

Capsonic Automotive & Aerospace

## APQM - USER'S MANUAL

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## Main Menu

The buttons in this Menu will take you to the different screens on the system, which will be explain separately.



## SIF Screen

In order to open this screen, just click the SIF button in Main Menu. This section will show up all SIF (Sales Inquiry Forms) that have been imported from Sales DB with SalesDB2APQM.exe application. Also, it displays all SIFs created directly in APQM.

**SIFs** New SIF

Assigned To:  Date From:  Date To:  Filter

Show  entries

Search:

SIF	Assigned To	Inquiry Number	Revision	Priority	Sales Person	Customer	Added to APQM	Created In	BOM	Progress
	<a href="#">Martha</a>	140407801	a	I Grn	J. McPhee	SAFRAN TECHNOFAN	23/4/2014 03:55:04	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>94%</div>
	<a href="#">Martha</a>	131220901	B	II Grn	Spencer Cable	MEGGITT	23/4/2014 08:31:43	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>Complete!</div>
	<a href="#">Magdeline</a>	140422701	A	I Grn	G. Albrecht	GHSP	24/4/2014 05:07:42	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>0%</div>
	<a href="#">Magdeline</a>	140423401	A	I Grn	R. Gonzalez	Delphi	25/4/2014 04:06:56	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>Complete!</div>
	<a href="#">Magdeline</a>	140423402	A	I Grn	R. Gonzalez	Delphi	25/4/2014 04:07:15	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>Complete!</div>
	<a href="#">Martha</a>	140407802	A	I Grn	J. McPhee	SAFRAN TECHNOFAN	25/4/2014 06:24:37	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>88%</div>
	<a href="#">Take</a>	140403401	P	I Grn	R. Gonzalez	Zodiac Aerospace	25/4/2014 08:26:26	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>0%</div>
	<a href="#">Martha</a>	140422401	A	II Grn	R. Gonzalez	Zodiac Aerospace	26/4/2014 04:37:13	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>Complete!</div>
	<a href="#">Take</a>	140422402	A	II Grn	R. Gonzalez	Zodiac Aerospace	26/4/2014 04:37:37	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>94%</div>
	<a href="#">Take</a>	140422403	A	II Grn	R. Gonzalez	Zodiac Aerospace	26/4/2014 04:37:55	Sales DB	<a href="#">Edit BOM</a>	<div><div></div>90%</div>

Showing 131 to 140 of 275 entries

Previous Next




You can filter the list by the following filters:

**Assigned To:** It filters SIFs assigned by the selected user. You can select "All" option in order to get all SIFs, including those which are not assigned to anyone.

**Date From and Date To:** You can get SIFs by a range of dates about when a SIF was entered to APQM ("Added to APQM" column).

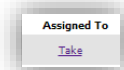
- If you do NOT enter a [Date From], but DO enter a [Date To], you will get all SIFs until the [Date To].
- If you DO enter a [Date From] but you do NOT enter a [Date To], then you will get all SIFs from [Date From].
- If you enter both dates, you will get those SIFs imported/created in that range.
- If you do not enter any date, you will get all SIFs.

The following columns in this table, have buttons or hyperlinks, which are made for achieve the following functions:

SIF	Assigned To	Inquiry Number	Revision	Priority	Sales Person	Customer	Added to APQM	Created In	BOM	Progress
 	<a href="#">Take</a>	140422404	A	II Grn	R. Gonzalez	Zodiac Aerospace	28/4/2014 04:38:29	Sales DB	<a href="#">Edit BOM</a> 	<div>94%</div>



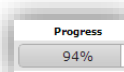
The “X” removes the current SIF record. The pencil opens a SIF form so you can update it.



The SIF is assigned to the user who is currently logged on and clicks this hyperlink.



The “X” removes the BOM from this SIF. The hyperlink opens the BOM screen. The text for the hyperlink can be the BOM’s “Finished Good” name, or “Edit BOM” when “Finished Good” name is empty.



This shows the progress a user has done about quoting components in a BOM.

- [Inquiry Number] to [Customer] columns show a basic SIF information.
- [Added to APQM] column displays the date about when the SIF was imported from Sales DB, or when was created in APQM.
- [Created In] tell us if this SIF was created in APQM or imported from Sales DB.
- The page store your filter in cookies, so the next time you open this page, it will retrieve the same filter you applied the last time.

## SIF Form

This is the Sales Inquiry Form. It can be used for create new SIFs or update existing ones by clicking the button “New SIF” or by clicking the pencil in SIF list respectively in the same screen.

Data in this form must be imported from Sales DB with SalesDB2APQM.exe application, however, we are able to create and edit SIFs directly in APQM.\*

**Sales Inquiry Form**

Inquiry Number: 140422404 | Priority: II Grn | Sales Person: R. Gonzalez  
Revision: A | Market Sector: Aerospace | New | Cost Model Location: Adv P

---

Customer: Zoduac Aerospace | New | Division/Location: Water & Waste Aero Systems  
Product: Rinse Valve PN 77000-037 | Application/Program: Aircraft Shower

---

Program Year	2015	2016	2017	2018											
Projected Annual Volume	674	674	674	674											
% of Volume Per Award	100														
Projected / Target Price	152														
Annual Revenue	102448														

Tooling Target: 0.0000  
Primary Competitors:

---

Quote Due: 5/13/2014 |  
SOP: 3/14/2015 |

Save Cancel

- You are able to create from this screen new “Market Sectors” and new “Customers” if they do not exist by hitting in “New” buttons located at the right of these fields.
- “Market Sectors” and “Customers” created here, are not rolled back when you hit “Cancel” button.
- Use “Save” button to update a SIF if this was opened by a hyperlink in SIF list on SIF screen.
- Use “Save” button to create a new SIF if this was opened by the button “New SIF” in SIF screen.
- Use “Cancel” button in order to quit this form without making any change.

\* APQM users won’t be able to create/update SIFs once the new Sales System (IQS) is integrated.

## BOM Screen

In Bill of Material (BOM) screen we can see all components that are related to a specific SIF. We cannot have a BOM without its SIF.

From this screen we are able to create new RFQs, or to see the ones that were already created.

### BOM 110609302 A

**Product** This is a test program.  
**Finished Good PN** 999999  
**Sales Rep** S. Gutkowski  
**Customer** Goodrich Aerospace

**Market Sector** Other  
**Status** 50%

**Imported** Imported from Sales Database.  
**Created** This component was not imported from Sales DB, instead, a Buyer created it.  
**For Add** You are adding this BOM line, but need to click Save button to create it.  
**For Edit** You are editing this BOM line, but need to click Save button to update it.  
**In Progress** Already sent several RFQs, but have not selected anyone.  
**No Quote** This Part Number is not going to be requested for quote.  
**Processed** Already requested to several vendors and selected one RFQ.

Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Processed	test	Description for Test	Each	79.36	12	Purchasing comments		Q
2	In Progress	test	Description for Test	Each	0	15	Second component		E

Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email
Alfredo	x	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56	
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com
Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36	
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com

New RFQ

Select All

Unselect All

No Quote

Quote

Edit BOM

Save

Refresh

SIF Volumes

Report Selected RFQs

Report All RFQs

BOM Print

## BOM Component's Status

Please take a look to the different status a component can be:

<b>Imported</b>	Imported from Sales Database.
<b>Created</b>	This component was not imported from Sales DB, instead, a Buyer created it.
<b>For Add</b>	You are adding this BOM line, but need to click Save button to create it.
<b>For Edit</b>	You are editing this BOM line, but need to click Save button to update it.
<b>In Progress</b>	Already sent several RFQs, but have not selected anyone.
<b>No Quote</b>	This Part Number is not going to be requested for quote.
<b>Processed</b>	Already requested to several vendors and selected one RFQ.

Other comments about it:

- **Imported:** The component was imported from Sales Database with SalesDB2APQM.exe application.
- **In Progress:** The buyer has sent out at least one RFQ for this component. This component will remain in this status until the buyer selects one RFQ as a winner (we will see this in RFQ Summary).
- **No Quote:** The buyer has decided not to request for quote this component. Do not confuse the “No Quote” status that one RFQ can be.

## BOM Header

Let's start explaining the top section of the BOM screen.

The screenshot shows the BOM Header screen with the following fields and annotations:

- Inquiry Number**: Points to the number 110609302, which is circled in blue.
- Revision**: Points to the letter A.
- Pulled from SIF**: Points to the Product, Finished Good PN, Sales Rep, and Customer fields.
- Product**: This is a test program.
- Finished Good PN**: 999999.
- Sales Rep**: S. Gutkowski.
- Customer**: Goodrich Aerospace.
- Market Sector**: Other.
- Status**: 50%.
- Components Processed**: Points to the Status field.
- Related to the Assembly which contains the BOM**: Points to the Finished Good PN field.

The only field that you can edit here is the [Finished Good PN]. The value in this field is the one that is showed in SIF List screen under “BOM” column.



## BOM Detail

In this part of the BOM Screen are listed all BOM's components, where we can watch for first glance only most important fields, that is, there are more fields hidden that belong to each component, which we are able to see if we use the button "Edit BOM" at the bottom of the page (we will see this in BOM Operations).



In this sample,  
we only have two  
components

Imported from  
Sales DB


Item fields									
Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Processed	test	Description for Test	Each	79.36	12	Purchasing comments		Q
2	In Progress	test	Description for Test	Each	0	15	Second component		E
RFQs created about the component containing them									
Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email		
Alfredo	X	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56			
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com		
Alfredo	X	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36			
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com		

- We are able to sort the list manually by dragging a component with the mouse to the desired position.
- In order to display RFQs sent out/created by a specific component, just click the BOM line you wanted. Click again the same line to hide the RFQ list.
- Header in gray represents Item fields. This means that there is an Item table internally in the system, and every time we work with a specific component, the internal record will be updated with the last data we used for it. The next time we add the same component to a BOM, Item's fields will be filled out automatically from this internal Item record.

At the end, we will have a catalog of items (Part Numbers or components) that Capsonic handles with the most recent information gathered either from RFQs processed, or because the Buyer entered manually when using them in the system.

- Click this icon  in order to delete a BOM line. A confirmation dialog will prompt you to do this action.
- Click the pencil  if you would like to update a BOM line. A popup form will be displayed where you can change the content. Note that once you click over "OK" button, it actually will not save the record. To do it, it is necessary to click the "Save" button at the bottom of BOM Screen. While you do not save it, the component status will remain in "For Edit", which means that you changed some data to this component, but you have not persisted it to the database.

This double check is necessary, because remember that we have an internal Item table, which is updated any time you update a BOM line, so it is convenient that you make sure to update a BOM line: Updates performed to Item table, will affect the information that all Buyers/Users see in the system.

- We use this icon:  to open the RFQ Summary screen, which will be explained further.
- "Assigned To" column, refers to which user is assigned to each component. By default, all components are assigned to the same user that took a SIF, inside SIF Screen.
- "Qty Required" column contents the component's quantity that is required for making one assembly.

## BOM Operations

Operations we can do over BOM Screen are:

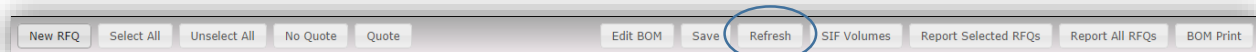
- Update BOM by batch or by line.
- Mark as No Quote or Quote BOM lines.
- Print BOM.
- Create/Resend/Edit/Delete/See RFQs.
- Reports to Sales.
- See SIF Volumes.

### Update BOM

There are two ways we can update a BOM, by batch or by line.

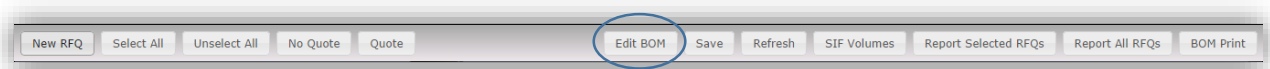
The following features work the same either for By Batch or By Line:

- Most important columns that you must fill in are:
  - **Part Number:** Unique number that identifies a component in the whole system. This is unique as well in Item table.  
Any time we use an existing Part Number, we update its corresponding record in the internal Item table. If we enter a non-existent part number, a new record is created to Item table.
  - **Material:** Component's description that is displayed in RFQ form, so vendors are able to see it.
  - **UOM:** Unit of measure about how we want to quote this component.  
By default, this value is imported from Sales DB. Also, this field appears in RFQ form, so vendors can see it.
  - **Qty:** Quantity required of this component to make one assembly/finished good part.  
The value here should be different of 0. It is multiplied by the Estimated Annual Usage when creating/sending out a new RFQ, so the vendor can know how many parts to quote.
  - **Purchasing Comments:** You can have some comments here about the quote status or any useful information related to the component.
- Every time you change the Part Number field, Item fields will be filled out automatically if they are empty at that moment. Those Item fields are:
  - Material
  - UM
  - Cost
  - Capsonic PN
  - Customer PN
  - Manufacture PN
  - Supplier PN
  - Commodity Code
- Read only fields:
  - Assigned To: You can take a BOM line by clicking "Take" hyperlink in BOM Screen.
  - Status: System field.
  - Sales LN: Imported from Sales DB.
  - Part Number: You are able to edit it by clicking the button inside this cell.
  - Sales Status: Imported from Sales DB.
  - Sales Comments: Imported from Sales DB.
- Clicking "OK" or the "X" to close the popup have the same functionality. It will mark those BOM lines where we made changes as "For Edit". If you wish not to save them, refresh the page by clicking the button "Refresh" at the bottom of BOM Screen:

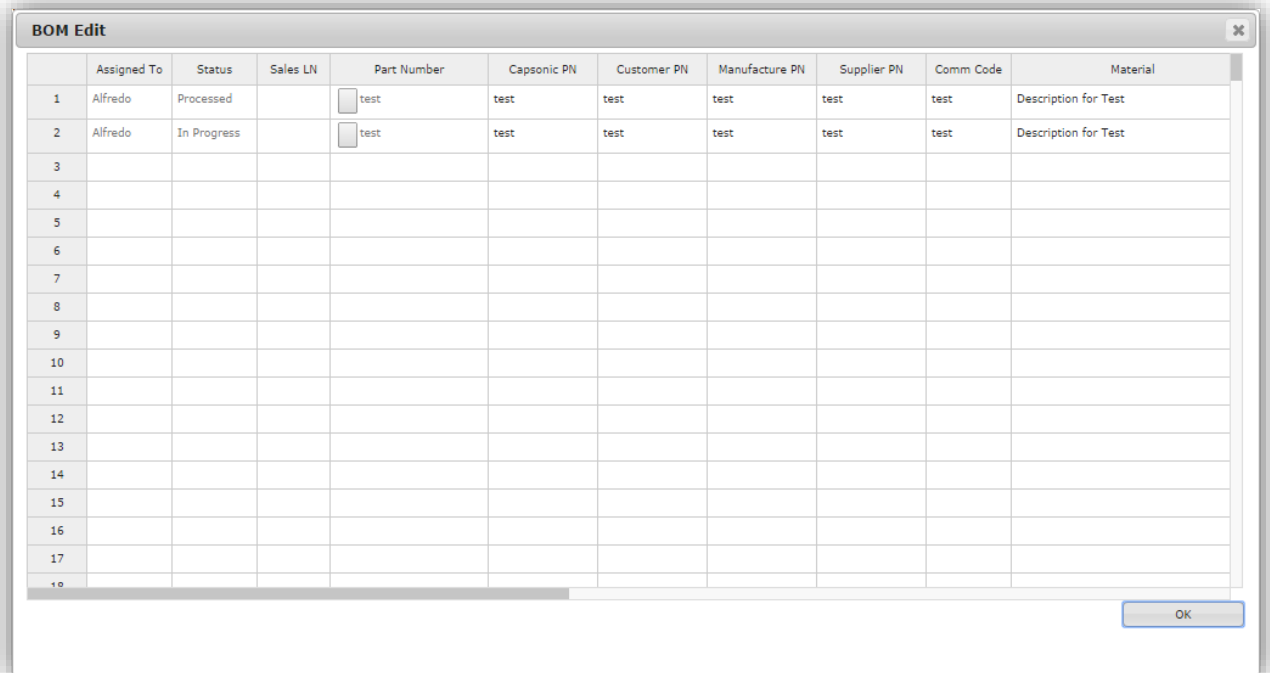


## Update BOM by Batch

1. Click "Edit BOM" at the bottom of BOM Screen:



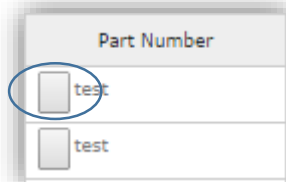
2. The next dialog will show up:



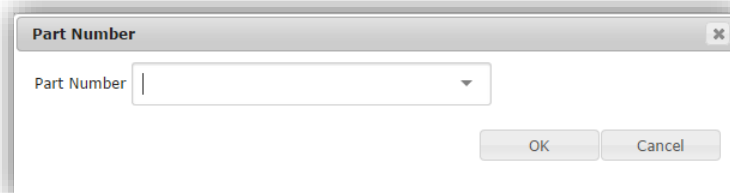
- Assigned To, Status, Sales LN and Part Number columns are fixed, and they are never hidden when we scroll to the right.

Steps to add/edit a Part Number:

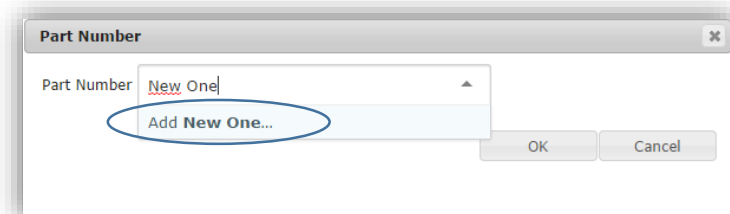
- a. Click the button inside the cell on Part Number column:



- b. The following dialog will show up:

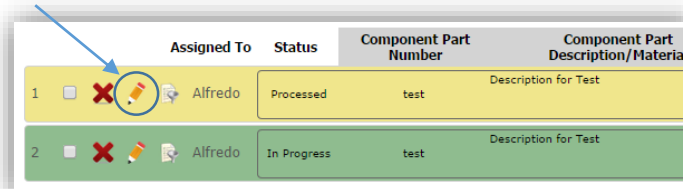


- c. Enter the Part Number, if it does not exist you can add it by writing it and then clicking on the option "Add <Your New Part Number>":



### Update BOM by line

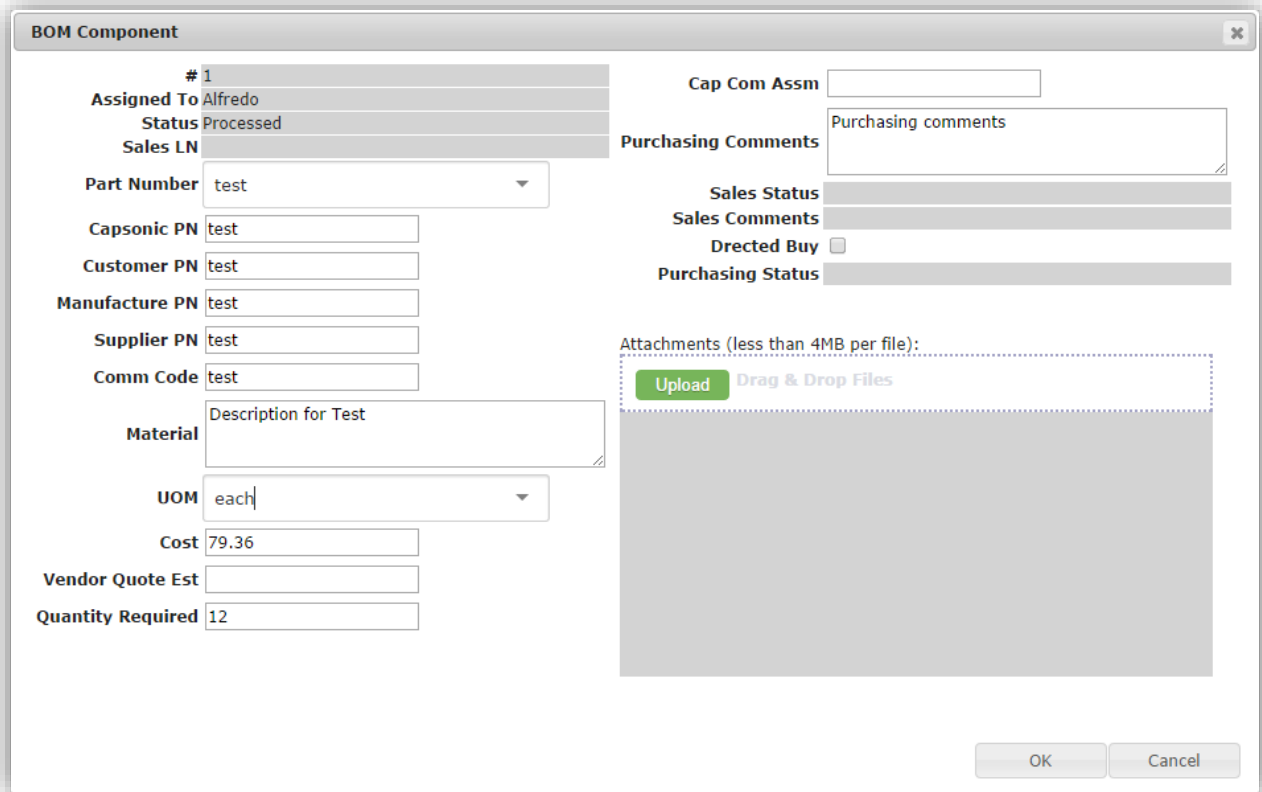
1. Click the pencil icon situated in the BOM Line you wish to edit. (Do not confuse the pencil inside RFQ list).



The screenshot shows a table with two rows. The first row is highlighted in yellow and has a pencil icon circled with a blue arrow. The second row is highlighted in green. The table has columns for 'Assigned To', 'Status', 'Component Part Number', and 'Component Part Description/Material'.

	Assigned To	Status	Component Part Number	Component Part Description/Material
1	Alfredo	Processed	test	Description for Test
2	Alfredo	In Progress	test	Description for Test

2. The next form will open:

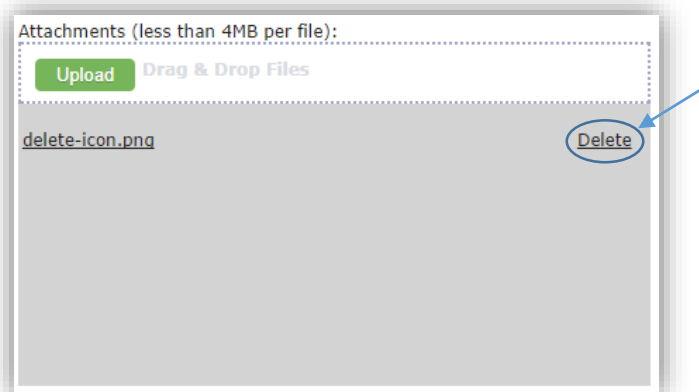


The screenshot shows a 'BOM Component' form. It has two main sections. The left section contains fields for: # 1, Assigned To (Alfredo), Status (Processed), Sales LN, Part Number (test), Capsonic PN (test), Customer PN (test), Manufacture PN (test), Supplier PN (test), Comm Code (test), Material (Description for Test), UOM (each), Cost (79.36), Vendor Quote Est, and Quantity Required (12). The right section contains fields for: Cap Com Assm, Purchasing Comments, Sales Status, Sales Comments, Drected Buy (checkbox), and Purchasing Status. At the bottom right, there are 'OK' and 'Cancel' buttons.

A difference we can note here against updating by batch is that we can attach files to the component.

We can only attach files one by one. Each attachment must weigh up to 4MB.

Be aware that attachments here are not related to the transaction for saving the record. For instance, if you upload an attachment, even though you click on “Cancel” button, the attachment will remain saved. If you want to truly remove it, you have to click the “Delete” hyperlink indicated in the next image:



The screenshot shows the 'Attachments (less than 4MB per file):' section. It has a green 'Upload' button and a 'Drag & Drop Files' area. Below the upload area, there is a file named 'delete-icon.png'. To the right of this file, there is a blue 'Delete' button, which is circled with a blue arrow.

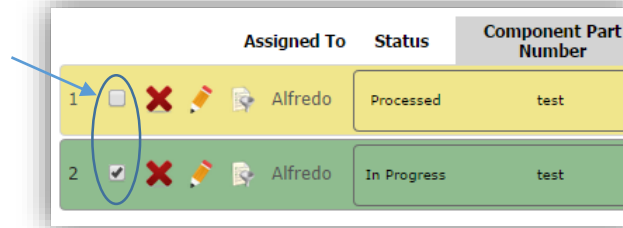
For more information about how attachments are handled, please see the Technical Manual.

## Marking “No Quote” or “Quote” BOM lines

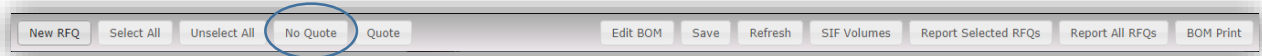
Sometimes you will need to mark a BOM line to “No Quote”, not because the vendor was not able to quote your component, but because you have decided to do it, maybe you already have the cost for that component, or we are talking about one component that is assembled in Capsonic, so you don’t want to request to vendors a quote for it.

The steps to make a BOM line “No Quote” are:

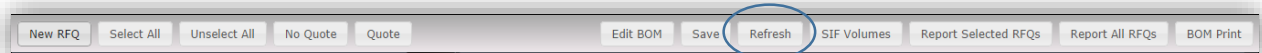
1. First of all, select the BOM lines desired with the checkbox at the far left of each line:



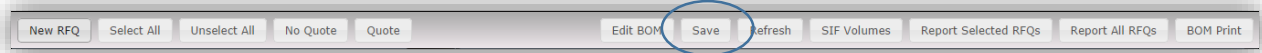
2. Then click on the button “No Quote” at the bottom of the BOM Screen:



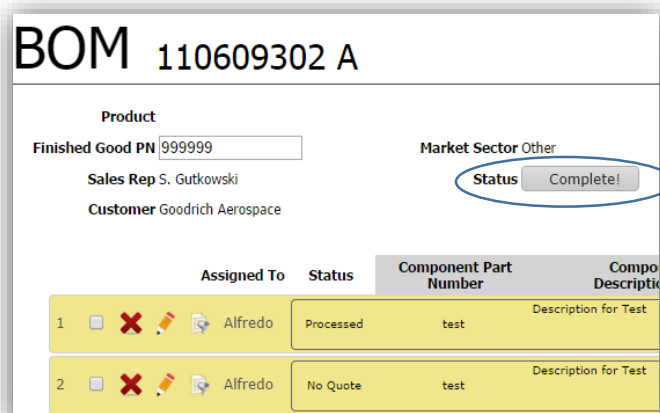
3. Until now, you have not saved the status in the database, so you can cancel this by refreshing the page, or by clicking the “Refresh” button:



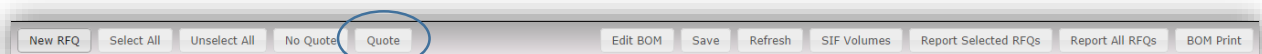
4. But if you are sure to save it, just click the “Save” button:



In this example, we just have two BOM lines, please be aware that kind of status: “Processed”, and “No Quote” are kind of ending status and will be considered when drawing the progress bar. That is why this example has its progress bar “Complete!”:



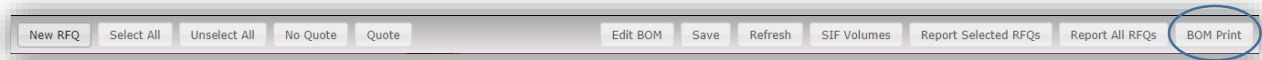
If you would like to revert a “No Quote” line to “Quote”, we are going to do the same steps that we did for set them to “No Quote”, but this time, instead of using the “No Quote” button, you will use the “Quote” button:



## BOM Print

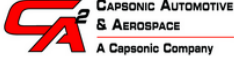
We are able to print a BOM if you need it.

1. Just click the “BOM Print” located at the bottom of BOM Screen:



2. This will open a new tab/page in your browser:

# BOM 110609302 A



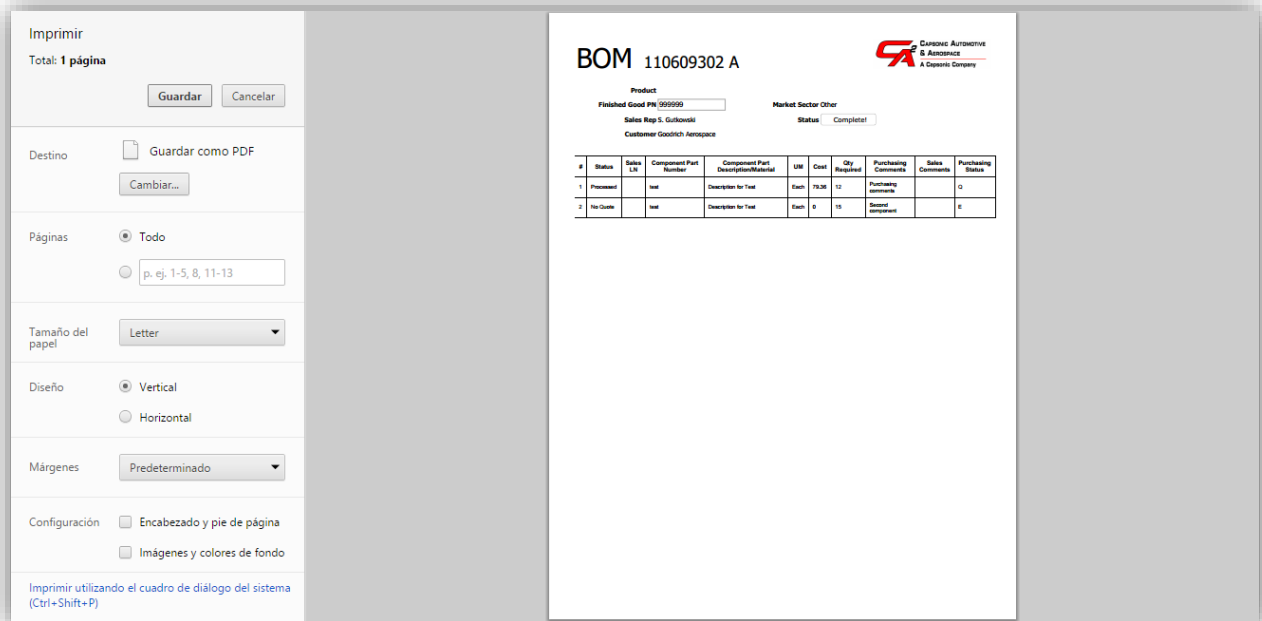
**Product**  
Finished Good PN  Market Sector Other  
Sales Rep S. Gutkowski Status   
Customer Goodrich Aerospace

#	Status	Sales LN	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Processed		test	Description for Test	Each	79.36	12	Purchasing comments		Q
2	No Quote		test	Description for Test	Each	0	15	Second component		E

The content in this page is the same as BOM screen, the difference is that it is arranged in order to be printed out well. We are not able to see RFQs per component from this page.

3. By default, when you open this page, the browser's print dialog is shown as well. If not, you have to open it manually (the way to do this will depend in the browser you are using, please see your browser documentation to know it).

Google Chrome Print Dialog Example:



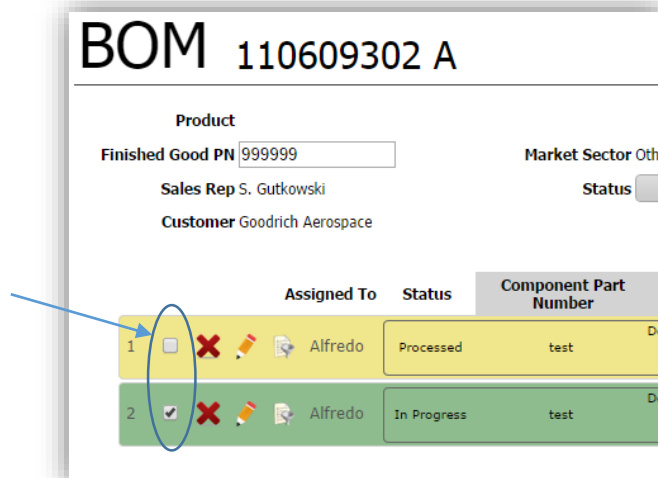
4. Use your browser print dialog to print out the document.

## CRUD, Resend RFQs

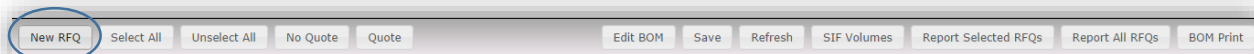
CRUD stands for Create, Read, Update and Delete. Let's see the steps for making these actions with RFQs from BOM Screen.

### Create RFQ from BOM Screen

1. Once you are in BOM screen, select the desired components you would like to Request for Quote.



2. Click the "New RFQ" button.



3. A new tab/page will open. This is the one we use to configure new RFQ(s).

Filter Vendors

Create new Vendor

Multiple select for vendors

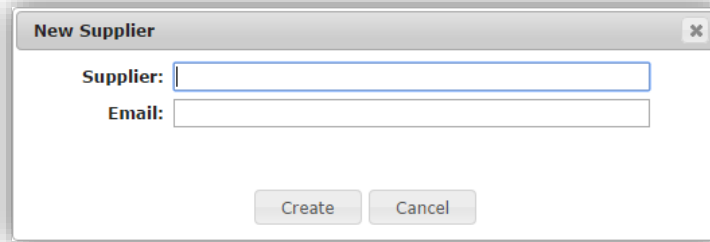
Volumes pulled from SIF

BOM component(s) selected from BOM Screen

Year	Volume
2012	150
2013	150
2014	150

Part Number	Material/Description	Qty. Required	UOH	Attachments
test	Description for Test	15	Each	No files attached.

4. Fill in all fields:
  - a. You are able to select multiple vendors at a time.
  - b. You can create new vendors if they do not exist by clicking the “New” button. The following dialog will open:



A dialog box titled "New Supplier" with a close button (X) in the top right corner. It contains two input fields: "Supplier:" and "Email:". Below the fields are two buttons: "Create" and "Cancel".

- c. By default, SIF's volumes are imported to this page, but you can edit it if you require it. Changes you make in those volumes do not affect the original SIF's volumes.
- d. You can remove a component from this view by clicking the red “X” situated at the far right of the list of components. Then, it will not be requested for quote:

Part Number	Material/Description	Qty. Required	UOM	Attachments	
test	Description for Test	15	Each	Some drawing.png X	X

- e. For those components which have files attached, they will be displayed under the “Attachments” column in the list of components.

Part Number	Material/Description	Qty. Required	UOM	Attachments	
test	Description for Test	15	Each	Some drawing.png X	X

Click the little “x” that is inside the box of an attachment to prevent the file be attached to the RFQ.

- f. If you already removed an attachment, but you would like to add it again, select it from the drop down in the same Attachment's cell:

Part Number	Material/Description	Qty. Required	UOM	Attachments	
test	Description for Test	15	Each	Some drawing.png	X

- g. The “Target Price” checkbox allow you to specify a target price to the vendor(s).



A checkbox labeled "Target Price" which is checked, followed by an input field containing the value "123.45".

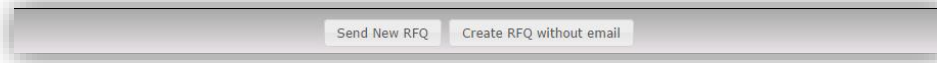
If you do not check this option, no target price will be shown to the supplier(s) in the RFQ form.

- h. For any comment you want to give to Vendor(s) selected, please use the “Comments to Vendor” field.



- i. We also can upload files (less than 4MB in weight for each one), taking into account that files attached here, will be shared across all components listed at that moment.
5. Once the information is well entered in the form, we have two options for the creation of the new RFQ(s):
  - a. Send New RFQ: Create the RFQ(s) and email to vendors selected.
  - b. Create RFQ without email: Just create the RFQ(s), without sending by email.

So, use the button located at the bottom of the screen at your convenience:



#### Read RFQ(s) from BOM Screen

1. After opening the BOM Screen, click over the component of which you would like to see its RFQs.

RFQ list

Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Alfredo	Processed	test	Description for Test	Each	79.36	12	Purchasing comments	Q
2	Alfredo	In Progress	test	Description for Test	Each	0	15	Second component	E

Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email
Alfredo	x	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56	
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com
Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36	
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com

The list shown below the BOM line you did click, contains all RFQs created for that component. Here is a brief description of each column:

- Created By: The APQM user who created the RFQ.
- Drawing Rev: Revision entered when creating the RFQ from “New RFQ” screen.
- RFQ Number: This is a number auto generated by the system, and can be used to reference a RFQ.
- Due Date: Due date entered creating the RFQ from “New RFQ” screen.
- Status: This is a system’s field which value will be changing as the RFQ passes for the different processes.
- Vendor: The vendor name as it is in our Supplier catalog’s records.
- Last Sent To Vendor: The last time we send an email to a vendor. It is empty if we did not send an email yet.
- Last Email: The last email address we used for sending an RFQ by email. It is empty if we did not send an email yet.

#### Update RFQ(s) from BOM Screen

1. Open the RFQ List as it is explained in the previous point.
2. Click on the pencil of the RFQ desired to update.

Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Alfredo	Processed	test	Description for Test	Each	79.36	12	Purchasing comments	Q
2	Alfredo	In Progress	test	Description for Test	Each	0	15	Second component	E

Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email
Alfredo	x	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56	
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com
Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36	
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com

3. The RFQ Form will show up in a new browser tab/page. This form is explained in point ????

#### Delete an RFQ from BOM Screen

1. Open the RFQ List as it is explained in “Read RFQ(s) from BOM Screen” topic.

2. Click the “X” located as the next image shows:

Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Processed	test	Description for Test	Each	79.36	12	Purchasing comments		Q
2	In Progress	test	Description for Test	Each	0	15	Second component		E
Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email		
Alfredo	x	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56			
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com		
Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36			
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com		

3. A popup will ask you to confirm you really want to delete the RFQ, click OK to delete it.

### Re-send RFQ from BOM Screen

We can use this function sometimes when it is necessary to send the RFQ again to the same Vendor for different reasons, some situations could be:

- When a Vendor has changed of Email Address.
- When a Vendor has lost our Email.
- We made a change to the RFQ and want the Vendor to continue working on it.

1. Follow the same steps to open the RFQ list in “Read RFQ(s) from BOM Screen”.
2. Click the icon shown in the image below:

Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	Processed	test	Description for Test	Each	79.36	12	Purchasing comments		Q
2	In Progress	test	Description for Test	Each	0	15	Second component		E
Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email		
Alfredo	x	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56			
Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com		
Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36			
Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com		

3. The next popup will be displayed:

RFQ that we attempt to re-send by email

Re-send RFQ

RFQ to Re-Send: 110609302RFQ00055

Supplier: Alfredo

Email:

Re-Send

Cancel

- We cannot change the vendor of which we want to email to.
  - By default, email field is filled with the same email address the last time was used in a RFQ, even though the vendor has a new email loaded in APQM Supplier’s catalog.
  - If there is no RFQs sent out yet, the email field is filled by the Supplier’s email stored in APQM Supplier’s catalog.
  - If we input a different email address, the Supplier record is updated with the new email address.
4. Click “Re-Send” button in order to email the RFQ.

### See SIF Volumes

We are able to see the SIF’s volumes inside the BOM screen:

1. Just click the “SIF Volumes” button.

2. The next popup will open:

Projected Annual Volume

Program Year

2012

2013

2014

Projected Annual Volume

150

150

150

Close

## Reports to Sales

This is the last step in APQM process. It consists in exporting reports in Excel format about all RFQs processed in one BOM/SIF.

1. Open the BOM Screen desired.
2. Click the "Report Selected RFQs" or "Report All RFQs" button, according to what you need.

New RFQ

Select All

Unselect All

No Quote

Quote

Edit BOM

Save

Refresh

SIF Volumes

Report Selected RFQs

Report All RFQs

BOM Print

### Report Selected RFQs

- It shows one row per BOM line existent.
- For those BOM lines which enclose multiple RFQs, the report will only show information of the RFQ selected.
- If a BOM line does not contain any RFQ, a row will be shown with no values in RFQ columns.
- If a BOM contains RFQs but none of them is selected, a row will be shown with no values in RFQ columns.

BOM Line fields

RFQ fields

Inquiry Number: 110609302

Revision: A

Sales Person: S. Gutkowski

Customer Name: Goodrich Aerospace

Finished Good PN: 999999

Annual Volume: 10

Market Sector: Other

Total Material Cost: \$240.72

Total Cost Reduction: \$24.07

Total Material Cost with Reduction: \$216.65

RFQ Status	Material Position	Part Number / Code ID	Manufacture PN	Material / Assembly Description	Qty Required	UM	Reason No Quote	EAU	MOQ	Part Cost	Vendor	Purchasing Comments	Purchasing Status	Tooling / Equipment Type	Tooling Cost (\$)	Prototype Tooling	Tooling Lead Time	Lead Time PPAP/FAIR	Lead Time First Production Order	Lead Time Normal Production Orders	Vendor Comments	Exception to Print
SELECTED		test	test	Description for Test	12	Each		1800	10	240.72	Jesus Alfredo	Purchasing comments	Q	A tooling detail example.	10	12		one week	2 weeks	3 weeks	A comments to buyer.	A exception to print.
IN PROCESS		test	test	Description for Test	15	Each		2250				Second component	E		0	0					An item	

Export

### Report All RFQs

- The columns are the same that we have in "Report Selected RFQs".
- It prints out one row per BOM line existent.
- It also shows one row per each RFQ existent, regardless its status.

Inquiry Number: 110609302

Revision: A

Sales Person: S. Gutkowski

Customer Name: Goodrich Aerospace

Finished Good PN: 999999

Annual Volume: 10

Market Sector: Other

Total Material Cost: \$240.72

Total Cost Reduction: \$24.07

Total Material Cost with Reduction: \$216.65

RFQ Status	Material Position	Part Number / Code ID	Manufacture PN	Material / Assembly Description	Qty Required	UM	Reason No Quote	EAU	MOQ	Part Cost	Vendor	Purchasing Comments	Purchasing Status	Tooling / Equipment Type	Tooling Cost (\$)	Prototype Tooling	Tooling Lead Time	Lead Time PPAP/FAIR	Lead Time First Production Order	Lead Time Normal Production Orders	Vendor Comments	Exception to Print
IN PROCESS					15						0 Alfredo	Second component	E		0	0					An item	
											0 Alfredo	Second component	E		0	0					testing from Firefox, I have attached the file "attachments in RFQ.png"	
											0 Jesus Alfredo	Second component	E		0	0						
DISMISSED		test	test	Description for Test	12	Each				1800		0 Alfredo	Purchasing comments	Q		0	0					
											79.36 Alfredo	Purchasing comments	Q		0	0						
											0 Jesus Alfredo	Purchasing comments	Q		0	0	edited				test	
IN PROCESS					15			2250			0 Alfredo	Second component	E		0	0						
SELECTED					12	s		1800	10	240.72	Jesus Alfredo	Purchasing comments	Q	A tooling detail example.	10	12		one week	2 weeks	3 weeks	A comments to buyer.	A exception to print.

Export

### Common information for both Reports

- The RFQ Status column, is a special column that is calculated when opening the report:

By default it uses the next status map:

Real RFQ Status	Sales Report RFQ Status
PENDING	IN PROCESS
IN PROGRESS	
COMPLETED	
NO QUOTE	NO QUOTE
DISMISSED	DISMISSED
SELECTED	SELECTED
AWARDED	AWARDED

- For components that you as a buyer marked to “No Quote”, independently if there are RFQs sent out for those components or not, their status in Sales Report will be changed to “No Quote”.

For example, you have one component with two RFQs created. The first RFQ is completed, therefore its status is “Complete”, and the other one is “In Progress”. Because you set that component (BOM line) to “No Quote” (with the button at the bottom of BOM Screen), the two RFQs will appear as “No Quote” in Sales Report.

- For calculating totals located on the header as we see in next image:

Inquiry Number: 110609302

Revision: A

Sales Person: S. Gutkowski

Customer Name: Goodrich Aerospace

Finished Good PN: 999999

Annual Volume: 10

Market Sector: Other

Total Material Cost: \$240.72

Total Cost Reduction: \$24.07

Total Material Cost with Reduction: \$216.65

RFQ Status	Material Position	Part Number / Code ID	Manufacture PN	Material / Assembly Description	Qty Required	UM	Reason No Quote	EAU	MOQ	Part Cost	Vendor	Purchasing Comments	Purchasing Status	Tooling / Equipment Type	Tooling Cost (\$)	Prototype Tooling	Tooling Lead Time	Lead Time PPAP/FAIR	Lead Time First Production Order	Lead Time Normal Production Orders	Vendor Comments	Exception to Print
SELECTED		test	test	Description for Test	12	Each	s	1800	10	240.72	Jesus Alfredo	Purchasing comments	Q	A tooling detail example.	10	12		one week	2 weeks	3 weeks	A comments to buyer.	A exception to print.
IN PROCESS		test	test	Description for Test	15	Each		2250				Second component	E			0					An item	

Export

The system does the following:

- For each RFQ Selected or Awarded, it sums its “Total A Cost”. The accumulation is shown in “Total Material Cost” on the report’s header.
  - For each RFQ Selected or Awarded, it looks for the highest “Annual Cost Reduction Commitment” and the value found which is a percent value, is calculated from “Total Material Cost” and it is placed on “Total Cost Reduction” in report’s header.
  - Finally, “Total Material Cost with Reduction” shows the subtraction of “Total Material Cost” minus “Total Cost Reduction”.
- We are able to export the report to Excel format, in order to do this, please look at the next steps:
    - Click on “Export” button located at the bottom of the web page, a file will be downloaded:

Inquiry Number: 110609302

Revision: A

Sales Person: S. Gutkowski

Customer Name: Goodrich Aerospace

Finished Good PN: 999999

Annual Volume: 10

Market Sector: Other

Total Material Cost: \$240.72

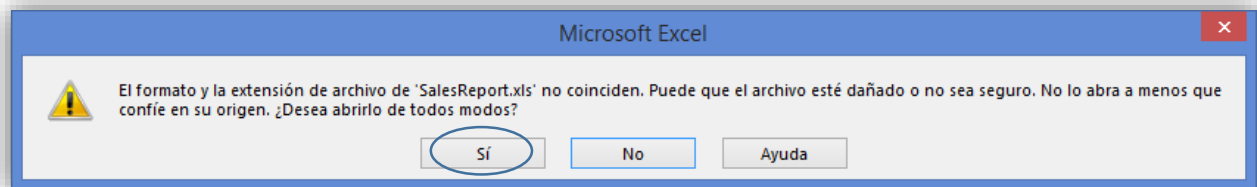
Total Cost Reduction: \$24.07

Total Material Cost with Reduction: \$216.65

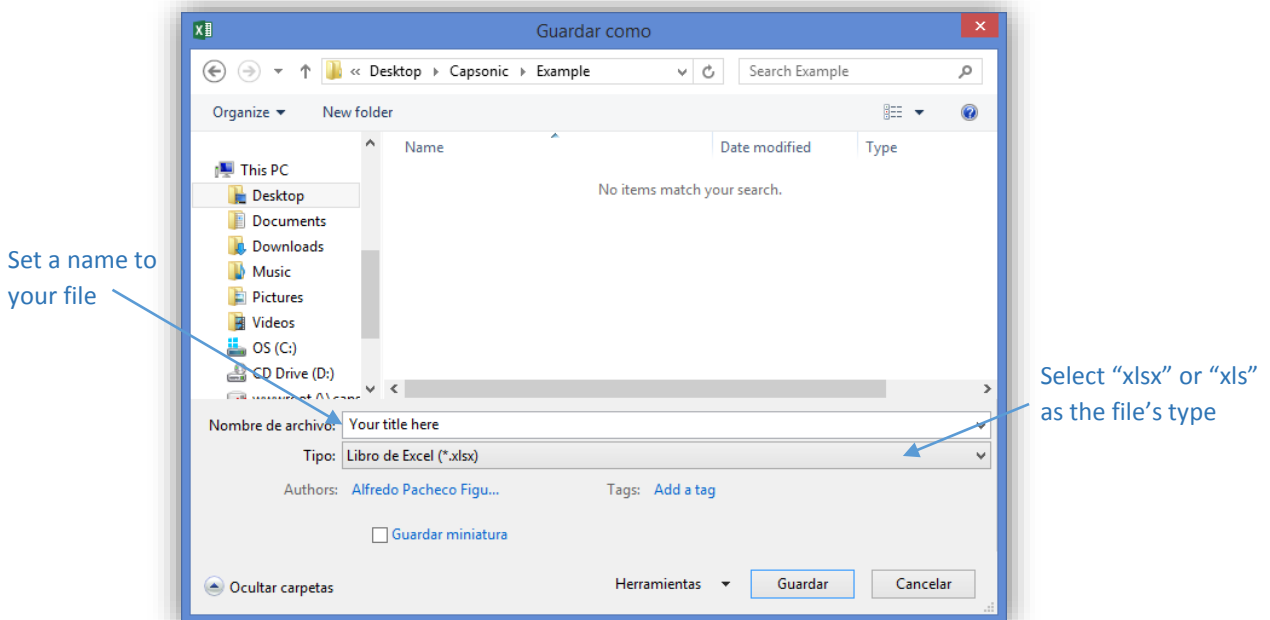
RFQ Status	Material Position	Part Number / Code ID	Manufacture PN	Material / Assembly Description	Qty Required	UM	Reason No Quote	EAU	MOQ	Part Cost	Vendor	Purchasing Comments	Purchasing Status	Tooling / Equipment Type	Tooling Cost (\$)	Prototype Tooling	Tooling Lead Time	Lead Time PPAP/FAIR	Lead Time First Production Order	Lead Time Normal Production Orders	Vendor Comments	Exception to Print
SELECTED		test	test	Description for Test	12	Each	s	1800	10	240.72	Jesus Alfredo	Purchasing comments	Q	A tooling detail example.	10	12		one week	2 weeks	3 weeks	A comments to buyer.	A exception to print.
IN PROCESS		test	test	Description for Test	15	Each		2250				Second component	E			0					An item	

Export

2. Open the file downloaded, and click Yes to the next popup:



3. Save the file as your name you want to give it, and change the file's type to "xls" or "xlsx":



## RFQ Screen

This screen has two tabs: “All RFQs” and “RFQs per BOM Lines”. They aim to query through all RFQ(s) existent.

### “All RFQs” tab:

From here, you can look for all single RFQs created in the system.

Inquiry Number	Revision	Finished Good Part Number	Product	Annual Volume	Market Sector	Component Part Number	Part Material	Comm Code	Vendor Quote Est	Qty Required	Directed Buy	Purchasing Comments	Sales Comments	RFQ Sent
070711900	B		I/P 4-gang Switch Bank	0		0	Painted buttons	E	3	false			Mold Tool FAM Buttons	5
070711900	B		I/P 4-gang Switch Bank	0		0	Actuators	E	3	false			HAZ Act has Follow Recess	6
070711900	B		I/P 4-gang Switch Bank	0		0		E	0	false				5
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				4
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				1
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				1
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				2
110609302	A	999999		10	Other	test	Description for Test	test	12	false		Purchasing comments		5
110609302	A	999999		10	Other	test	Description for Test	test	15	false		Second component		3
120401937	A		Stator Assembly: 517396-10 using RFQ4-179	0	Aerospace	105-034-9001	Adhesive	E	0.1	false			Per Honeywell RFQ BOM	5

- We can filter by the user who created the RFQs, this by selecting the user in the drop down and then by clicking the “Filter” button.
- As you can see, this table has the same columns we find on ????? and the functionality here is exactly the same.
- Just as a summary, here are the functions we are able to do from this screen:

At the far left of the table, there are three icons from which we can do the following functions:

ICON	FUNCTION
	Delete a RFQ in current row.
	Opens the RFQ so it can be updated.
	Resend RFQ, a popup will open in which we optionally can change the target email address required.

### “RFQs per BOM Lines” tab:

This view is intended to get all components from all BOMs, and to know how many RFQs we have created for them.

Inquiry Number	Revision	Finished Good Part Number	Product	Annual Volume	Market Sector	Component Part Number	Part Material	Comm Code	Vendor Quote Est	Qty Required	Directed Buy	Purchasing Comments	Sales Comments	RFQ Sent
070711900	B		I/P 4-gang Switch Bank	0		0	Painted buttons	E	3	false			Mold Tool FAM Buttons	5
070711900	B		I/P 4-gang Switch Bank	0		0	Actuators	E	3	false			HAZ Act has Follow Recess	6
070711900	B		I/P 4-gang Switch Bank	0		0		E	0	false				5
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				4
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				1
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				1
110328601	A		Non- Contact Seat Sensor Assembly	0	Agriculture	0	0	E	0	false				2
110609302	A	999999		10	Other	test	Description for Test	test	12	false		Purchasing comments		5
110609302	A	999999		10	Other	test	Description for Test	test	15	false		Second component		3
120401937	A		Stator Assembly: 517396-10 using RFQ4-179	0	Aerospace	105-034-9001	Adhesive	E	0.1	false			Per Honeywell RFQ BOM	5

## RFQ Form Buyer Side

This is the form to complete quotes, and it is the one that a vendor has to fill out when a buyer request it.

In order to open it, just go to the Pencil in "RFQ list" located in "BOM Screen" or "RFQ Screen" as it is explained on those topics before.

**Vendor can choose not to quote**

**Buyer who created this RFQ**

**Component requested to quote**

**Vendor must quote for these EAU and Years**

**Vendor is able to attach files**

**Middle Section**

**Capsonic Automotive & Aerospace**  
A Capsonic Company

Tuesday, August 19, 2014

☒ Quote ☐ No Quote

Comments to vendor:

Attachments from Buyer to Vendor:  
No files attached.

Due Date: 28/7/2014  
RFQ #: 140422404RFQ00001  
Market Sector: Aerospace  
Component Part Number: 19053  
Part Description: Body, Valve Assy (EB Weld process)  
Drawing Level:

Supplier Name: Acceleron Inc  
Manufacturing Location: 21 Lordship Road  
Ship From Location: East Granby, CT 06026  
Prepared By: MIKE DOWD

Lead Time PPAP/FAIR: 1 WEEK  
Lead Time First Production Order: 2 WEEKS  
Lead Time Normal Production Orders: 2 WEEKS

Buyer: Martha Salcedo  
Email: msalcedo@capsonic.com  
Office: 915-400-2015  
Mobile: 915-201-6522

Estimated Annual Usage: 674 Calendar Years: 2015, 2016, 2017, 2018

Raw Material And Purchased Components				Outside Services			Scrap		Labor		Burden Per Unit			
Item Description	UOM	Quantity	Cost/Unit	Material Total	Quantity	Cost/Unit	Service Total	Scrap Value %	Scrap Cost	Directly Hly Labor Rate	Std Hrs.	Labor Cost	Burden	Total Burden
BODY VALVE ASSY	EA	1.00000	11.80000	11.8	0.00000	0.00000	0	0.00000	0	0.00000	0.00000	0	0.00000	0
				0			0		0			0		0
				0			0		0			0		0
				0			0		0			0		0

MOQ: 25 PCS

Total Manufacturing Cost: 11.80000  
SG&A Profit: 0  
Packing Cost/Unit: 0  
Assembly Cost/Unit: 0  
Total Piece Cost: 11.80000

Tooling Detail

Production Tooling: 0  
Prototype Tooling: 0  
Prototype Piece: 0

Annual Cost Reduction Commitment

Year	Cost %

Shipping Weight (lb): 0  
Brand:   
Cavitation:   
Material:

Attachments from Vendor to Buyer (less than 4MB per file):  
Upload Drag & Drop Files  
No files attached.

☒ Quote 100% to Print

Comments

Finalize Save Cancel

Capsonic Automotive & Aerospace, Inc. 2012  
UMD: 8/18/2014

- Gray fields, are Read-Only fields.
- When the user selects “No Quote”, the RFQ form’s content is replaced by the following, and it is required to write the Reason this cannot be done:

Quote No Quote

Reason

Finalize and submit Save & Continue Later Cancel

- “Middle Section” of the RFQ is repeated for every EAU (Estimated Annual Usage) specified at the moment of the RFQ creation.
- EAU and Calendar Years are grouped by EAU values.
- About the “Middle Section”, it is required the column “Item Description” in order to take that row into account, otherwise, even though there are other values in other columns in the same row, they will be erased by the system at the moment of saving the form.
- “Save” button allows the user to save the form without applying any validation, thus enabling us to save partially the form whether we wish to continue completing it later. When pressing this button, the status for the RFQ changes to “In Progress”, even though it was “Complete” before.
- “Finalize” button first applies validation to fields, and if they all are well entered, the form is saved and its status changes to “Complete”, otherwise, a popup tells the user what field to fix, for example:

Prepared By

Please verify field. Field is required.



## Email and RFQ Form to Vendor

Either when an APQM User has created an RFQ from “New RFQ” screen with the “Send New RFQ” button or when a User has Re-Sent an RFQ, the Vendor receives an email with the following content:

Dear Supplier,

We are seeking quotations to match the part/process description shown on our Request For Quotation (RFQ) form. Please click the following link to be directed to the RFQ page, where drawings and special instructions are included. Please complete all required fields. You may attach documents to the RFQ, but the RFQ must be completed.

There is an instruction module available to walk you through the form should you need assistance.

If you have any questions regarding the RFQ, please contact the Capsonic Advanced Purchasing Buyer shown below:

APQM user who created the RFQ

Jesus Alfredo Pacheco Figueroa
(656)372-8449
<a href="mailto:apacheco@capsonic.com">apacheco@capsonic.com</a>

RFQ Number generated by the system

RFQ Number: 120522901RFQ00001

Part Number: 3830

Part Requested to Quote

[Start quoting here.](#)

Please mark this e-mail as coming from a trusted source to avoid issues with future correspondence reaching your inbox.

In order to open the hyperlink, it is necessary to have Javascript enabled in your browser.

Sincerely,  
The Capsonic Advanced Purchasing Team

**NOTE:** By submitting a quote the Supplier is agreeing to the Capsonic Terms and Conditions and requirements outlined in the Capsonic Supplier Manual. To reference these requirements / documents go to: [www.capsonic.com](http://www.capsonic.com)

Then, the Supplier has to click the hyperlink: “Start quoting here” which opens our web application. The first page the Vendor sees is:

INSTRUCTIONS: If your information is correct click next, otherwise please update it.

Next

Supplier Name \* Alfredo

Manufacturing Location

Ship Location

Quoted Currency

Contact Name \* Alfredo

Contact Phone Number \* 6563728449

Contact Cell Phone

Contact Email \* j.alfredo.pacheco@gmail.com

\* Fields required.

Save Cancel

This form aims to update the main contact information of a Vendor. In this way, Vendors update by themselves and for us their information, and we keep the most current data from our Vendor each time we request for a quote.

Once the Supplier hits on “Save” or “Next” buttons, the next page displayed is the RFQ form. This is the same RFQ as we mentioned before in “RFQ Form Buyer Side” with the exception of:

- “Finalize” and “Save” buttons become “Finalize and Submit” and “Save and Continue Later” respectively for vendors, but the functionality is exactly the same.
- There is an additional button called “Instructions”. This will guide the vendor thru the fields in the page, and gives a brief description about how to fill out the form. For example:

Please fill in all the non-shaded fields. The gray fields are locked informational fields and the blue fields are calculated fields based on the information you provide. Please click on the Instructions button below for a tutorial on filling out this form. Upon completion, please click the Finalize & Submit button. You will have the opportunity to Save & Continue later should you need to do so.

Buttons: Back, Finalize and submit, Save & Continue Later, **Instructions**

2 ☒ Quote ☐ No Quote

Select "Quote" if you are able to quote this piece. Otherwise select "No Quote" and please specify your reason.

Buttons: Skip, ← Back, Next →

Attachments from Buyer to Vendor:  
[delete-icon.png](#)

Due Date	9/4/2014	Supplier Name	Alfredo
RFQ #	120522901RFQ00001	Market Sector	Aerospace
		Manufacturing Location	sa

- There are also some instructions at the top of the page about the basic functionality of the page.
- Once the Vendor has completed the form by clicking the “Finalize and submit” button, as we said before, the RFQ changes its status to “Complete”, and the next page is shown:

**CA<sup>2</sup> CAPSONIC AUTOMOTIVE & AEROSPACE**  
A Capsonic Company

Wednesday, September 10, 2014

Thank you! Your information has been sent.

Capsonic Automotive & Aerospace, Inc. 2012  
LMD: 8/29/2014

- The vendor is able to open the RFQ already completed by clicking again the “Start quoting here” hyperlink from his/her mailbox. But this time, he/she won’t be able to make any change to the form because buttons for saving it become hidden:

You have already sent us your information, but you can see it as read only.

[Back](#)

☒ Quote ☐ No Quote

Comments to vendor:  
Comments to vendor.

Attachments from Buyer to Vendor:  
[delete-icon.png](#)



















Due Date 9/4/2014  
RFQ # 120522901RFQ00001  
Supplier Name Alfredo

New message here

No buttons for saving here anymore

## RFQ Summary

Upon completion of multiple RFQs for one component, we are ready to compare those quotations and select the best option for our need. To do so, go to the BOM screen where these RFQs are completed, and then open the RFQ Summary by clicking the following icon:

	Assigned To	Status	Component Part Number	Component Part Description/Material	UM	Cost	Qty Required	Purchasing Comments	Sales Comments	Purchasing Status
1	   Alfredo	In Progress	test	Description for Test	Each	240.72	12	Purchasing comments		Q
2	   Alfredo	In Progress	test	Description for Test	Each	0	15	Second component		E
	Created By	Drawing Rev	RFQ Number	Due Date	Status	Vendor	Last Sent To Vendor	Last Email		
  	Alfredo	X	110609302RFQ00055	3/6/2014	IN PROGRESS	Alfredo	7/3/2014 00:41:56			
  	Alfredo	X	110609302RFQ00056	3/6/2014	COMPLETED	Alfredo	3/9/2014 10:42:21	apacheco@capsonic.com		
  	Alfredo	x	110609302RFQ00057	3/6/2014	COMPLETED	Alfredo	7/3/2014 00:51:36			
  	Alfredo	A	110609302RFQ00059	9/3/2014	PENDING	Jesus Alfredo	3/9/2014 10:36:12	j.alfredo.pacheco@gmail.com		

And the next page will open:

Switch between  
distinct EAUs

The screenshot shows the 'RFQ Status' page in the Capsonic Aerospace system. At the top left, there are radio buttons to switch between distinct EAUs (2250 and 3000) and a 'Calendar Years' dropdown (2012, 2013, 2014, 2015). The top right header includes the Capsonic Automotive & Aerospace logo and company name. Below this, a metadata section displays fields like 'InquiryNumber: 110609302', 'Finished Good Description: Armature: 23080-372', 'SIF Program: This is a test program.', 'Component Part Number: test', and 'Component Material: Description for Test'. An 'EAU:' input field is also present, with an annotation 'Component quoted' pointing to it. The main table has four columns: 'IN PROGRESS', 'COMPLETED', 'COMPLETED', and 'CREATED'. Each column has a 'Supplier Name' hyperlink (Alfredo, Alfredo, Alfredo, Jesus Alfredo) and a list of cost components (Material, Material O/S, Scrap, Labor, Burden, Manufacturing Cost, SGA&A Profit, Packaging, Assembly Cost Per Unit, A Cost, B Cost, C Cost, Total Acquisition Cost, Estimated Annual Volume, Annual Purchase Cost, Production Tooling, Prototype Tooling, Cavitation, Material, UOM). Annotations include 'Calculated from RFQ' pointing to the cost rows, 'Input fields' pointing to the B Cost and C Cost rows, 'Calculated fields' pointing to the Total Acquisition Cost and Annual Purchase Cost rows, and 'Pulled from RFQ' pointing to the Production Tooling and Prototype Tooling rows. Below the table, there are input fields for 'PPAP Date', 'Initial Release Quantity', 'Initial Release Date', 'Pre-Build Quantity', and 'Pre-Build Date'. A 'Recommended Supplier' field is highlighted with an annotation 'Shows Vendor's name of RFQ Selected'. To the right, there are checkboxes for 'Purchasing', 'Engineering', 'Manufacturing', 'Quality', and 'Sales', each with a label 'All Recommendations' or 'All Concurrences'. A 'Notes' text area is at the bottom left, and a 'Save' button is at the bottom center.

- At the top left section we have a list of EAU with its corresponding Years. This will filter the RFQs for the EAU you select, thus you are able to compare those RFQs quoted in the same volume.
- In the header at the top right of the page, there is another EAU input text field, and the number you enter here, will replace the Estimated Annual Volume of each column, so that you can compare them over the same volume.
- We can drag and drop columns in order to sort them as we required. To persist the order, it is necessary to save the form with "Save" button.

To select one RFQ as the one we want to recommend to Sales, follow the next steps:

1. Click on the Supplier's name hyperlink located on the top of the column that represents the RFQ you want to set as "Selected".
2. The next popup will show up:

Do you wish to select this RFQ as a winner?

RFQ Number:	110609302RFQ00056
Supplier Name:	Alfredo
Inquiry Number:	110609302
Component Part Number:	test
Component Current Cost:	

New Cost from RFQ: 0

☐ Update Cost for this BOM Component

Select Cancel

- The dialog will ask you to confirm your selection.
- Optionally, we are able to update the Component's Cost by the one the vendor gave us thru the RFQ. Just click the checkbox.
- Finally click "Select" button to commit the changes or "Cancel" to close the dialog without making any update.

After selecting one RFQ as a winner, the column selected looks like so:

	DISMISSED	DISMISSED	SELECTED	DISMISSED	DISMISSED
Supplier Name	<a href="#">Alfredo</a>	<a href="#">Alfredo</a>	<a href="#">Alfredo</a>	<a href="#">Alfredo</a>	<a href="#">Jesus Alfredo</a>
Material	0	0	0	0	0
Material O/S	0	0	0	0	0
Scrap	0	0	0	0	0
Labor	0	0	0	0	0
Burden	0	0	0	0	0
Manufacturing Cost	0	0	0	0	0
SGA&A Profit	0	0	0	0	0
Packaging	0	0	0	0	0
Assembly Cost Per Unit	0	0	0	0	0
A Cost	0	0	0	0	0
B Cost	0	0	0	0	0
C Cost	0	0	0	0	0
Total Acquisition Cost	0.000	0.000	0.000	0.000	0.000
Estimated Annual Volume	0	0	0	0	0
Annual Purchase Cost	0.000	0.000	0.000	0.000	0.000
Production Tooling	0	0	0	0	0
Prototype Tooling	0	0	0	0	0
Cavitation					
Material					
UOM	Each				Each

- The status for the winner RFQ updates to "SELECTED".
- Status for the others changes to "DISMISSED".
- Just for RFQs where Vendors decided not to quote, the RFQ's Status will remain to "NO QUOTE".
- Every RFQ under that BOM Line we used to open this RFQ Summary page will update its status, including those ones out of the filter EAU we have in this page, for example:

Even though we selected an RFQ for EAU 2250, you can see that every RFQ on other EAUs are updated. Note that now this RFQ is "Dismissed" because other RFQ was "Selected".

EAU	Calendar Years
2250	2012,2013,2014
3000	2015

	DISMISSED
Supplier Name	<a href="#">Alfredo</a>
Material	0
Material O/S	0
Scrap	0
Labor	0
Burder	0
Manufacturing Cost	0
SGA&A Profit	0
Packaging	0
Assembly Cost Per Unit	0
A Cost	0
B Cost	0
C Cost	0
Total Acquisition Cost	0.000
Estimated Annual Volume	0
Annual Purchase Cost	0.000
Production Tooling	0
Prototype Tooling	0
Cavitation	
Material	
UOM	Each

## Suppliers

This is the catalog for suppliers from which we can add new vendors, remove them, update or just for consulting them.

Go to main menu, and click on “Suppliers” button. The first view we have is the list of all vendors stored:

Suppliers				
Show 10 entries			Search:	
Supplier Name	Contact Name	Contact Phone	Contact Email	
<a href="#">Ellsworth</a>	Diana Smith	915-772-0121	dsmith@ellsworth.com	<a href="#">Delete</a>
<a href="#">Empire Die Casting</a>	Jessie	330-467-0750	jessie.rapkin@empiredie.com	<a href="#">Delete</a>
<a href="#">Endicott Precision, Inc.</a>	Ronald Olivera ( send po quotes to him)	607-754-7076 X 108	roliveira@endicottprecision.com	<a href="#">Delete</a>
<a href="#">Entec Polymer LLC</a>	Maggie Bailey	800-225-1529	mbailey@entecresins.com	<a href="#">Delete</a>
<a href="#">ESSEX</a>	Gresley, Ingrid M	260.461.4740	Ingrid.Gresley@superioressex.com	<a href="#">Delete</a>
<a href="#">ESSEX - BROWNELL - Tubing</a>	Robert Tudor	678.429.3984 mobile	robert.tudor@spsx.com	<a href="#">Delete</a>
<a href="#">Essex Brownell - Magnet Wire</a>	Kevin Moore	260-449-1384	kevin.moore@spsx.com	<a href="#">Delete</a>
<a href="#">ESSEX GROUP INC</a>	Andy Garcia	915.772.6041 x 15	Mark.Arend@superioressex.com	<a href="#">Delete</a>
<a href="#">Essex Magnet Wire</a>	Patrick Palmer	915.726.0600	patrick.palmer@spsx.com	<a href="#">Delete</a>
<a href="#">EURO TRANCIAURA</a>	Wayne Johnson	630-670-9005	wayne.johnson@eurotranciatura.com	<a href="#">Delete</a>

Showing 121 to 130 of 443 entries

Previous Next

- This view shows the most important data about Suppliers.
- First column has hyperlinks as values, and they are used to open the Supplier form.
- The last column also has hyperlinks as values, but they are used to delete Suppliers.

## New Supplier

In order to add a new Supplier to the system, let's click the “New Supplier” button seen on the previous screenshot. The following form is shown:

**New Supplier**

Supplier Name \*

Manufacturing Location

Ship Location

Quoted Currency

Contact Name \*

Contact Phone Number \*

Contact Cell Phone

Contact Email \*

Capabilities

Comments

Commodity

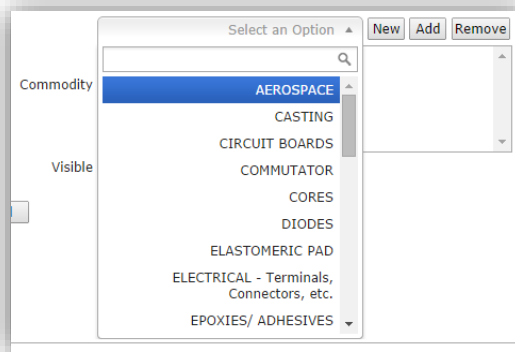
Select an Option

Commodity

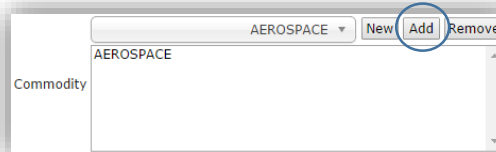
Visible ☐

Do not use anymore, for read-only purposes

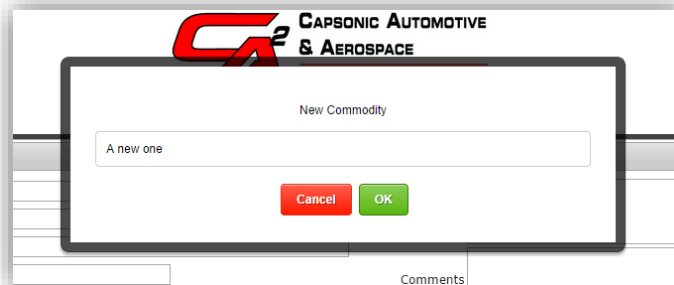
- Fields at the left, are the same that a vendor has to fill out when receiving an RFQ, and for them, a validation is applied so the vendor has to fill in required fields marked with a start (\*), but the buyer is able to leave these fields empty.
- There are two Commodity fields. The one that is indicated not to fill, it is because at the beginning of the project this was the original field, but further, we wanted to have multiple Commodities per Supplier, therefore, that field is going to disappear.
- Commodities are used to classified vendors, and we can use it by the moment we create RFQs from “New RFQ” screen, where vendors’ drop down are filtered by the commodity selected.
- For adding commodities to vendor do this:
  1. Select a commodity from the drop down:



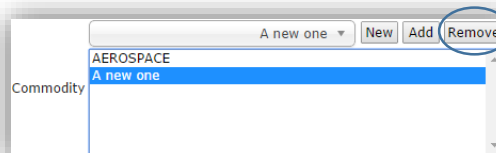
2. Then click "Add" button:



3. If the Commodity does not exist you can add a new one by pressing the "New" button, consecutively a popup will prompt you for the new Commodity:

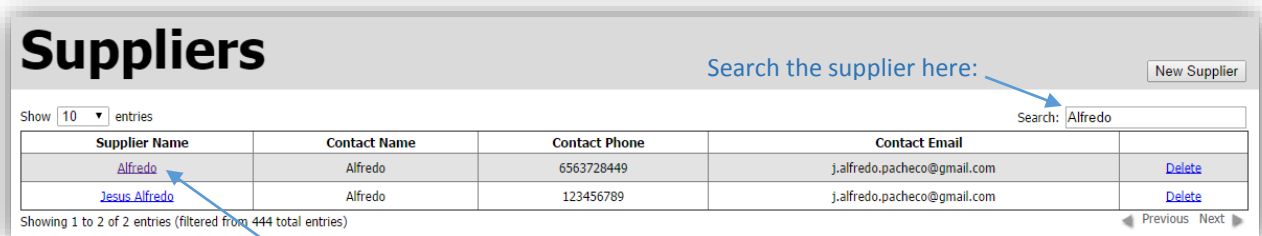


4. Now click "Add" button in order to add the new commodity recently created, as we explain in point 2.
5. For removing a commodity already added, first select it from the list, and then hit the "Remove" button:



## Update Supplier

1. Go to Supplier section in main menu.
2. Search for the supplier wanted to update, and then click on the hyperlink of the first column:





- The following page is displayed:

You can find two tabs: Supplier and Surveys:

- Do your convenient changes under Supplier tab, and then press “Save” button to persist it in database, or just click “Cancel” to reset the form with the original values, by restoring them from the database.

## Delete Supplier

- Open Supplier screen from main Menu.
- Look for the Supplier desired to be deleted.
- Click to “Delete” hyperlink.

- Confirm the popup to delete it, or cancel it to avoid removing the Supplier.

## Supplier Surveys

We can send Surveys to our Vendors in order to get information regarding of their business line and contact data.

### Send New Supplier Survey

- Go to Supplier section under main menu.
- Find the Supplier who you would like to send a new Survey.
- Open by clicking the hyperlink in first column:

4. Click to "Surveys" tab:

**Surveys > Alfredo** Button visible under Surveys tab

Supplier | Surveys

Show 10 entries Search:

Last Survey	Primary Business	Secondary Business	Contract Expiration	Sent To Vendor	
1/24/2014 1:01:53 PM	From survey			1/21/2014 4:07:09 PM	Delete

5. Click "Send new survey" button, the next popup will show up:

**Send New Survey**

Supplier Alfredo

Email

6. By default, current Supplier's vendor is loaded, but you are able to change it, uploading by this the original Supplier's record.
7. Click "Send" button to email the Survey to the vendor. Otherwise, hit "Cancel" to close the popup without making any change.

#### Survey Arrived to Vendor

When you send a new survey, the vendor will receives a similar email to:

Dear Potential Supplier,  
Please click the following link to fill out our supplier survey form. Please fill out as completely as possible. Once we have received your completed survey, a representative will contact you to discuss the next steps.

<http://b2b.capsonic.com/APQM/Vendor/Survey.aspx?token=CA49805FD6464F4ED585B243DA000A9C>

Thank you for your time. We look forward to hearing from you.

Sincerely,

The Capsonic Advanced Purchasing Team

So, the Vendor has to click that hyperlink in order to launch our web application.

This is similar to the process of filling out an RFQ, the first page is just to corroborate the basic Supplier information, and if something is outdated the vendor is able to update it:

If your information is correct click next, otherwise please update it.

Supplier Name \*

Manufacturing Location

Ship Location

Quoted Currency

Contact Name \*

Contact Phone Number \*

Contact Cell Phone

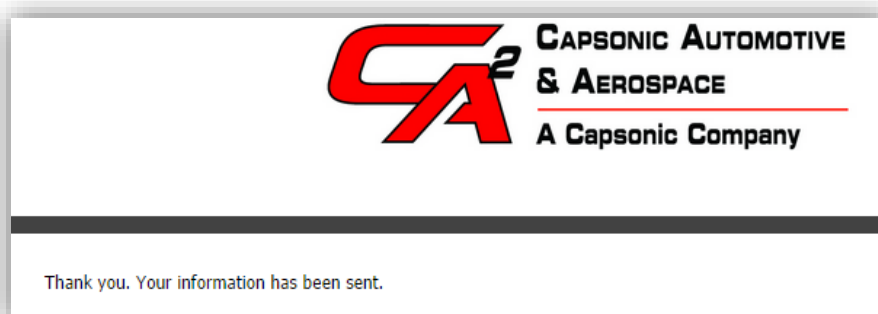
Contact Email \*

The next page is the Survey form required to complete:

Once your survey is ready to be sent, please click "Finalize and submit".

Mode Update ID 76	Supplier <b>Alfredo</b>	<input type="radio"/> Union (Y or N) <input type="radio"/> Yes <input type="radio"/> No Local <input type="text"/> Contract Expiration <input type="text"/>
Last Survey	Contact Person <b>Alfredo</b>	
NDA signed	Contact Phone <b>6563728449</b>	
RFQ Score		
Address <input type="text"/>	Primary Business <input type="text"/>	
City <input type="text"/>	Secondary Business <input type="text"/>	
State <input type="text"/>	Manufacturing Method <input type="text"/>	
Zip <input type="text"/>	Current Capacity <input type="text"/>	
Website <input type="text"/>		
Current Annual Sales <input type="text"/>	Tooling	
Year <input type="text"/> Value <input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>	<input type="checkbox"/> New-In-House Manufacture	
Forecast Sales <input type="text"/>	<input type="checkbox"/> New Outsourced	
	<input type="checkbox"/> Repair In-House	
	<input type="checkbox"/> Repair Outsource	
<input type="button" value="New industry"/> <input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="New"/>	<input type="button" value="new certification"/> <input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="New"/>	
Industries Supplied <input type="text"/>	Certifications <input type="text"/>	
Executive	Sales	
Name <input type="text"/>	Name <input type="text"/>	
Title <input type="text"/>	Title <input type="text"/>	
Address <input type="text"/>	Address <input type="text"/>	
Phone <input type="text"/>	Phone <input type="text"/>	
Cell <input type="text"/>	Cell <input type="text"/>	
Email <input type="text"/>	Email <input type="text"/>	
Quality	Customer Support	
Name <input type="text"/>	Name <input type="text"/>	
Title <input type="text"/>	Title <input type="text"/>	
Address <input type="text"/>	Address <input type="text"/>	
Phone <input type="text"/>	Phone <input type="text"/>	
Cell <input type="text"/>	Cell <input type="text"/>	
Email <input type="text"/>	Email <input type="text"/>	
After Hours Contact	Notes/Comments	
Name <input type="text"/>	<input type="text"/>	
Title <input type="text"/>		
Address <input type="text"/>		
Phone <input type="text"/>		
Cell <input type="text"/>		
Email <input type="text"/>		

And when the Vendor completes it, the next page is shown:



## Consult Supplier Surveys

1. Go to Supplier section thru the main menu.
2. Search for the vendor of which you want to consult their surveys.
3. Go to Surveys tab:

# Surveys > Alfredo

Send new survey

Supplier Surveys

Show 10 entries Search:

Last Survey	Primary Business	Secondary Business	Contract Expiration	Sent To Vendor	
<a href="#">1/24/2014 1:01:53 PM</a>	From survey			1/21/2014 4:07:09 PM	<a href="#">Delete</a>
<a href="#">9/10/2014 2:36:25 PM</a>	Primary Business	Secondary Business		1/24/2014 1:13:28 PM	<a href="#">Delete</a>
<a href="#">9/10/2014 2:37:01 PM</a>	Primary business		321	1/8/2014 10:15:29 AM	<a href="#">Delete</a>
<a href="#">9/10/2014 3:49:02 PM</a>				9/10/2014 2:37:21 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:05:31 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:06:24 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:06:35 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:17:39 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:19:15 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:21:38 PM	<a href="#">Delete</a>

Showing 1 to 10 of 10 entries Previous Next

- Values in first column are the date in which the Survey was completed and for uncompleted Surveys values are "Not filled yet".
  - "Sent To Vendor" column shows the date about when the Survey was created and sent by email to the vendor.
4. Use the hyperlink in "Last Survey" column in order to open it, the Survey will be opened in a dialog:

### Supplier Survey

Mode Update  
ID 72  
Last Survey 9/10/2014  
NDA signed  
RFQ Score

Supplier Alfredo  
Contact Person Alfredo  
Contact Phone 6563728449

Union (Y or N)  
☒ Yes ☐ No  
Local  
Contract Expiration

Address An address  
City A city  
State A state  
Zip A zip  
Website A website

Primary Business Primary Business  
Secondary Business Secondary Business  
Manufacturing Method Manufacturing method  
Current Capacity Current Capacity

Current Annual Sales  
Year Value + -  
Forecast Sales

Tooling  
New-In-House Manufacture ☐  
New Outsourced ☒  
Repair In-House ☐  
Repair Outsource ☒

Save Cancel

5. We can edit the survey by clicking the "Save" button, or close the dialog with "Cancel" button.

### Delete Supplier Survey

1. Go to Supplier section thru the main menu.
2. Search for the vendor of which you want to delete a survey.
3. Go to Surveys tab:

## Surveys > Alfredo

Send new survey

Supplier

Surveys

Show 10 entries

Search:

Last Survey	Primary Business	Secondary Business	Contract Expiration	Sent To Vendor	
<a href="#">1/24/2014 1:01:53 PM</a>	From survey			1/21/2014 4:07:09 PM	<a href="#">Delete</a>
<a href="#">9/10/2014 2:36:25 PM</a>	Primary Business	Secondary Business		1/24/2014 1:13:28 PM	<a href="#">Delete</a>
<a href="#">9/10/2014 2:37:01 PM</a>	Primary business		321	1/8/2014 10:15:29 AM	<a href="#">Delete</a>
<a href="#">9/10/2014 3:49:02 PM</a>				9/10/2014 2:37:21 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:05:31 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:06:24 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:06:35 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:17:39 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:19:15 PM	<a href="#">Delete</a>
<a href="#">Not filled yet</a>				1/24/2014 1:21:38 PM	<a href="#">Delete</a>

Showing 1 to 10 of 10 entries

PreviousNext

4. Click on "Delete" hyperlink on survey desired, and confirm the popup if you are sure to make it.

# Appendix

## Common Controls

This section describes common controls used in APQM web application.

### Data Table

Show a certain quantity of visible rows by page

We can filter the table by entering a value or multiple values separated by a space

Sort columns by clicking on headers

The screenshot shows a data table with columns: SIF, Assigned To, Inquiry Number, Revision, Priority, Sales Person, Customer, Added to APQM, Created In, BOM, and Progress. The table contains 10 rows of data. Annotations point to various controls: 'Show 10 entries' (rows per page), 'Search:' (filter), 'Assigned To' header (sorting), 'BOM' header (sorting), and 'Progress' (completion status). The bottom of the table shows 'Showing 1 to 10 of 279 entries' and 'Previous Next' navigation links.

SIF	Assigned To	Inquiry Number	Revision	Priority	Sales Person	Customer	Added to APQM	Created In	BOM	Progress
✖	Alfredo	120522901	A	II	Spencer Cable	Honeywell Aerospace		Sales DB	✖	Complete!
✖	Take	120406701	A	I	Sam Bullaro	Eaton		Sales DB	✖	0%
✖	Alfredo	120401937	A	II	Spencer Cable	Honeywell Aerospace		Sales DB	✖	8%
✖	Take	1201120341	A	III	S. Gutkowski	CA INTERNAL		Sales DB	✖	0%
✖	Take	120102321	A	III	S. Gutkowski	CA2 INTERNAL		Sales DB	✖	0%
✖	Take	120102301	A	III	S. Gutkowski	CA2 INTERNAL		Sales DB	✖	0%
✖	Alfredo	110609302	A	II	S. Gutkowski	Goodrich Aerospace		Sales DB	✖	50%
✖	Alfredo	110609301	A	II	S. Gutkowski	Goodrich Aerospace		Sales DB	✖	0%
✖	Martha	110328601	A	III	T. Zangler	Sears Manufacturing		Sales DB	✖	12%
✖	Take	120824701	A			SOGEFI Group		Sales DB	✖	0%

Showing 1 to 10 of 279 entries

Previous Next

### Chosen

We can filter the list by writing a criteria here

The screenshot shows a dropdown menu with a search bar at the top. The search bar contains the text 'Honeywell Aerospace'. Below the search bar, a list of items is displayed, including 'Gecom', 'GHSP', 'GKN', 'Goodrich Aerospace', 'Hitachi Automotive', 'Honda Lock', 'HONEYWELL', 'HONEYWELL AEROSAPCE', and 'Honeywell Aerospace'. The 'Gecom' item is highlighted in blue.

## Handsonatable

Cell focused looks like so

Headers are read-only, and unselectable

We can apply some validations rules

Rows are added automatically when the last one is used

Year	Volume
2012	150
2013	150
2014	150
	sdf

## Uploader

Click the button for opening the windows explorer dialog

We can also drop files in order to upload them

Zone for files already uploaded

Click the hyperlink to download the file

Click here to delete a file

Upload

Drag & Drop Files

other.PNG

test.jpeg

Delete

Delete

## Date Picker

Date To:

Click this icon to open the calendar

Navigate thru months

Click on one date to fill it in the text box

◀

September 2014

▶

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

## Alertify

Alertify is the way the system notifies the user when interacting with on the interface. There are four kind of messages:

### *Success Message:*

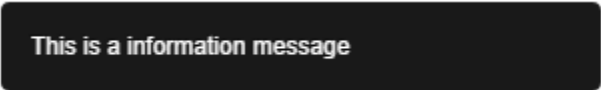
This message disappears automatically after 5 seconds. We can also dismiss it by clicking on it.

A green rectangular box with rounded corners containing the text "This is a success message".

This is a success message

### *Information Message:*

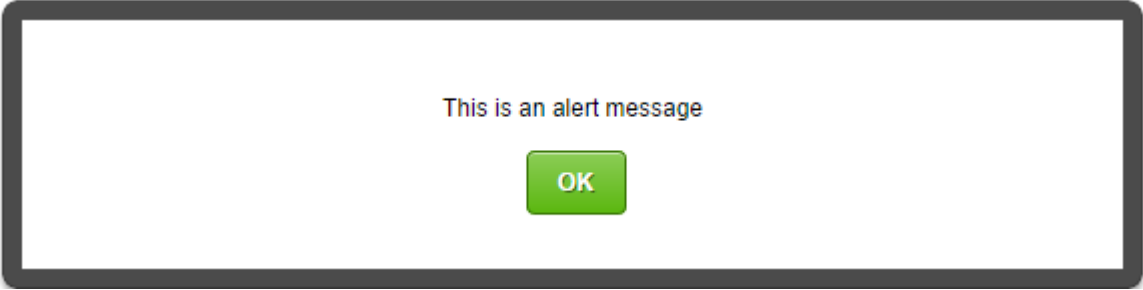
This message disappears automatically after 5 seconds. We can also dismiss it by clicking on it.

A dark gray rectangular box with rounded corners containing the text "This is a information message".

This is a information message

### *Alert Message*

Mostly used for displaying an error message. We have to click OK in order to dismiss it.

A white rectangular box with a thick dark gray border and rounded corners. It contains the text "This is an alert message" and a green "OK" button below it.

This is an alert message

OK