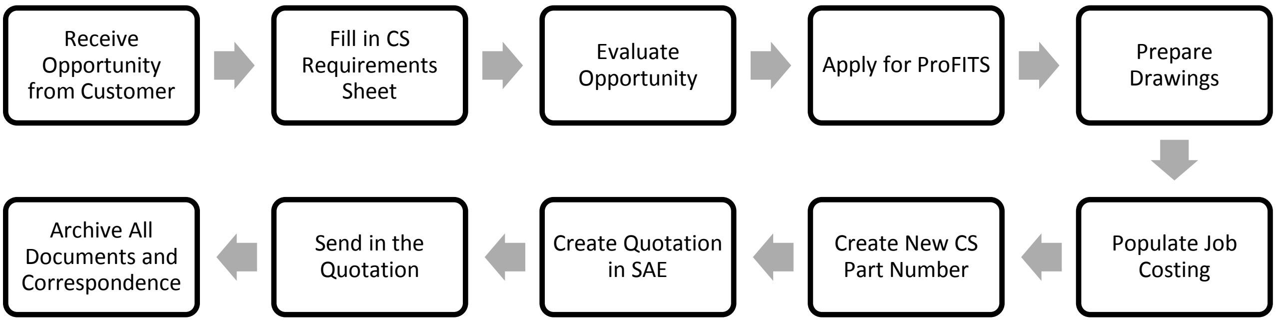
OBJECTIVE(S)

- 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

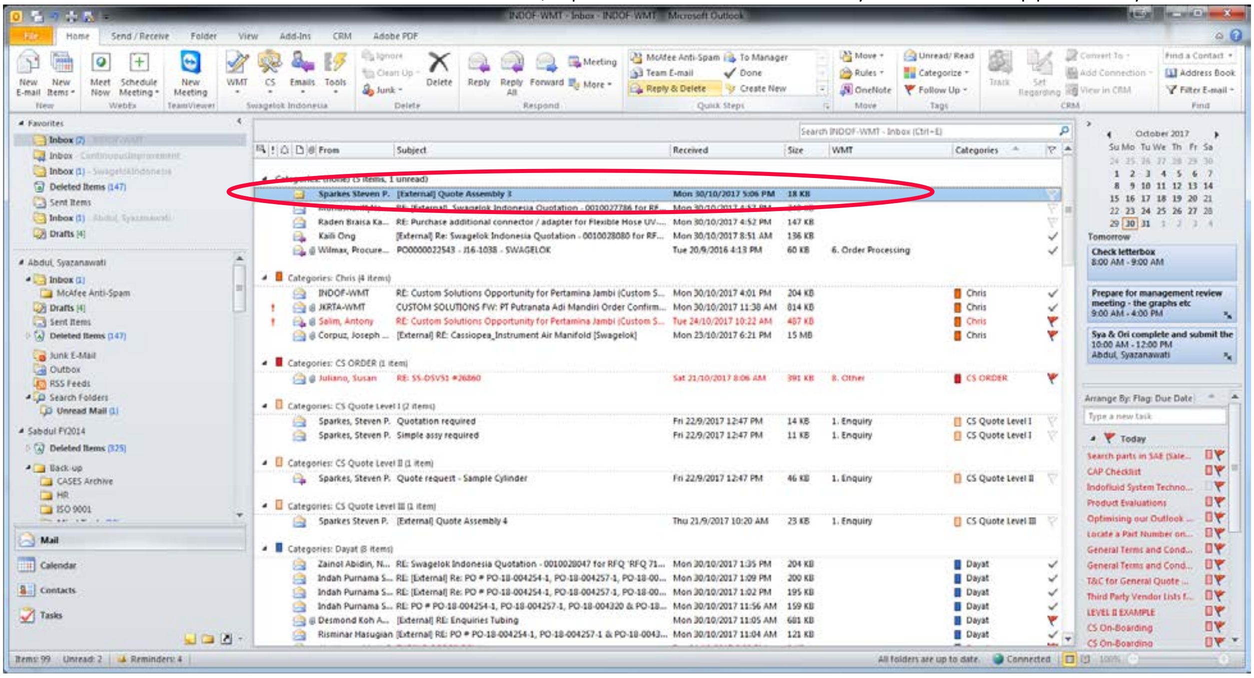
- Swagelok Custom Solutions & Product Modification Policy
- Distributor Sourcing of Non-Swagelok Products Policy

PROCESS FLOW

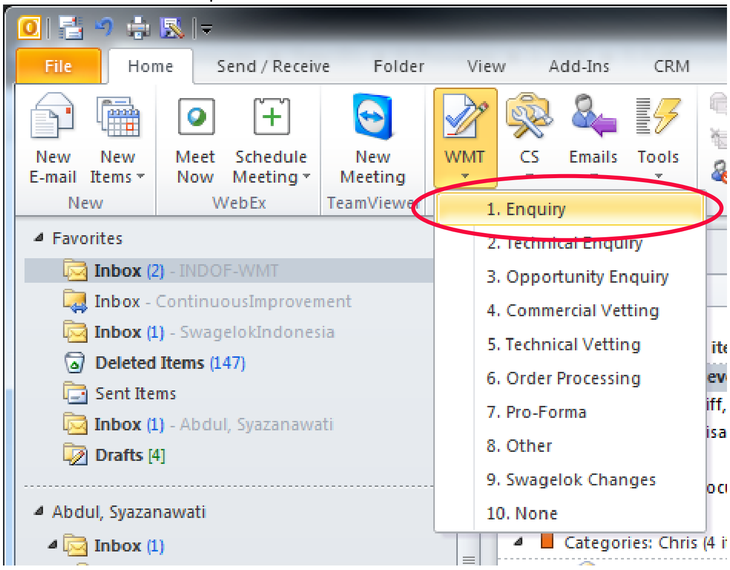


1.0 RECEIVE OPPORTUNITY FROM CUSTOMER

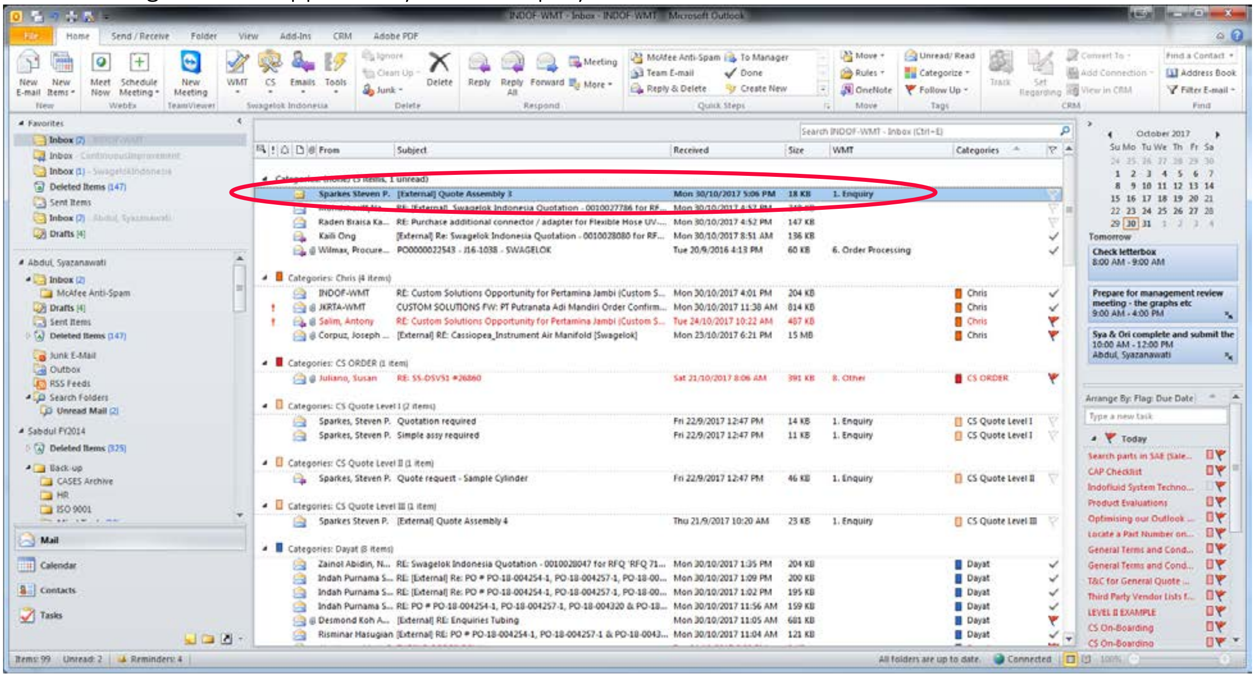
1.1 Once the e-mail is in the INBOX-WMT, open the e-mail to identify if it is a CS Opportunity.



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

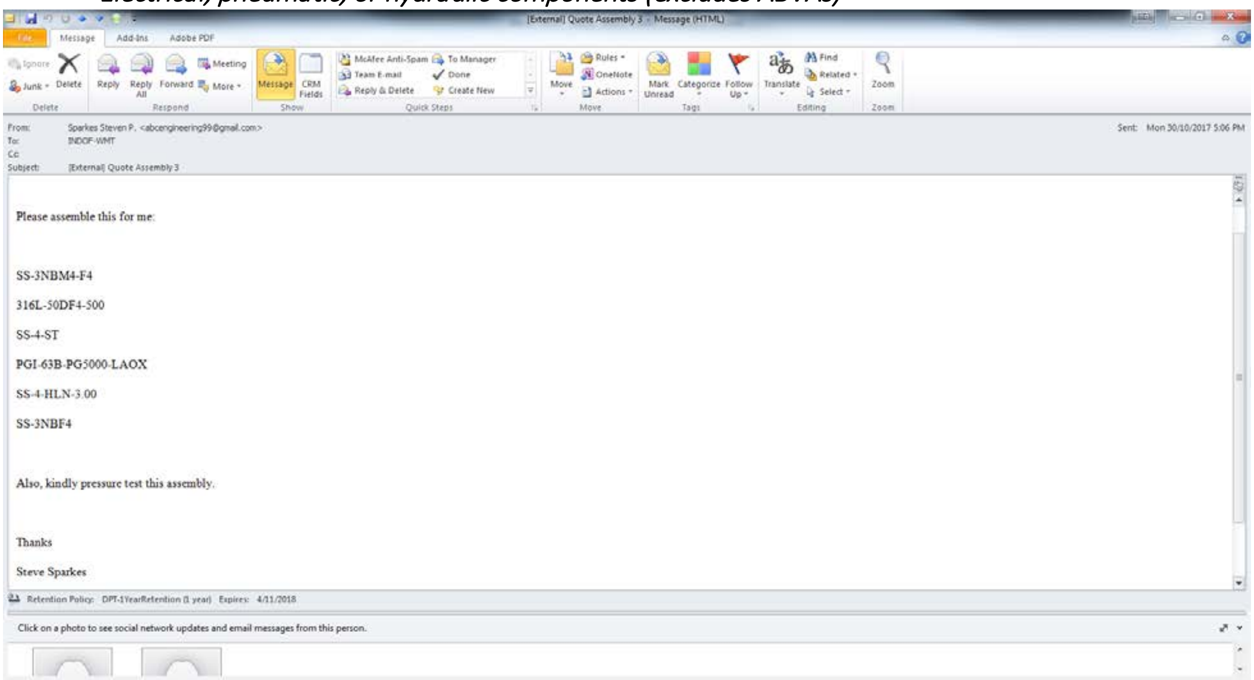


1.4 Open the e-mail and identify if the potential assembly falls under Assembly Level II or III.

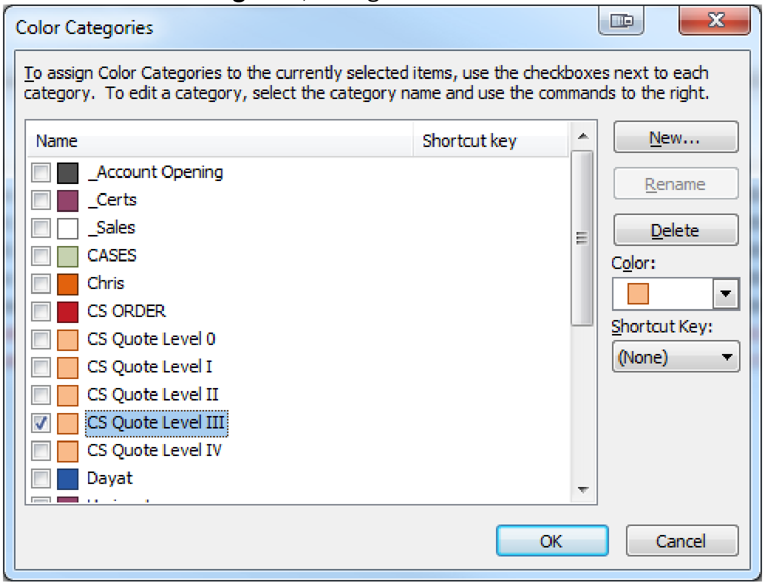
Assembly Level II is a set of components that require a Product & Instrumental Drawing (P&ID) or CAD drawing to define orientation or layout.

Level III Systems can be defined as systems that include any or all of the following:

Close tolerances, typically defined as less than +/- .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 opprotunity is assigned to the wrong level, the CS Manager can reassign it.

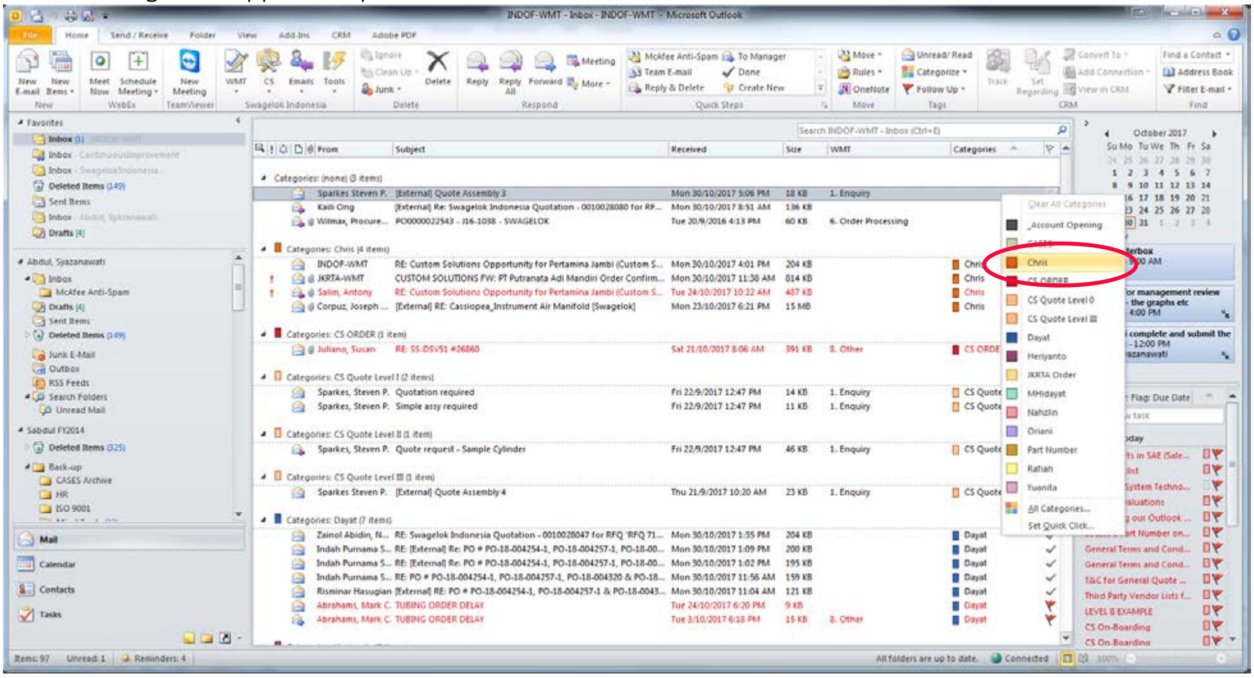
1.6 Refer to the **Associate Skills Matrix.** *Click on the image above for the latest Skills Matrix.*

ASSOCIATE SKILLS MATRIX - QUOTE

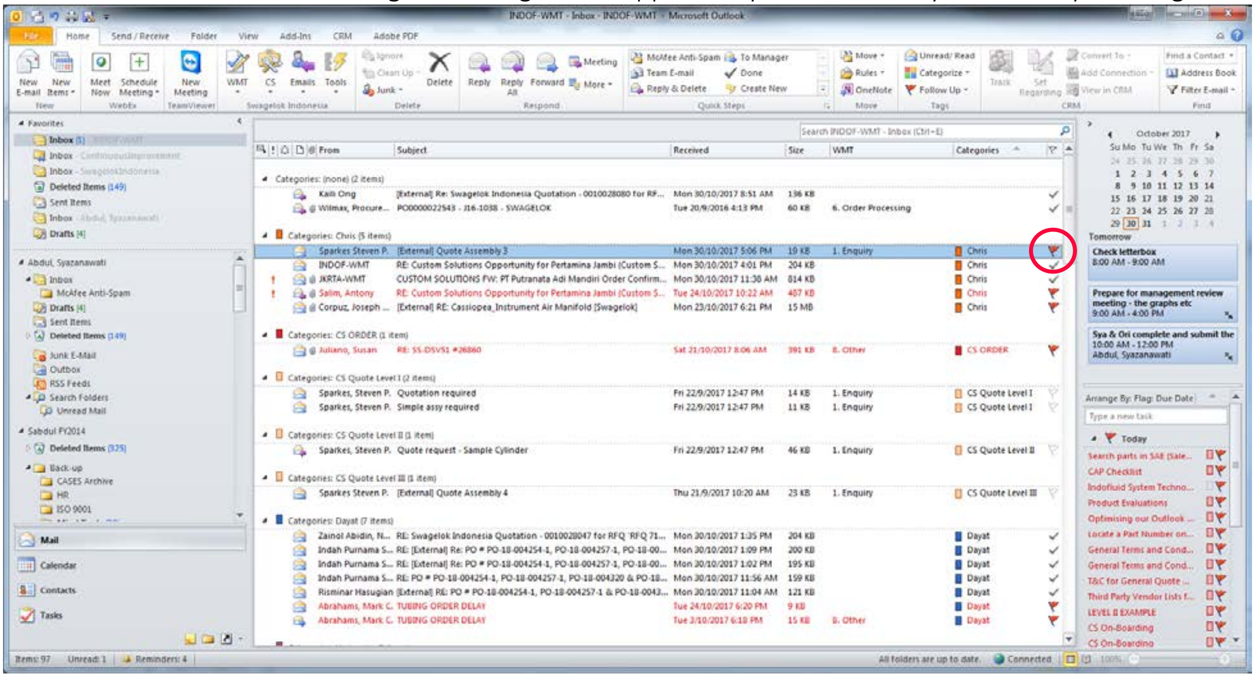
Primary | Secondary | Backup | ☒ Trained

	Antony Salim	Nahzlin Shariff	Yuanita Hantoro	Syazanawati	Oriani	Chris Dixon	Heriyanto	Hidayat Zainol	Monn	Nicole Draper	Fiesta Saraswati	Hendra Sie	Irfan Nofa	Joel Siallagan	Kevin Fajri	Ribalai Wau	Rifky Ballas	Rizkiah	Sahat Panjaitan	Yuliani Kasman
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.

CS REQUIREMENTS
(Level II to IV)

DCN #SI-FT-TER-006B
REVISION LEVEL 1.0
DATE OF REVISION
31/03/17
PAGE 1 OF1

Customer & Opportunity Details

Sales Associate or CSR	
Office JKRTA / INDOF	
Customer Name	
Project (if applicable)	
Region / Location	
Enquiry Reference Number	
Contact Name	
Phone No	
Email Address	
Date Received	
Quote Due Date	
Required Delivery Date	
Special Instructions / Notes	

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	

BOM - Swagelok Parts

Item	Part Number	Qty
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
29		
30		

BOM - 3rd Party

Item	Part Number	Qty
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

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.

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

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 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.**

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.

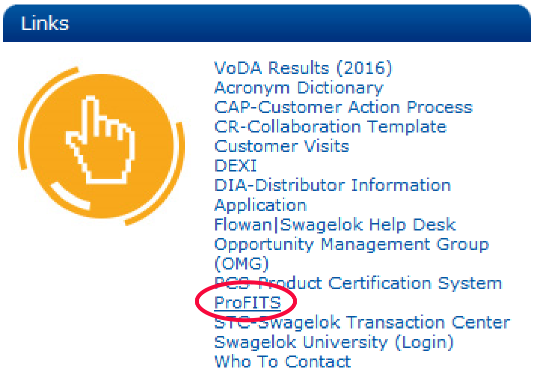
4.0 APPLY FOR PROFITS

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.

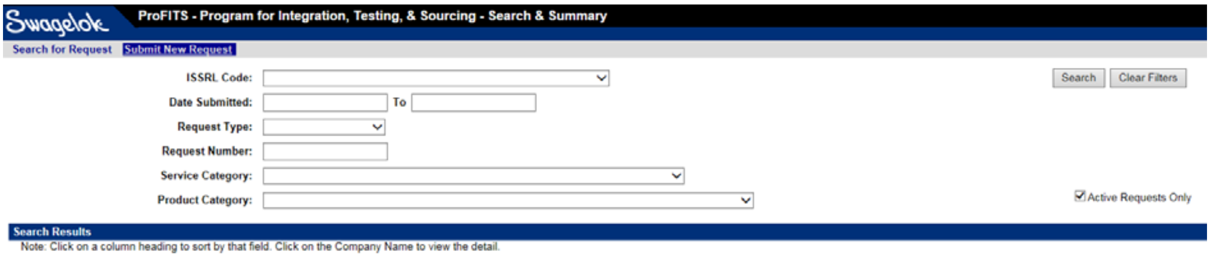
4.1 Log on to iswagelok.

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

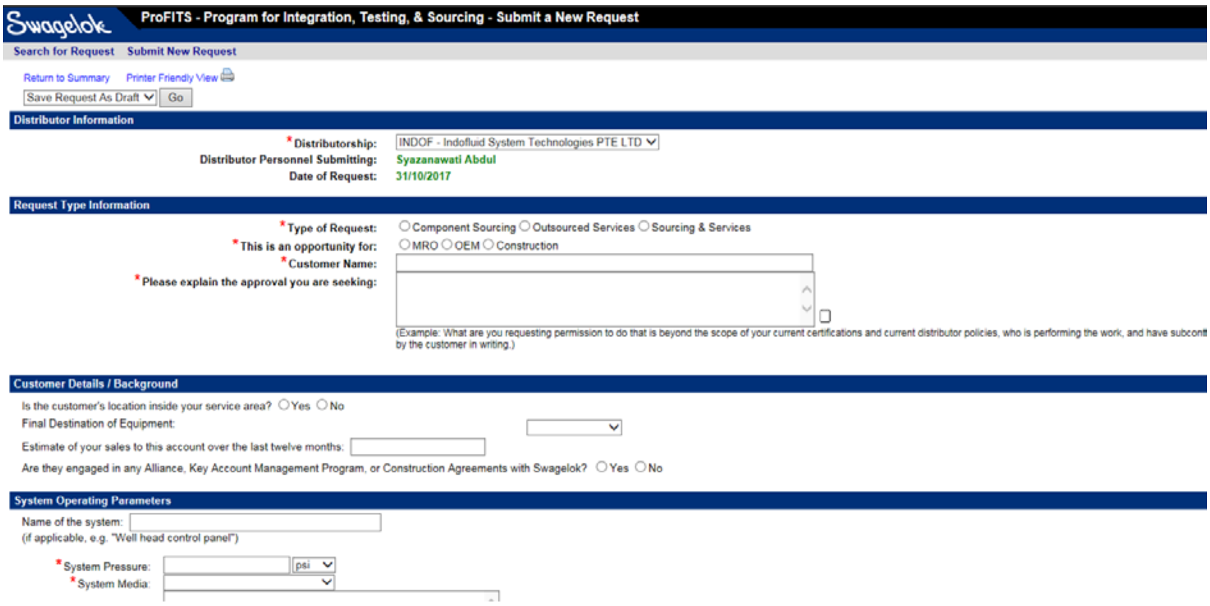
4.3 Under the tab **Links**, click on **ProFITS.**



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.



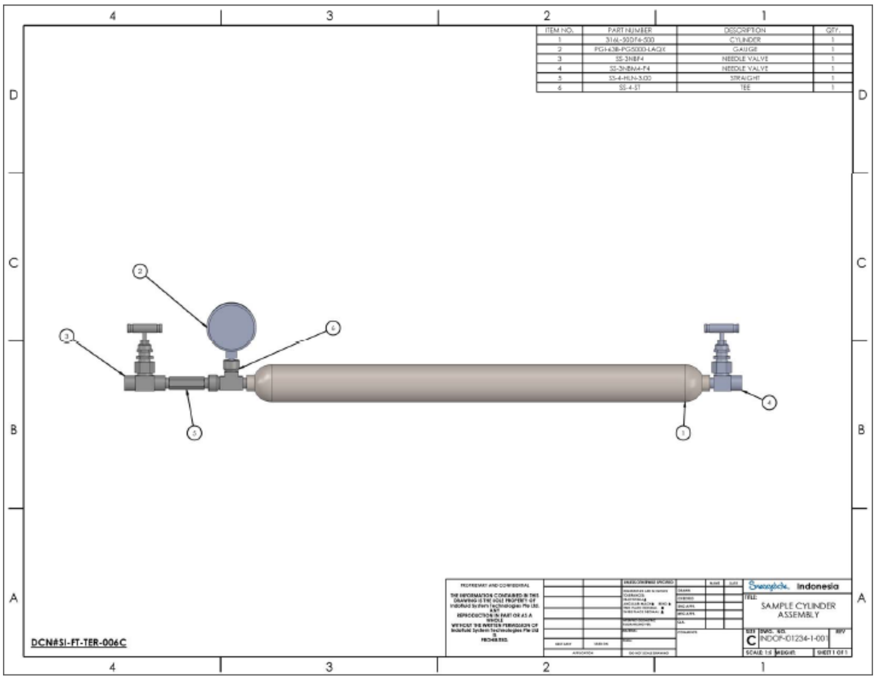
4.6 Select the correct **Type of Request**. In most cases, we seek approval for Third Party products so we select **Component Sourcing / Service.**
Ensure all sections with asterisks are filled in.

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

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:

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	$ 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.

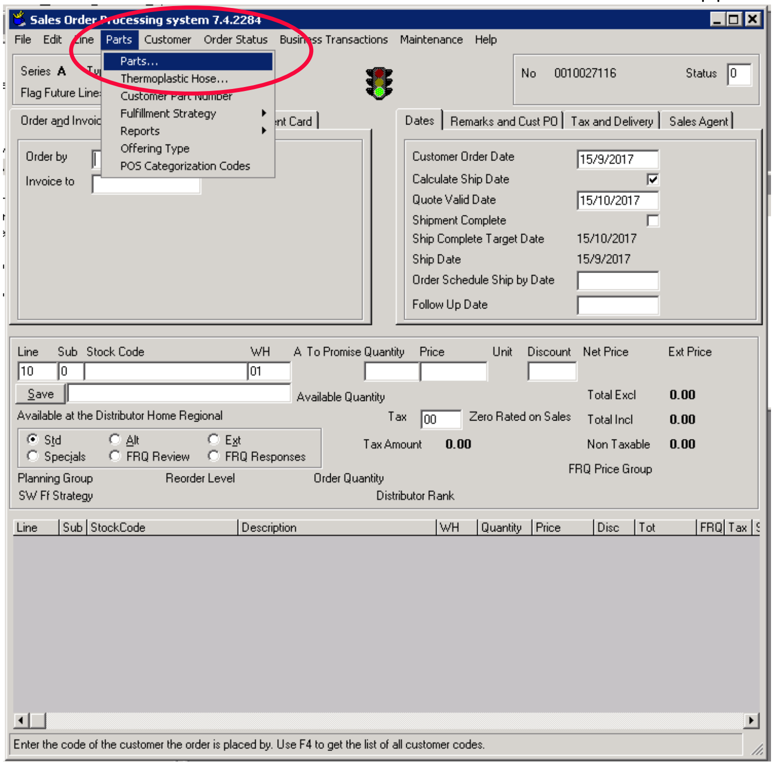
7.0 CREATE NEW CS PART NUMBER

<u>Creating Part Number as A Stock Item</u>

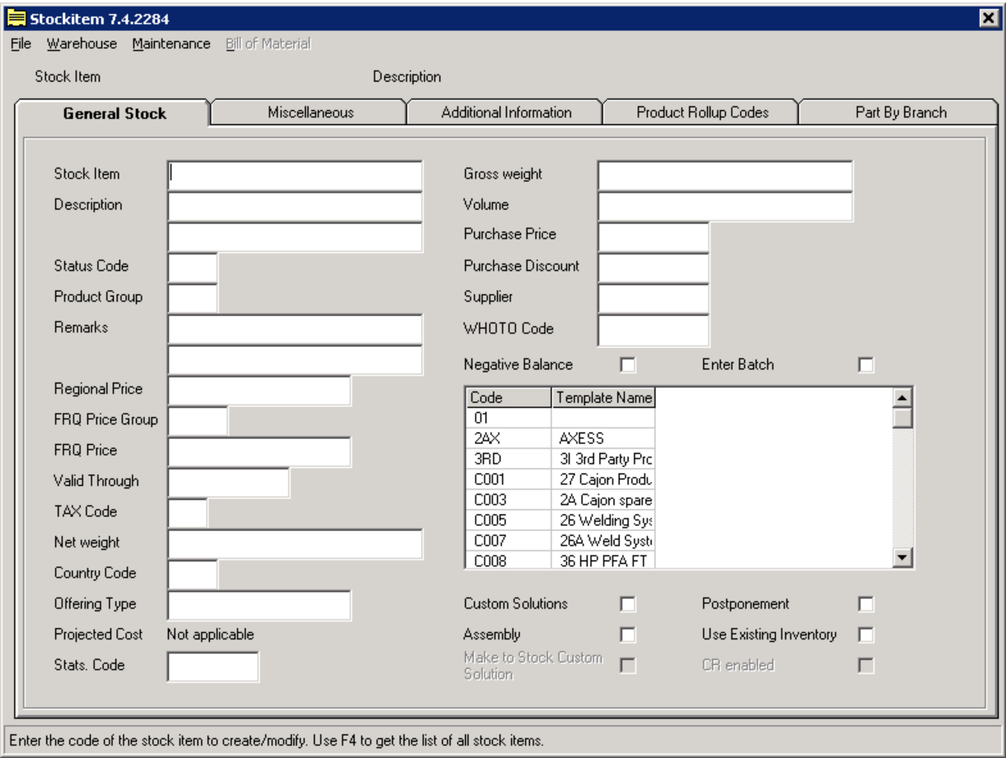
7.1 Access into **SAE** -> **Sales Order** and a new window will appear

X

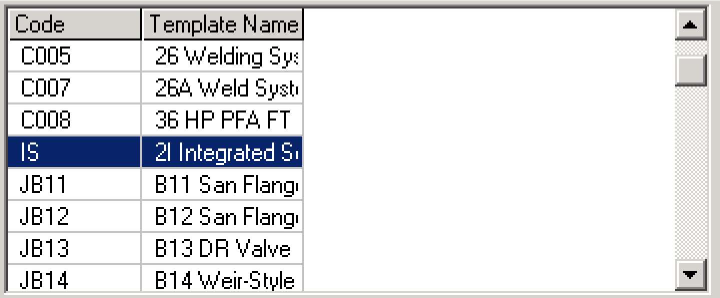
7.2 Click the tab **Parts** -> **Parts** and a new window will appear.



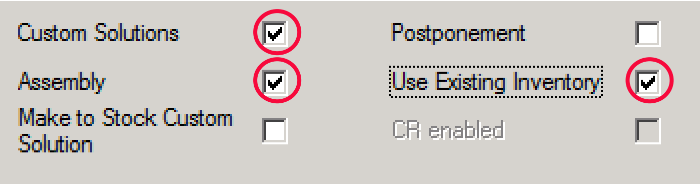
New window:



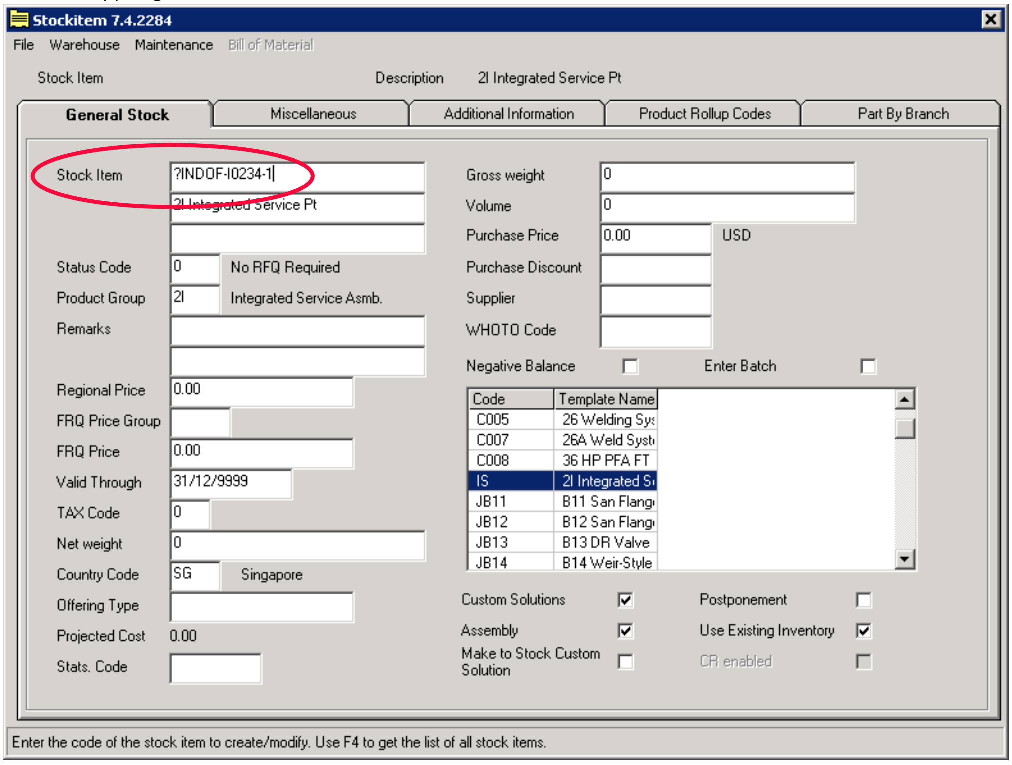
7.3 Select **Code IS** with the **Template Name: 2I Integrated Service Pt** to begin with a Custom Solutions template



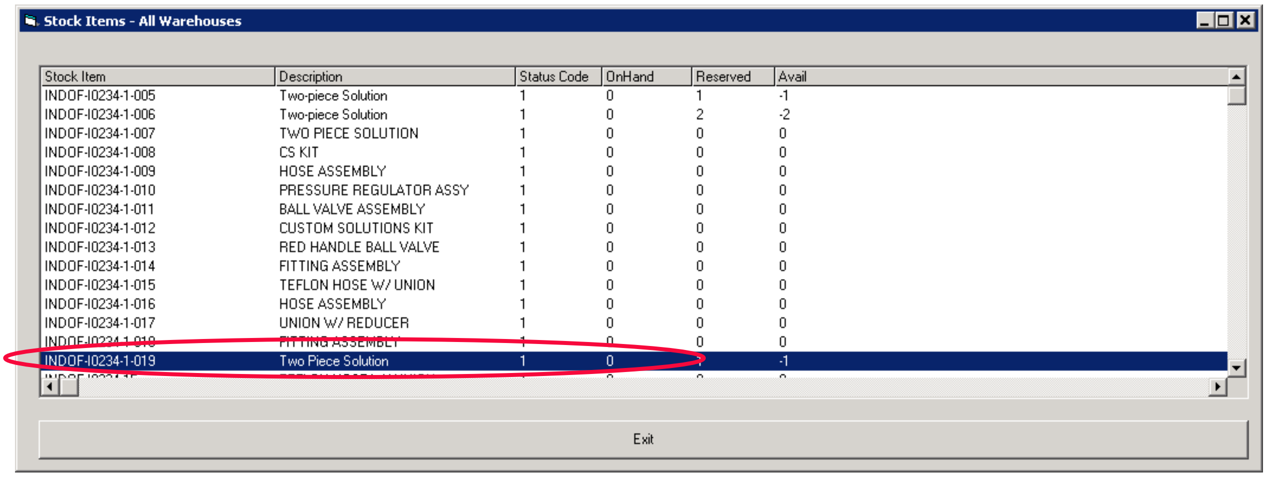
7.4 Tick the following boxes:



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.

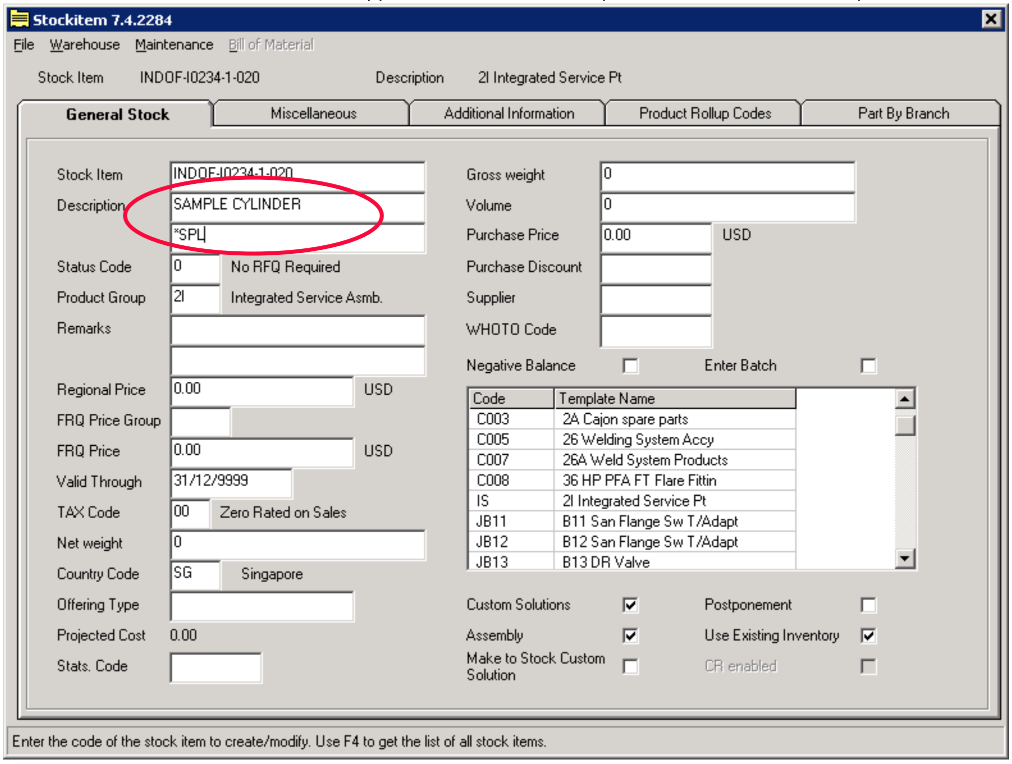


New window:



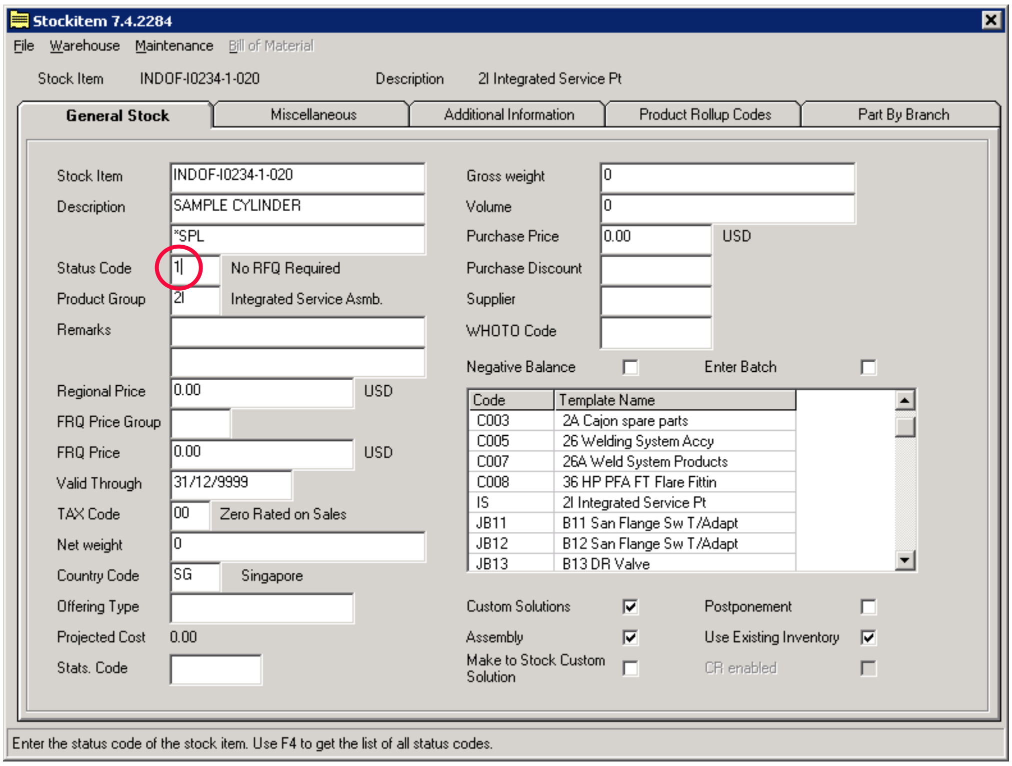
This means the next CS PN# should be INDOF-I0234-1-020.

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

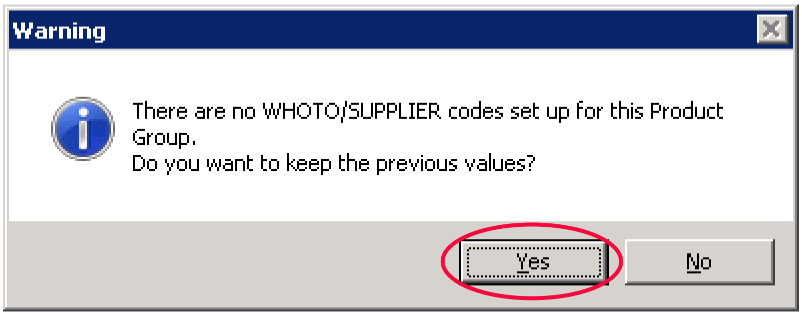


Type ***SPL** on the second blank as it is a special item.

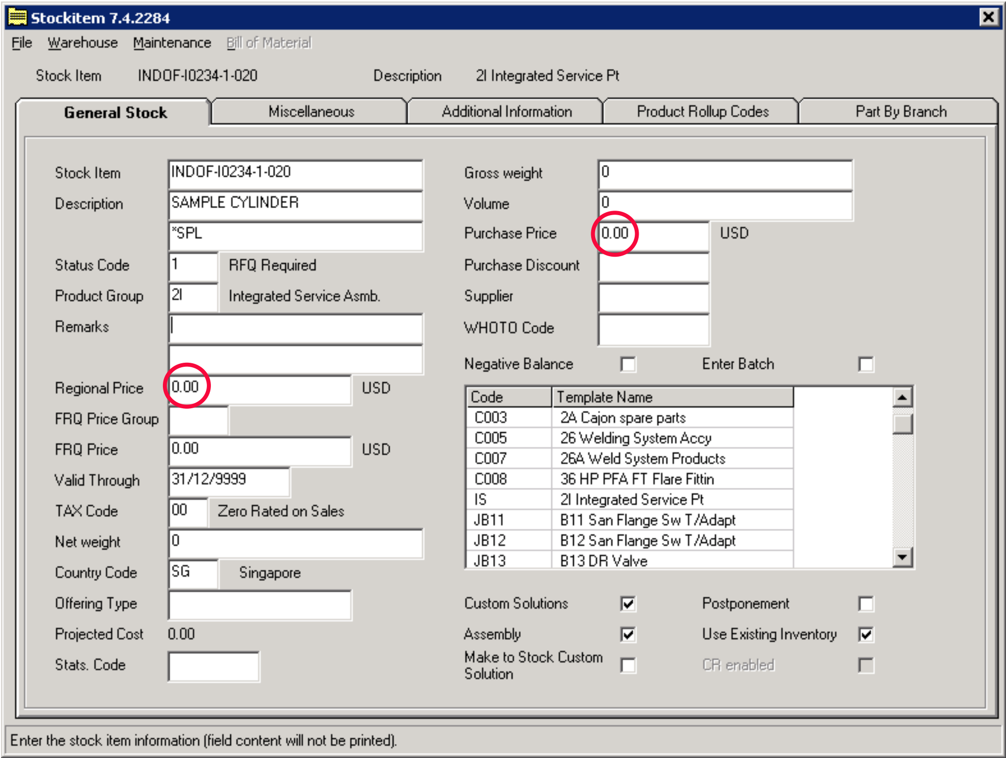
7.7 Select **1** next to **Status Code** and hit **Enter**



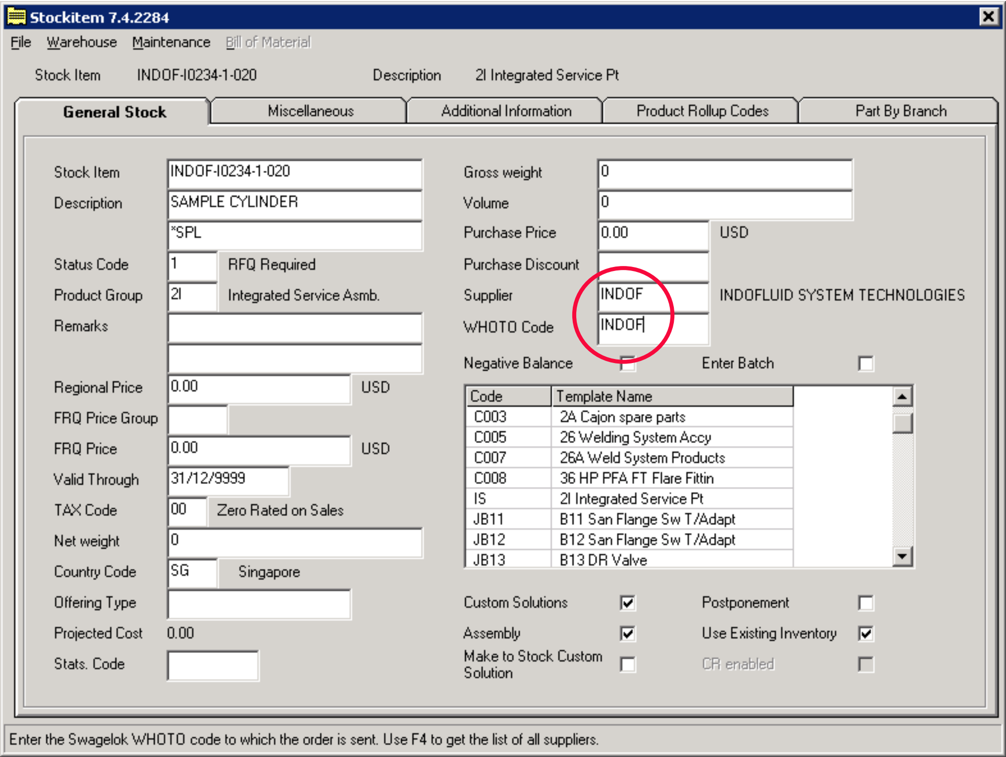
7.8 Hit **Enter** again and a new window will appear.
Click **Yes**.



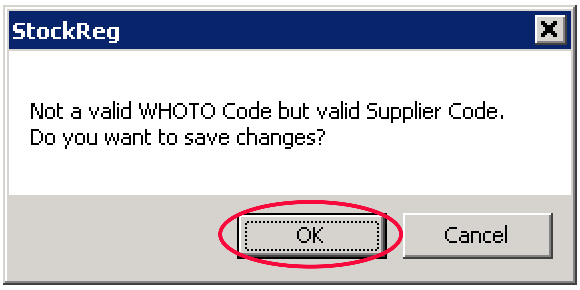
7.9 Leave the **Regional Price** and **Purchase Price** to be **0.00.**
Amount of the CS Part will be calculated by the system – the sum of prices of all parts listed.



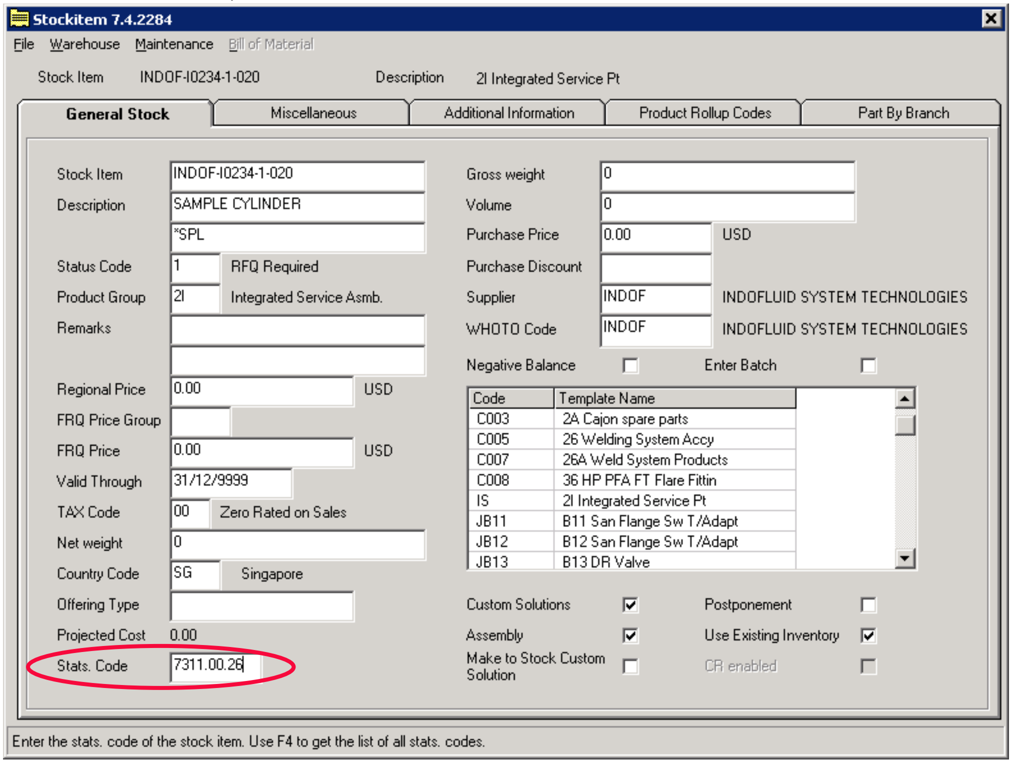
7.10 Type **INDOF** in the blank next to **Supplier** and **WHOTO Code** then a new window will appear



7.11 Click **OK**



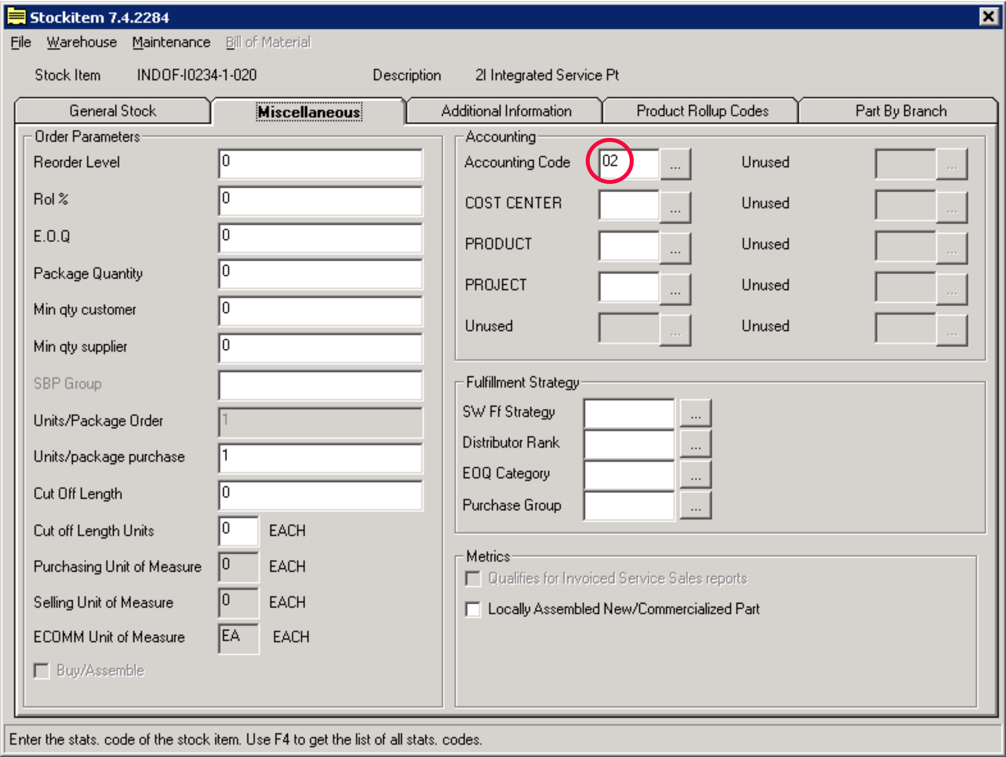
7.12 Hit the **Tab** key until the cursor appears next to the **Stats. Code.**
Access the [CS HS Codes] **(O:\2) Custom Solutions)** excel file and choose the appropriate HS Code based on the product in the Bill of Materials (BOM): - this file lists all the CS ordered and you can refer to one similarly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



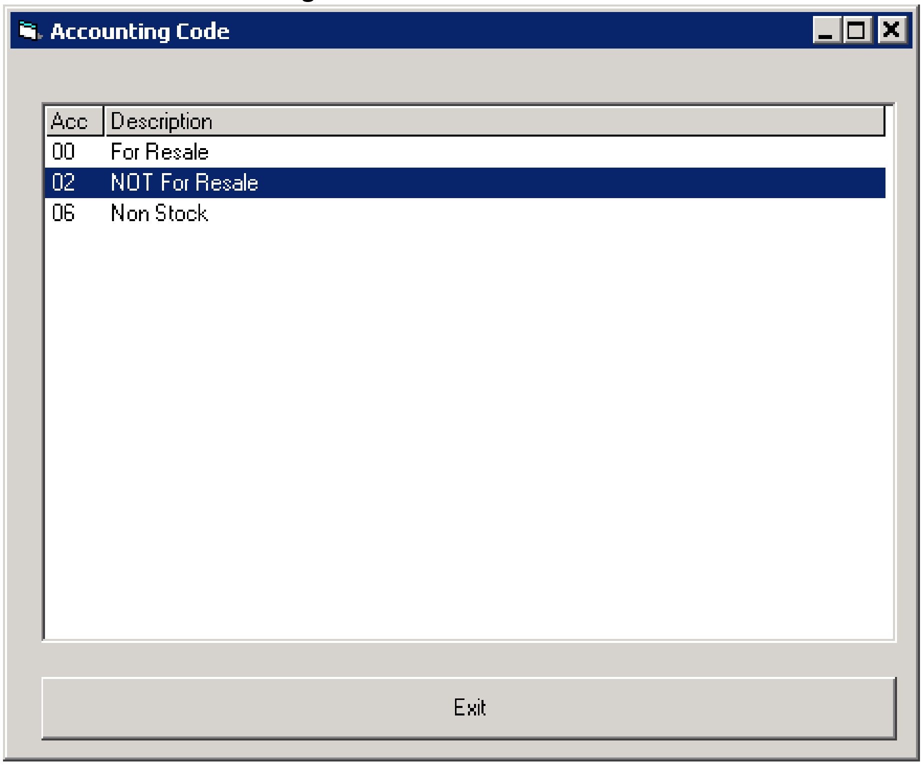
⚠

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.

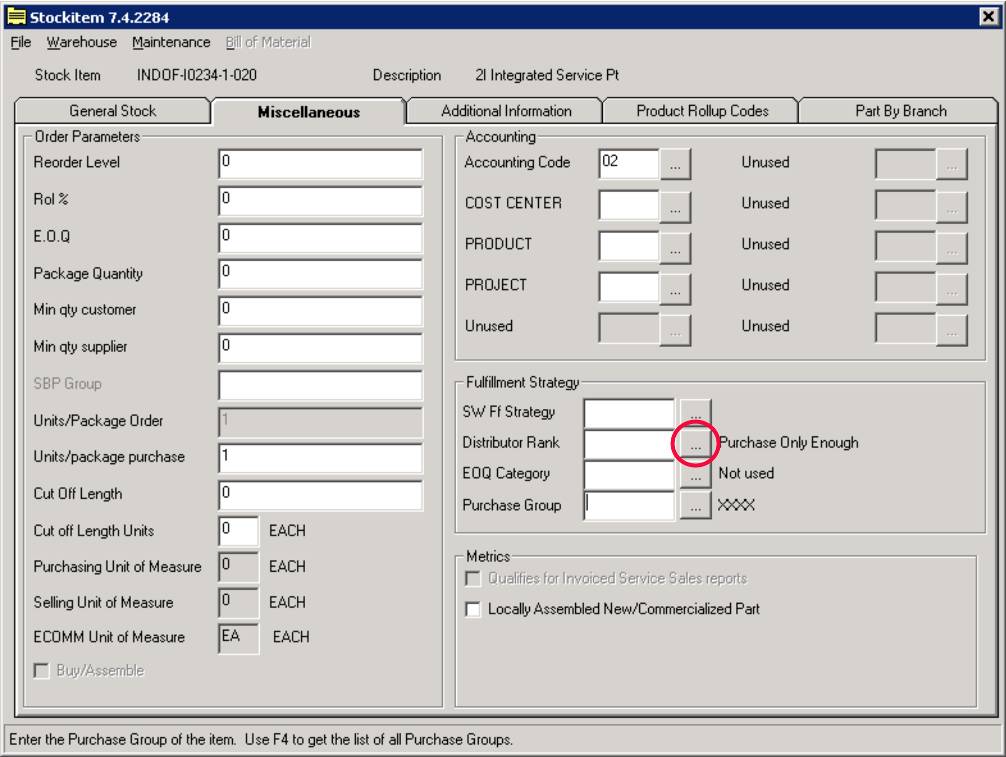
7.13 Click on the **Miscellaneous** tab



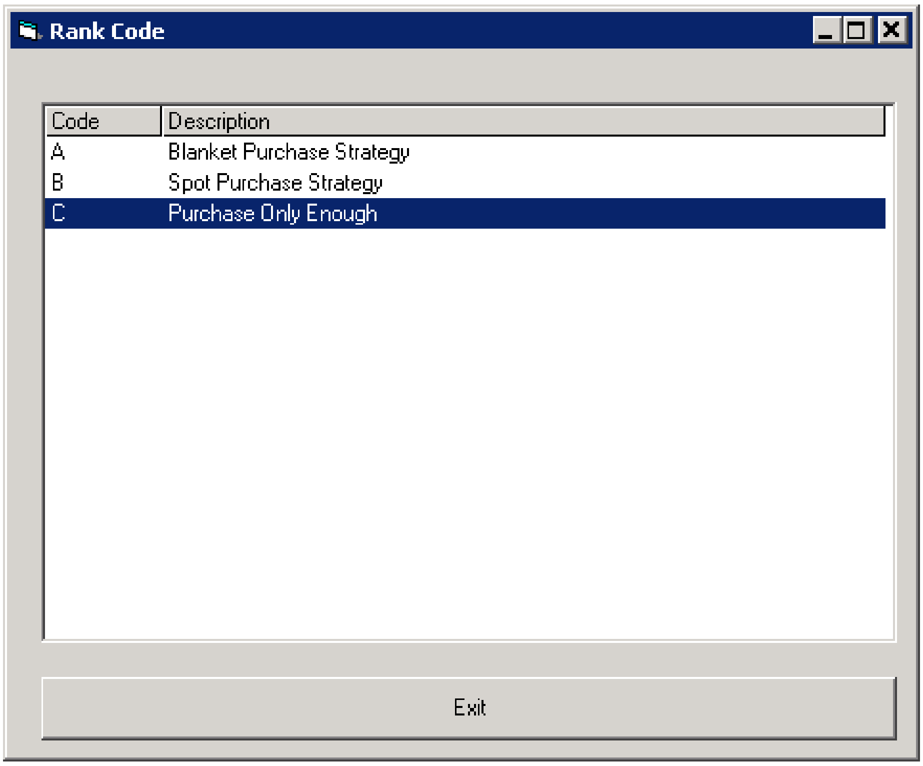
7.14 Ensure **Accounting Code** is **02**



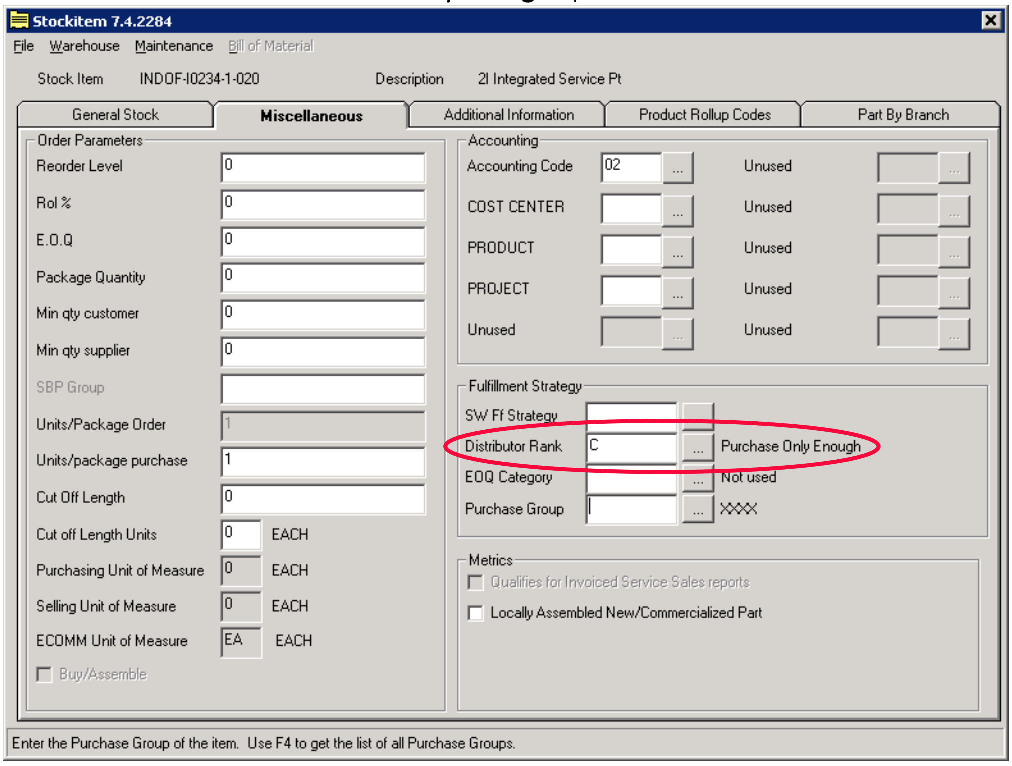
7.15 While the cursor blinks in the blank next to **Distributor Rank**, click on the **...** button and a new window will appear



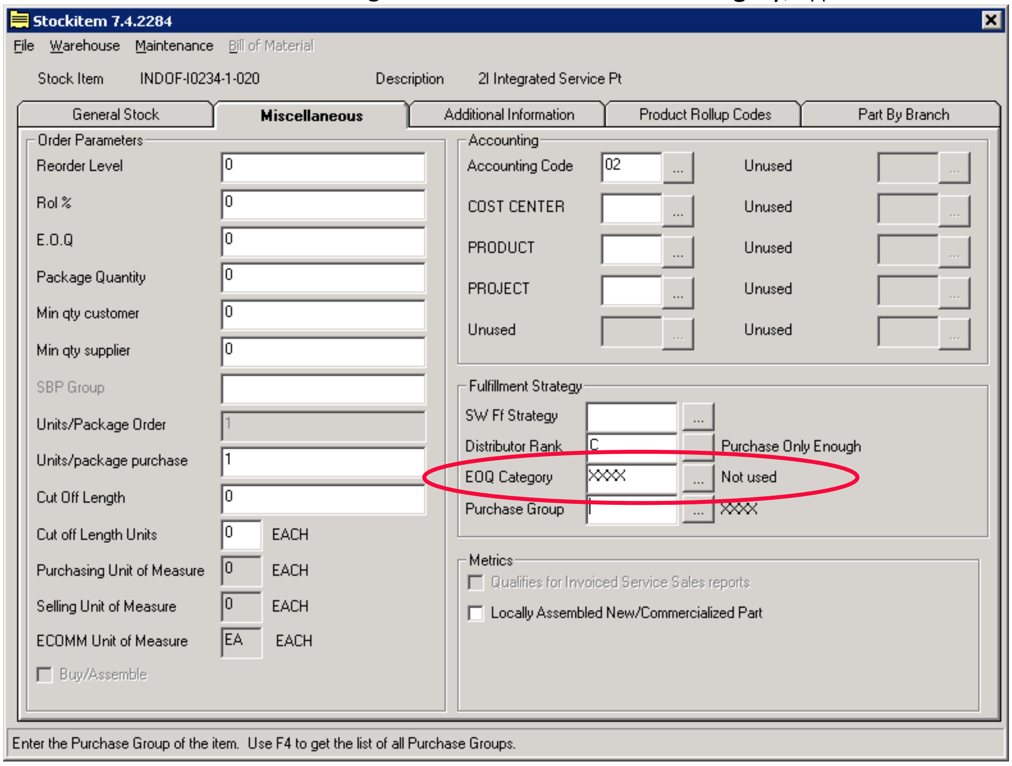
New window:



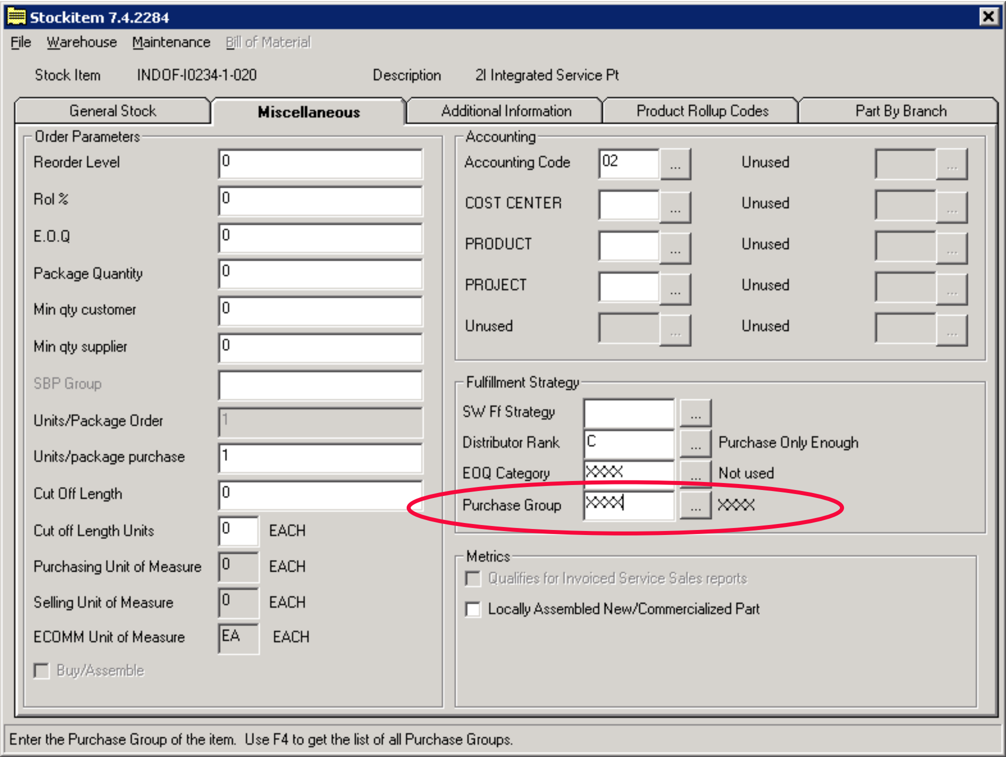
7.16 Select **C** **Purchase Only Enough** option



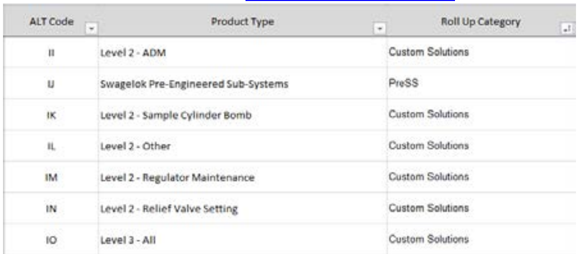
7.17 With the cursor blinking in the blank next to **EOQ Category**, type **XXXX** and hit **Enter**



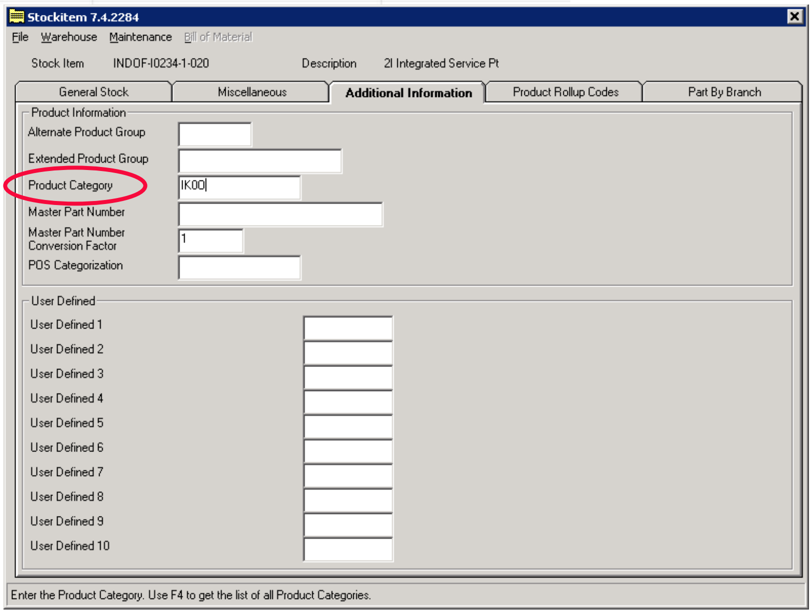
7.18 Repeat the same step while the cursor is blinking in the blank next to **Purchase Group**



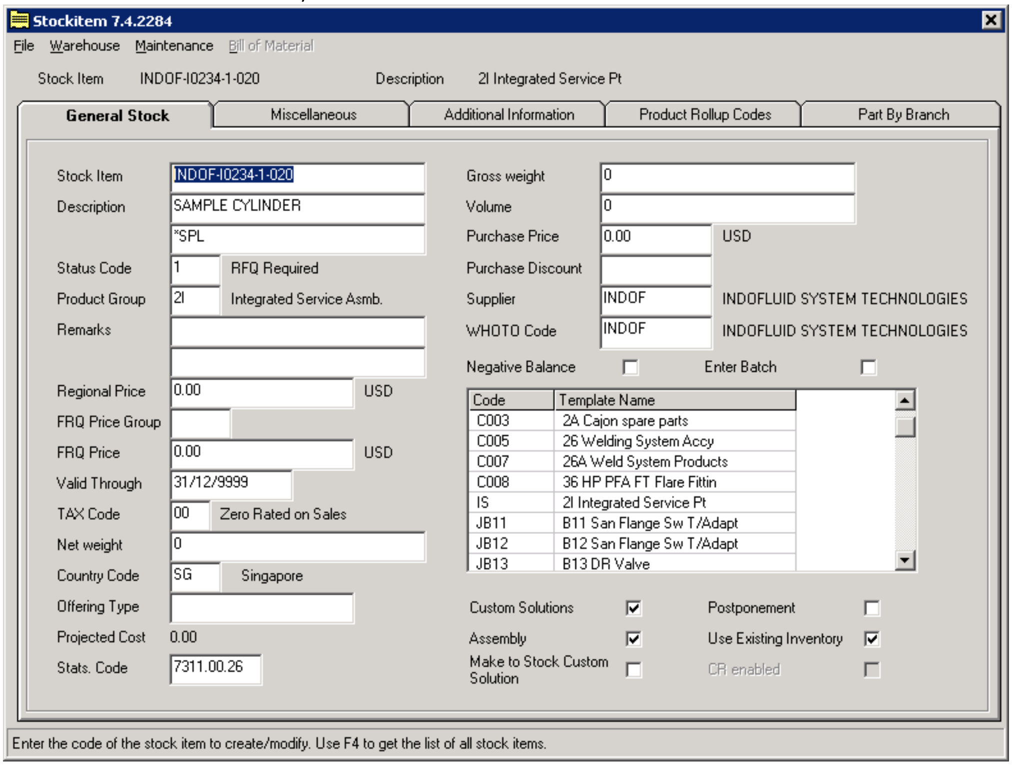
7.19 Click on the **Additional Information** tab.
Refer to the [Product Database]() and for this example, type **IG00** in the blank next to **Product Category** .



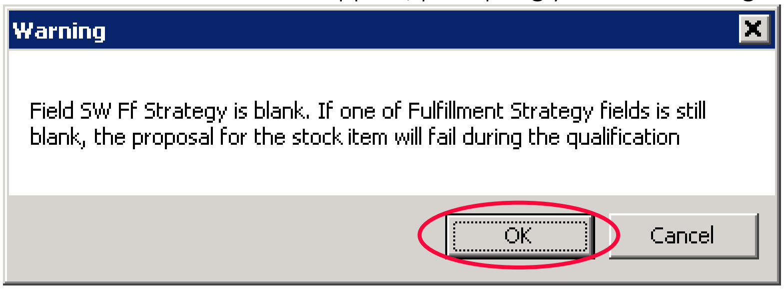
ALT Code	Product Type	Roll Up Category
II	Level 2 - ADM	Custom Solutions
IJ	Swagelok Pre-Engineered Sub-Systems	PreSS
IK	Level 2 - Sample Cylinder Bomb	Custom Solutions
IL	Level 2 - Other	Custom Solutions
IM	Level 2 - Regulator Maintenance	Custom Solutions
IN	Level 2 - Relief Valve Setting	Custom Solutions
IO	Level 3 - All	Custom Solutions



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



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



Click **OK.**

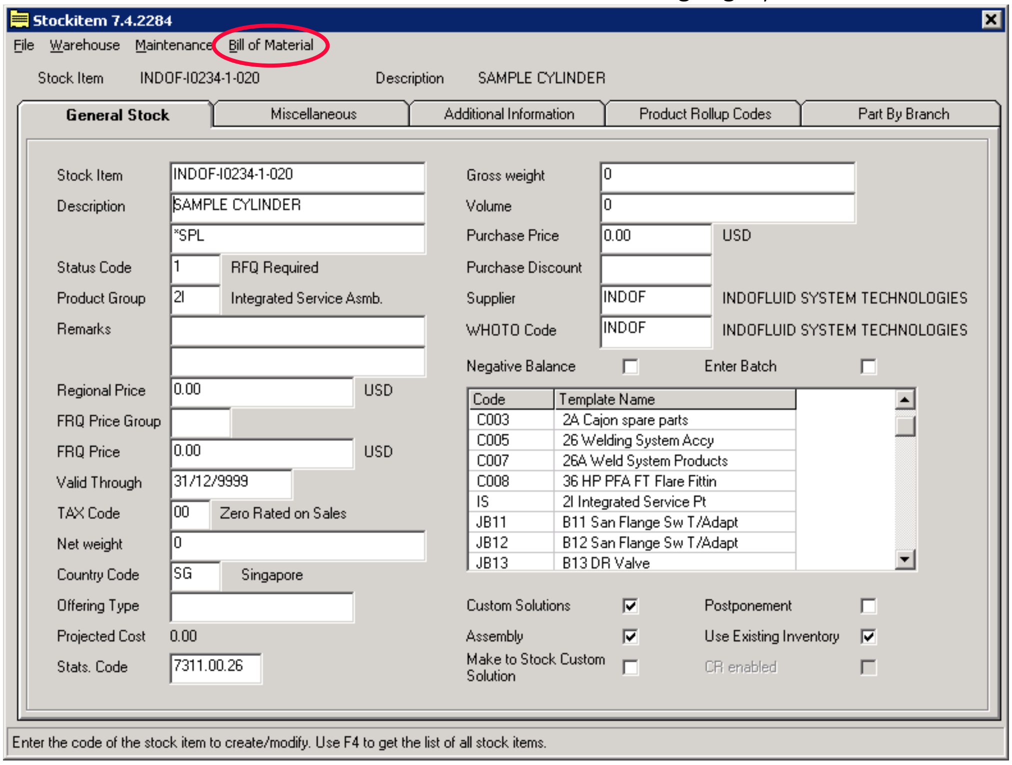
Input the Bill of Materials

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

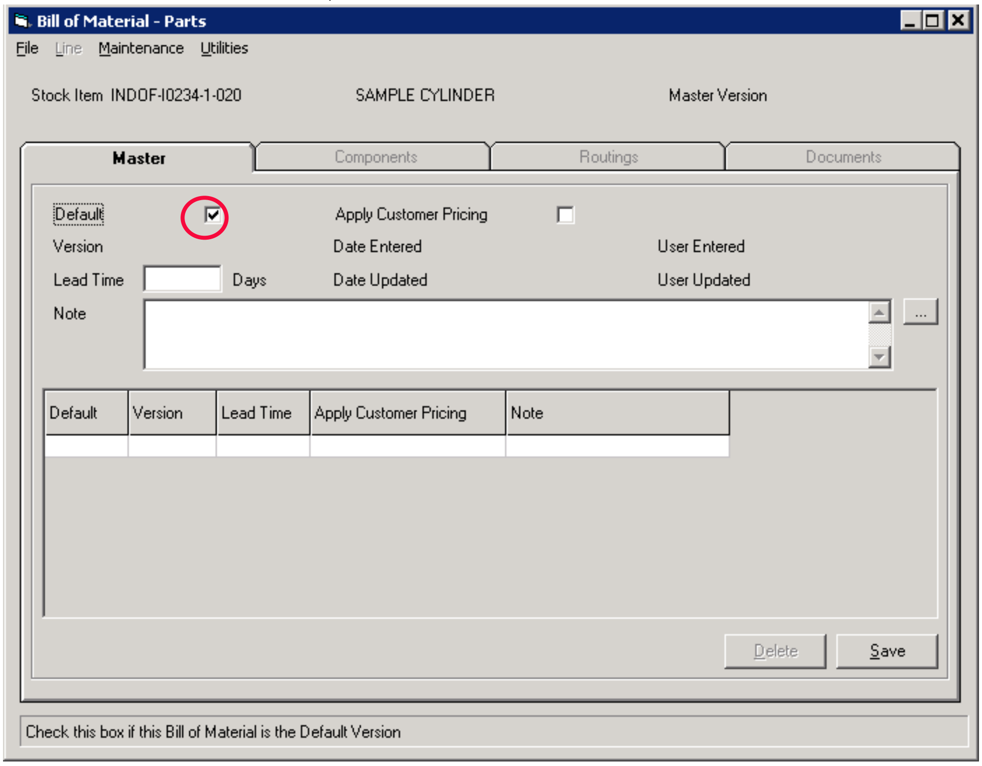
A complete stock check requires you to do a:

- 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.

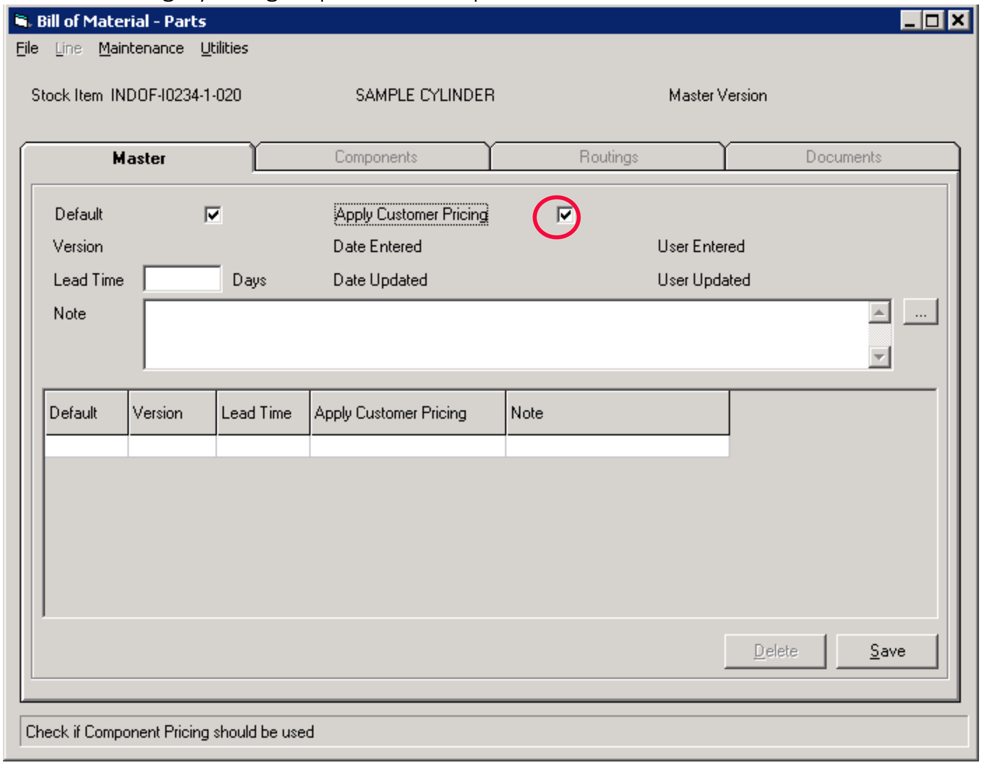
7.22 Once you are on a new window, paste **(Ctrl + V)** the PN# you copied and hit **Enter.** You would notice that the **Bill of Material** is no longer greyed out.



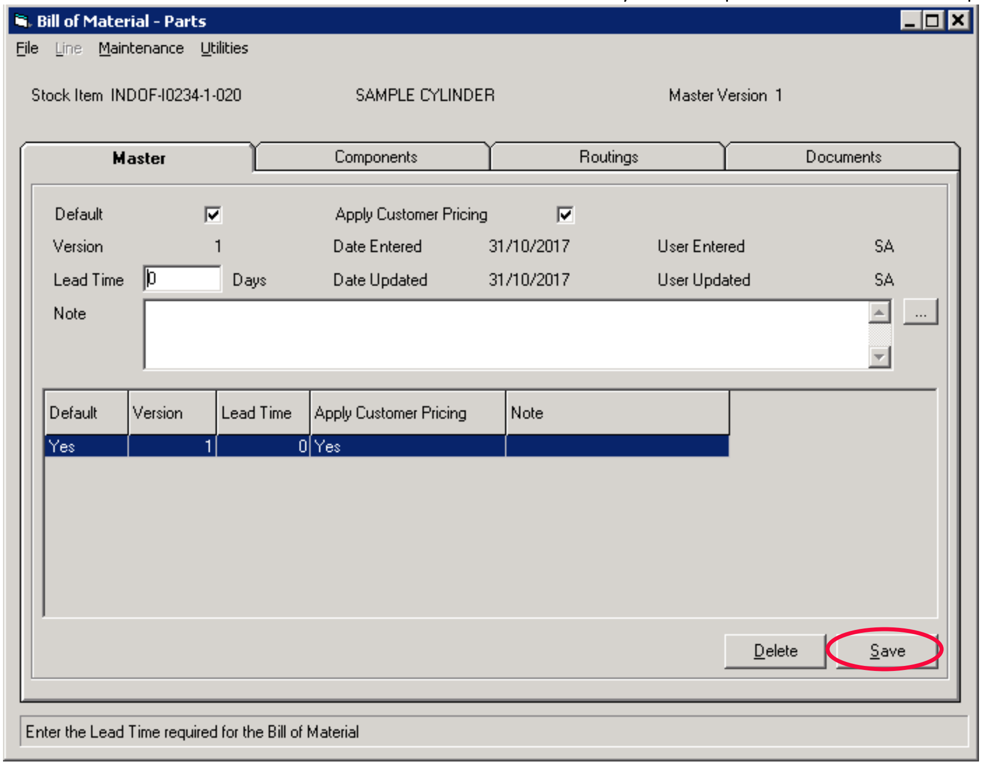
7.23 Click on the tab **Bill of Material** and a new window will appear.
On the new window, check the box next to the **Default.**



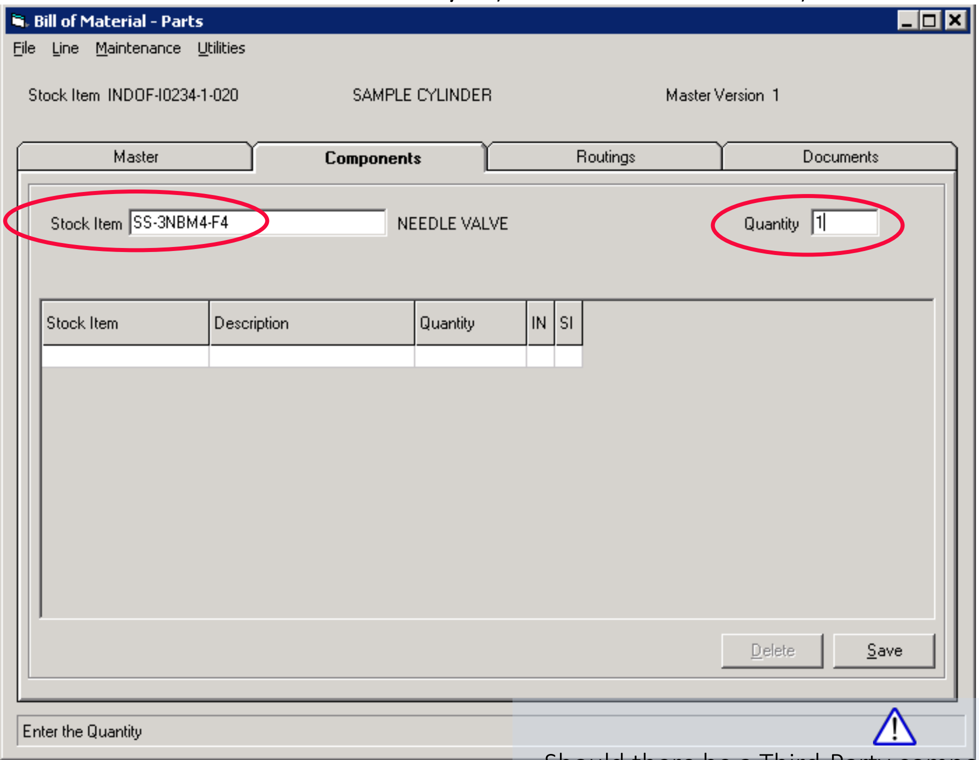
7.24 Check the box next to the **Apply Customer Pricing** option so that then system can populate the job costing by using all prices of the parts.



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#.

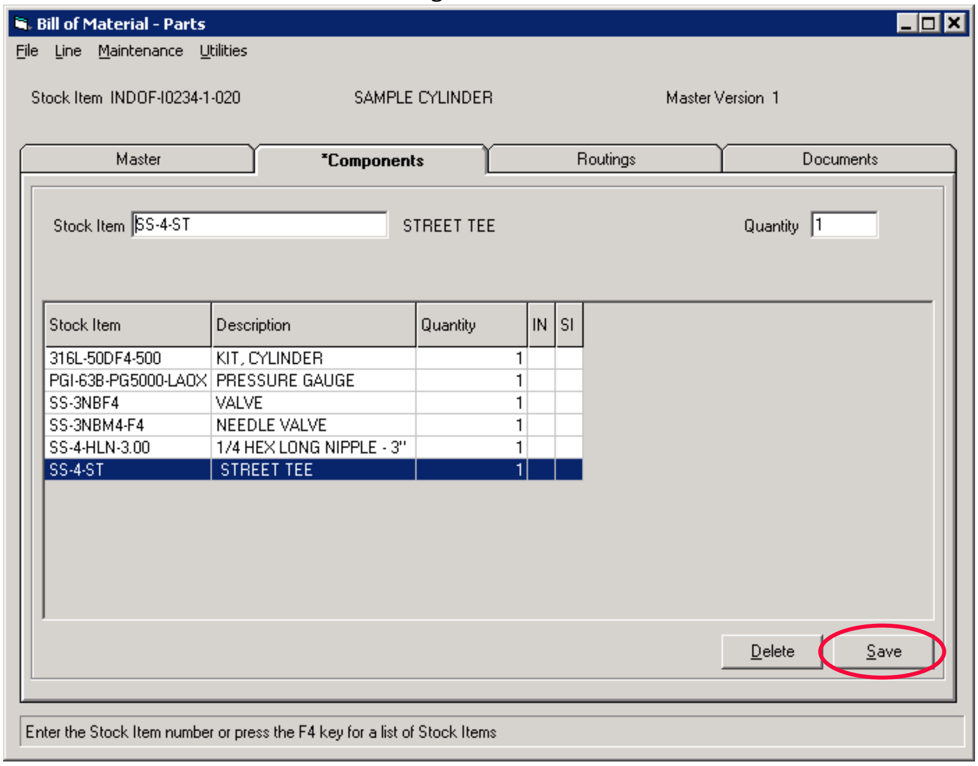


7.26 Click on the tab **Components.**
Begin keying in each PN# and its Quantity.
Please ensure that the **Quantity** keyed in is for ONE assembly.



⚠ 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.

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



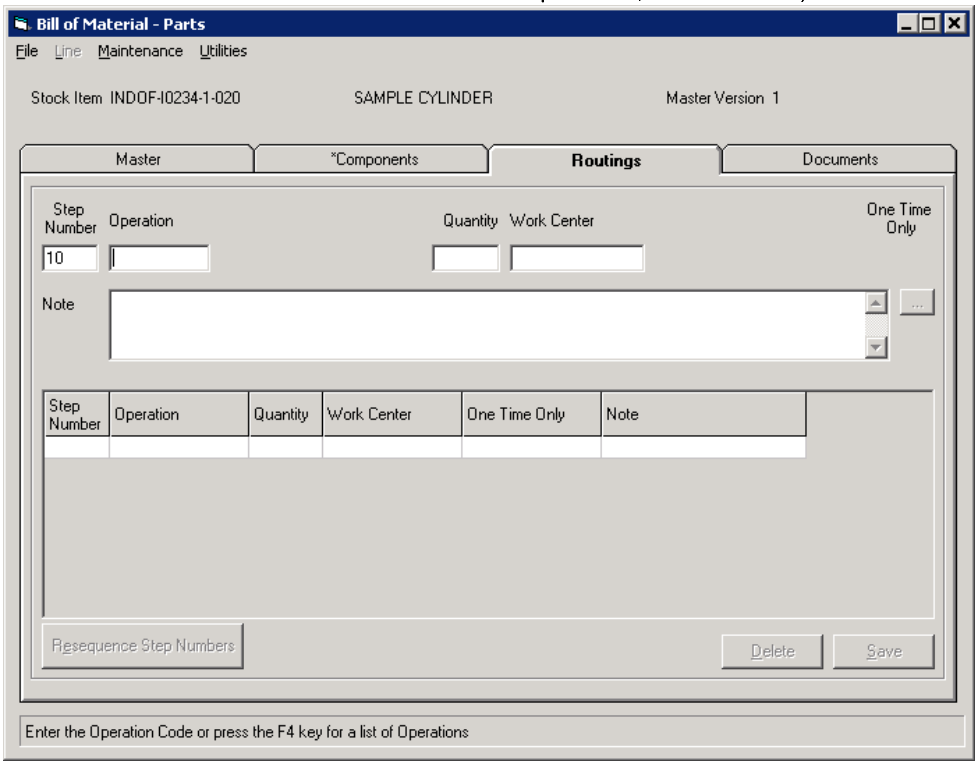
7.28 To make changes to the BOM, select the line(s) and click **Delete**, then repeat step 7.26 onwards

Input Routings

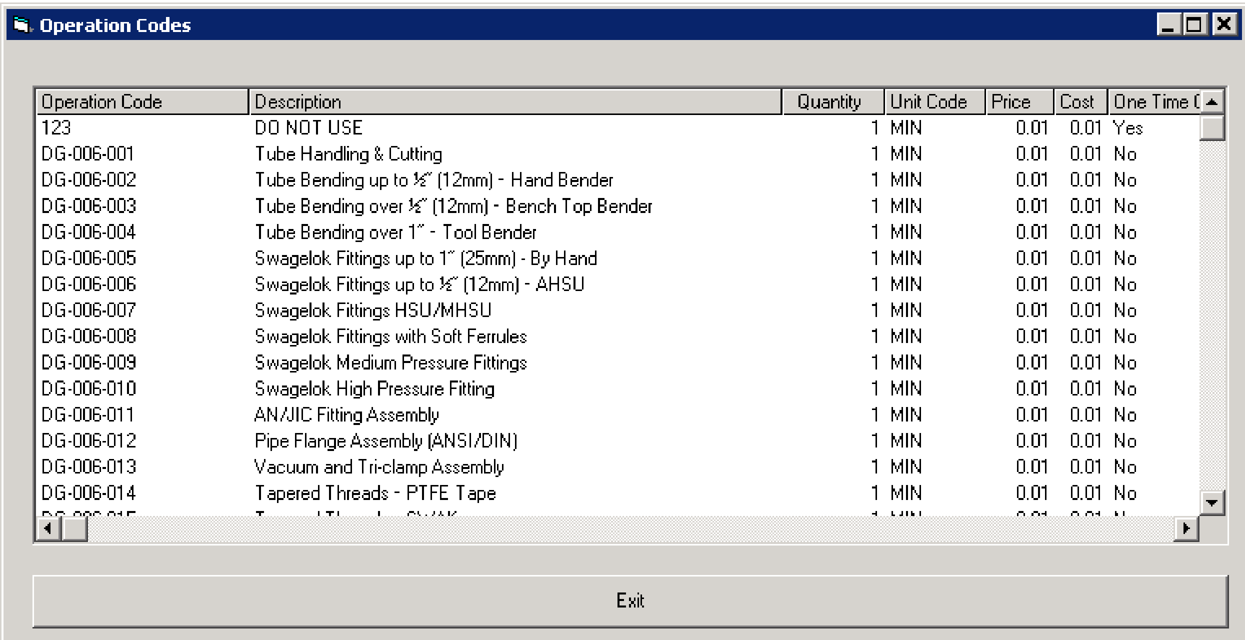
Before begin routing, ensure we have the necessary customer information, drawing or sketch to pick out the right routings.

7.29 Click on the **Routings** tab.

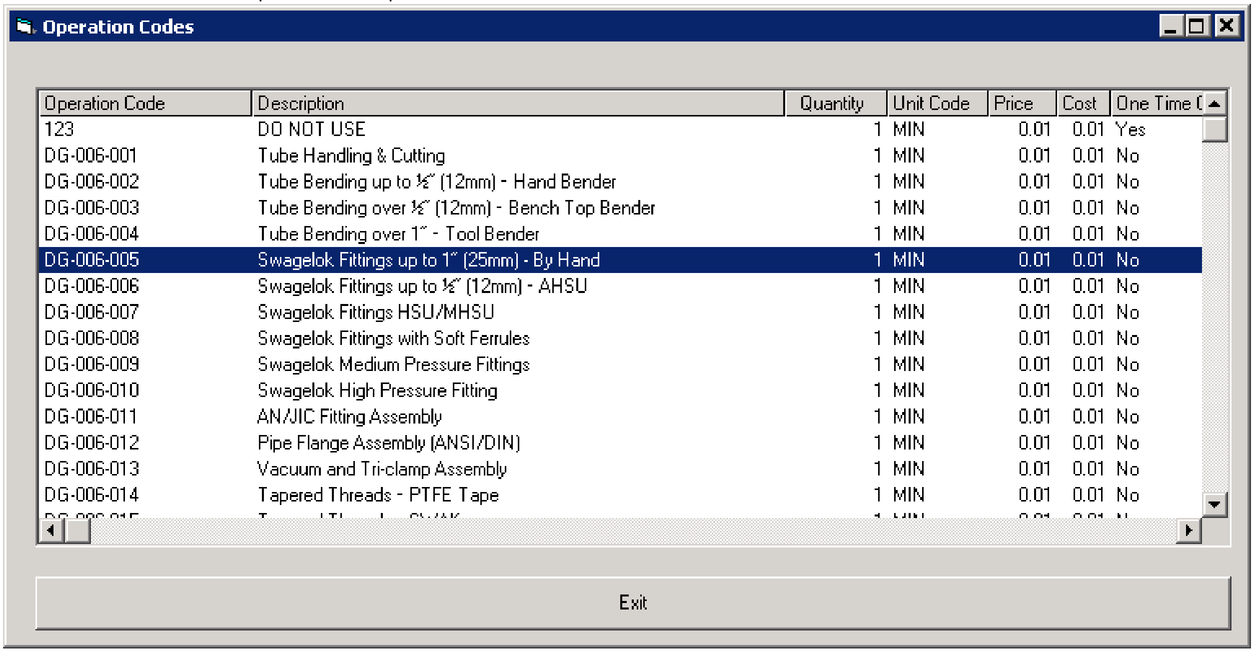
With the cursor on the blank under **Operation**, hit the **F4** key and a new window will appear.



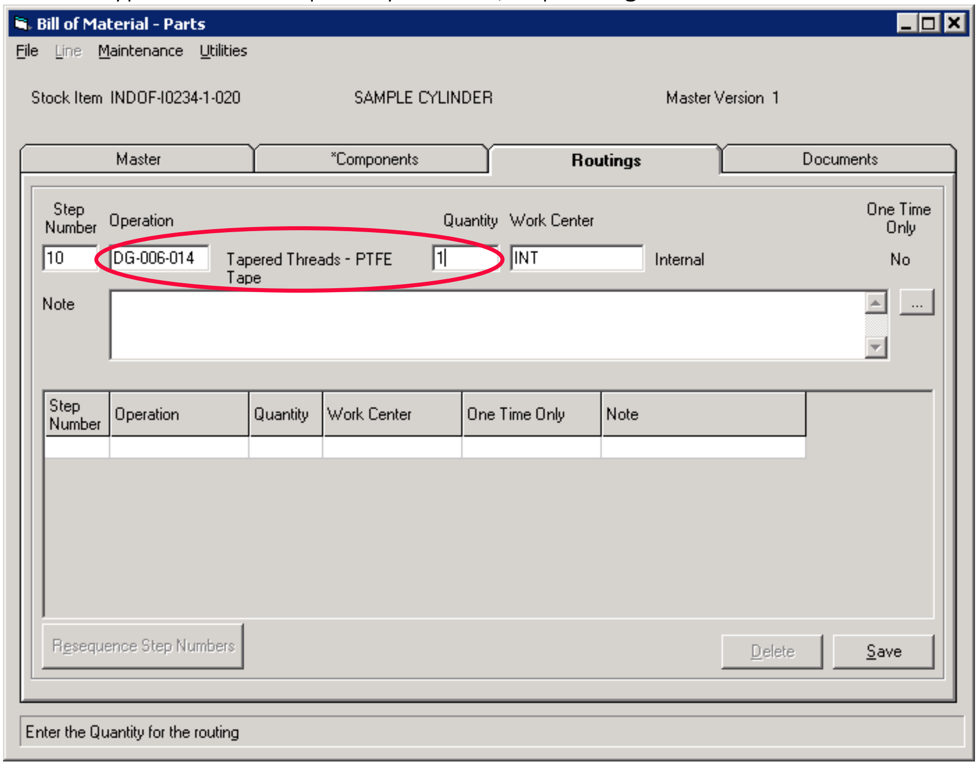
New window:



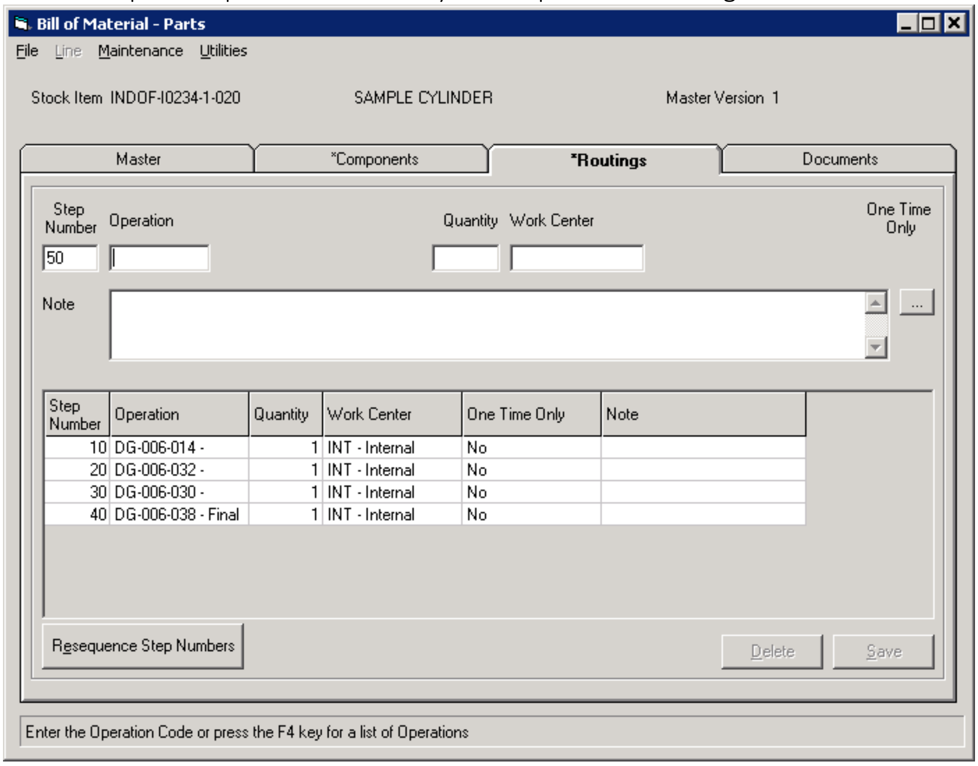
7.30 Select the sequential steps to assemble the custom solutions.



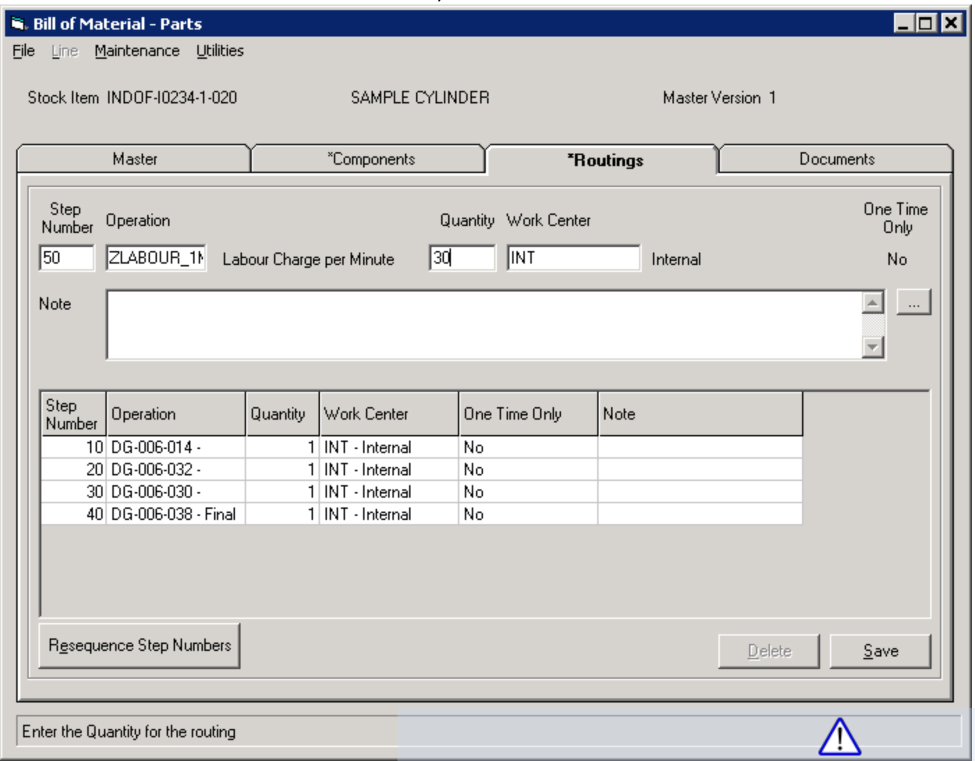
7.31 Type the correct quantity number, depending on the number of assemblies to be built.



7.32 Repeat steps 7.29-7.31 until you complete the routing.

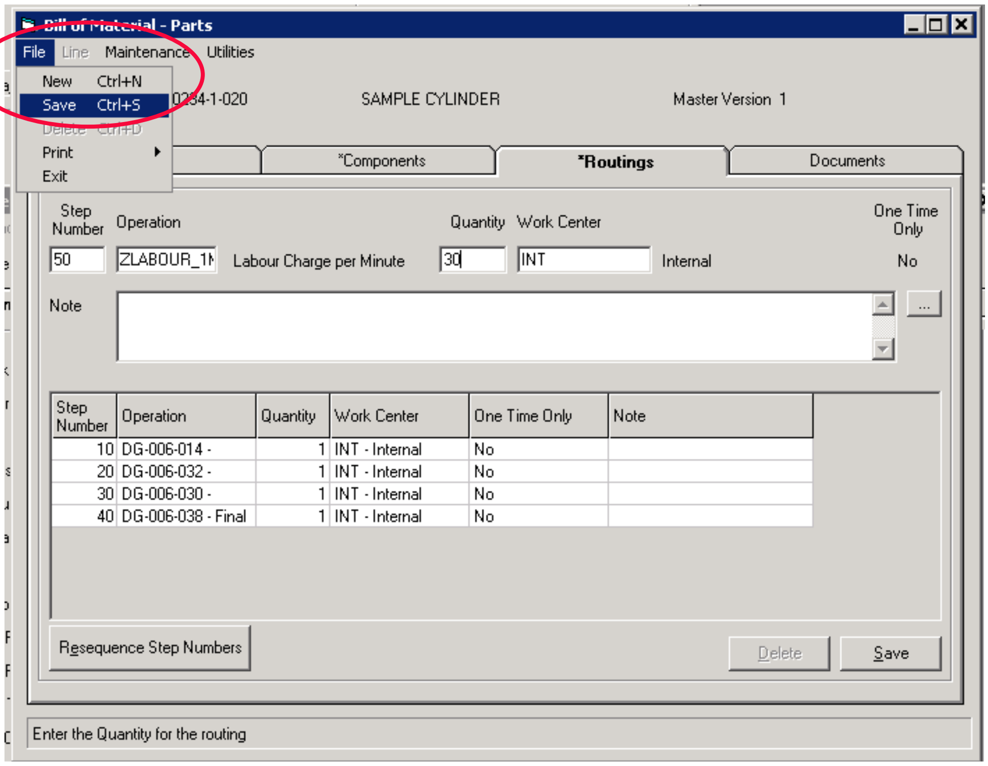


7.33 Complete the flow of steps with **ZLABOUR_1M** and assign the correct quantity which is the number of minutes to build one assembly.



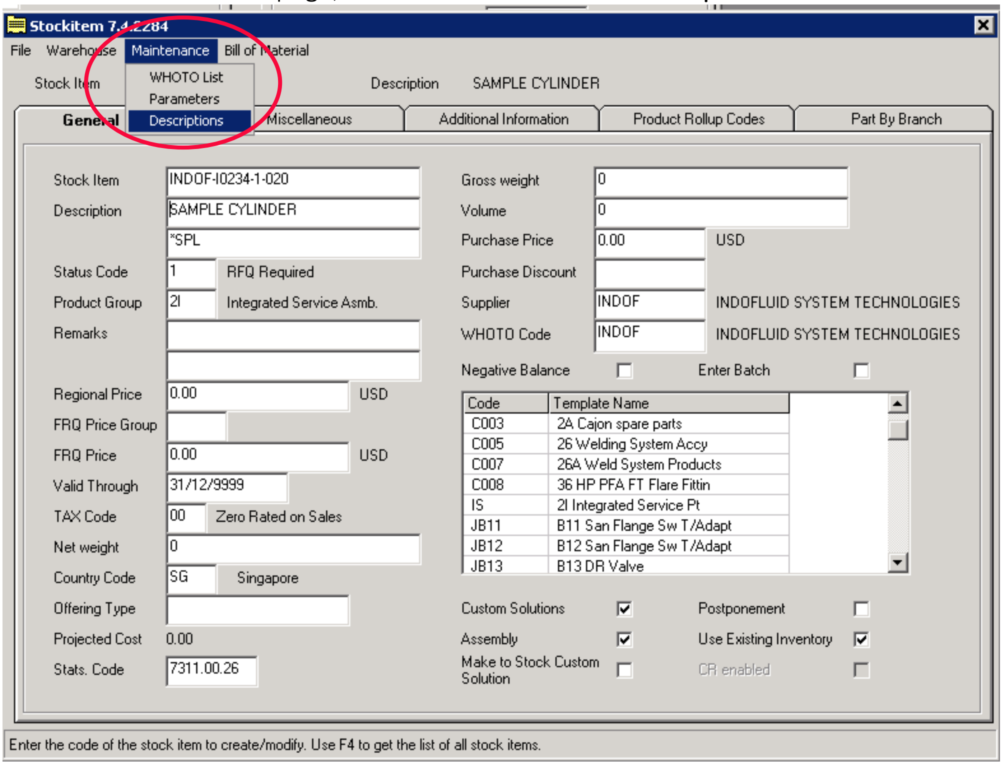
⚠
1-5 order quantities: ZLABOUR = 10
>5: Check with the CS Manager
Large Volumes: Get a quotation from then Tech Centre and determine if it is more worthwhile getting them to complete the job

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

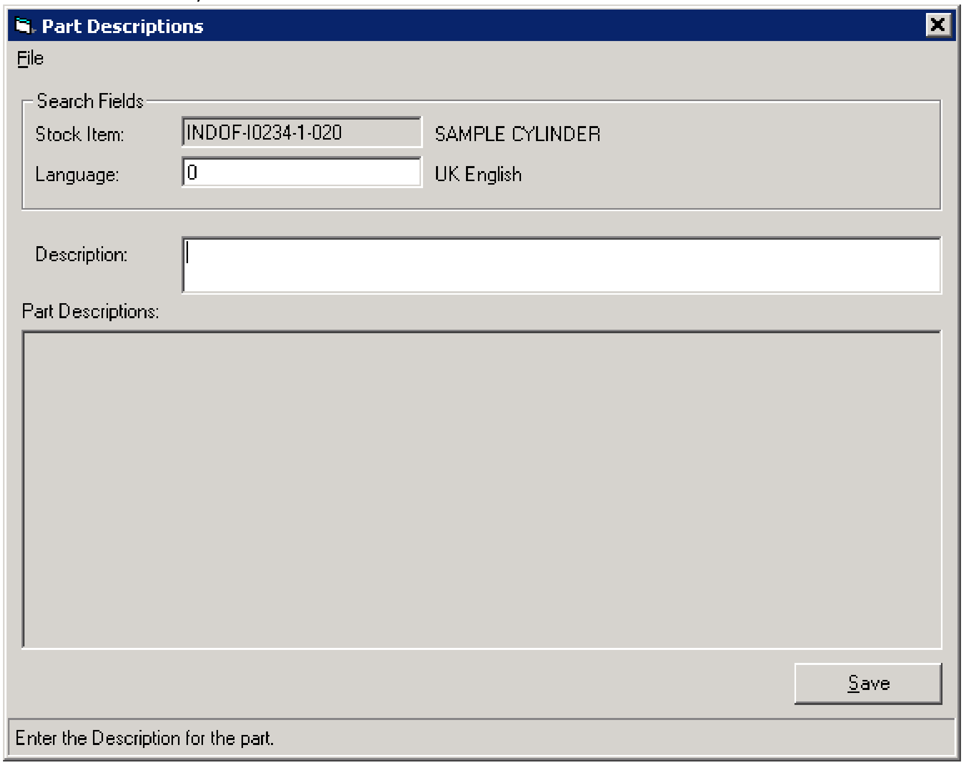


Key in Long Description of CS Part Number

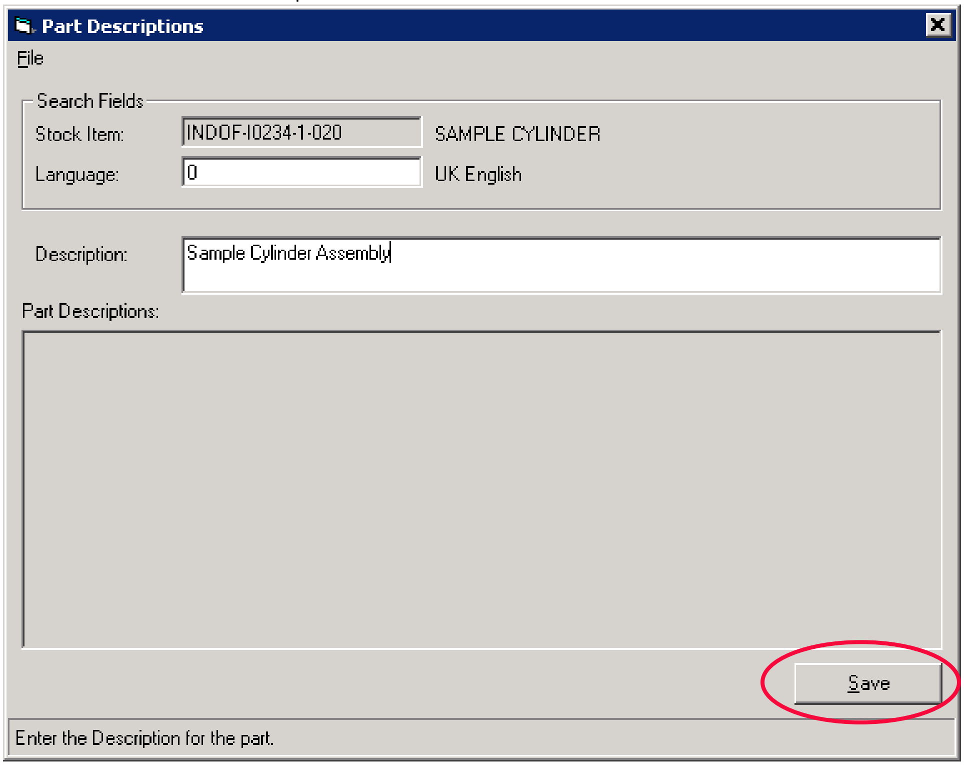
7.35 On the **General** page, click on **Maintenance** -> **Descriptions** and a new window will appear.



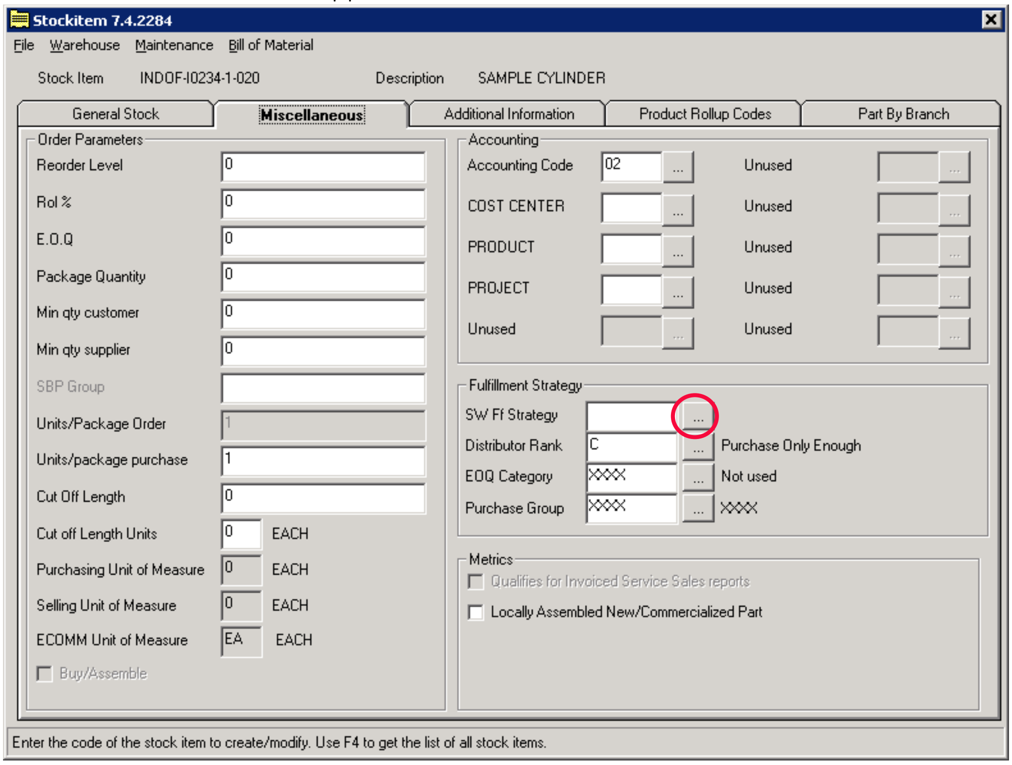
7.36 Create a long description for the CS part number by describing all the parts used to make up the assembly.



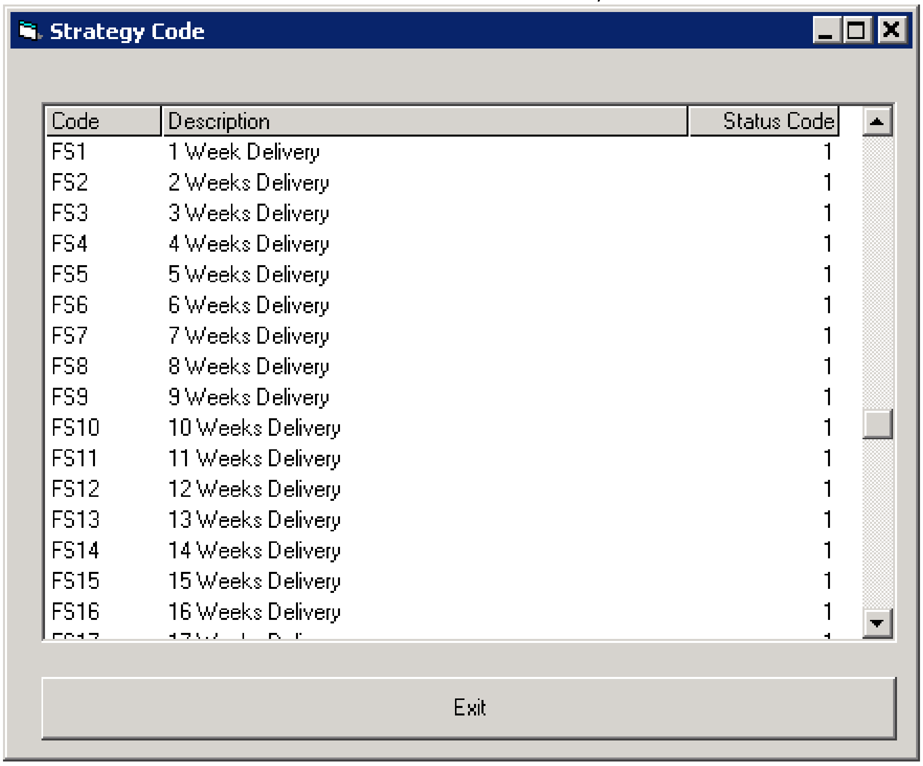
7.37 Click **Save** once you have completed the long description then close the window. Below is an example:



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.



7.39 Select the correct number of week delivery



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
Value beyond the expected™

Swagelok Indonesia
Indofluid System Technologies Pte Ltd
10 Ubi Crescent, #05-97 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

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	PartNumber	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.

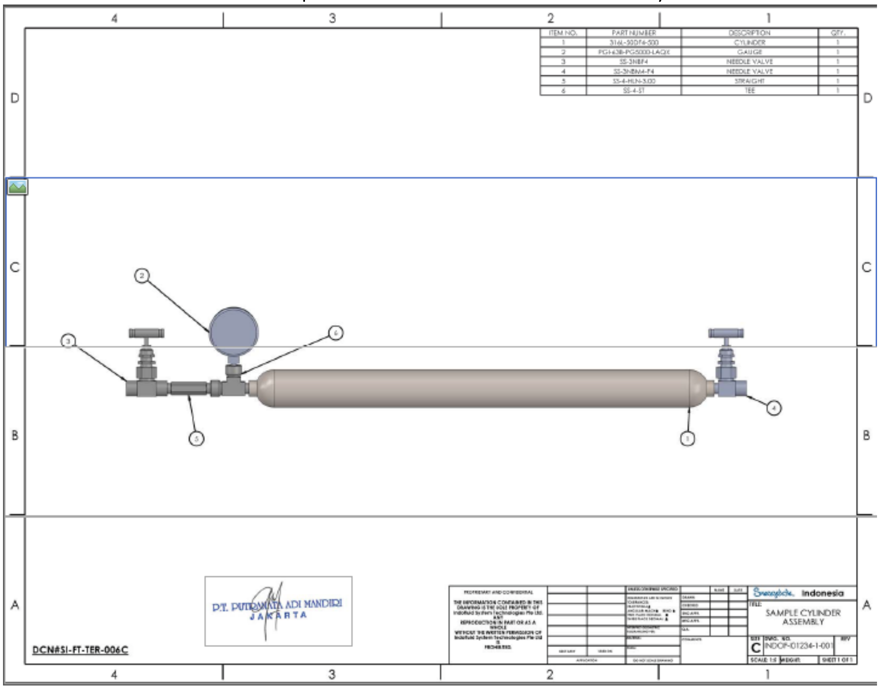
Please contact our Custom Solutions Department on +65 6908 5300
or e-mail us by clicking here for further help
www.swagelok.com/indonesia

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:

⚠

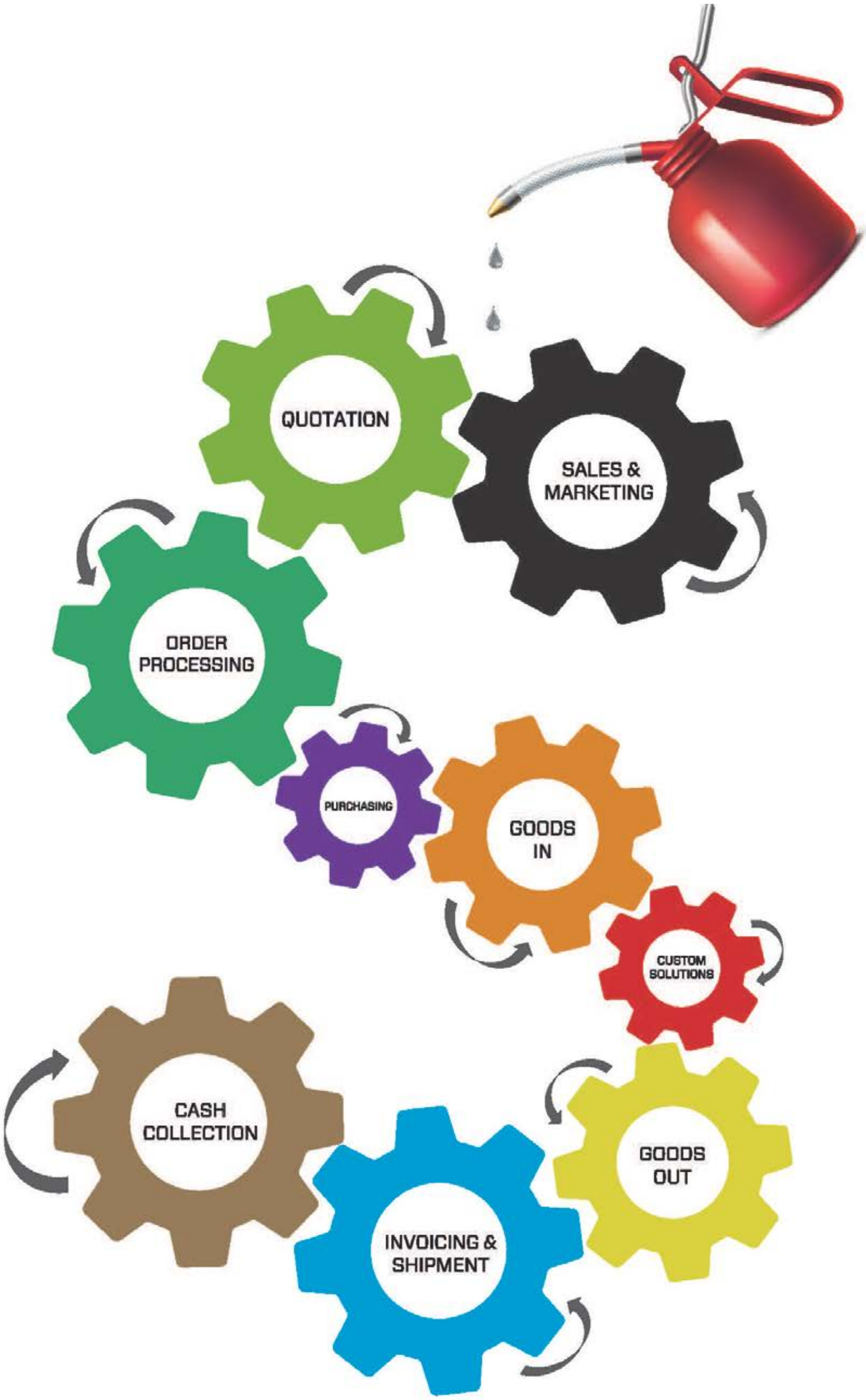
Under the column **Status**, you can put it as:
Quoted once quotation is done
Won once converted to order
Lost if we could not convert it to order

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



DOCUMENT ENDS HERE.