

# Quotation Management



*Using Business Process Automation to Streamline Customer Quotes*

# Value of an effective QMS System

**“Each individual in an organization can increase their productivity by at least 30%. Most workers are not working on the right things in the right way.”**

**“The main culprits include sub-optimized processes, excessive paperwork and reporting requirements, unproductive meetings, inappropriate systems and tools, etc.”**

**- Tor Dahl, American Productivity & Quality Center**

**“Automated workflow management helps speed the organization’s response time and improves the accuracy of the communications and activities that result in the products and services that customers value.”**

**- Imanet.org, Business Performance Management**



## **QMS Adds Value**

- ➔ Manage and streamline the **Process**, Eliminate **Wasted Effort**, Reduce the **Cost**
- ➔ Realize payback in the **first year**

# Return on YOUR Investment

➔ Use an ROI Model to calculate your potential Return-On-Investment

	A	B	C	D	E	F	G	H
<b>Quotation Management</b>								
<b>Estimating/Quotation System Payback Analysis</b>								
4	Annual Sales Revenues							
5	Gross Profit %							
6	Cost of Goods Sold Breakdown							\$80,000,000.00
7	Material %							15.00%
8	Labor %							
9	Overhead %							60.00%
10	<b>Engineering / Technical Professionals</b>							15.00%
11	Average burdened compensation							25.00%
12	Percent of time on Quotations							5
13	<b>Materials and Operations people</b>							\$90,000.00
14	Average burdened compensation							15.00%
15	Percent of time on Quotations							2
16	<b>Finance / Cost Estimating</b>							\$70,000.00
17	Average burdened compensation							10.00%
18	Percent of time on Quotations							1
19	<b>Purchasing</b>							\$70,000.00
20	Average burdened compensation							50.00%
21	Percent of time on Quotations							1
22	<b>Time Reduction Estimates</b>							\$70,000.00
23	Quotations %							10.00%
24	<b>Inventory Carrying Rate</b>							30.00%
25	Inventory turns (COGS)							20.00%
26	Quote related Inventory reduction %							20
27	<b>Administrative Costs</b>							1.00%
28	Number of Quotes per year							300
29	Average Administrative Cost per Quote							\$150.00
30	Percent of Admin Cost Saved							30.00%
32	<b>Potential Savings Summary</b>							
33	Engineering /Technical Professional Productivity Savings							\$20,250.00
34	Materials/Operations Productivity Savings							\$4,200.00
35	Finance / Cost Estimating							\$10,500.00
36	Purchasing							\$2,100.00
37	Quote Administrative direct cost savings							\$13,500.00
38	Shipping, Postage, Filing, Research, etc.							\$34,000.00
39	Inventory Savings (Matl. Labor, OH)							\$84,550.00
40	<b>Total Cost Savings</b>							
41	<b>Increased Profit Potential</b>							



# Common Problems with Quoting

- ⇒ Estimating formulas are defined in spreadsheets – often multiple different versions of spreadsheets, which are silos of information
- ⇒ Quote approvals are frequently missed or bypassed
- ⇒ Quote Due Dates are not tracked correctly and are frequently missed
- ⇒ No good way to keep up with different Quote Options, Quote Revisions, and Quote Scenarios
- ⇒ Management visibility to Quote status is limited to monthly reports (at best)
- ⇒ Supplier RFQ's are not tracked with the Quote
- ⇒ Supporting documentation must be found by “directory diving” for files
- ⇒ Final Quote disposition is often non-existent
- ⇒ Statistics and Hit Rates cannot be assessed
- ⇒ The process needs to be streamlined and SHORTENED.

# Business Process Automation

## Applications that Link People, Processes, Data, Documents, and what's needed to Improve Business Performance



- ✓ - Workflows/Rules
- ✓ - File Support
- ✓ - Automated Approvals
- ✓ - Triggers and Notifications
- ✓ - Backup Reassignments

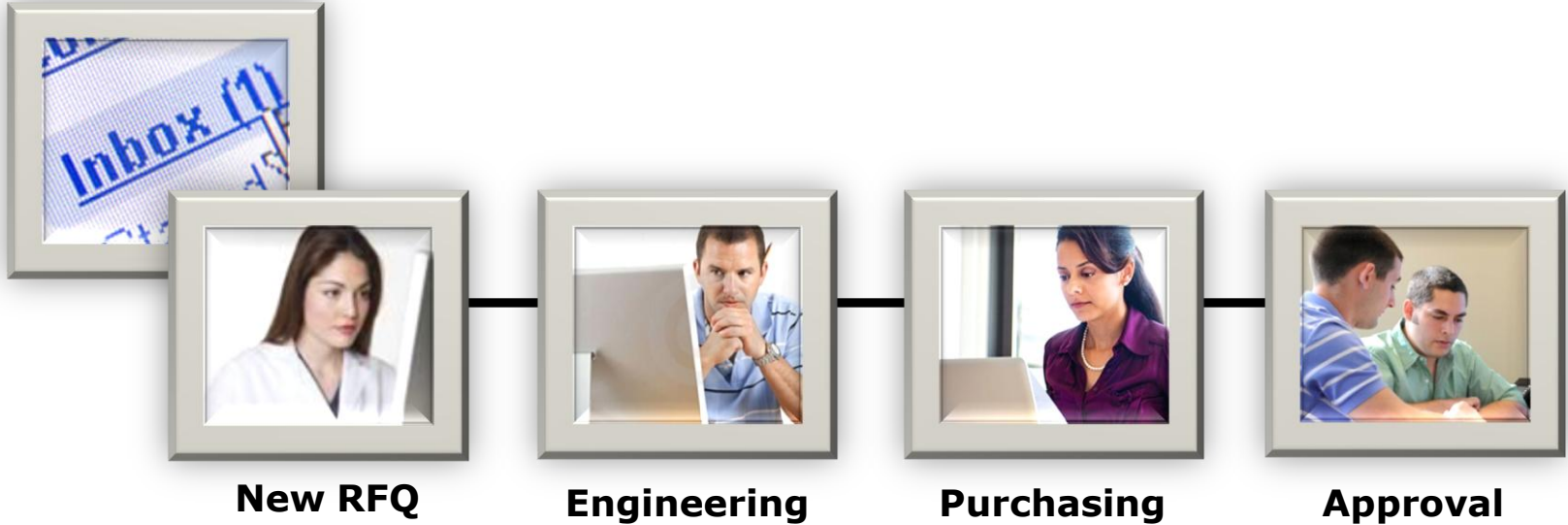
- ✓ - Web Based
- ✓ - Infor XA Integration
- ✓ - E-Mail Correspondence
- ✓ - Performance Statistics
- ✓ - Audit Trails/History



# How does MKA's Business Process Automation help you improve performance?

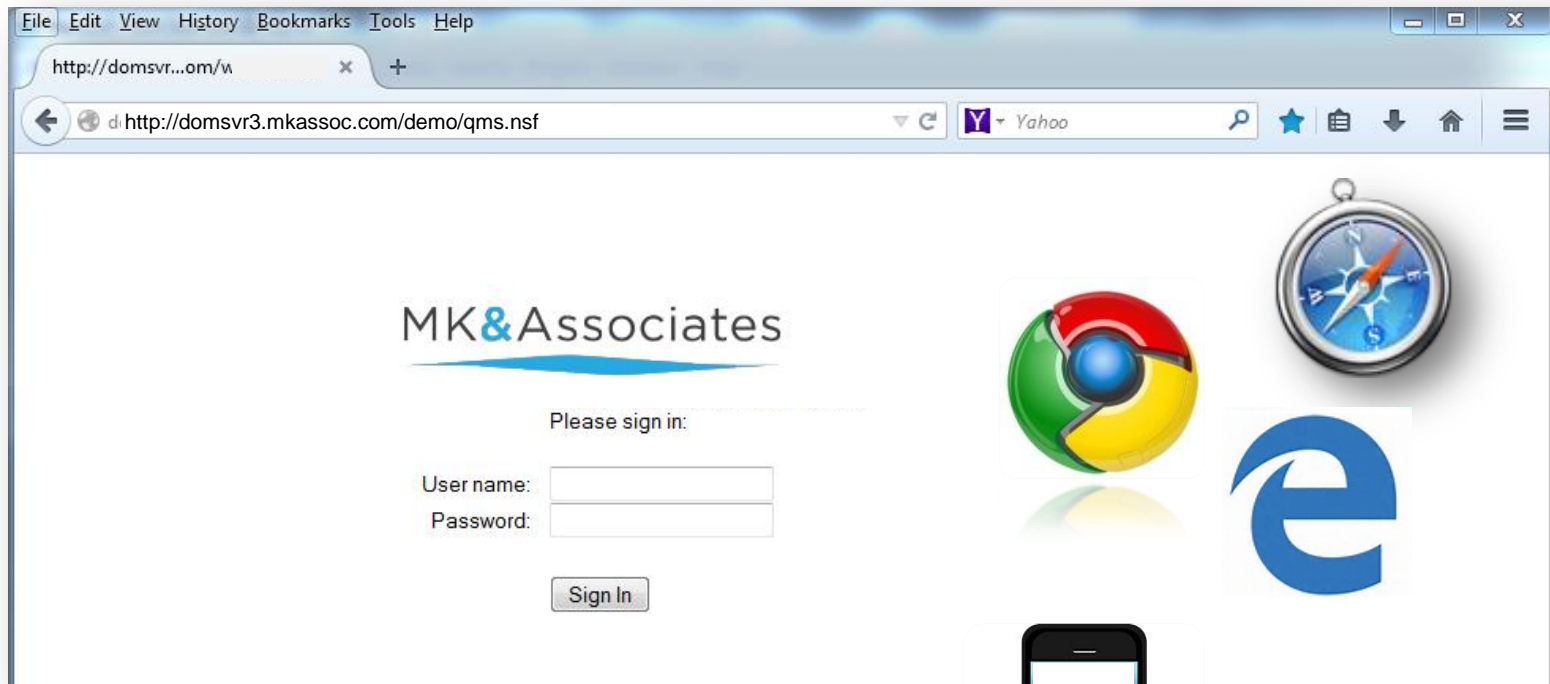
- ⇒ It's not just about "data." (Data is not very useful by itself.)
- ⇒ EFFICIENCY is about being able to:
  - ⇒ Integrate or eliminate "islands of information"
  - ⇒ MOVE information and TRIGGER action based on business processes
  - ⇒ automatically "route" data, information, messages to the right users
  - ⇒ communicate effectively with everyone who needs information
  - ⇒ utilize electronic approvals/sign-offs
  - ⇒ ensure that there are backups / follow-up
  - ⇒ manage time
  - ⇒ manage priorities
  - ⇒ measure your effectiveness
  - ⇒ create simple or complex forms and/or workflows
  - ⇒ automatically keep management "aware" without generating more paper
  - ⇒ provide visibility to EC's, quotes, programs, product development, tasks, ...
  - ⇒ get the RIGHT INFORMATION to the RIGHT people at the RIGHT time (eliminate "searching for information" and directory diving)

# Typical Process for Quoting



**Won**  
**Lost**  
**Expired**

# Getting Started...



- ➔ Browser based access
- ➔ Secure authentication
- ➔ Supports MS Active Directory
- ➔ Multi-device compatible





# Quotes List Page

## Quotation Management System



Quote #   **Quotes**    New Part Setups    Engineering Changes    Prototypes    Sample Materials    Files    Administration    Help

### All Customer Quotes

Compare Quotes    Export to Excel    Save Preferences...

Filter: By Quote Number ▼

Position to:

All     Open     Active     Scenarios

- Advanced**
- Show: 5 |
- By Customer
  - By Customer Part
  - By Customer Part Desc
  - By Date Created
  - By Date Due
  - By Date Sent
  - By Inquiry Number
  - By Originator
  - By Owner
  - By Part Status
  - By Project Name
  - By Quote Number**
  - By Workflow Status
  - Components
  - Components by Comm
  - Components by Desc

Click Column Headers to Sort

Row	Status	Finished Good / Customer - Project	Material Timing	Commodity	Owner	Created	Due	Sent	Options
21.		123456789, something Nissan - Q2-Revised,	-Select-	C-Class	Robert Pozsgai	Oct 15, 2015	Nov 12, 2015		
22.		58105-06060, Panel S/A FR FLR RR UPR SUB Toyota - 010B, Camry	FY2015 Cost Planning	C-Class	Josh	Sep 22, 2016	Oct 20, 2016		
23.		17ZC0-09PL3, Exhaust Center Toyota - 010B, Camry	010B Standard	Exhaust	cand	Nov 25, 2015	Dec 2, 2015		
24.		17167-0V030, Manifold Insulator Assy - pass thru Toyota - 782F, Camry	Current Standard	C-Class	Tiffar	Aug 30, 2016	Sep 27, 2016		
25.	<input type="checkbox"/>	QC1604001 53743-010B0, Reinforcement, FR Fender Apron Toyota - 010B, Camry	Current Standard	C-Class	Josh	Apr 7, 2016	May 5, 2016		
26.	<input type="checkbox"/>	QE1609017 17430-16PQR, 2.4L Turbo Exhaust Tail Assembly Toyota - 550B/16PL, Highlander	010B Standard	Exhaust	Chris	Sep 29, 2016	Oct 24, 2016		
27.	<input type="checkbox"/>	QC1608006 18450-0S100, Underfloor Toyota - 135B, Tundra	Current Standard	CCO	Tiffar	Aug 16, 2016	Sep 13, 2016		
28.	<input type="checkbox"/>	QE1512002 1234567, bobs testing part Toyota - BP3344,	010B Standard	Exhaust	Robert Pozsgai	Dec 2, 2015	Dec 30, 2015		
29.	<input type="checkbox"/>	QC1607008 61711-07020, PANEL ROOF SIDE OUTER Toyota - 241B, Lexus ES	FY2015 Cost Planning	C-Class	Josh Gollihue	Jul 20, 2016	Aug 17, 2016		

Previous 1 2 3 4 5 6 7 8 ... Next

# Quotes List Page

## Quotation Management System

Statistics

Quote #   **Quotes** New Part Setups Engineering Changes Prototypes Sample Materials Files Administration Help

### All Customer Quotes

Compare Quotes Export to Excel Save Preferences...

**System Availability**

Filter: By Quote Number  Position to:   All  Open  Active  Scenarios

- Advanced Search
- Select-
  - Assigned to Me
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  - By Customer Part Desc
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  - By Owner
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23.		17ZC0-09PL3, Exhaust Center Toyota - 010B, Camry	010B Standard	Exhaust	c:	Nov 25, 2015	Dec 2, 2015		
24.		17167-0V030, Manifold Insulator Assy - pass thru Toyota - 782F, Camry	Current Standard	C-Class	T	Aug 30, 2016	Sep 27, 2016		
25.	<input checked="" type="checkbox"/> <b>QC1604001</b>	53743-010B0, Reinforcement, FR Fender Apron Toyota - 010B, Camry	Current Standard	C-Class	Ji	Apr 7, 2016	May 5, 2016		
26.	<input checked="" type="checkbox"/> <b>QE1609017</b>	17430-16PQR, 2.4L Turbo Exhaust Tail Assembly Toyota - 550B/16PL, Highlander	010B Standard	Exhaust	C	Sep 29, 2016	Oct 24, 2016		
27.	<input checked="" type="checkbox"/> <b>QC1608006</b>	18450-0S100, Underfloor CCO Toyota - 135B, Tundra	Current Standard	CCO	T	Aug 16, 2016	Sep 13, 2016		
28.	<input checked="" type="checkbox"/> <b>QE1512002</b>	1234567, rt Toyota - BP3344,	010B Standard	Exhaust	R	Dec 2, 2015	Dec 30, 2015		
29.	<input checked="" type="checkbox"/> <b>QC1607008</b>	61711-07020, PANEL ROOF SIDE OUTER Toyota - 241B, Lexus ES	FY2015 Cost Planning	C-Class	Ji	Jul 20, 2016	Aug 17, 2016		

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MK&Associates Welcome Robert Pozsgai | Firefox v32.0 | Status: Available | Logout

**Quotation Management System** Statistics

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**Side by Side Comparisons**

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24.		17167-0V030, Manifold Insulator Assy - pass thru Toyota - 782F, Camry	Current Standard	C-Class	T	Aug 08, 2016	Aug 23, 2016		
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27.	<input checked="" type="checkbox"/>	QC1608006 18450-0S100, Underfloor CCO Toyota - 135B, Tundra	Current Standard	CCO	T	Aug 16, 2016	Sep 15, 2016		
28.	<input checked="" type="checkbox"/>	QE1512002 1234567, rt Toyota - BP3344,	010B Standard	Exhaust	R	Dec 2, 2015	Dec 30, 2015		
29.	<input checked="" type="checkbox"/>	QC1607008 61711-07020, PANEL ROOF SIDE OUTER Toyota - 241B, Lexus ES	FY2015 Cost Planning	C-Class	Jr	Jul 20, 2016	Aug 17, 2016		

**System Availability**

**Side by Side Comparisons**

**Export this list for Analysis**

**Export this Quote for Analysis**

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**Multiple filter options**

**Export this list for Analysis**

**Export this Quote for Analysis**

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23.		17ZC0-09PL3, Exhaust Center Toyota - 010B, Camry	010B Standard	Exhaust	C	Nov 05, 2015	Nov 05, 2015		
24.		17167-0V030, Manifold Inlet thru Toyota - 782F, Camry	010B Standard	C-Class	T	Apr 29, 2016	May 11, 2016		
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27.	<input type="checkbox"/>	<b>QC1608006</b> 18450-0S100, Underfloor CCO Toyota - 135B, Tundra	Current Standard	CCO	T	Aug 16, 2016	Aug 16, 2016		
28.	<input type="checkbox"/>	<b>QE1512002</b> 1234567, rt Toyota - BP3344,	010B Standard	Exhaust	R	Dec 2, 2015	Dec 30, 2015		
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- Components by Comm
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**System Availability**

**Side by Side Comparisons**

**Multiple filter options**

**Search Query Tool**

**Export this list for Analysis**

**Export this Quote for Analysis**

Row	Status	Finished Good / Customer - Project	Material Timing	Commodity	Owner	Created	Due	Sent	Options
21.		123456789, Nissan - Q2-Revised,	-Select-	C-Class	R	Oct 15, 2015	Nov 12, 2015		
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23.		17ZC0-09PL3, Exhaust Center Toyota - 010B, Camry	010B Standard	Exhaust	C	Nov 25, 2015	Dec 2, 2015		
24.		17167-0V030, Manifold Inlet thru Toyota - 782F, Camry	010B Standard	C-Class	Ti	Nov 25, 2015	Dec 2, 2015		
25.	<input type="checkbox"/>	QC1604004 53743-010B0, Reinforcement, FR Fender Toyota - 010B, Camry	Current Standard	C-Class	Jr	Apr 7, 2016	May 5, 2016		
26.	<input type="checkbox"/>	QE1609017 17430-16PQR, 2.4L Turbo Exhaust Tail Assembly Toyota - 550B/16PL, Highlander	010B Standard	Exhaust	C	Sep 29, 2016	Oct 24, 2016		
27.	<input type="checkbox"/>	QC1608006 18450-0S100, Underfloor CCO Toyota - 135B, Tundra	Current Standard	CCO	Ti	Aug 16, 2016	Aug 16, 2016		
28.	<input type="checkbox"/>	QE1512002 1234567, rt Toyota - BP3344,	010B Standard	Exhaust	R	Dec 2, 2015	Dec 30, 2015		
29.	<input type="checkbox"/>	QC1607008 61711-07020, PANEL ROOF SIDE OUTER Toyota - 241B, Lexus ES	FY2015 Cost Planning	C-Class	Jr	Jul 20, 2016	Aug 17, 2016		

# Search Query Tool

MK&Associates Welcome Robert Pozsgai | Firefox v32.0 | Status: Available | Logout

## Quotation Management System Statistics

Quote #   **Quotes** New Part Setups Engineering Changes Prototypes Sample Materials Files Administration Help

**All Customer Quotes**  Export to Excel  Save Preferences...

Q30016A

Filter: By Quote Number  Position to:    All  Open

**Advanced Search Criteria**

1 Search:  Quotes -OR- Select from My Criteria:

2 Where:   Not =

(FIELD CustName CONTAINS "ADAC")

**Custom Criteria** **Save Your Favorites**

3 Condition:  Must Match All  Match One or More

4

Show: 5 | 10 | 25 | 50 | 100 entries Previous 1 2 3 4 5 6 7 8 ... Next

Row	Quote	Status	Customer / Program / Description	Inquiry	Estimator	Salesman	Created	Due	Sent
21	<input type="checkbox"/> <input type="checkbox"/> Q00095A	<input type="checkbox"/>	ADAC Automotive Spotter adhesive foam tape		Dave Gibbs	Jeff Greene	Apr 2, 2014	Mar 12, 2014	Apr 2, 2014

- ➔ Enables ad-hoc reporting
- ➔ Export to Excel for personalized analysis

# Compare Quotes

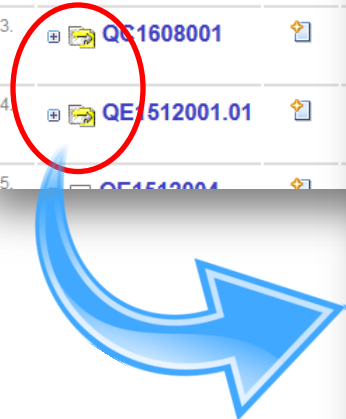
**All Customer Quotes**

Filter:  Position to:    All

**Advanced Search Criteria**

Show: 5 | 10 | 25 | 50 | 100 entries

Row	Quote	Status	Finished Good / Customer - Project	Material
1.	<input type="checkbox"/> QM1606008			
2.	<input type="checkbox"/> QE1601002			
3.	<input checked="" type="checkbox"/> <input type="checkbox"/> <b>QC1608001</b>			
4.	<input checked="" type="checkbox"/> <input type="checkbox"/> <b>QE1512001.01</b>			
5.	<input type="checkbox"/> QE1512001			



**Compare Quotes** [Back to Quote List](#)

Quote #: **QC1609007**  **QE1512001.01**  **QC1608001**

Include Dates, Volumes, Rates

Customer Name:	<b>Toyota</b>	<b>Toyota</b>	<b>Nissan</b>
Project Name:	<b>010B</b>	<b>010B</b>	<b>L42P</b>
Vehicle Name:	<b>Camry</b>	<b>Camry</b>	<b>Altima</b>
Commodity Type:	<b>C-Class</b>	<b>Exhaust</b>	<b>CCO</b>
Customer Part Number:	<b>50105-06060</b>	<b>17ZC0-09PL3</b>	<b>20800-TR2k3-A</b>
Part Description:			
Drawing Level:		<b>FS</b>	<b>Prototype</b>
Customer Target Price:	\$	\$	\$

	Cost	Price	Margin	Margin %	Cost	Price	Margin	Margin %	Cost	Price	Margin	Margin %
Material:	\$ 2.9418	\$ 3.3368	0.4000	12%	\$ 0.0000	\$ 0.0000	0.0000		\$ 0.0000	\$ 5.4695	5.4700	100%
Processing:	\$ 1.2543	\$ 1.2507	0.0000	0%	\$ 0.0000	\$ 5.1759	5.1800	100%	\$ 0.0000	\$ 2.1012	2.1000	100%
<b>Total Manufacturing:</b>	<b>\$ 4.1961</b>	<b>\$ 4.5875</b>	<b>0.3900</b>	<b>9%</b>	<b>\$ 0.0000</b>	<b>\$ 5.1759</b>	<b>5.1800</b>	<b>100%</b>	<b>\$ 0.0000</b>	<b>\$ 7.5707</b>	<b>7.5700</b>	<b>100%</b>
SG&A:		\$ 0.6879				\$ 13.9732				\$ 0.5852		
Catalyst SG&A:		\$ 0.0000				\$ 0.0000				\$ 0.0000		
Freight:		\$ 0.0000				\$ 0.0000				\$ 0.0000		
Equipment Depreciation:	\$ 0.2199				\$ 0.0000				\$ 0.0000			
Equip Depreciation Override:	\$				\$				\$			
Tooling Depreciation:	\$ 0.0180				\$ 0.0000				\$ 0.0000			
Tooling Depreciation Override:	\$				\$				\$			
<b>Total Depreciation:</b>	<b>\$ 0.2379</b>				<b>\$ 0.0000</b>				<b>\$ 0.0000</b>			
Royalty:	\$ 0.1337				\$ -0.9140				\$ 0.3175			
Royalty Override:	\$				\$				\$			
<b>SUB-TOTAL:</b>	<b>\$ 4.5678</b>	<b>\$ 5.2754</b>			<b>\$ 0.0000</b>	<b>\$ 19.1491</b>			<b>\$ 0.0000</b>	<b>\$ 8.1559</b>		
		\$ Other				\$ -42.0000	Gentani description			\$ Gentani		
Total Other:	\$ 0.0000				\$ -42.0000				\$ 0.0000			



# Create a New Quote

**New Quote**  
Current Status: [Initiator]

QUOTATION

Save & Continue Back Help

Description Project Schedule Files E-Mail Status

▼ Dates, Volumes, Rates ...

Customer Name: Toyota  
Project Name: 2.5L Turbo  
Vehicle Name: Camry, RAV4  
Commodity Type: Manifold  
Quote Type: Sourcing  
Customer Part Number: 88716-4451-Q-4  
Part Description: Exhaust Manifold Turbo  
Drawing Level:  
Quote To: Internal Customer  
Kickoff Meeting Required: Yes No  
Inquiry Number: Rev. Fields  
Mfg Facility: -Select-  
Customer Location: Shipping Terms:  
Quote Volume: 340,000  
Production Plan Volume:  
APR Volume:  
Customer Target Price: \$  
Contact Name: -Select- Remove  
Phone Number:  
E-Mail Address:

Quote Number: **New Quote** Scenario Only  
Created By: robert pozsgai  
Quote Comment:  
Quote Owner: Matt Swanson  
Salesman:  
Date Created: 12/6/16 11:43:02 AM  
Cost Build-Up Date:  
Date Due: 1/3/2017 On Hold  
Date of Expiration: 3/6/2017 90 days  
Date Quoted:  
SOP Date: 9/8/2019  
EOP Date:  
Part Status: Quote Production Service  
Active Date:  
Equipment Depreciation: 7 Years  
Unbillable Tooling Amortization: 4 Years  
Freight Truck Cushion: 15 %  
Quoted Std Mat Rate Group: Current Standard  
Quoted Material Timing: 12/6/2016  
Quoted Proc Rate Group: Current Standard

**Type Ahead Customer Search**

**Auto Numbered**

**Required Fields**

**Pricing Strategy**

# Submit the Quote

**New Quote**  
Current Status: [Quotation]

Save & Continue Back Help

Description Project Schedule Files E-Mail Status

Dates, Volumes, Rates ...

Customer Name: Toyota  
Project Name: 2.5L Turbo  
Vehicle Name: Camry, RA4  
Commodity Type: Manifold  
Quote Type: Sourcing  
Customer Part Number: 86716-4451-Q-4  
Part Description: Exhaust Manifold Turbo  
Drawing Level:  
Quote To: Internal Customer  
Kickoff Meeting Required: Yes No  
Inquiry Number: Rev:  
Mfg Facility: Select-  
Customer Location:  
Shipping Terms:  
Quote Volume: 340,000  
Production Plan Volume:  
APR Volume:  
Customer Target Price: \$  
Contact Name: Select- Remove  
Phone Number:  
E-Mail Address:  
Order Probability: Select-  
Quote Number: **New Quote** Scenario Only  
Created By: robert pozgali  
Quote Comment:  
Quote Owner: Matt Swanson  
Salesman:  
Date Created: 12/6/16 11:43:02 AM  
Cost Build-Up Date:  
Date Due: 1/3/2017 On Hold  
Date of Expiration: 3/6/2017 90 days  
Date Quoted:  
SOP Date: 9/8/2019  
EOP Date:  
Part Status: Quote Production Service  
Active Date:  
Equipment Depreciation: 7 Years  
Unbillable Tooling Amortization: 4 Years  
Freight Truck Cushion: 15 %  
Quoted Std Mat Rate Group: Current Standard  
Quoted Material Timing: 12/6/2016  
Quoted Proc Rate Group: Current Standard  
Quoted Process Timing: 12/6/2016  
Catalyst \$:  
Exch Rate for Sango:  
Exch Rate for Equip/Tooling:

Click here to Save & Add Components.

General Comments to Include on the Quote Letter Select Comments

Internal Comments:  
Save Comment













Save & Continue Save & Close

**Submit**

- ➔ Required fields are validated
- ➔ Courtesy notifications are sent
- ➔ Workflow e-mail sent to next assignee
















# Sample Quote Workflow Definition

 <b>[QInitiator]</b>   New Quote
 <b>[Estimating]</b>   Review & Estimate
 <b>[QApproval]</b>   Price & Timing Approval
 <b>[Distribution]</b>   Submit to Customer
 <b>[Customer]</b>   Awaiting Disposition
 <b>[NPL]</b>   Update Navision
 <b>[Won]</b>   Job Awarded
 <b>[Lost]</b>   Job Lost
 <b>[Expired]</b>   Quote Expired
 <b>[Revised]</b>   Quote Revised
 <b>[NoQuote]</b>   Not Quoted
 <b>[Cancelled]</b>   Quote Cancelled

- ⇒ Serial or Parallel processing
- ⇒ Automated notifications
- ⇒ Conditional routing
- ⇒ Dynamic user assignments
- ⇒ Backup definitions
- ⇒ Overdue reminders












# Sample Quote Workflow Definition

 [QInitiator]   New Quote
 [Kickoff]   Quote Kickoff Meeting
 [Estimating]   Cost Build-Up and Pricing
 [CostVsPrice]   Cost vs Quote Meeting
 [VPRReview]   Quote Review for submission
 [QSubmit]   Ready to Submit to Customer
 [Customer]   Awaiting Disposition
 [Accepted]   Job Awarded
 [Declined]   Job Lost
 [Expired]   Quote Expired
 [Revised]   Quote Revised
 [NoQuote]   Not Quoted
 [Cancelled]   Quote Cancelled

- ⇒ Serial or Parallel processing
- ⇒ Automated notifications
- ⇒ Conditional routing
- ⇒ Dynamic user assignments
- ⇒ Backup definitions
- ⇒ Overdue reminders



# Sample Quote Workflow Definition

 <b>[QInitiator]</b>   Prepare the Quote
 <b>[CustomerSvc]</b>   Customer Service
 <b>[Customer]</b>   Awaiting Customer Disposition
 <b>[Won]</b>   Quote Awarded
 <b>[Lost]</b>   Quote Lost
 <b>[Revised]</b>   Quote Revised
 <b>[NoQuote]</b>   No Quote
 <b>[Expired]</b>   Quote Expired
 <b>[Cancelled]</b>   Quote Cancelled

- ⇒ Serial or Parallel processing
- ⇒ Automated notifications
- ⇒ Conditional routing
- ⇒ Dynamic user assignments
- ⇒ Backup definitions
- ⇒ Overdue reminders



# User Assignments



## New Quote # Q30036 for Billington Products

**Billy** to: Michael

### Document Link Information:

Database: Quotation Management System

Document: Quotation Q30036

Workflow status: Review and Estimate

Please review this document requiring your attention.

Requestor: Jeff Maxwell

Description: Window Regulator

[Change](#)

Access the document by using the link below. Review the document and click the Approve button if you want the document to be processed. Clicking the Reject button returns the document to the author.

Thank you.

<http://mxti.beechwood.com/prod/qms.nsf/0/35J26LK3136K35L67J85L5K858VH&action=openDocument>

# User Assignments



## New Quote # Q30036 for Billington Products

**Billy** to: Michael

### Document Link Information:

Database: Quotation Management System  
Document: Quotation Q30036  
Workflow status: Review and Estimate

Please review this document requiring your attention.

Requestor: Jeff Maxwell  
Description: Window Regulator Change

Access the document by using the link below. Review the document and click the Approve button if you want the document to be processed. Clicking the Reject button returns the document to the author.

Thank you.

<http://mxti.beechwood.com/prod/qms.nsf/0/35J26LK3136K35L67J85L5K858VH&action=openDocument>



**Q30036 | Billington Products**

BPQ#1053

Current Status: [ ] is [ ]

**CUSTOMER QUOTE**

Edit

Preview Quote Letter

Back

Help

Description

Related Documents

Files

E-Mail

Status

Customer Number: C10980

Quote Number: **Q30036**

# Costing Method





# Sample Costing Methods

## RAW MATERIAL & COMPONENTS

	Description	Cost / Unit	Parts / Unit	Units	Scrap %	Cost / Part	Usage Per Order	Usage Annual	OSF	Vendor
1.	RT8002 2.14" X 164'	0.57590	60.91	LF	119.76% 9.88%	\$0.01039	1,804	20,782	<input type="checkbox"/>	
2.	4701-60-25062-04 Poron 2.25" X 150'	0.29270	60.91	LF	119.28% 9.65%	\$0.00527	1,800	20,738	<input type="checkbox"/>	
3.	RT8002 2.14" X 164'	0.57590	60.91	LF	119.76% 9.88%	\$0.01039	1,804	20,782	<input type="checkbox"/>	
4.	1-220-050-06775 CLRLNR .002" T X 2.5" W X 3,900' CLEAR LINER	0.02250	60.91	LF	0.00% 9.65%	\$0.00041	1,800	20,738	<input type="checkbox"/>	

Raw Material Sub-Total: **\$0.02645**

Inbound Freight: **\$0.00033** 1.25%

Multi-Year Material Increase: **\$0.00201** 2.50%

Total Material Cost: **\$0.02884**

**Foam Pad Producer**

## LABOR & MACHINE DATA

	Description	Setup Time	Lot Size	Units / Hr	Cost / Part	Capacity Hrs / Order	Rate
1.	Die Cutting <a href="#">Work Instructions</a> ✓	3	100,000	45,000	\$0.00495	5	\$98.8

Labor / OH Sub-Total: **\$0.00495** 3% /yr

Labor / OH + Raw Material: **\$0.03374**

## TOOLING

	Tool Number	# Cavities	Quantity	Options	Cost	Sell Price	Vendor
1.	Tooling	1	1	<input type="checkbox"/> Common <input type="checkbox"/> Existing <input checked="" type="checkbox"/> Itemize on Letter		\$950.00	

Tooling Total: **\$0.00** **\$950.00**

# Sample Costing Methods

RAW MATERIALS		Specifications					
D		Material					\$189,793.67
1. R		Purchased Items					\$109,531.00
		Description	Unit Cost	UOM	Quantity	Total	
		1. Guide Pins + Bushings - sets	200	each	10	\$2,000.00	
	4	2. Ejector Pins	30	each	60	\$1,800.00	
		3. Core Pins		each			
	3. R	4. Hot Runner System Misc. Type	7,500	each	11	\$82,500.00	
		5. Hot sprue bushing		each			
	4. 1- C C	6. Manifolds (Water, Hydraulic, etc.)	450	each	4	\$1,800.00	
		7. Connectors Water & Hydraulic	30	each	30	\$900.00	
		8. Electrical Components Limit Switches/Sensors	1,000	each	3	\$3,000.00	
		9. Hydraulics	750	each	6	\$4,500.00	
		10. Swivel Eye Bolts	3,500	each	1	\$3,500.00	
		11. Straight Locks / PL Locks		each			
		12. Misc. Items	9,531	each	1	\$9,531.00	
		13. Metric Upcharge		each			
LABOR		Sub-Total:					\$109,531.00
D		Markup%					\$0.00
1. C		Purchased Items Total:					\$109,531.00
E							
		In-House Process Steps					\$236,925.00
		Miscellaneous Services					\$36,500.00
		Other Costs					\$12,000.00
TOOLING		FINAL PRICE					\$584,750.00
		Internal Comments	Cost Adjustment				
		All					
			Cost Sub-Total:		\$584,750.00		
			Rebate Factor:		%		
			Cost Total:		\$584,750.00		
					<input type="checkbox"/> Include Finance Cost		
			Override Cost:				

**Injection Mold Die Shop**

# Sample Costing Methods

**Specifications**

Type:  Seating  Carts  Tables  Parts  Other

Item	Description	List Price	Override
Ma	Seat: B = BIO – Concaved – 18.5" wide x 16.5" deep x 3" thick	\$118.00	
Pr	Backrest: E = Ergonomic – 15.5" wide x 14.5" high	\$122.00	
1. C	Base: N = Nylon Composite (CAB) – leg spread 27"	\$137.00	
2. E	Height: 1722R	\$63.00	
3. C	Casters/Glides: R = single-wheel, thermoplastic rubber, nonmarring ball bearing casters		
4. H	Finish: -Select-		
5. F	Perf Package: -Select-		
6. M	Armrests: PSAS = Height adjustable with self-skinned urethane pads	\$75.00	
7. C	Footring: -Select-	\$0.00	
8. E	Seat Controls: -Select-		
9. H	Extras		
10. S	Upholstery Grade: Grade 2		
11. S	Upholstery Desc: AV126 Black vinyl		
12. M	Description:		
13. M	Sample File Path:		
In-	Internal Comments:		
Mi	TOTAL List Price:	\$515.00 with Overrides	

Pricing Strategy Comments

\$189,793.67
\$109,531.00
\$236,925.00
\$36,500.00
\$12,000.00
\$584,750.00

**Office Furniture Manufacturer**

Cost Adjustment	
Cost Sub-Total:	\$584,750.00
Rebate Factor:	%
<b>Cost Total:</b>	<b>\$584,750.00</b>
<input type="checkbox"/> Include Finance Cost	
Override Cost:	

# Sample Costing Methods

**Specifications**

Ma Type:  Seating  Carts  Tables  Parts  Other List Price Override **\$189,793.67**

Seat B - B10 - Coupled - 18.5" wide x 18.5" deep x 2" thick **\$440.00**

Quantity:	1	50
Net Price:	<b>\$427.700</b> Automatic pricing	<b>\$427.700</b> Automatic pricing
Available to Ship:		
Price Acceptable?:	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input checked="" type="radio"/> No
Lead Time:	1-2 weeks	3-5 weeks
Date Quoted:	28-Sep-2011	28-Sep-2011

Concerns, Exceptions & Assumptions

Revision:

Item Class: **GM LF 90**

Eng Drawing: **NO DWG**

LAB Item Price Class: **D12 Torsional**

Base Price: **\$650.00** 01/01/20

Base Price UOM: **EA**

Estimated Order Value:

**Internal Comments:**

**TOTAL List Price:**

TOOLIN

Quantity	1	50
List / Base Price	\$650.000	\$650.000
Standard Net Price	<b>\$427.700</b>	<b>\$427.700</b>
Standard Pricing Method	Automatic pricing	Automatic pricing
<b>Modification Charges</b>		
<b>List Adders / Deducts</b>		
<b>Net Adders / Deducts</b>		
<b>Sub-Total</b>	<b>\$427.700</b>	<b>\$427.700</b>
Multiplier (0.658)		
Cmt:		
<b>Calculated Price</b>	<b>\$427.700</b>	<b>\$427.700</b>
<b>Override Price</b>		\$170.750
Cmt: qty discount cost plus		
<b>Percentage Markup</b>		
<input checked="" type="checkbox"/> Ready to Quote	<input checked="" type="checkbox"/> Ready to Quote	
Lead Times	1-2 weeks	3-5 weeks
Date Quoted		
Current Unit Cost	\$68.285	
<b>Gross Margin</b>	<b>84.0%</b>	<b>60.0%</b>

Include Finance Cost

Override Cost:

Industrial Coupling Manufacturer

# Sample Costing Methods

Material Type: **302W - Type 302 Stainless Steel Spring Wire**  
 Machine Series:   
 Machine Rate:  pcs / hr

Progression:  in.  
 Stock Width:  in.

- TOOLS** Yes No
- Front Tool:  Yes  No
- Right Tool:  Yes  No
- Left Tool:  Yes  No
- Back Tool:  Yes  No
- Arbor:  Yes  No
- Retainer:  Yes  No
- Fifth Side:  Yes  No
- Stripper:  Yes  No
- Double Cutoff:  Yes  No
- Posi-Lock:  Yes  No
- Special Cams:  Yes  No
- Top Action:  Yes  No
- Die:  Yes  No

**ESTIMATE** Hours Cost

Design:  \$0.00

Die Set:

Die Build:  \$0.00

ride **\$189,793.67**  
**09,531.00**

Oper.	Facility	Description
0010	C00	No. 00 Coiler Wrkctr C001,C002,C003,C004
0020	HTP	Tempering Workcenter 475 for 30 Min

**Industrial Spring Manufacturer**

imum Quantities (M)

	10	25	50
	\$0.72	\$0.72	\$0.72
	\$0.18	\$0.18	\$0.18
	\$0.00	\$0.00	\$0.00

<b>Purchased Parts Freight</b>	\$0.00	\$0.00	\$0.00	\$0.00
<b>O/S Process - Op 0030, HSOAS Fin Wt: 0.5 #/M</b>	\$20.00	\$10.00	\$4.00	\$2.00
<b>Shipping Supplies Fin Wt: 0.5 #/M</b>	\$0.03	\$0.03	\$0.03	\$0.03
<b>Total Outside Costs</b>	\$20.92	\$10.92	\$4.92	\$2.92
<b>Primary - Op: 0010, C-0 Speed: 4 M/hr</b>	\$11.47	\$6.37	\$3.30	\$2.28
<b>Coiler Scrap ( Use 10.00% )</b>	\$1.24	\$0.73	\$0.42	\$0.32
<b>Internal Finish - Op: 0020, HTP Fin Wt: 0.5 #/M</b>	\$2.00	\$1.00	\$0.40	\$0.20
<b>Raw Material Handling Blk Wt: 0.5 #/M</b>	\$0.01	\$0.01	\$0.01	\$0.01
<b>Packaging &amp; Store FG Fin Wt: 0.5 #/M</b>	\$0.06	\$0.06	\$0.06	\$0.06
<b>Tool Maintenance Tooling: \$0.00</b>	\$0.00	\$0.00	\$0.00	\$0.00
<b>General Scrap Gen Scrap: 2.25%</b>	\$0.80	\$0.43	\$0.21	\$0.13
<b>Total Hard Manufacturing Costs</b>	\$36.50	\$19.51	\$9.32	\$5.92
<b>General Manufacturing Overhead Cost</b>	\$3.83	\$2.05	\$0.98	\$0.62
<b>Administrative Overhead Cost</b>	\$3.32	\$1.78	\$0.85	\$0.54

**Internal Comments:**

TOOLIN

1. Tr

**TOTAL List Price:**

All

# Sample Costing Methods

Blank Size | Process

\$189,793.67

- Horizontal
- Vertical
- Angle
- Rectangle
- Trim / Radius

Trim Stock I.D.  in. Trim Width On Side

Bottom Dia:  in.

Full Bottom Radius:  in.

Partial Bottom Radius:  in. Height

**Part Volume**

Height:  in.

Length:  in.

Width:  in.

Volume: **0.000** cubic in  
**0.000** cubic mm

ReCalc

Blank Size | Process

\* = Stations that exceed press capacity ( 14 + 2 )

Display Currency:  USD  EUR  RMB

No.	Sta.	Description	%	Size (in.)	Setup Hours	Cost USD	Tons
1	B	BLANK (ADJUSTED SLIGHTLY TO BE EQUAL TO Q18833 AND 34 BLANK DIA) _COMMON	0%	1.887	2	2,546.00	8.9
2	C	CUP - COMMON	35%	1.226	1	2,050.00	5.8
3	D	DRAW - COMMON	20%	0.981	1	1,882.00	4.6
4	D	DRAW - FINISH (UNIQUE)	19.3%	0.792	1	1,882.00	3.7
5	R	RESTRIKE	0%	0.792	1	2,780.00	3.7
6	R	FLANGE FLATTEN	0%	1.430	1	2,780.00	6.8

Pricing | Quote Letter

Display Currency:  USD/1,000  EUR/Ea  RMB/Ea ReCalculate

Note: This setting also determines the Quote Letter currency

Specifications

## Stamping Company

Fiscal Year	2014	2015	2016	2017	2018
<b>Description (All Values in USD / 1,000)</b>					
Projected E.A.V.	EAV 1	EAV 2	EAV 3	EAV 4	EAV 5
	10,195,288	11,596,816	12,468,266	12,652,456	11,735,643
Projected Releases	6	6	6	6	6
Release Quantities	1,699,215	1,932,803	2,078,044	2,108,743	1,955,941
Material Cost	0.0000	0.0000	0.0000	0.0000	0.0000
OSP 1 Cost <input checked="" type="checkbox"/> Include in Price (Clean - Ultrasonic - Ultrasonic Clean - Continental Spec S1139)	0.0000	0.0000	0.0000	0.0000	0.0000
Setup Cost (0 hrs @ (24.00 + 260.00 OH) = 0.00 USD / 1,000)	0.0000	0.0000	0.0000	0.0000	0.0000
Spare/Repair Tool Cost Reference based on EAV (20%) / 1,010.00 USD / 1,000	2,070.5000	2,323.0000	2,525.0000	2,575.5000	2,373.5000
Spare/Repair Tool Cost	0.2031	0.2003	0.2025	0.2036	0.2022
Spare/Repair Tool Cost Override					
Machine Overhead	0.0000	0.0000	0.0000	0.0000	0.0000
Packaging <input type="checkbox"/> Include in Price	0.0000	0.0000	0.0000	0.0000	0.0000
Material Scrap Redemption (0.540 USD / LB)	(0.1884)	(0.1884)	(0.1884)	(0.1884)	(0.1884)
Secondary #1					
Secondary #2					
Secondary #3					
<b>SUB-TOTAL (USD / 1,000)</b>	<b>0.0147</b>	<b>0.0119</b>	<b>0.0141</b>	<b>0.0152</b>	<b>0.0139</b>
Scrap - Quality (1%)	0.0001	0.0001	0.0001	0.0002	0.0001
SG&A (8%)	0.0012	0.0010	0.0011	0.0012	0.0011
<b>TOTAL (USD / 1,000)</b>	<b>0.0160</b>	<b>0.0130</b>	<b>0.0154</b>	<b>0.0166</b>	<b>0.0151</b>

Manufacturing Facility: **Holland**

TOTAL List Price:

TOOLING

1. Tr

Price

Admin

# The Bottom Line

$$\bar{y}_{it} = \beta' \bar{x}_{it} + \bar{\varepsilon}_{it}$$

where  $\bar{y}_{it} = y_{it} - \bar{y}_i$ , with  $\bar{y}_i = T^{-1} \sum_{t=1}^T y_{it}$  (and the same for  $x$ ,  $\mu$ , and  $\varepsilon$ ). Because  $\mu_i$  is fixed over time, we have  $\mu_i - \bar{\mu}_i = 0$ .

Markup:	<input type="text" value="140"/>	%
Sell Price:	<input type="text" value="\$ 0.04766"/>	56% Material
Sell Price Override:	<input type="text" value="\$ 0.04790"/>	141% Markup 55% Material



- ➔ Leverage YOUR competitive advantage to calculate accurate pricing
- ➔ Pull from XA when possible to build the estimate (Unit Costs, Routings, PO History, Surrogate BOMs)
- ➔ Enforce consistent formulas, rates and rules for ALL customer quotes

# Leveraging XA Data LIVE

p95-261

P95-26110-NH686 - R/C ASSY R SLIDE DOOR MANUAL, Dwg # 72622-TK8A-A010 [1] ~Tailgate/Slide Door

P95-26110-NH767 - R/C ASSY R SLIDE DOOR M

P95-26110-YR400 - R/C ASSY R SLIDE DOOR M

P95-26120-NH686 - R/C ASSY L SLIDE DOOR M

P95-26120-NH767 - R/C ASSY L SLIDE DOOR M

P95-26120-YR400 - R/C ASSY L SLIDE DOOR M

P95-26130-NH686 - R/C ASSY R SLIDE DOOR P

P95-26130-NH767 - R/C ASSY R SLIDE DOOR P

P95-26130-YR400 - R/C ASSY R SLIDE DOOR POWER, Dwg # 72622-TK8A-A110 [1] ~Tailgate/Slide Door


P95-26140-NH686 - R/C ASSY L SLIDE DOOR POWER, Dwg # 72662-TK8A-A110 [1] ~Tailgate/Slide Door

P95-26140-NH7

P95-26140-YR4

### XA Assembly Number Search

Search By:  Part Number  Description  Drawing Number  Customer Number


Q Type first few characters to Search  Clear Selection

Ord Date	PO Number	Vendor	Buyer	Whse	Status	Order Qty UOM	Due Date	Qty Rec
Nov 8, 2016	P032153	AMERICAN PLASTIC MOLDING	Tony Smith	1	10	5 EA	Nov 18, 2016	0
Nov 16, 2016	P032278	AMERICAN PLASTIC MOLDING	Tony Smith	1	10	5 EA	Nov 19, 2016	0

- QMS connects directly to XA
- Uses a common user ID, **no** XA license required
- Supports both PDM and EPDM file structures
- Retrieve Item Numbers, Descriptions, Base Price, MO History, PO History



# File Attachments / Hyperlinks

 **New File Registration for Q11723, ADH Products, LLC**

**File Description**

Document Relationship: **Q11723**

Description: **ADH Products, LLC**

File Attachment:  18-52412\_XA Panel A-Pill...r Upper Da

File Path:

Include with Quote Letter to the Customer

File Description:

File Categories:  Engineering Change Documentation  
 Supporting Data  
 Work Instructions

Store the file in categories like tabs in a binder  
Hold the Ctrl key to select more than one

**Secure Access**

Date Created: **Dec 6, 2016**

Created By: **mk**

File Security:  Enable  Disable  
All users have access to this file


Authorized to Edit:

Notify Others?  Yes  No  
Let others know this file is available

**Allow Others to Edit**

**Files**

Description Related Documents Files E-mail Status



- ➔ Store files with the Quote for reference
- ➔ Embed as attachments or link to a network file

# E-Mail Correspondence




**FW: Appliance Badge plating RFQ**

From: **Dave**

To: "Quote System"

Sent: Wednesday, September 11, 2013 1:11:02 PM

 [Show Details](#)

**qms@mkassoc.com**

Key=q00046

**David**

**From:** Nancy [<mailto:Nancy@LacksEnterprises.com>]

**Sent:** Monday, September 09, 2013 2:59 PM

**To:** Dave

**Subject:** Appliance Badge plating RFQ

Hi Dave, please quote adhesive per the attached drawings. EAU – 1,200,000. Quotes are due by midday Wednesday the 11<sup>th</sup>. Start of production shows 7/7/1905

Thanks

# E-Mail Correspondence

 **FW: Appliance Badge plating RFQ** Sent: Wednesday, September 11, 2013 1:11:02 PM  
From: **Dave** To: "Quote System" [Show Details](#)

**qms@mkassoc.com**

Key=q00046

David

From: Nancy [mailto:Nancy@LacksEnterprises.com]  
Sent: Monday, September 09, 2013 2:59 PM  
To: Dave  
Subject: Appliance Badge plating RFQ

Hi Dave, please quote adhesive per the attached drawings. EAU – 1,200,000. Quotes are due by midday Wednesday the 11<sup>th</sup>. Start of production shows 7/7/1905

Thanks

**Q00046 for ADH Products, LLC**  
Current Status: [QInitiator] assigned to Dave

Description Related Documents Files **E-Mail** Status

Delete Selected E-Mail Help

From	Subject
Dave	FW: Appliance Badge plating RFQ



*No printing / scanning / attaching / copying / pasting !!!*

# Quote Status Tracking

**Q11723 for ADH Products, LLC**  
Program: GM D  
Current Status: [Customer] assigned to Mike

**CUSTOMER QUOTE**  
◀ Back   Edit   Export to Excel

Description   Files   E-Mail   **Status**

Current Status: [Customer] - Assigned to Mike   on 12/06/2016 at 12:33:23 PM

Seq	Section	Description	Completed	User	Time	Performance	%
5	[Initiator]	Create the Quote	-	-	-	-	-
10	[Estimating]	Estimate the Quote	12/06/16 11:15 AM	Kurt	10.60 Minutes		12.04%
20	[Pricing]	Review Pricing	12/06/16 11:34 AM	Mike	18.68 Minutes		21.23%
21	[MgmtReview]	Second Opinion	-	-	-	-	-
30	[QReview]	Administrative review	12/06/16 12:33 PM	Kris	58.73 Minutes		66.73%
40	[QApproval]	Price & Timing Approval	-	-	-	-	-
50	[Distribution]	Submit to Customer	-	-	-	-	-
▶ 60	[Customer]	Awaiting Disposition	-	-	-	-	-
70	[Wdn]	Job Awarded	-	-	-	-	-
80	[Lost]	Quote Lost	-	-	-	-	-
90	[Expired]	Quote Expired	-	-	-	-	-
100	[Revised]	Quote Revised	-	-	-	-	-
110	[NoQuote]	Quote Not Quoted	-	-	-	-	-
999	[Cancelled]	Quote Cancelled	-	-	-	-	-

**Automatic progress logging**

**Complete tracability and audit trail**

**Review Log**

- Created at [Estimating] by Kurt   on Dec 6, 2016 at 11:05:22 AM
- Section [Estimating]: Submit Quote by Kurt   on 12/6/2016 at 11:15:58 AM
- Section [Pricing]: Notification for Review Pricing sent to Mike   on 12/6/2016 at 11:15:58 AM
- Section [Pricing]: Approved Quote by Mike   on 12/6/2016 at 11:34:39 AM
- Section [QReview]: Notification for Administrative review sent to Kris   on 12/6/2016 at 11:34:39 AM
- Quote Letter sent to the Customer by Kris   on 12/6/2016 at 12:33:23 PM
- Section [QReview]: submit Quote by Kris   on 12/6/2016 at 12:33:23 PM

- ➔ Easily trace each Quote through the process
- ➔ Evaluate performance for Continuous Improvement
- ➔ Full audit trail captured in the Activity Log

# Weekly Open Quote Reports



## Open Quote Report

QMS System to: Dave

Sent to Quote  
Creator and  
Quote Owner

Dave,

The following Quotes are currently still Open and assigned to you. Please address these by opening the Quote System.

Quote Number	Customer	Description	Due Date
Q30151	Interface FLOR		Nov 22, 2016
Q30017A	GLT International	2MM thick EPDM per MSAY430 with 3M 9832	Nov 27, 2016
Q30017-1	GLT International	Spotter adhesive foam tape	Dec 3, 2016
Q00100	H&L Manufacturing	PVC foam 3.8mm id x 22mm od	Dec 5, 2016

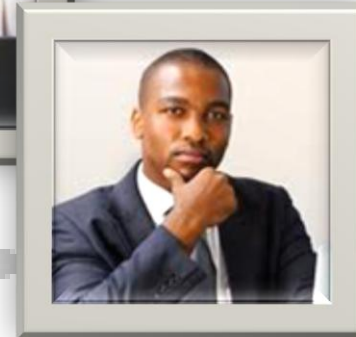


- ⇒ Includes Overdue & Due this week
- ⇒ Quotes never get lost or forgotten
- ⇒ E-Mail reports can be escalated

# Approvals

## Management Review & Approval

- ⇒ By Customer
- ⇒ By Product Line
- ⇒ Limits of Authority Rules
- ⇒ Pricing Validation



Approved

Rejected

# Send the Quote Letter to the Customer

Preview Quote Letter

**MK&Associates**

MK & Associates, Inc.  
P.O. Box 109  
Grand Rapids, MI 43216  
Ph (800) 867-5309  
Fx (419) 825-1944  
www.mkassoc.com

**QUOTATION**

November 21, 2016

Customer: **ADH Products, LLC**  
MW-H11  
Palatine, IL 60038-0001

Quote Number: **Q00261**

Quoted By: Kristy  
Sales Rep: Vern Kanz

Attention: **Natalie**

Terms: 1/2% 10 Net 30 with Credit  
F.O.B.: Delivered


Price Firm for: 30 Days  
Ship Via:

Project Name: RFQ 1165062565-00100

Shipment: 3-4 Weeks

Line	Qty	Model	Sample	Units	Unit Price	Ext Price
1	1	BTT2934-SPEC			\$ 441.00 List	\$ 441.00 List
		Spec = with S6148 non-rotational pneumatic			\$ 230.50 Net	\$ 230.50 Net

\*\*Special order, not returnable  
AV126 Black (684 Black)



# Send the Quote Letter to the Customer

**Preview Quote Letter**

MK & Associates, Inc.  
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Grand Rapids, MI 43216  
Ph (800) 867-5309  
Fx (419) 825-1944  
www.mkassoc.com

**QUOTATION**  
November 21, 2016

Customer: **ADH Products, LLC**  
MW-H11  
Palatine, IL 60038

Attention: **Natalie**

Quote Number: **Q00261**

Send To:

Copy To:

Blind Copy To:

**Create Quote Letter**

Subject: MKA Quotation Q00261 for: RFQ 1165062565-00100

Font Size [Rich Text Editor]

Natalie \_\_\_\_\_,  
Thank you for this opportunity to quote. Please see our attached quotation.  
Regards,  
Kristy \_\_\_\_\_  
MK & Associates, Inc.  
quoting@mkassoc.com  
(800) 537-0726  
(See attached file: Q00261\_Quote.pdf)

**Defaulted from the Quote**

**Prepopulated based on a template**

**File Attachments**

File Type	Size	File Name	Created On
application/pdf	6 KB	Q00261_Quote.pdf	9/23/12 7:52 PM

Files to Attach: 1 Upload

Browse... Send Back

**PDF Quote created and attached**



# Weekly Follow-Up Reports



## Reply with History

Rusty

This message contains all Quotes that have been sent to customers in your area and are awaiting disposition.

Update the Status of the Quotes by replying to this message and using the Status column. Enter text for Won or Lost or simply type in a status comment.

NOTE: For Lost Quotes, please use the Reason numbers below when possible.

- 1 Price too high
- 2 Competitive bid
- 3 Lead time too long
- 4 Late submission
- 5 Project cancelled
- 6 Style

Examples:

Won Order #123456

Lost 1

Lost 2,4

Lost Reason unavailable

Customer is still considering this

**Reply and  
Update the  
Status Column**

Regards,

BIN System Automated Messaging

Quote #	Customer / Project	Contact	# Items	List / Net	Date Quoted	Status
<a href="#">Q05820</a>	N-Miscellaneous Customers Quote parts	Cathy Ph: 44 <a href="#">cathy.</a>	1	List \$35.21 Net \$17.60	01/07/2014 by Sandra	
<a href="#">Q06596</a>	P-Miscellaneous Customers Metal Injection Facility	Nick E Ph: 71 <a href="#">nick.e</a> <a href="#">.com</a>	2	List \$190.92 Net \$190.92	03/06/2014 by Sandra	
<a href="#">Q06617</a>	U-Miscellaneous Customers	Ronal Ph: 24 <a href="#">mark</a>	2	List \$55.80 Net \$55.80	03/07/2014 by Quality	
<a href="#">Q06754</a>	M-Miscellaneous Customers Middle East Project	Joan Ph: 51 <a href="#">jesbe</a>	2	List \$1,956,465.00 Net \$777,928.80	03/18/2014 by Amie !	
<a href="#">Q06757</a>	O-Miscellaneous Customers Otis Elevator	Mike I Ph: 86	1	List \$769.00 Net \$769.00	03/18/2014 by Sandra	

# Weekly Follow-Up Reports



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<a href="#">Q05820</a>	N-Miscellaneous Customers Quote parts	Cathy Ph: 44 <a href="#">cathy.</a>	1	List \$35.21 Net \$17.60	01/07/2014 by Sandra	
<a href="#">Q06596</a>	P-Miscellaneous Customers Metal Injection Facility	Nick E Ph: 71 <a href="#">nick.e</a> <a href="#">.com</a>	2	List \$190.92 Net \$190.92	03/06/2014 by Sandra	
<a href="#">Q06617</a>	U-Miscellaneous Customers	Ronal Ph: 24 <a href="#">mark</a>	2	List \$55.80 Net \$55.80	03/07/2014 by Quality	
<a href="#">Q06754</a>	M-Miscellaneous Customers Middle East Project	Joan Ph: 51 <a href="#">jesbe</a>	2	List \$1,956,465.00 Net \$777,928.80	03/18/2014 by Amie !	
<a href="#">Q06757</a>	O-Miscellaneous Customers Otis Elevator	Mike I Ph: 86	1	List \$769.00 Net \$769.00	03/18/2014 by Sandra	

**Quotation Management System**

Quote #



# Quote Revisions / Options / Scenarios

- ⇒ Quote **Revisions** represent changes to an existing Quote
  - ⇒ Auto Numbered with a letter suffix
  - ⇒ Q12345A, Q12345B



# Quote Revisions / Options / Scenarios

⇒ Quote **Revisions** represent changes to an existing Quote

⇒ Auto Numbered with a letter suffix

⇒ Q12345A, Q12345B

⇒ Quote **Options** represent variations of a Quote

⇒ Auto Numbered with a dash number suffix

⇒ Q12345-1, Q12345-2



# Quote Revisions / Options / Scenarios

⇒ Quote **Revisions** represent changes to an existing Quote

⇒ Auto Numbered with a letter suffix

⇒ Q12345A, Q12345B



⇒ Quote **Options** represent variations of a Quote

⇒ Auto Numbered with a dash number suffix

⇒ Q12345-1, Q12345-2

⇒ Quote **Scenarios** represent “what if” approaches to costing

⇒ Auto Numbered with an SC prefix

⇒ SC03040, SC03041

# Quote Revisions & Options

**All Customer Quotes** Quote Statistics Export to Excel Set as Default.. Help

Q16081

Filter: By Customer For: Program:  All  Open New Quote New Option Revise Quote Copy Quote

Still TBD & Rec More than 2 Days ago Due within 2 Days Overdue Quote Sent Cancelled / No Quote

Show: 5 | 10 | 25 | 50 | 100 entries Previous 1 2 3 4 5 6 7 8 ... Next


Row	Image	Quote Num	Rtg	Status	Assigned To	Customer / Part	RFQ Number	Pts	Pkg Code	Quote Total	Created	Due	Sent
11.		Q16119	4	TBD		6402 / 3-A, REINF HOOD HINGE KT RH / LH	P375 OLQ package 12	149	PKG5324	138,000	Nov 17, 2016	Nov 29, 2016	Dec 5, 2016
12.		Q16103	4	TBD		280C54 / 55-A, REINF BDY SD IL EXT, RH/LH	C519	5	PKG5353	409,500	Dec 1, 2016	Dec 6, 2016	Dec 6, 2016
13.		Q16102	4	TBD		111C88 / 89-A, BRKT FLR S/M FRT #1, RH/LH	C519	5	PKG5353	378,000	Dec 1, 2016	Dec 6, 2016	Dec 6, 2016
14.		Q16101	4	TBD		37110 / 111-A, BRKT RR ST BK NK, RH/LH	C519	5	PKG5353	380,000	Dec 1, 2016	Dec 6, 2016	Dec 6, 2016
15.		Q16100	4	Job # 13440		044B52 / 53-A, BRKT IPNL MTNG HLH	C519	5	PKG5353	361,200	Dec 1, 2016	Dec 6, 2016	Dec 6, 2016
16.		Q16098-1		RFerguson	RFerguson	100164-AA165-AA, REINRRR R	C519	5	PKG5353	432,700	Dec 1, 2016	Dec 6, 2016	
17.		Q16098		TBD		06A64-100A65-AA, Reinf RR FLR INR, RH/LH	C519	5	PKG5353	203,200	Dec 1, 2016	Dec 1, 2016	Dec 2, 2016
18.		Q16020A	4	RFerguson	RFerguson	te	P375 OL	14	PKG5324	2,386,543.5	Dec 5, 2016	Dec 8, 2016	
19.		Q16020	4	TBD		LQ package 19	P375 OL	149	PKG5324	2,386,543.5	Nov 17, 2016	Nov 29, 2016	Nov 29, 2016
20.		Q15987	3			JX61-A044B52_53-AA	JX61-A044B52_53-AA	10	PKG5308	0	Nov 15, 2016	Nov 22, 2016	

JX61-A044B52\_53-AA

Quote Option

Revision of the original Quote

# Quote Scenarios

 **New Quote** **QUOTATION**

Current Status: [QInitiator] assigned to robert pozsgai on 12/06/2016 at 02:08:12 PM

[◀ Back](#) [Help](#)

**Description** | Project Schedule | Files | E-Mail | Status

▼ Dates, Volumes, Rates ...

Customer Name:  Quote Number: **New Quote**  Scenario Only

Project Name:

# Quote Scenarios

**New Quote**  
Current Status: [QIniator] assigned to robert pozsgai on 12/06/2016 at 02:08:12 PM

QUOTATION

Save & Continue Back Help

Description Project Schedule Files E-Mail Status

Dates, Volumes, Rates ...

Customer Name: [ ] Quote Number: **New Quote**  Scenario Only

Project Name: [ ]

**Customer Quotes** Compare

Filter: By Originator For: -Select- All Open Active  Scenarios New Quote

- ⇒ Auto Numbered separate from “real” Quotes
- ⇒ Use for “what if” analysis
- ⇒ Create Template Quotes for different Customers, Product Lines, Manufacturing Facilities, etc.
- ⇒ Simple conversion to a “real” Quote anytime by just unchecking the Scenario Only checkbox



# Managing Supplier RFQ's



**Purchasing**

*Please quote the attached Tooling print.  
Reference # **Q28128**  
Please respond by replying to this E-Mail.*



Vendor A, Vendor B, Vendor C



Vendor A



Vendor B



Vendor C

# Managing Supplier RFQ's



**Purchasing**

Please quote the attached Tooling print.  
Reference # **Q28128**  
Please respond by replying to this E-Mail.



Vendor A, Vendor B, Vendor C



Vendor A



Vendor B



Vendor C



**Quotation Management System**

Quote #

# Managing Supplier RFQ's



**Purchasing**

Please quote the attached Tooling print.  
Reference # **Q28128**  
Please respond by replying to this E-Mail.



Vendor A, Vendor B, Vendor C



Vendor A



Vendor B



Vendor C



Quotation Management System

Quote #



- ⇒ Automatic expediting e-mail notifications
- ⇒ Complete visibility to outstanding RFQ's by Vendor, by Customer, by Quote, by Due Date, etc.

# Quotation Statistics



## Quote Statistics

View:  Quote Volume  Hit Rates

Show: **By Industry**

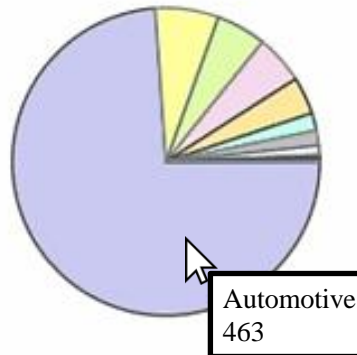
-Select-

From:    
By Estimator  
By Industry  
By Salesman

To:

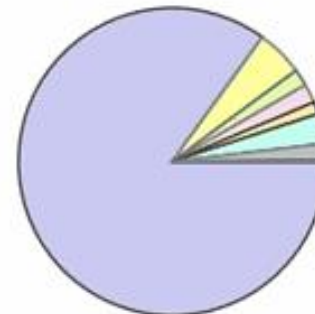
### Number of Quotes

Total Quantity = 710



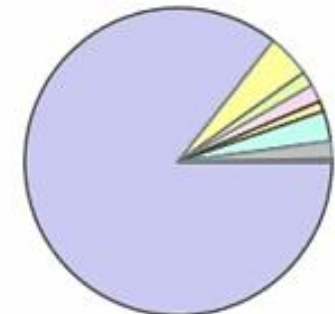
### Material \$ Quoted

Total Material = \$277,551



### Annual \$ Quoted

Total Quoted = \$628,590



# Quotation Statistics

## Quote Statistics

View:  Quote Volume  Hit Rates

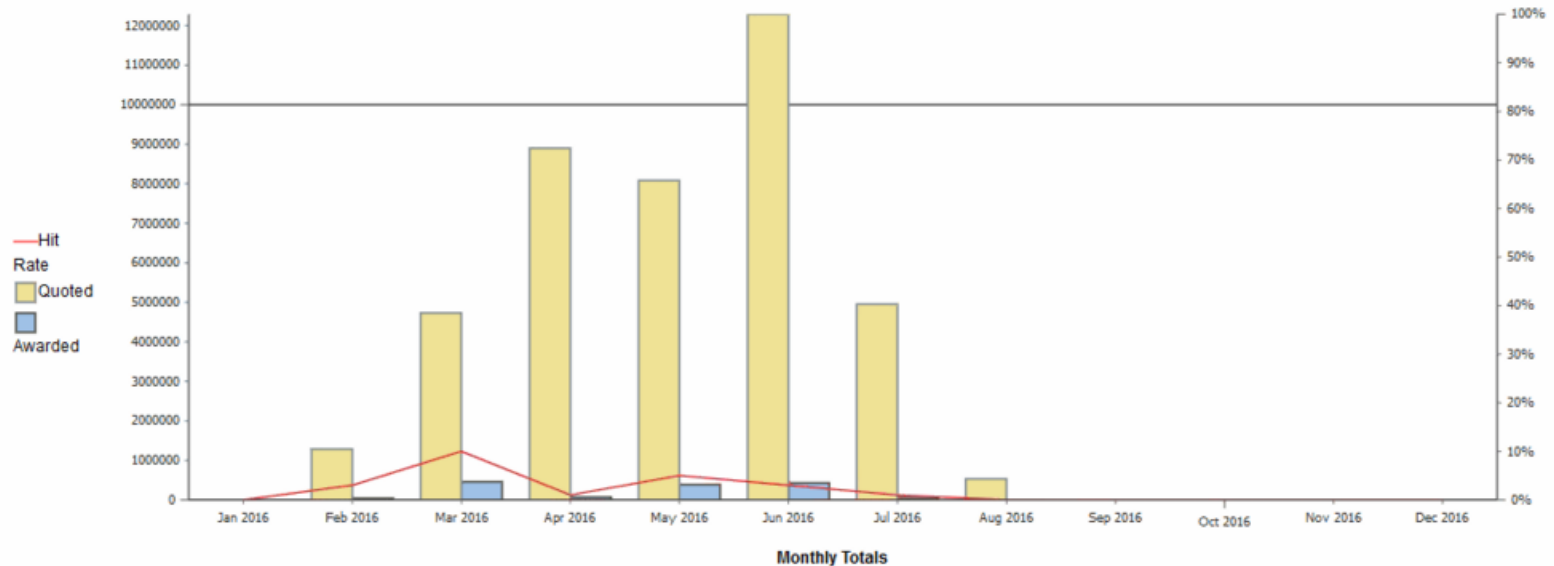
Show: **All Quotes**  Quote \$  Quote Qty

From:  To: Dec 31, 2016

**-Select-**  
 All Quotes  
 By Customer  
 By Industry  
 By Salesman

### Quote Hit Rates

Total Quoted: \$40,774,790.90648 - Total Awarded: \$1,452,705.3960000002 - Total Hit Rate: 4%



	Jan 2016	Feb 2016	Mar 2016	Apr 2016	May 2016	Jun 2016	Jul 2016	Aug 2016	Sep 2016	Oct 2016	Nov 2016	Dec 2016	TOTAL
Quoted	\$ 0	\$ 1,287,115	\$ 4,731,313	\$ 8,898,290	\$ 8,082,486	\$ 12,288,993	\$ 4,954,308	\$ 532,286	\$ 0	\$ 0	\$ 0	\$ 0	\$ 40,774,791
Awarded	\$ 0	\$ 41,843	\$ 458,426	\$ 72,438	\$ 387,755	\$ 428,869	\$ 62,375	\$ 1,000	\$ 0	\$ 0	\$ 0	\$ 0	\$ 1,452,705
Hit Rate	0%	3%	10%	1%	5%	3%	1%	0%	0%	0%	0%	0%	4%

# Common Problems with Quotes

- ✓ Management visibility to Quote status is limited to monthly reports (at best)
- ✓ Estimating formulas are defined in spreadsheets – often multiple different versions (and usually as silos of information)
- ✓ Quote approvals are frequently missed or bypassed
- ✓ Supporting documentation must be found by “directory diving” for files
- ✓ Quote Due Dates are not tracked correctly and are frequently missed
- ✓ Final Quote disposition is often non-existent
- ✓ No good way to keep up with different Quote Options, Quote Revisions, and Quote Scenarios
- ✓ Supplier RFQ’s are not tracked with the Quote

## Summary: How QMS Can Improve *YOUR* Business Performance

- ⇒ Manage all Quotes in a secure, reliable web based solution
- ⇒ Ensure all Quotes use common rates and rules for costing
- ⇒ Route Quotes through an approved, auditable process
- ⇒ Store all related documentation together with the Quote
- ⇒ Use follow-up reports to stay on top of Due Dates
- ⇒ Track inception to disposition to support hit rate analysis
- ⇒ Leverage XA data to ensure accuracy and completeness
- ⇒ Easily maintain Revisions / Options / Scenarios
- ⇒ Integrate Supplier RFQ's with automated expediting
- ⇒ **REDUCE Quote Time by 30%-70%**
- ⇒ Improve your professional image and customer service



***Respond FASTER and WIN more business.***

# Quotation Management



*Using Business Process Automation to Streamline Customer Quotes*