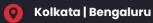# JOININGENDS

An Initiative by Joiningends Technologies Pvt Ltd

Proposal for

RFQ Management System

SOW

for Progressive Web Portal

Project Scope

VENDOR will provide the following web engine development services to CLIENT with the following functionalities:

The application will have the following workflow and functionalities (as detailed in Appendix A):

1. A new RFQ is received and the details of the same will be entered in the application along with all the technical drawings and specifications received from the client
   a) On clicking "New RFQ Request", first the client needs to be selected from a dropdown. If it does not exist, the user can create it right on that page in a pop up screen.
   b) Then there will be 2 options: "Existing Products", "New Products"
   c) When the Account Manager clicks on "New Products", the following fields will be presented: Part Name & No, Total Qty, Description, Drawing Ref No, Size, Material Specs
      o The user can add upto a maximum of 200 entries
      o For each of the parts, the user also needs to enter the Sub-part name, Qty per Assembly, Raw material type including the name and Qty per Assembly of various Bought Out materials.
      o The user will upload all the technical drawings received from the client.
   d) When the Account Manager clicks on "Existing Product" then they will be able to select the product from a dropdown.
      o Based on the product selected, the application will fetch the Ex-Factory cost= Labour Cost + Raw Material cost
      o Raw material cost will be calculated based on the latest Raw material and Scrap Cost as updated in the Settings page
      o All the other information related to the RFQ is also uploaded which includes the technical drawings

   e) Once the basic details are filled, then the Account Manager is presented with an option to "Approve" or "Disapprove" the RFQ.
      o If the Account Manager "Disapproves" the RFQ, then they have to state the reason (Capability, Volume, Material, Customer Background check and others) along with a Detailed Comment
      o If the Account Manager "Approves" the RFQ, then they have to select the plant to which they want to send the RFQ to
      o The same RFQ can be sent to multiple plants simultaneously
      o Once the request is sent, an email is triggered to the Plant Head about the New RFQ.

2. Hence forth, the RFQ is reviewed by the Plant Head and is accepted or rejected with comments- rejection can be based on Capability, Volume, Material, Customer Background check and others. An email notification is triggered in both scenarios to the respective individuals.

3. Once the plant manager approves the RFQ it is sent to the Plant Engineer, upon which there is another email notification
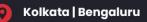
4. The Plant Engineer is presented with the Cost sheet for all the SKU's including the sub part details as filled by the Account Manager
   o The Plant Engineer will be required to fill the Yield Rate, BOM Cost/Kg, and Net Wt of Production (in kg) as well for the respective sub-parts
   o Based on the above information, net Raw Material cost will be calculated for each of the sub part
   o The Plant Engineer then fills out the various labour cost like Welding, Tapping etc. from a defined list of drop down options (configurable from the Settings page)
   o For each of the labour, the user has the option to either define it at the art level or across the parts along with a comment box to write down the formula used.
   o Finally the Assembly Cost, Packaging Cost, Tooling Cost per Kg is input to determine the Ex-Factory Cost
   o This cost sheet is now sent to the Plant Head, and an email notification is sent.

5. The Plant Head can edit the cost entered by the Plant Engineer and make changes as required.
   o The Plant Head will also add the Factory Over Head to come up with the Total Factory cost
   o The Cost Sheet is now submitted and is sent to the Account Manager at the HO
   o If the Plant Head wants to edit after submitting the cost sheet, then a request can be made to the Admin who can give edit access to the Cost Sheet again. An email notification is triggered in this scenario

6. Once the final cost sheet is sent to the Commercial Team, then the following additions are made to come up with final Selling Price
   o Freight Cost
   o Insurance Cost
   o Margin

7. The final cost including the tooling cost (per sub part) is now sent to the commercial Head for review
   o The commercial head will have edit access to make changes to come up with the final quotation to be sent to the client

8. The price is finally sent over to the customer. Customer can approve or reject the proposal either based on technical grounds or commercial grounds
   - There will be a "Revision" button, clicking which the Account Manager will be presented with a prompt "Do you want to send the proposal to the Plant Head for review?"
   - If the user clicks "Yes", then the relevant part of Cost sheet is sent to the Plant Head for revisions along with email notifications
   - If user clicks "No", then the Account Manager is able to edit the overhead cost on top of the Ex-Factory Cost.
   - Versions will be maintained to keep track of it.

9. Once the customer finally accepts it, then the final price is updated in the application along with comments.
   o The Account Manager will have an option to either selects some or all of the SKU's before closing the RFQ.
   o Once user clicks on Submit, if none of the SKU's are selected then a warning message will be given before the RFQ is closed along with comments
   o If the Account Manger has done any mistake in selecting a SKU before closing the RFQ, a request can be made to the admin to give edit access again.

10. At each RFQ level, there will be a configurable setting that allows user to set the email notification days

11. The application will have the following users each with a different set of view and functionalities:
   - Admin
   - Account Manager
   - Plant Head
   - Plant Engineer
   - Commercial Team
   - Commercial Approver (Manager)

12. Several reports will be available in the application:
   - Turn Around Time- RFQ to Quote and Quote to PO
   - Open RFQ report
   - Hit Rate: RFQ to quotation and Quotation to PO
   - List of rejected RFQ
   - Total production: Product Category wise, Process Category wise, Plant wise

   Note: A sample report format will be shared by the CLIENT for all the reports.