Q2P – RFQ Process Flow Chart
Rev G: January 8,2019

CMC Sales Staff | CMC App Engr | RISK ANALYSIS SECTIONS

Related ISO Forms: Q2P-1 Replaces S1

CMC Sales Staff Receives Quote Request from Customer

CMC Sales Staff (Inside/Outside Sales) logs their quote in to Q2P Portal (Linking it to their Profile)

CMC Sales Staff select "File, Create, Request for Quote"

Add All Required (*) Header Info, Customer and Contact info.

Header Info Required:
Sales Rep & Email (Pull down menu)
Request Origin
Due Date : Customer quote expectation date
Customer Part Number & Revision
Provided Customer Print: Y/N?
AS9100 Required: Y/N?
Design Type: Special (non-catalog), Current Product (Re-quotes), Product Extensions (Cable Catelog Variations)
Prototype Required : Qty & Delivery Date

Customer & Contact Info:
Users may choose Existing Customers from Pull Down Menu.
Linked to the customer selected are customer contacts.
Contacts may be saved or edited.

Select a Project Number if the quote is tied to only one possible launch (It will link Quotes as one Group). Leave blank if no related products
NOTE: This is not to be used for a RH & LH version that both could be bought, but rather two versions of the same item where the customer will only choose one quote.

After Entering Customer and Contact Details Sales Staff will select "Create RFQ and Continue" to advance to the Product Details Section

Product Details
(Details appears on Quote Letter)
Product Description* -
Application & Performance Data:*
EAU* - Estimated Annual Usage
Will PPAP or FAI be Required:* Y/N
Target Price: if known
Similar To: (existing products)
Competition: if known

If Sales expects the customer to request a FAI/PPAP for the product, enter all available details to help capture potential cost

The RFQ 'Notes' section should be used to capture any additional customer direction or information related to the quote (i.e. conversation details, sample requests, costing information). Notes may be added at any time.

CMC Sales will then fill out all required fields (*) in the product details section. Note the EAU, must be entered as numerical entry in order to be accepted. Click Continue

Is this okay to Quote?

No → Inform Sales Staff or Customer that this type of product is not feasible to quote at this time. Method of notification should be formal "No Quote" Letter. Enter Reason in "Explanation Field" in Q2P. → Process is Complete

Yes → YES (No Concerns) – Sales Staff after initial Risk Analysis sees no concern regarding liability, testing, leadtime, design limitations or other financial concerns based on their assessment
.
YES (See Details) – Sales Staff has concerns, but still want to pass the quote for further review. Risk details should be captured via the Text Box in Q2P Prompt and included in the quote response.

CMC Sales Staff selects the **desired output from Engineering**.
1. Current Product OR No Cost Accounting Required (Proceeds directly to quote, based on estimate from historical quotes)
2. Send Directly to Cost Accountant for Cost Estimation (Example: Tabulated Drawing with Existing BOM)
3. BOM Only (Engineering Creates BOM)
4. Engineering to detail Variants (NCV) – Engineering to create Exception list – Used often to quote standard items
5. Informal marked up Print (Engineering creates sketch for Mfg or Costing)
6. Preliminary Quote Drawing (Formal Top Level Drawing is created for Customer)

Type Selected

Type 3-6 → App Engineering will receive an "auto" email that a quote has been submitted → CMC Engineering: Is this request Feasibile

No → CMC Engineering will list Technical reasons for "No Quote" Decision

Yes → An Engineer will be assigned and notified of Project. Eng MGR or Prod Engineer can make assignments → CMC Engineering will commence a Design Review and drawing creation as required.

Type 1-2 → The Product Filters should be completed with (*) categories mandatory and then click "Save & Review" to see quote form followed by "submit for costing"

App Engineering will complete the RFQ **Engineering Package** Tab
Engineering Output: (Proposal Drawing, Parts List, Sketch/ Mark up)
1. Non-Conformance Verification Sheet (NCV) (Record all non-compliant outputs or vague inputs). (Form E4:01-14).
2. Design Specification Sheet (Y/N) (If Necessary)
3. Notation of Special Tool (Y/N) List Details in Comments
4. Notation of Special material or process (List Details in comments). (Y/N)
5. Was an outside quote received? (Y/N)
6. Design Review (Y/N): List details of Design Reviews and upload notes if applicable.
Documents in support of any Y answers should be uploaded to RFQ in Q2P.

CMC Engineering will upload all documents in "PDF or other image format" that were required or requested per the Initial Sales Load. Engineering will also complete the Eng Product Categorization Section.

Stage 1 Risk
Engineering will Perform a Risk Analysis expanding upon the initial Sales review based on any design issues. Details will be listed here if the Engineer deems extraordinary risk

Qualification Package
Engineering will detail any qualification test(s) that are recommended beyond standard compliance. Detail costs, if known, in this section. This data will be used to determine possible NRE charges

The App Engineer will select **MFG & Purchasing Support Selection:**
1) Manufacturing Required (Y/N) & Assign Mfg Eng
2) Purchasing Required (Y/N) & Assign Purchasing Staff.
3) If neither are required, the quote will be sent directly to Costing.

If an "Engineering Quote" has been obtained, it should be uploaded and indicated in the comments section of the purchasing area.

Once Engineering Package is complete with Files & Notes uploaded, The Engineer will select Engineering Complete.

MFG / Purch Required

Yes → MFG Required → Manufacturing Engineering will complete the "Cycle Time & Work Flow Estimation Sheet" and upload under the appropriate "tag" in the UPLOAD FILES section. Any additional notes may be added to the **Manufacturing Package** tab. Once complete select "Manufacturing Complete" and a Costing Accountant is assigned

Yes → Purchasing Required → Purchasing will upload any quotes received in support of the RFQ and note any special costs or lead times on the **Purchasing Package** tab.. Document any quote details if a formal quote is unavailable. Quotes should be loaded with Quote – Purchasing 'tag'.

No → The Costing Accountant will upload the cost sheet to the "Cost Data" file tag in the upload file area and add additional comments to the **Costing Package** Tab. Once Completed select "Costing Complete" to send the complete request back to Sales for Pricing

Customer or Sales may request a project be moved to a temporary hold status or cancelled. Engineering may check "Project on Hold" or "Cancel". The Project may be resumed at a later date by selecting "Resume Project" button.

With Costing complete the quote is ready for pricing.

Sales Staff selects Quick Quote (Upper Right) and enter data gathered during the quote process and any subsequent sales duties (required field are noted; certain fields will pre-populate).

Submit the "Quick Quote". The Quick quote will be sent to the Sales Manager for Approval. The Quick Quote must be approved by the assigned manager. A rejected quick quote should have the reason documented (i.e. Pricing, Min Buys, Lead-time, etc). The Rejection Email will instruct the Sales Staff to resubmit with re-worked data.

Approved?

No → Sales Staff selects Quick Quote (Upper Right) and enter data gathered during the quote process and any subsequent sales duties (required field are noted; certain fields will pre-populate).

Yes → After the Quick Quote is approved. The CMC Sales Staff will create a quote letter outside of the system and send the quote to the customer along with the following (as required):

1) Formal print
2) Non-Conformance Documentation

Reporting and Sales Data will be maintained in Q2P by CMC Sales Staff, by keeping accurate EAU, Pricing and SOP Dates. This data can be used for future planning and quote follow-ups.

Any additional data pertinent to the RFQ should be uploaded in Q2P or captured in the Notes section including customer prints, deviation requests and important email correspondence.

Process is Complete