



# QUOTE TO ORDER

## User Guide

Version 1.0



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# Introduction

This user guide will provide the overview of quote to order process

## Quote Creation

The quote can be create by customer & CRM, please refer below steps :

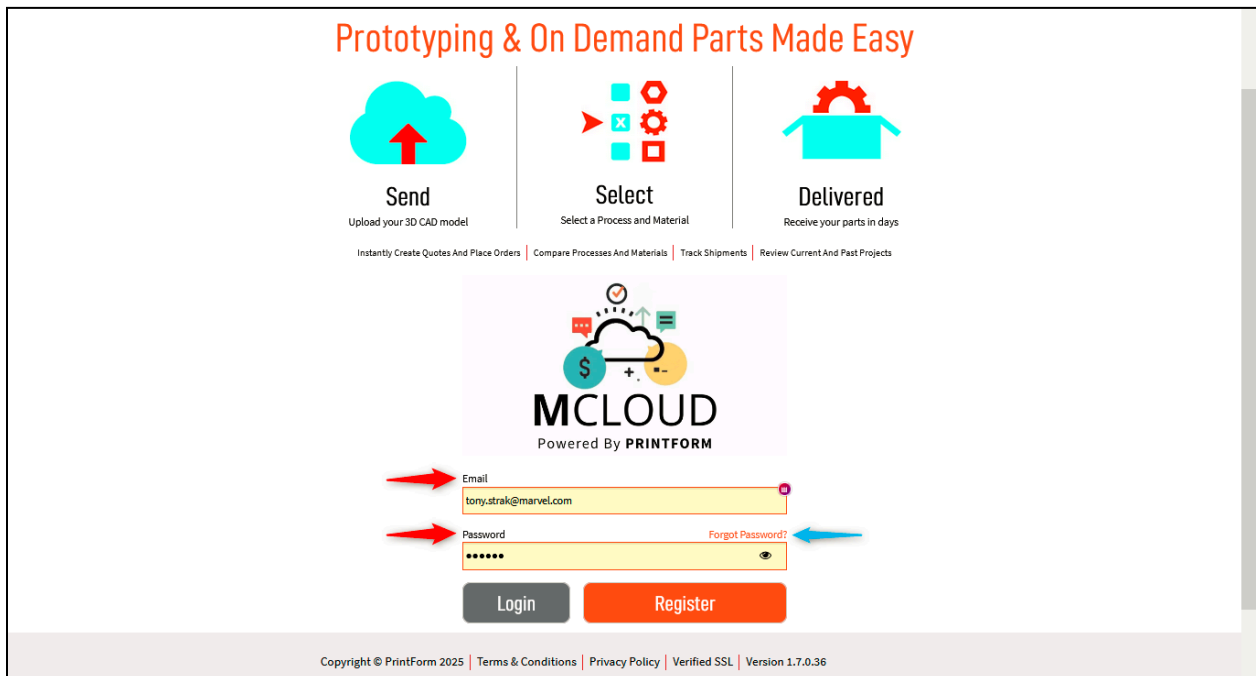
### 1. Via Customer

Customers can create the quote by themself following through below steps:

#### 1.1 Registration Process

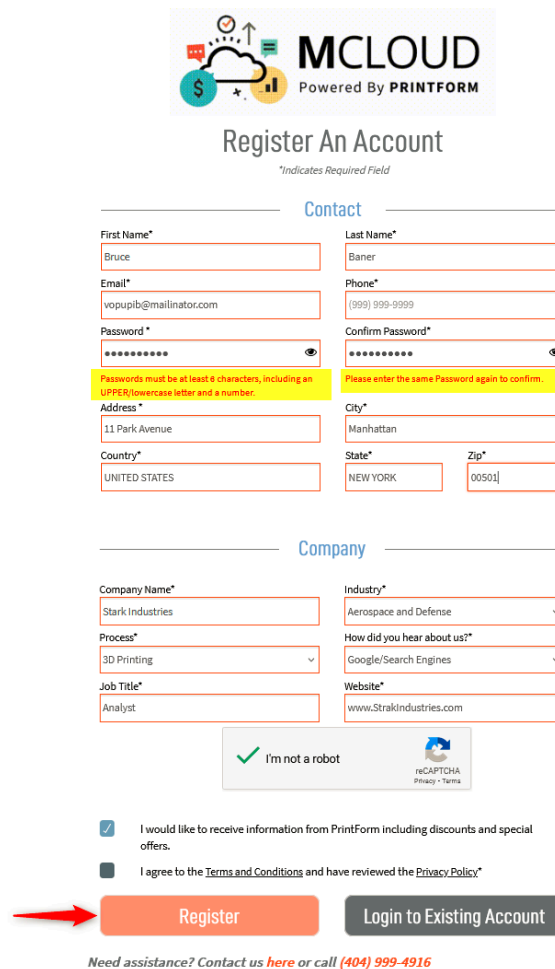
Customer can visit to printform website & get registered by them self though following steps:

- Open the website for Printform  
<http://testpaasport.printform.com/paasport/register>
- Enter the email & password
- Click on “**Register**”



The screenshot displays the Printform website's registration process. At the top, the heading "Prototyping & On Demand Parts Made Easy" is shown. Below it, a three-step process is outlined: "Send" (Upload your 3D CAD model), "Select" (Select a Process and Material), and "Delivered" (Receive your parts in days). A central graphic features the "M-CLOUD" logo with the text "Powered By PRINTFORM". Below the logo, there is a registration form with fields for "Email" (containing "tony.strak@marvel.com") and "Password" (masked with dots). A "Forgot Password?" link is next to the password field. At the bottom of the form are "Login" and "Register" buttons. The footer contains copyright information: "Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36".

- On registration account form, enter the all mandatory (*fields with \* symbol*) informations for **Contact & Company**



**MCloud**  
Powered By **PRINTFORM**

### Register An Account

\*Indicates Required Field

#### Contact

First Name\*  
Bruce

Last Name\*  
Baner

Email\*  
vopupib@mailinator.com

Phone\*  
(999) 999-9999

Password\*  
\*\*\*\*\*

Confirm Password\*  
\*\*\*\*\*

Passwords must be atleast 6 characters, including an UPPER/lowercase letter and a number.

Please enter the same Password again to confirm.

Address\*  
11 Park Avenue

City\*  
Manhattan

Country\*  
UNITED STATES

State\*  
NEW YORK

Zip\*  
00501

#### Company

Company Name\*  
Stark Industries

Industry\*  
Aerospace and Defense

Process\*  
3D Printing

How did you hear about us\*  
Google/Search Engines

Job Title\*  
Analyst

Website\*  
www.StarkIndustries.com

☒ I would like to receive information from PrintForm including discounts and special offers.

☐ I agree to the [Terms and Conditions](#) and have reviewed the [Privacy Policy](#)\*

[Register](#) [Login to Existing Account](#)

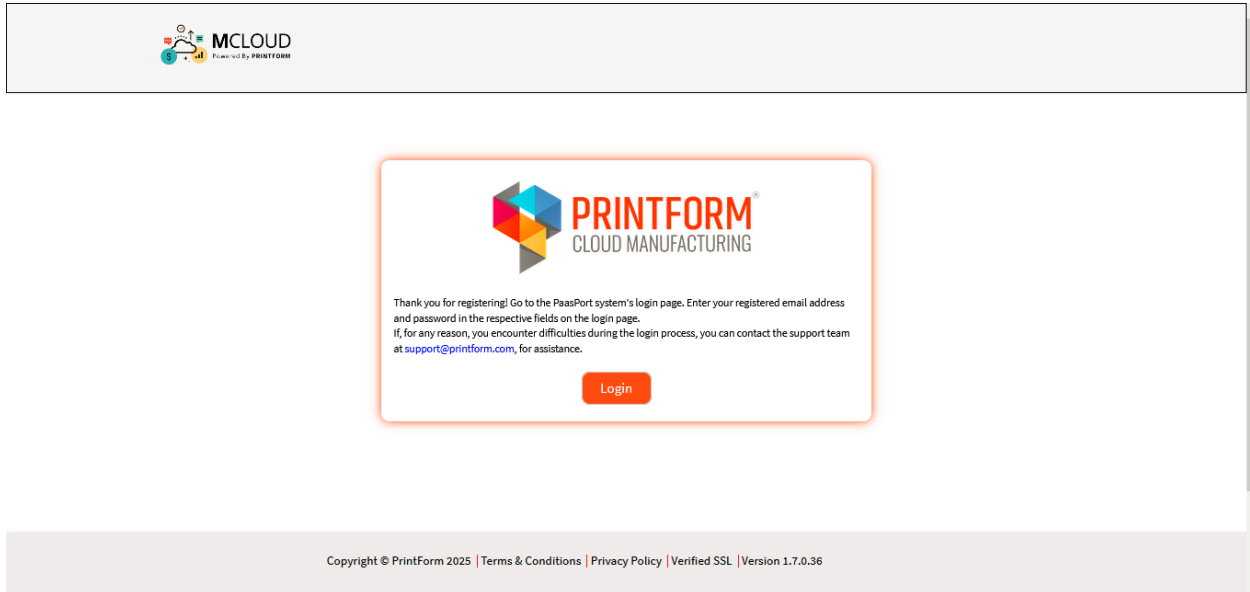
Need assistance? Contact us [here](#) or call (404) 999-4916

- Password must be atleast 6 characters, including an UPPER/lower case letter and a symbol
- Verify as “I am not a robot” by clicking on checkbox
- Check the 2nd check box, after you read the **Terms and Condition & Privacy Policy**

**Note :** You can not proceed further without accepting Terms and Condition & Privacy Policy

- Click on the “**Register**” button.

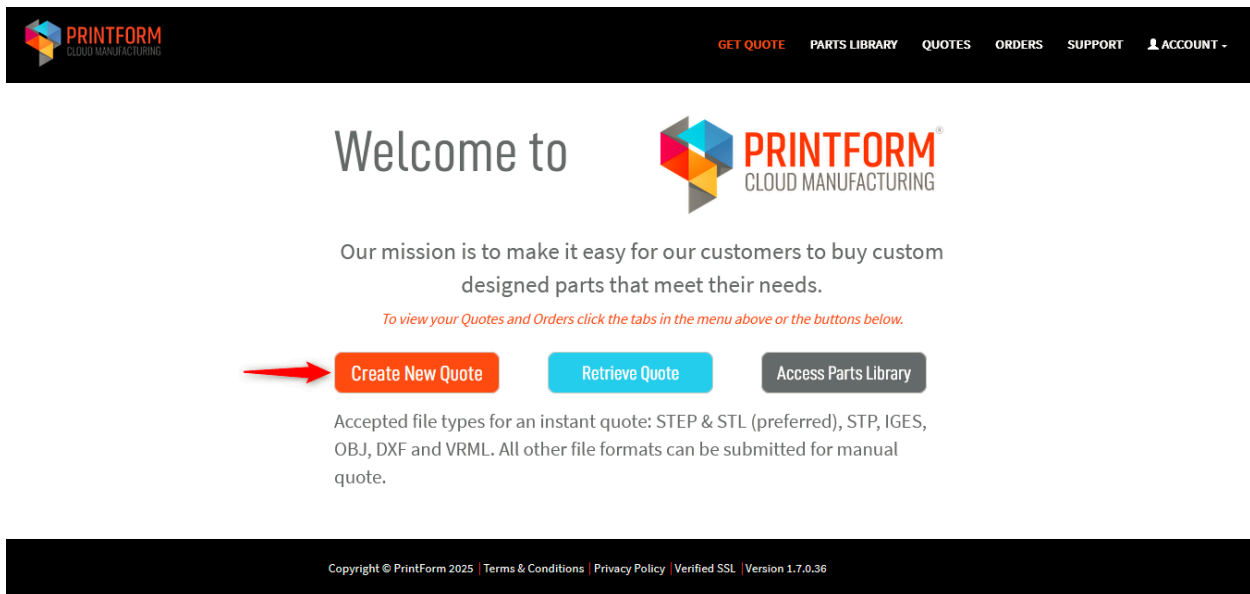
- Once your registration get successful then click on “**Login**” button



- Once your registration get successful then click on “**Login**” button

## 1.2 New Quote Creation (Via Customer)

- Login again with your credentials
- Now to create new Quote, click on “**Create New Quote**”

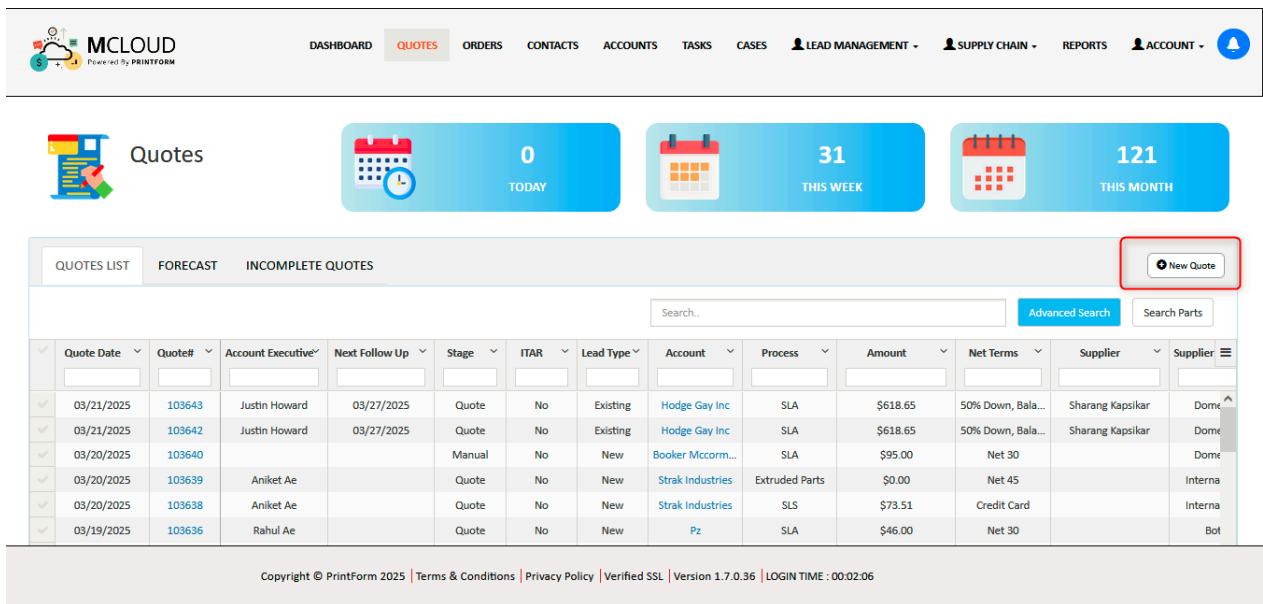


## 2. Via CRM Role

The CRM person can create the quote for customers as per their communications, following through below steps:

### 2.1 New Quote Creation (Via CRM)


- Open the website for Printform  
<http://testpaasport.printform.com/paasport/register>
- Login with your credentials
- Go to **Quote** Page & click on “**New Quote**”




Quote Date	Quote#	Account Executive	Next Follow Up	Stage	ITAR	Lead Type	Account	Process	Amount	Net Terms	Supplier	Supplier
03/21/2025	103643	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	\$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
03/21/2025	103642	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	\$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
03/20/2025	103640			Manual	No	New	Booker Mccorm...	SLA	\$95.00	Net 30		Dome
03/20/2025	103639	Aniket Ae		Quote	No	New	Strak Industries	Extruded Parts	\$0.00	Net 45		Interna
03/20/2025	103638	Aniket Ae		Quote	No	New	Strak Industries	SLS	\$73.51	Credit Card		Interna
03/19/2025	103636	Rahul Ae		Quote	No	New	Pz	SLA	\$46.00	Net 30		Bot


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- On Quote page, click on search icon of **First Name**
- **Search** the **customer contact** on pop window
- Select the customer


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[QUOTES](#)
[ORDERS](#)
[CONTACTS](#)
[ACCOUNTS](#)
[TASKS](#)
[CASES](#)
[LEAD MANAGEMENT](#)
[SUPPLY CHAIN](#)
[REPORTS](#)
[ACCOUNT](#)


Quotes




0

TODAY



31

THIS WEEK



121

THIS MONTH

QUOTE INFORMATION

[Copy Quote](#)
[Send an Email](#)
[New Task](#)
[Edit](#)
[Save](#)
[Close](#)

Quote ID

SDR

Account Executive

Project Manager

First Name

Q

Last Name

Email

Manufacturing

Stage

Quote

Account

Contact

(999) 999-9999

Date of Next Follow-up


Reason


Search Contact

Account Name	First Name	Last Name	Email
HULK	Bruce	Banner	brucebanner@marvel.com
	jeo	mart	jeo2@gmail.com
mt	Den	Joe	den7@gmail.com

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- Once customer is selected, click on **“Create Quote”** button


Quotes




0

TODAY



31

THIS WEEK



121

THIS MONTH

QUOTE INFORMATION

[Copy Quote](#)
[Send an Email](#)
[New Task](#)
[Edit](#)
[Save](#)
[Close](#)

Quote ID

SDR

Account Executive

Project Manager

First Name

Tony

Q

Last Name

Strak

Email

tony.strak@marvel.com

Manufacturing

Industry

Lead Type

Production Type

Stage

Quote

Account

Strak Industries

Contact

(123) 456-7899

Date of Next Follow-up

Reason

ITAR

Lead Source

Payment Terms

Closed Date

Created Date

Create Quote

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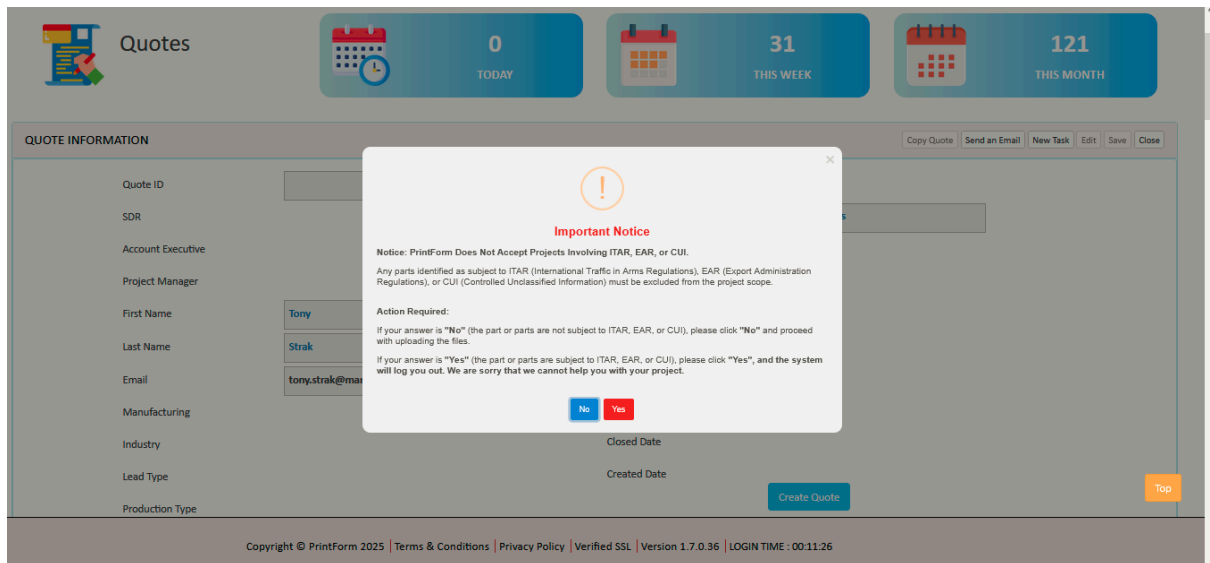
[Terms & Conditions](#)
[Privacy Policy](#)
[Verified SSL](#)

Version 1.7.0.36

LOGIN TIME : 00:08:59

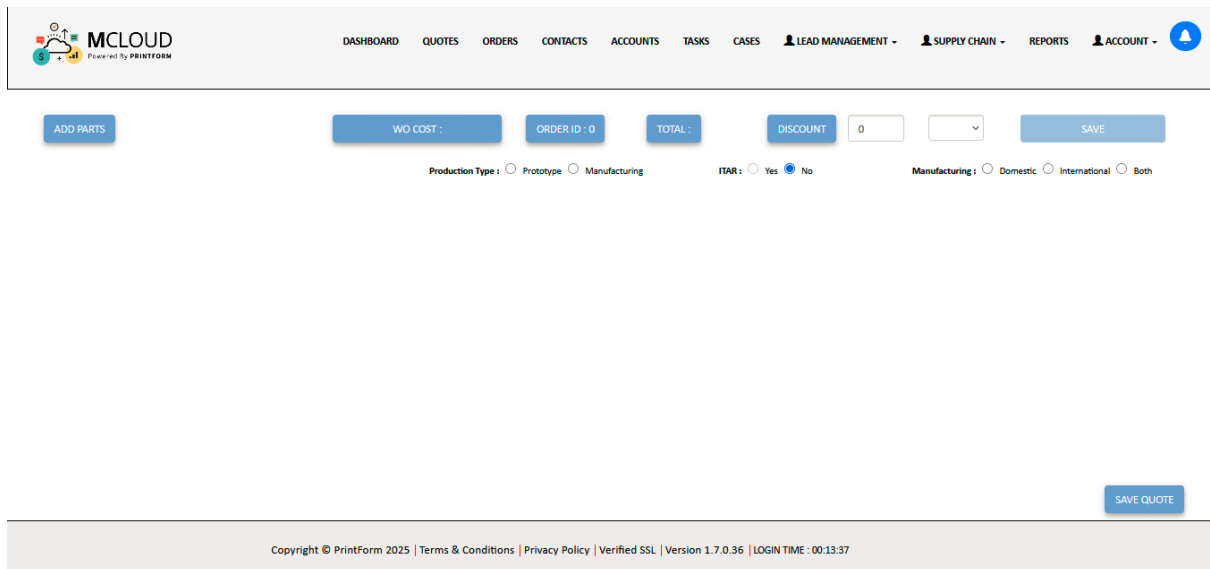
- Click on **“No”** on ITAR notification pop up window

**Note :** You can not proceed by selecting **“Yes”**



The screenshot shows the 'Quotes' section of the PrintForm interface. At the top, there are three summary cards: '0 TODAY', '31 THIS WEEK', and '121 THIS MONTH'. Below these is the 'QUOTE INFORMATION' form. A modal window titled 'Important Notice' is displayed in the center. The notice states: 'Notice: PrintForm Does Not Accept Projects Involving ITAR, EAR, or CUI. Any parts identified as subject to ITAR (International Traffic in Arms Regulations), EAR (Export Administration Regulations), or CUI (Controlled Unclassified Information) must be excluded from the project scope. Action Required: If your answer is "No" (the part or parts are not subject to ITAR, EAR, or CUI), please click "No" and proceed with uploading the files. If your answer is "Yes" (the part or parts are subject to ITAR, EAR, or CUI), please click "Yes", and the system will log you out. We are sorry that we cannot help you with your project.' At the bottom of the modal are two buttons: 'No' (blue) and 'Yes' (red). The background form includes fields for Quote ID, SDR, Account Executive, Project Manager, First Name (Tony), Last Name (Strak), Email (tony.strak@ma...), Manufacturing, Industry, Lead Type, and Production Type. There are also buttons for 'Copy Quote', 'Send an Email', 'New Task', 'Edit', 'Save', 'Close', 'Create Quote', and 'Top'.

- Your quote is created



The screenshot shows the 'MCloud' interface, powered by PrintForm. The top navigation bar includes links for DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS, TASKS, CASES, LEAD MANAGEMENT, SUPPLY CHAIN, REPORTS, and ACCOUNT. Below the navigation bar is a form for creating a quote. It includes an 'ADD PARTS' button, a 'WO COST' button, an 'ORDER ID : 0' button, a 'TOTAL' button, a 'DISCOUNT' field with a value of '0', and a 'SAVE' button. Below these are three groups of radio buttons: 'Production Type' with options 'Prototype' and 'Manufacturing'; 'ITAR' with options 'Yes' and 'No' (selected); and 'Manufacturing' with options 'Domestic', 'International', and 'Both'. At the bottom right is a 'SAVE QUOTE' button. The footer contains copyright information: 'Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 00:13:37'.

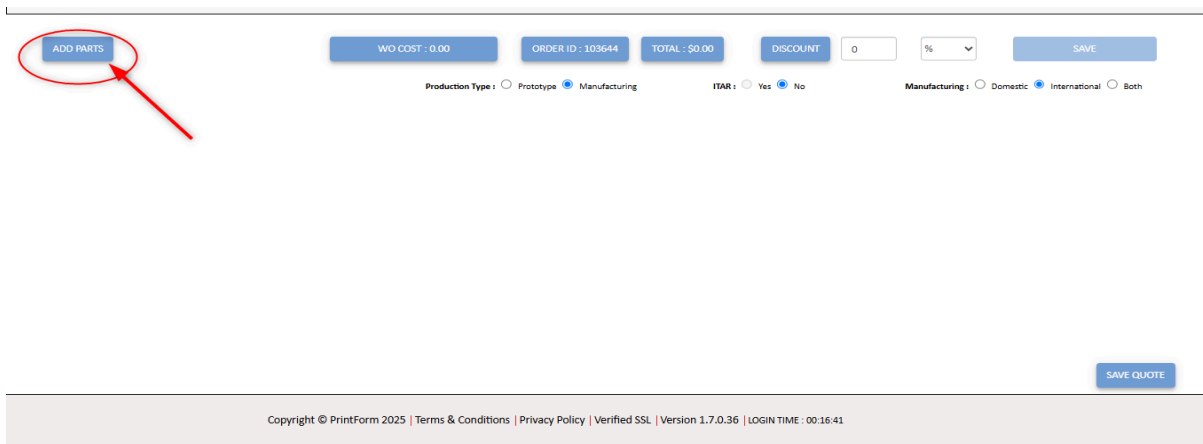


## Addition of Parts on Quote

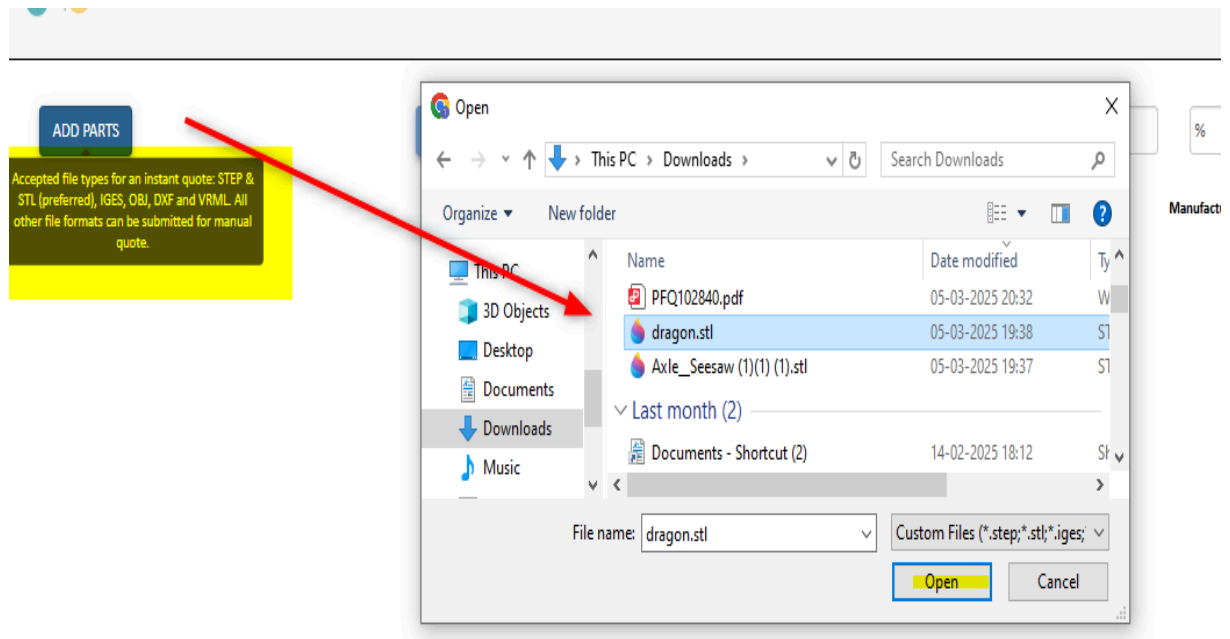
### 3.1 Normal Parts

After creation of quote, we can add the parts on the quote

- Click on “**ADD PARTS**”
- We can add multiple parts to a single quote



- Select file Click on **OPEN**.



ADD PARTS

ADD CUSTOM PARTS

ORDER ID : 103644

MANUAL QUOTE REQUIRED

SAVE AND SUBMIT

Production Type : ☐ Prototype ☒ Manufacturing

ITAR : ☐ Yes ☒ No

Manufacturing : ☐ Domestic ☒ International ☐ Both

INCH

MM

3D VIEWER

X: 4.01

Y: 5.30

Z: 6.68

Please confirm if the design dimensions shown are mm or inch.

dragon.stl

PROCESS

MATERIAL

FINISH

LEAD TIME

HTS CODE

NOTES

SLA

SLS

FDM

MUF

Compression Mold

Compression Molded Parts

Extrusion Tooling

Extruded Parts

DMLS

Cast Urethane

CNC Machining

Sheet Metal

Injection Molding

Injection Molding Parts

Die-Casting

Cast Urethane Parts

PART SUMMARY

Process : SLA

Material : ABS-Like White

Finish : Standard

Lead Time : Standard

HTS Code :

PF Rate : \$0.00

Discount :

Supplier Rate

GP %

Sub Total : \$0.00

Customer

SAVE QUOTE

- Dimensions of the part mentioned in the tab,

1. INCH
2. MM

Also 3D view button (user can view in diff angles).

INCH

MM

3D VIEWER

X: 4.01

Y: 5.30




Z: 6.68

Please confirm if the design dimensions shown are mm or inch.

dragon.stl




- User can select the process for the part from the following options

PROCESS	MATERIAL	FINISH	LEAD TIME	HTS CODE	NOTES
<input checked="" type="radio"/>	SLA		<input type="radio"/>	DMLS	
<input type="radio"/>	SLS		<input type="radio"/>	Cast Urethane	
<input type="radio"/>	FDM		<input type="radio"/>	CNC Machining	
<input type="radio"/>	MJF		<input type="radio"/>	Sheet Metal	
<input type="radio"/>	Compression Mold		<input type="radio"/>	Injection Molding	
<input type="radio"/>	Compression Molded Parts		<input type="radio"/>	Injection Molding Parts	
<input type="radio"/>	Extrusion Tooling		<input type="radio"/>	Die-Casting	
<input type="radio"/>	Extruded Parts		<input type="radio"/>	Cast Urethane Parts	

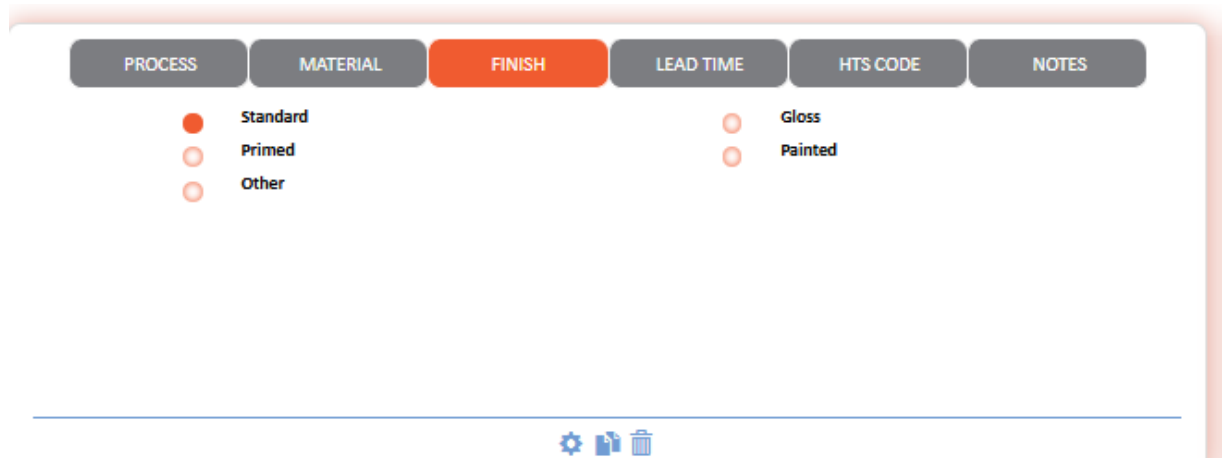




- User can select material as per requirements from the given options.

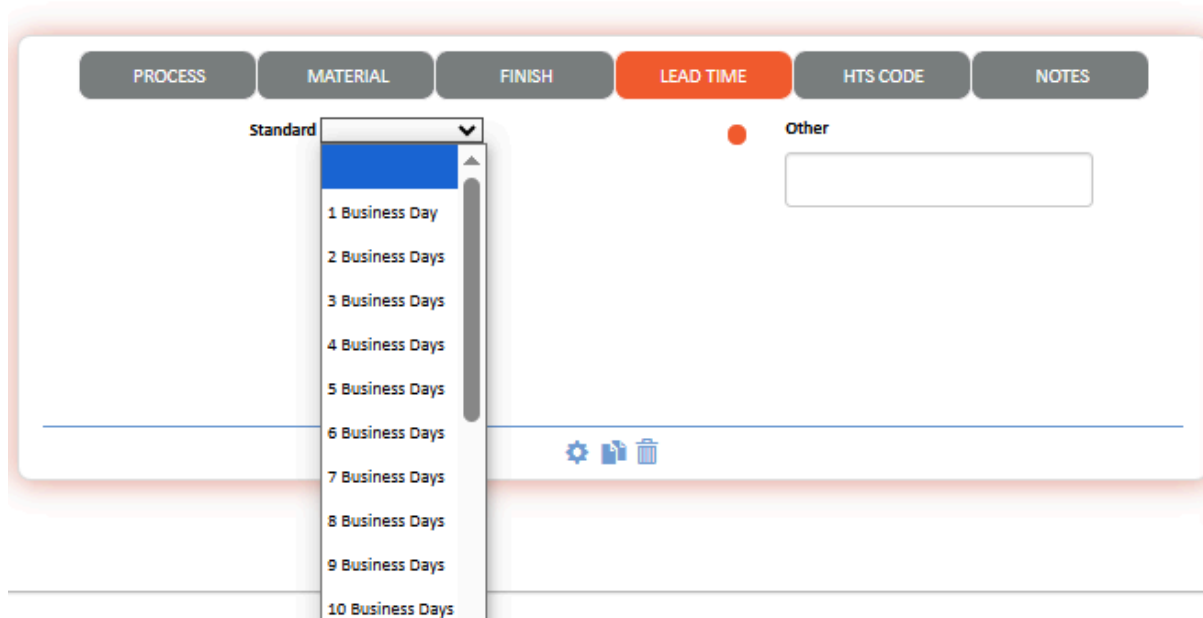
PROCESS	MATERIAL	FINISH	LEAD TIME	HTS CODE	NOTES
<input checked="" type="radio"/>	ABS-Like White		<input type="radio"/>	PC-Like Frosted	
<input type="radio"/>	ABS-Like Black		<input type="radio"/>	High Impact ABS-Like White	
<input type="radio"/>	PP-Like White		<input type="radio"/>	PC-Like, Clear	
<input type="radio"/>	High Temp ABS-Like		<input type="radio"/>	Other	

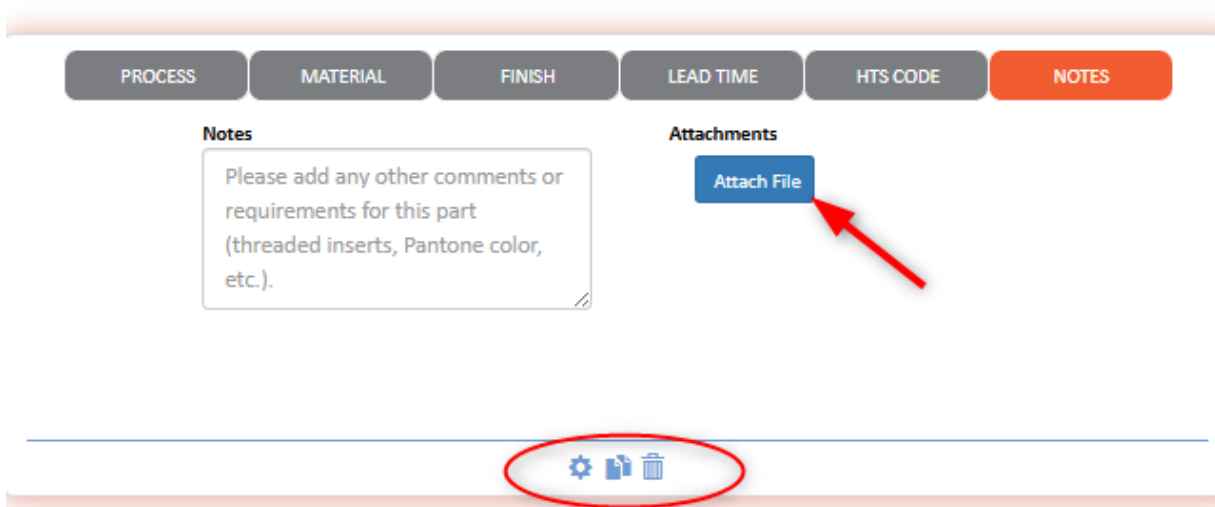
- Select Finish as per requirement from the given options.



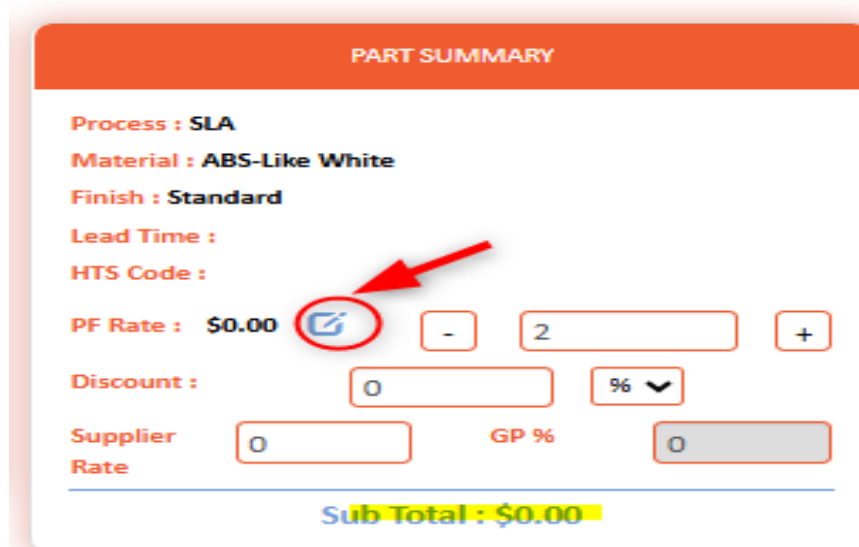
- Lead time is used for expected delivery days
- user can select it from given days in the dropdown and also to manually put desired days into other option.
- automatically 3 days set as lead time.
- User can Add HTS Code .



- In Notes user able to add additional info regarding to the parts or able to attach files related to the parts.
- Below in circle their is 3 options (apply to all , duplicate and remove).

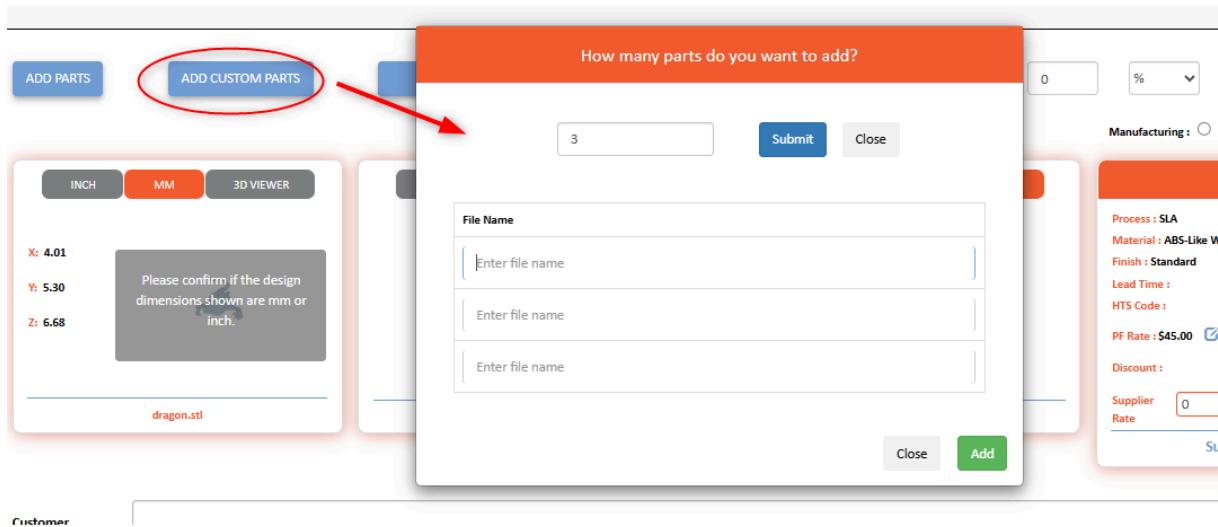


- In this part summary user can view all the selected option regarding the part
- User can change the quantity ('+' add quantity, '-' sub quantity)
- Can Add PF rate( click on edit icon)  
Note- 1-when PF rate mentioned sub total will calculate automatically  
2- In above header discount button will display )
- User can gave Discount for part

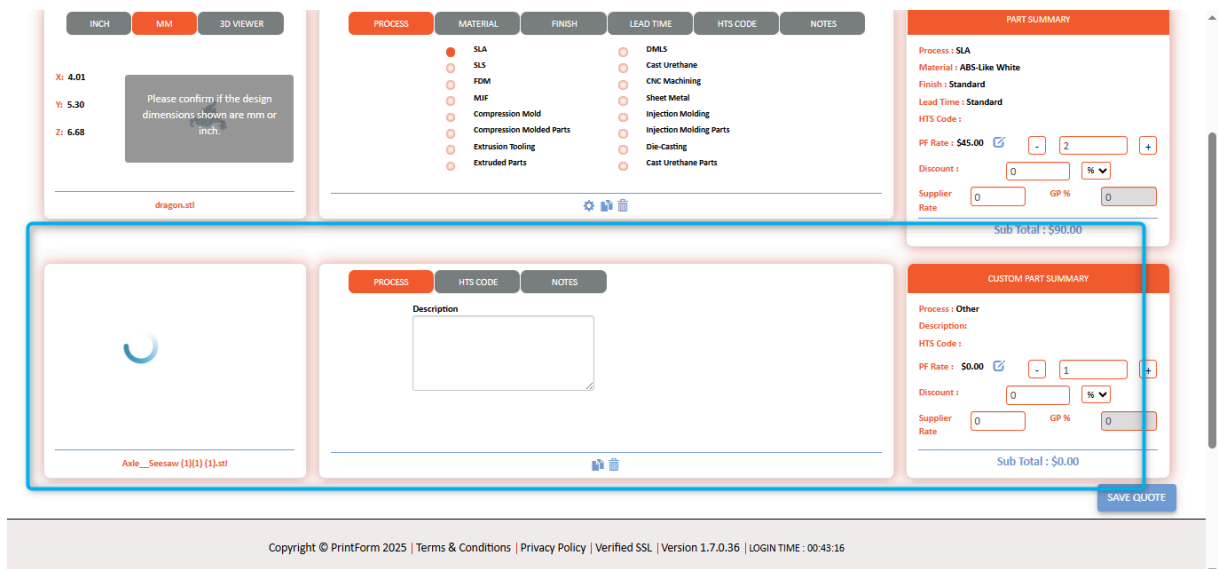


## 3.2 Custom Parts

- Click on **Add to custom parts** , Enter a file name and click on add button.



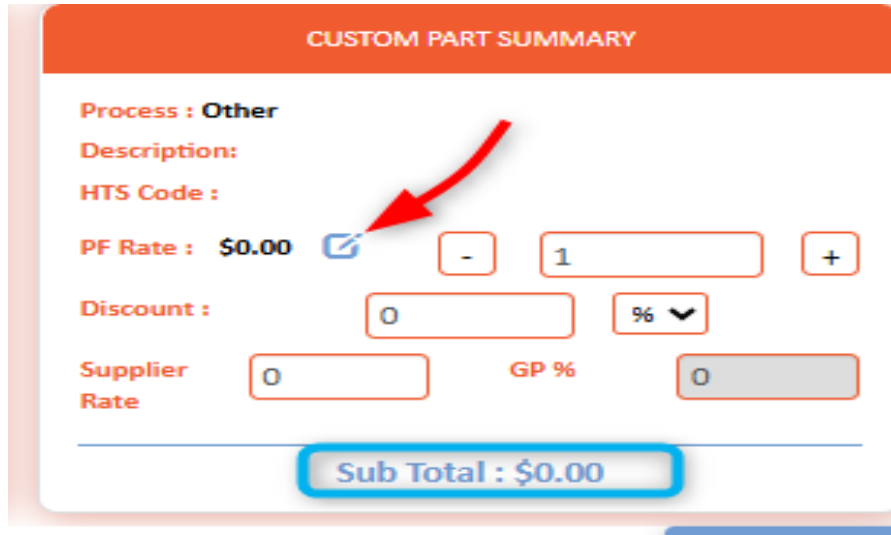
- User able to put process in description .
- Able to put HTS Code.
- In Notes user able to add additional info regarding to the parts or able to attach files related to the parts.



Below user able to write a note in customer notes section

- In this Custom part summary user can view all the option regarding the part
- User can change the quantity ('+' add quantity, '-' sub quantity)
- Can Add PF rate( click on edit icon)

Note- 1-when PF rate mentioned sub total will get same amount.




**CUSTOM PART SUMMARY**

**Process :** Other

**Description:**

**HTS Code :**

**PF Rate :** \$0.00  - 1 +

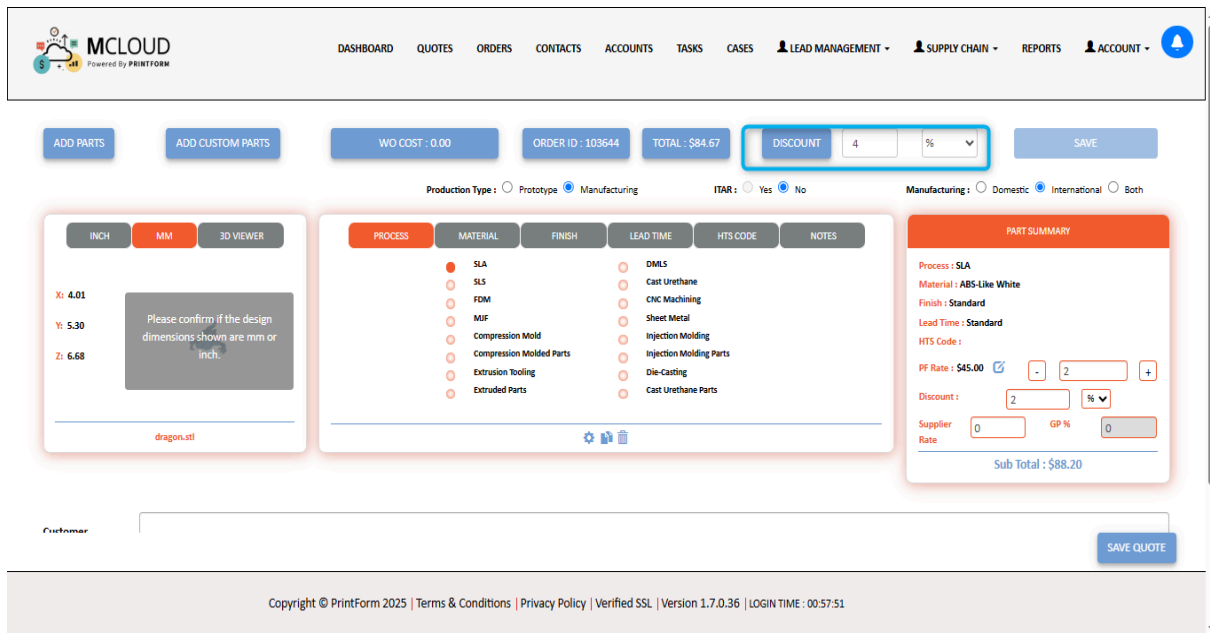
**Discount :** 0 % ▾

**Supplier Rate** 0 **GP %** 0

**Sub Total : \$0.00**

## Header level discount feature

- User can able to put discount for all parts (discount can given in ‘%’ and “\$”)



- Also in above section
  - User able to select production type(‘prototype’, ‘Manufacturing’)
  - ITAR (International Traffics in Arms Regulation) by yes and no if it is ‘yes’ then you cant able to quote
  - Manufacturing gives 3 options(domestic,international ,both) as per requirement user can select it.

Production Type : ☐ Prototype ☒ Manufacturing

ITAR : ☐ Yes ☒ No

Manufacturing : ☐ Domestic ☒ International ☐ Both




# Quote fields in details all features


## 4.1 Quotes List

- Navigate to the quote page user will able to view Quote list.
- Quote list provide a detailed overview of all quotes in the system. It includes key information such as:


- Quote Date: The date the quote was created.
- Quote : The unique identifier for the quote.
- Account Executive: The person responsible for the quote.
- Next Follow-Up: The scheduled follow-up date.
- Stage: The current stage of the quote (e.g., New, Existing).
- Account: The account associated with the quote.
- Process: The process or service being quoted.
- Amount: The total amount of the quote.
- Net Terms: The payment terms (e.g., Net 30, Net 45).
- Supplier: The supplier information if applicable.
- ETC.




Quotes



1  
TODAY



32  
THIS WEEK




122  
THIS MONTH

QUOTES LIST FORECAST INCOMPLETE QUOTES <span>New Quote</span>												
<input type="text" value="Search..."/> <span>Advanced Search</span> <span>Search Parts</span>												
Quote Date	Quote#	Account Executive	Next Follow Up	Stage	ITAR	Lead Type	Account	Process	Amount	Net Terms	Supplier	Supplier
03/21/2025	103644	Sojwal Ingle	03/28/2025	Quote	No	Existing	Strak Industries	SLA	\$84.67	Net 45	Sharang Kapsikar	Internal
03/21/2025	103643	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	\$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
03/21/2025	103642	Justin Howard	03/27/2025	Quote	No	Existing	Hodge Gay Inc	SLA	\$618.65	50% Down, Bala...	Sharang Kapsikar	Dome
03/20/2025	103640			Manual	No	New	Booker Mccorm...	SLA	\$95.00	Net 30		Dome
03/20/2025	103639	Aniket Ae		Quote	No	New	Strak Industries	Extruded Parts	\$0.00	Net 45		Internal
03/20/2025	103638	Aniket Ae		Quote	No	New	Strak Industries	SLS	\$73.51	Credit Card		Internal
03/19/2025	103636	Rahul Ae		Quote	No	New	Pz	SLA	\$46.00	Net 30		Bot
03/19/2025	103635	Rahul Ae	03/28/2025	Quote	No	New	Pz	SLA	\$140.01	Net 30		Bot
03/19/2025	103633			Quote	No	New	Dell	SLA	\$0.00	Net 30		Bot
03/19/2025	103631			Manual	No	New	Dell	SLS	\$0.00	Net 30		Bot
03/19/2025	103628	Rahul Ae		Quote	No	New	Mk	Injection Molding	\$8.00	Net 30		Bot

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- Click on any Quote# it will open Quote Information.



Quotes

1

TODAY

32

THIS WEEK

122

THIS MONTH

QUOTE INFORMATION

Copy Quote

Send an Email

New Task

Edit

Save

Close

Quote ID	103578	Stage	Positive Buying Sign
SDR		Account	Lyft
Account Executive	Justin Howard	Contact	(425) 748-7272
Project Manager	Julie Thomas	Date of Next Follow-up	03/10/2025
First Name	Kaymann	Reason	
Last Name	Hua	ITAR	No
Email	khua@lyft.com	Lead Source	Referral
Manufacturing	Domestic	Payment Terms	Net 15
Industry	Consumer Products	Closed Date	
Lead Type	Existing	Created Date	03/07/2025
Production Type	Prototype		

Top

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- User can view multiple tabs such as:
  - 1-Able to copy quote click on “**copy quote**” tab.
 [ user will get one pop up message of quote alert]

Quote Alert

New Quote ID:-103647

Close

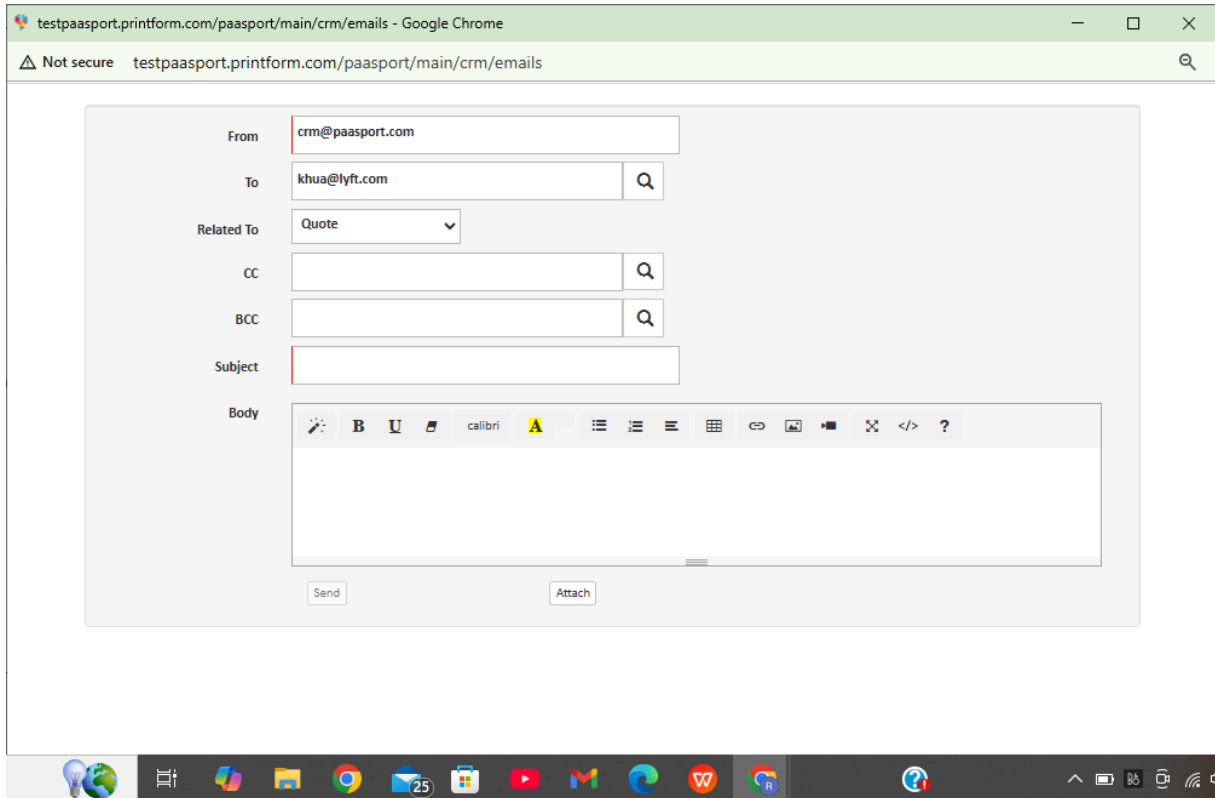
17

Stage

Quote

2- able to send an email click on “**send to email**” tab.

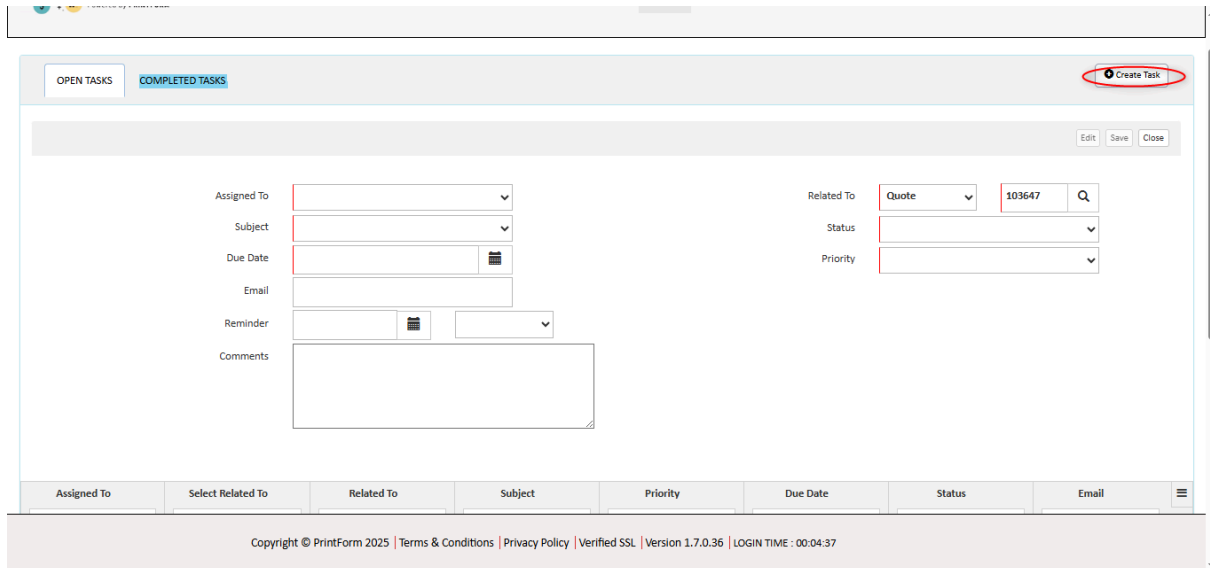
- Fill all mandatory details also can attach documents, file .
- Click on send button



3- User can create new task click on “**new task**” tab.

It will redirect to tasks page

- User able to view two different sub tabs
  - 1.Open tasks - task created by user that are currently under process.
    - Only open tasks able to edit by assigned user
  - 2.completed tasks -task created by user that completed the process.
    - completed task is not able to edit by any user.



## 4.2 Edit Quote

- Click on “edit” tab
- Quote information displayed following fields will be available on the edit quote form.
- Quote ID -This field will be auto-populated when a quote gets created
- Stage-This field will be auto-selected to the option quote. Following options will show in the drop-down -
  - 1) Manual
  - 2) Request for quote
  - 3) Quote
  - 4) Follow up/Review
  - 5) Positive buying sign
  - 6) Negotiation
  - 7) Purchase order
  - 8) Closed lost
- Account executive / project manager-able to select (dropdown option)
- Manufacturing- select suppliers where options to select(domestic,international,both).
- The CRM person will be able to save the data for further processing after all required fields have been filled. By modifying the first name field, the CRM person can update the customer on the generated quote. On the first name field, a search option to select the preferred customer will show up.

QUOTE INFORMATION

Copy Quote Send an Email New Task Edit Save Close

Quote ID	103647	Stage	Quote
SDR		Account	Lyft
Account Executive	Justin Howard	Contact	(425) 748-7272
Project Manager	Julie Thomas	Date of Next Follow-up	03/10/2025
First Name	Kaymann	Reason	
Last Name	Hua	ITAR	No
Email	khua@lyft.com	Lead Source	Referral
Manufacturing	Domestic	Payment Terms	Net 15
Industry	Consumer Products	Closed Date	
Lead Type	Existing	Created Date	03/21/2025
Production Type	Prototype		

Quote Details

Line Process FN CFN Material Finish Qty UP LD LT Attachments X Y Z Vol LeadTime Notes HTS Code Specifications SR

Top

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## 4.3 Order details

- All details displayed in order details
- Below there is Five Tabs:
  - ❖ On the created quote page following functionalities will be given to help the CRM for improving quotes –
  - ❖ Edit quote – Using this button the CRM person will be able to edit information of the added parts.
  - ❖ Place order – Using this button the CRM person will be able to place an order after the customer paid the amount of the quote.
  - ❖ Email quote – using this button the CRM person should be able to send a copy of the quote directly through email to the customer.
  - ❖ Download quote – Using this button the CRM person should be able to download quote in the PDF format.
  - ❖ Supplier RFQ- we have to way to assign supplier first way is manual way

- ❖ Click on supplier RFQ -pdf will download and email to supplier the supplier put his prices again send back to AE they have conversation . so when the supplier confirm price then AE edit quote add Supplier rate ,save quote and select supplier from below.

Quote Details

Line	Process	FN	CFN	Material	Finish	Qty	UP	LD	LT	Attachments	X	Y	Z	Vol	LeadTime	Notes	HTS Code	Specifications	SR	GP
1	FDM Standard	71- 0000534_RevA_3- 6-2025.STEP		PC-ABS	Standard	1	\$3,450.00	0%	\$3,450.00		0.00	0.00	0.00	0.00	6 Business Days		/	/	1868	45.8
2	FDM Standard	71- 0000535_RevA_3- 6-2025.STEP		PC-ABS	Standard	1	\$1,075.00	0%	\$1,075.00		0.00	0.00	0.00	0.00	6 Business Days		/	/	556	48.2
Sub Total:										\$4,525.00										
Discount:										0%										
Shipping:																				
Total:																				

Edit Quote
Place Order
Email Quote
Download Quote
Supplier RFQ

Supply Chain

Domestic Suppliers  
☐ Prototek ( USA )

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## 4.4 Supply Chain

- All potential suppliers on the corresponding quote based on the specified manufacturing will be displayed following the successful creation of the quote. Only domestic suppliers will be displayed on the quote when domestic manufacturing is chosen. Likewise, suppliers will be displayed if international manufacturing is chosen.
- A CRM person will be able to simultaneously send requests for quotes to several suppliers.
- The CRM person will be able to view all suppliers' rates in a single window whenever suppliers submit their rates for quotes

- . A CRM person will be able to assign a quote to an eligible supplier from the same window.

Edit Quote
Place Order
Email Quote
Download Quote
Supplier RFD

Supply Chain

Domestic Suppliers

☐ Prototek ( USA )

International Suppliers

☐ Sharang Kapsikar ( INDIA )
☐ DONGGUAN BOLE RP M COLTD ( CHINA )
☐ Hkwcd ( CHINA )
☐ Fusion ( USA )
☐ PrintForm Supplier ( USA )
☐ Agile Manufacturing ( CANADA )
☐ Wuxi odiem Technology Co.,Ltd ( CHINA )
☐ ZHONG SHAN SUNPE TECHNOLOGY Co., Ltd. ( CHINA )
☐ Ninja ( MALAYSIA ) ( Tier 2 )
☐ Marshall ( INDONESIA )
☐ Dingzhou Yunlingyu Sports Goods Co., Ltd. ( CHINA )

Notes

Account Executive Notes
3.7 JH: Sent to Lyft

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## Notes –




In the notes section following fields will be added to add notes

# Assigning to Supplier

## 5.1 Old way

- Click on edit.



 TODAY
  THIS WEEK
  THIS MONTH

QUOTE INFORMATION

[Copy Quote](#)
[Send an Email](#)
[New Task](#)
[Edit](#)
[Save](#)
[Close](#)

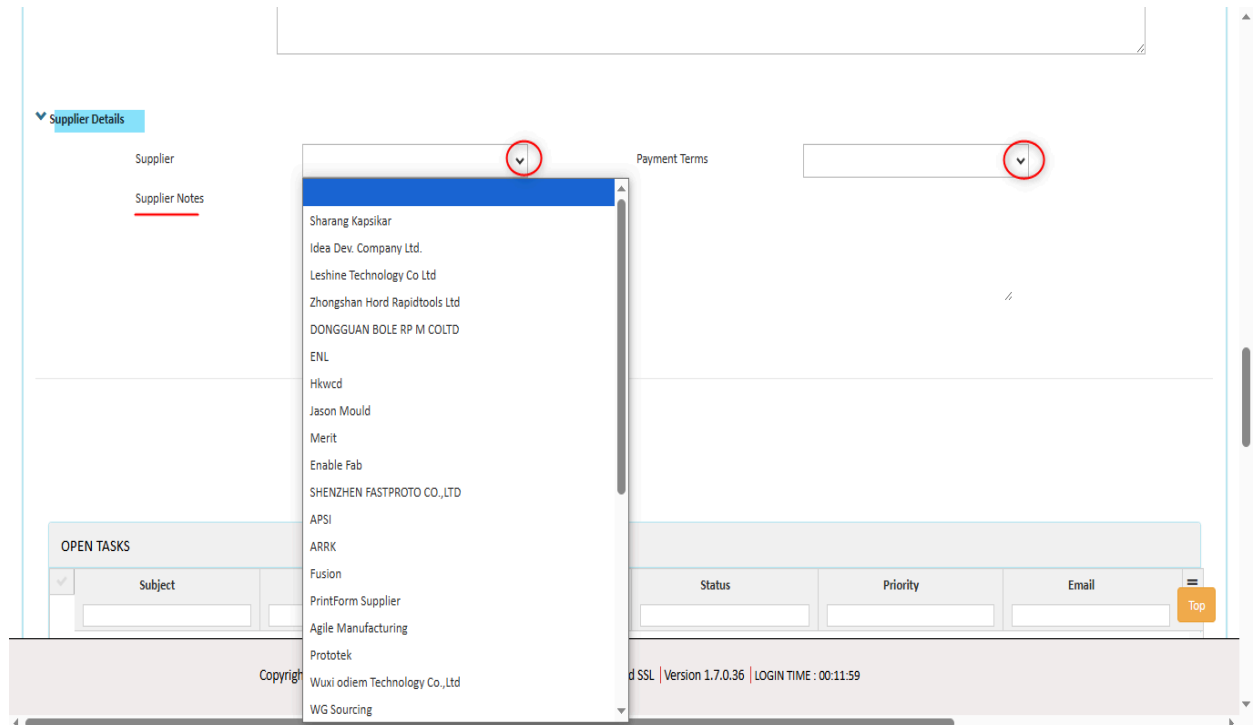
Quote ID	103647	Stage	Quote
SDR		Account	Lyft
Account Executive	Justin Howard	Contact	(425) 748-7272
Project Manager	Julie Thomas	Date of Next Follow-up	03/10/2025
First Name	Kaymann	Reason	
Last Name	Hua	ITAR	No
Email	khua@lyft.com	Lead Source	Referral
Manufacturing	Both	Payment Terms	Net 15
Industry	Consumer Products	Closed Date	
Lead Type	Existing	Created Date	03/21/2025
Production Type	Prototype		

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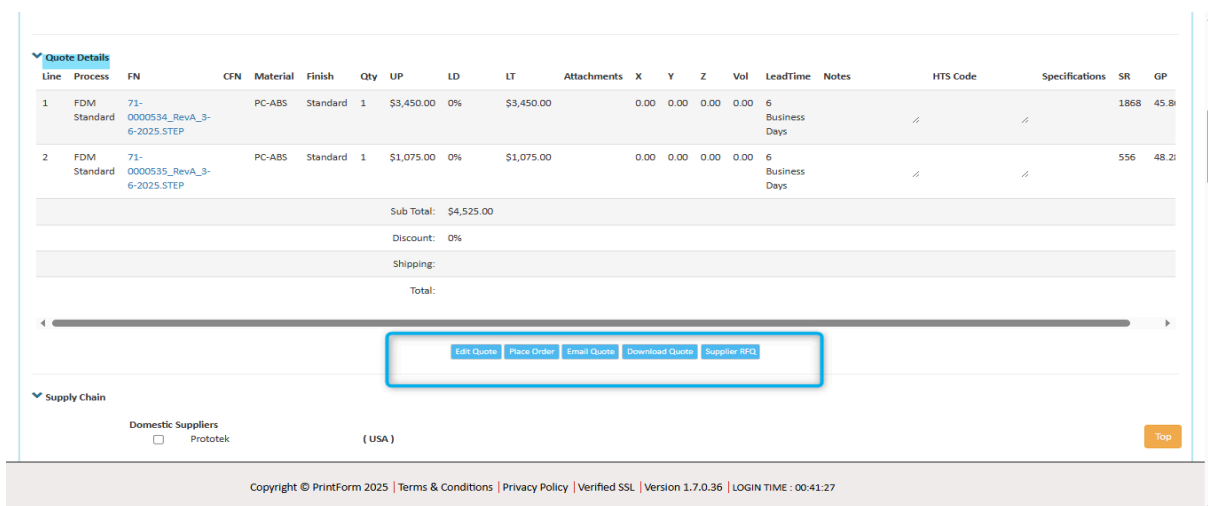
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- When you scroll a bit below user will be able to view **Supplier Details**
- User able to Select suppliers from supplier list (by drop down)
- Beside it you can select payment terms also.(by drop down)
- User can write a note in note section below supplier list



- After assigning supplier Click on Save button on the top .
- Scroll a bit in Quote details user able to view supplier RFQ tab
- Click on it download pdf



## SUPPLIER RFQ- .

- Click on supplier RFQ -pdf will download .



3423 Piedmont Rd NE, Atlanta, GA 30305, USA. Ph:(404) 999-4916

### REQUEST FOR QUOTE

Quote # : PFQ103647

Date : 03/22/2025

Account Executive	Est. Lead Time
Justin Howard	6 Business Days

#### Quote Details

Line #	Process	File Name	Material	Finish	Specification	Leadtime	Qty	Unit Price
1	FDM	71-0000534_RevA_3-6-2025.STEP	PC-ABS	Standard		6 Business Days	1	
2	FDM	71-0000535_RevA_3-6-2025.STEP	PC-ABS	Standard		6 Business Days	1	

#### Quote Notes

Line #	File Name	Special Instructions	Attachments	HTS Code
1	71-0000534_RevA_3-6-2025.STEP			
2	71-0000535_RevA_3-6-2025.STEP			

#### Parts List (All the X, Y, Z Dimensions shown are in Inches, and Volume is in Cubic Inches.)

File Name	X	Y	Z	Vol
71-0000534_RevA_3-6-2025.STEP	0.00	0.00	0.00	0.00
71-0000535_RevA_3-6-2025.STEP	0.00	0.00	0.00	0.00

Notes

Request for Quote (RFQ), which will be active and accepting responses within 24 hours

Line #	File Name	S
--------	-----------	---

- User able to email the pdf to supplier and then supplier put his prices again send back to AE they have conversation .
- so when the supplier confirm price then AE edit quote add Supplier rate ,save quote and select supplier from below.

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## 5.2 New way

- User can select suppliers from the supply chain.
- Click on request for Quote tab
- Supplier and AE will get notification

Supply Chain

Domestic Suppliers

☐ Prototek (USA)  
☒ J&J (INDIA)

International Suppliers

☐ Shering Kapsikar (INDIA)  
☐ Leshine Technology Co Ltd (CHINA)  
☐ DONGGUAN BOLE RP MI COLTD (CHINA)  
☐ Hkwood (CHINA)  
☐ Fusion (USA)  
☐ PrintForm Supplier (USA)  
☐ Agile Manufacturing (CANADA)  
☐ Wuxi odlem Technology Co.,Ltd (CHINA)  
☐ HyMetals (CHINA)  
☐ Marshall (INDONESIA)  
☐ Dingzhou Yunlingyu Sports Goods Co., Ltd. (CHINA)  
☐ Merritt (INDIA)  
☐ tata (USA)

Request for Quote

Notes

Account Executive Notes

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- Users will be able to view the review Quote button.
- Click on Review quote(user can see status )
- Supplier can accept and decline quotes and it will auto updated in status.

Supply Chain

Domestic Suppliers

☐ Protosch (USA)  
☒ J&J (INDIA)

International Suppliers

☐ Shuang Kapsler (INDIA)  
☐ Leshine Technology Co Ltd (CHINA)  
☐ DONGGUAN BOLE KP M CO LTD (CHINA)  
☐ Hivest (CHINA)  
☐ Pulton (USA)  
☐ PrintForm Supplier (USA)  
☐ Agile Manufacturing (CANADA)  
☐ Wujiashen Technology Co Ltd (CHINA)  
☐ HyMetals (CHINA)  
☐ Marshall (INDONESIA)  
☐ Dingzhou Yunlingyu Sports Goods Co., Ltd (CHINA)  
☐ Merritt (INDIA)  
☒ tata (USA)

Review Quote

Update Supplier Quote

Supplier Quote

Close

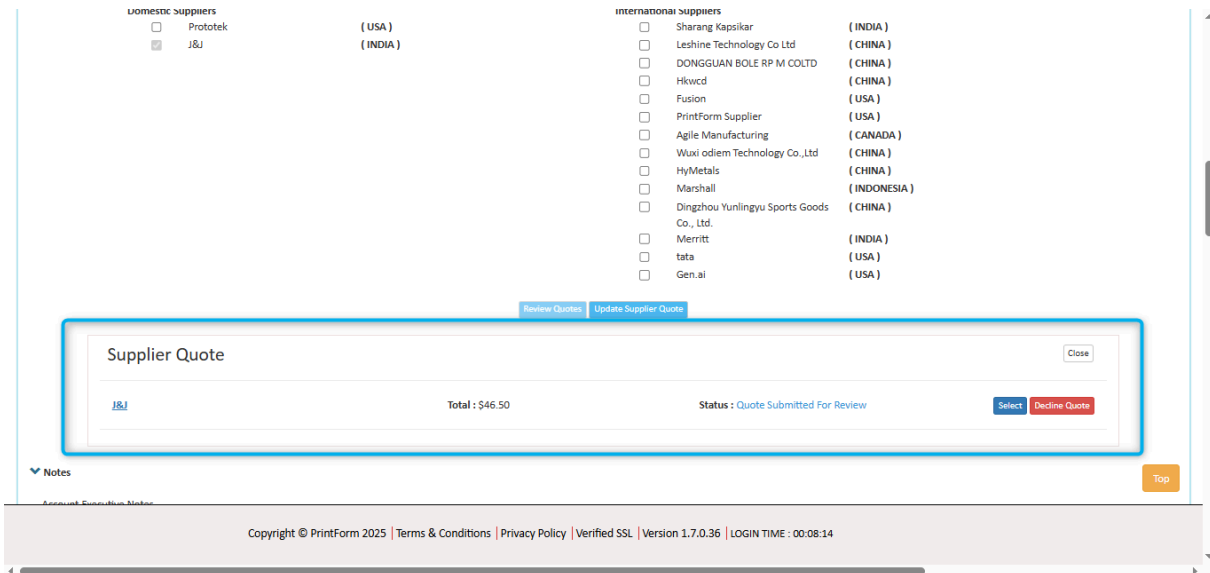
J&J	Total:	Status: Request For Quote	Select	Decline Quote
tata	Total:	Status: Request For Quote	Select	Decline Quote

Page

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## Get Pricing from Suppliers

- Once supplier accept Quote it put supplier rate(both supplier and crm will get notification)
- AE will receive notification and status will auto updated( submitted for review)
- AE have two option one select it or decline it .



The screenshot displays the PrintForm interface for managing suppliers and quotes. It features two columns of suppliers: Domestic and International. A 'Supplier Quote' modal is open, showing a quote for 'J&J' with a total of \$46.50 and a status of 'Quote Submitted For Review'. The modal includes 'Select' and 'Decline Quote' buttons. The footer contains copyright information for PrintForm 2025 and a login time of 00:08:14.

Domestic suppliers		International suppliers	
<input type="checkbox"/> Prototek	( USA )	<input type="checkbox"/> Sharang Kapskar	( INDIA )
<input checked="" type="checkbox"/> J&J	( INDIA )	<input type="checkbox"/> Leshine Technology Co Ltd	( CHINA )
		<input type="checkbox"/> DONGGUAN BOLE RP M COLTD	( CHINA )
		<input type="checkbox"/> Hkwc	( CHINA )
		<input type="checkbox"/> Fusion	( USA )
		<input type="checkbox"/> PrintForm Supplier	( USA )
		<input type="checkbox"/> Agile Manufacturing	( CANADA )
		<input type="checkbox"/> Wuxi odien Technology Co.,Ltd	( CHINA )
		<input type="checkbox"/> HyMetals	( CHINA )
		<input type="checkbox"/> Marshall	( INDONESIA )
		<input type="checkbox"/> Dingzhou Yunlingyu Sports Goods Co., Ltd.	( CHINA )
		<input type="checkbox"/> Merritt	( INDIA )
		<input type="checkbox"/> tata	( USA )
		<input type="checkbox"/> Gen.ai	( USA )

Supplier Quote

[J&J](#) Total : \$46.50 Status : Quote Submitted For Review

[Select](#) [Decline Quote](#)

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- Once AE select it (Supplier get notification)
- AE select it (assigns supplier) .

## Quote Updates

Update Supplier Quote Button Visibility:

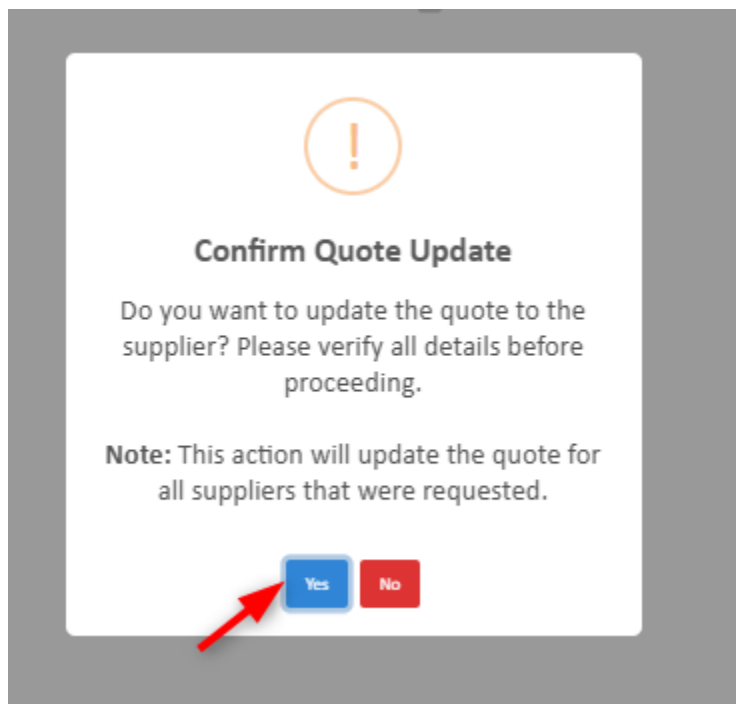
- After successfully assigning a supplier beside the **"Review Quotes"** button, the user will see the **"Update Supplier Quote"** button.

Confirmation Pop-Up:

- Clicking the **"Update Supplier Quote"** button triggers a pop-up message asking: "Confirm Quote Update – Proceed to update quotes for all requested suppliers?"

The user can select:

- Yes: Updates quotes for all suppliers included in the original request.
- No: Cancels the action, leaving quotes unchanged.



Update Execution:

- Selecting Yes instantly applies the update to all relevant suppliers.
- The system will reflect the changes across the platform once confirmed.

## Order Placement

- Supplier Assignment:

After an Account Executive assigns a supplier, the user can proceed to place the order.

- Initiate Order Placement:

In the Order Details section, the user will see a "Place Order" button.

Clicking this button redirects the user to the \*Shipping Address\* page.

Lead type

new

Created Date

05/19/2025

Production Type

Manufacturing

Quote Details

Line	Process	FN	CFN	Material	Finish	Qty	UP	LD	LT	Attachments	X	Y	Z	Vol	LeadTime	Notes	HTS Code	Specifications	SR	GP
1	SLA	Axle__Seesaw	Axle__Seesaw	ABS-Like	Standard	2	\$23.00	0%	\$46.00		0.31	0.31	0.23	0.01	Standard		//	//	23.25	-1.05
Sub Total:										\$46.00										
Discount:										0%										
Shipping:										TBD										
Total:										\$46.00										

Edit Quote

Place Order

Email Quote

Download Quote

Supplier RFQ

Supply Chain

Domestic Suppliers

☐ Prototek ( USA )
 ☒ J&J ( INDIA )

International Suppliers

☐ Sharang Kapsikar ( INDIA )
 ☐ Leshine Technology Co Ltd ( CHINA )
 ☐ DONGGUAN BOLE PRM CO LTD ( CHINA )

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- Shipping Address Page:

Options available:

Edit Button: Modify the current shipping address.

Delete Button\*: Remove the current address.

Select Address Button\*: Choose a previously saved shipping address (if available).

Enter a New Shipping Address Button\*: Add a new address.

## Shipping Address

First Name\* : Potter  
Last Name\* : Zack  
Address \* : Street122  
City\* : Mexico  
State\* : FD  
Country\* : NORTH AMERICA  
Zip\* : 3435366  
Phone\* : (835) 363-7282

SaveEditDeleteSelect Address

Enter A New Shipping Address

BackContinue

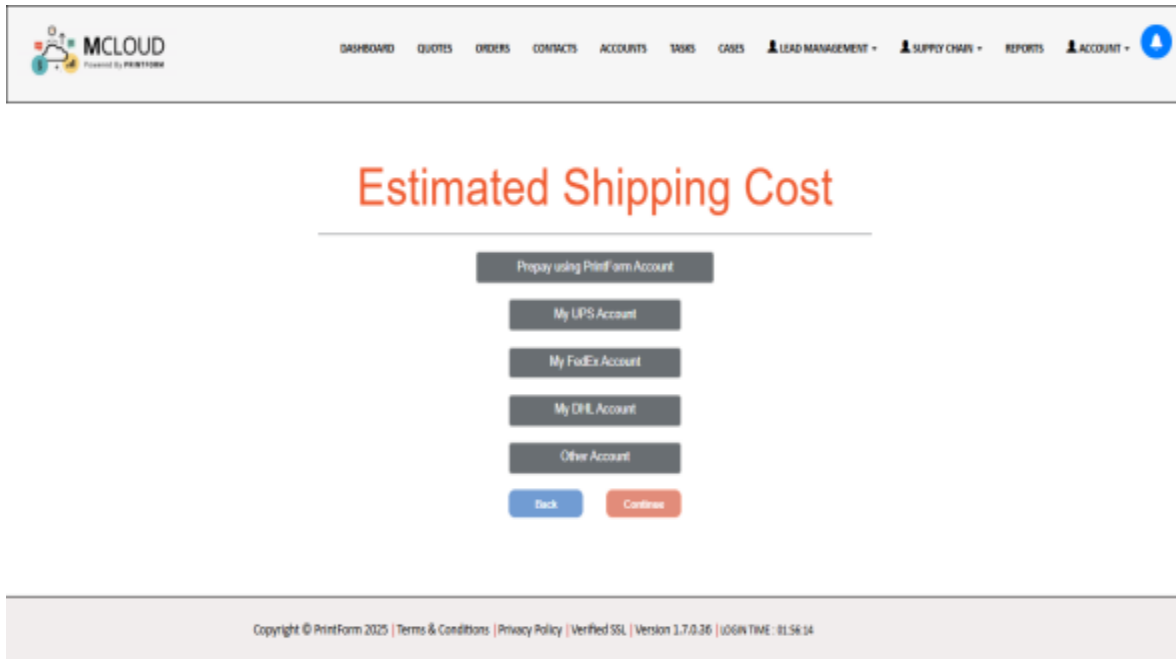
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After selecting/adding an address, click \*Continue\* to proceed.



#### 4. Estimated Shipping Cost Page:

Select the account to be used for payment.



The screenshot shows the 'Estimated Shipping Cost' page within the MCloud interface. The header bar includes the MCloud logo and a navigation menu with links: DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS, TASKS, CASES, LEAD MANAGEMENT, SUPPLY CHAIN, REPORTS, and ACCOUNT. The main heading 'Estimated Shipping Cost' is displayed in orange. Below it, a section titled 'Prepay using PrintForm Account' contains four buttons: 'My UPS Account', 'My FedEx Account', 'My DHL Account', and 'Other Account'. At the bottom of this section are 'Back' and 'Continue' buttons. The footer contains copyright information: 'Copyright © PrintForm 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 3.7.0.36 | LOGIN TIME : 81.56.14'.

Click Continue to advance to the Payment Information page.

## 5. Payment Information Page:

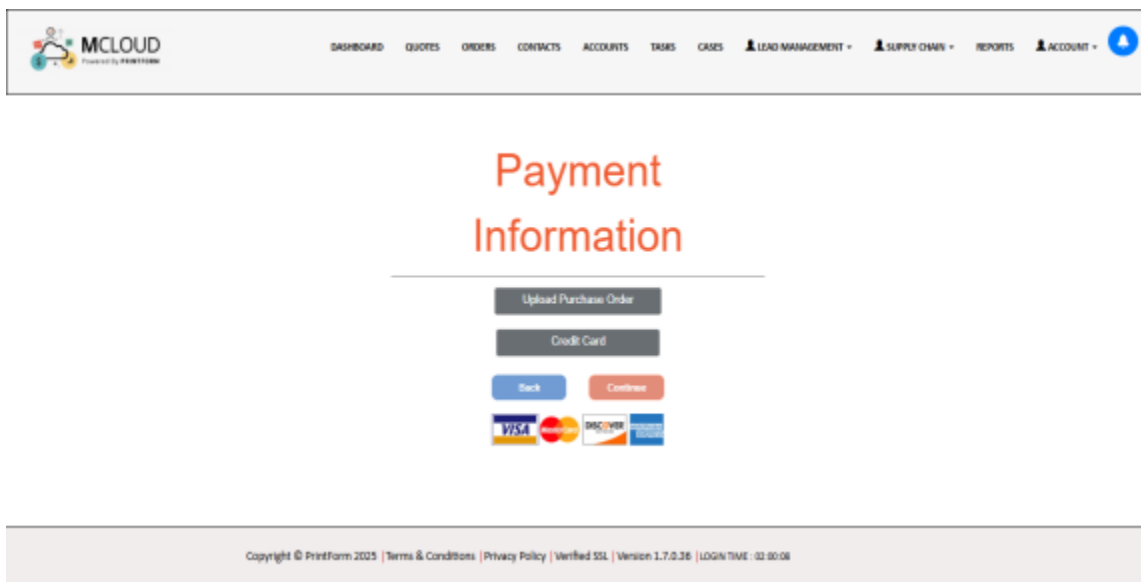
Two payment options:

### 1. Upload Purchase Order:

Attach the purchase order file.

Enter the \*PO number\*.

### 2. Credit Card: Select this option for card payment.



The screenshot shows the 'Payment Information' page within the MCloud interface. The header bar includes the MCloud logo and navigation links: DASHBOARD, QUOTES, ORDERS, CONTACTS, ACCOUNTS, TASKS, CASES, LEAD MANAGEMENT, SUPPLY CHAIN, REPORTS, and ACCOUNT. The main content area features the title 'Payment Information' in large orange text. Below the title are two buttons: 'Upload Purchase Order' and 'Credit Card'. Under these buttons are 'Back' and 'Continue' buttons. At the bottom of the main content area are logos for VISA, Mastercard, and Discover. The footer contains copyright information: 'Copyright © Printform 2025 | Terms & Conditions | Privacy Policy | Verified SSL | Version 1.7.0.36 | LOGIN TIME : 02:00:08'.

Click \*Continue\* after choosing a payment method.

## 6. Confirmation Pop-Up:

- A "Submission Successful" message appears to confirm the action.

## 7. Final Review & Order Placement:

The user is redirected to a \*Review Page\* displaying:

Order Details (editable if adjustments are needed).

Order Summary (to verify items, costs, and terms).

Final Step:

Check the \*confirmation checkbox\* to acknowledge accuracy.

Click “Place Order” to finalize the process.

**DETAILS**

[Shipping Address](#)  
 Petter Zack  
 Street122,  
 Mexico, FD 3435366  
[Edit](#)

[Estimated Shipping Cost](#)  
 Prepay Using PrintForm Account  
[Edit](#)

[Payment Information](#)  
 Purchase Order  
 PO-6  
[Edit](#)

**ORDER SUMMARY-PFQ103636**


Item #	Process	File Name	Material	Finish	Lead Time	HTS Code	Quantity	Unit Price	Line Total	
1	SLA	Axle__Seesaw (1)(1) (1).stl	ABS-Like White	Standard	Standard		2	\$23.00	\$46.00	
									<b>Sub Total</b>	\$46.00
									<b>Discount</b>	0%
									<b>Shipping</b>	TBD
									<b>Total</b>	<b>\$46.00</b>


Need assistance? Contact us [here](#) or call (404) 999-4916

☒ By placing your order, you agree to PrintForm [Privacy Policy](#) and [Terms & Conditions](#)

[Edit Quote](#)
[Place Order](#)

- Order placed successfully.

MCloud  
Powered By PRINTFORM

DASHBOARDQUOTESORDERSCONTACTSACCOUNTSTASKSCASESLEAD MANAGEMENT -SUPPLY CHAIN -REPORTSACCOUNT -



### Order Confirmation

Thank you for your order!  
Your order ID is PFQ103636  
To create another quote or return to your account, please click [here](#).