

# **eRFX System**

## **Business Process Documentation**

### **User Agreement & Acknowledgment**

**Version:**

1.0

**Date:**

September  
2025

# Section 1: Executive Summary

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## Purpose of eRFX System

The eRFX System is an electronic Request for Quotation platform designed to streamline and digitize the procurement process for Thai Union Group. This system replaces manual paper-based processes with an efficient, transparent, and auditable digital workflow.

## Vision & Mission

**Vision:** To become the standard procurement platform that enables efficient, transparent, and compliant purchasing processes across Thai Union Group.

**Mission:** To provide a user-friendly, secure, and efficient digital platform that reduces procurement cycle time, ensures compliance, and delivers cost savings through competitive bidding.

## Key Performance Indicators

- 60% faster procurement cycle time
- 30% cost reduction through competitive bidding
- 100% compliance with procurement policies

## Section 2: Business Model

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### Key Partners

- Suppliers and vendors
- Internal departments
- IT support team
- Compliance team

### Key Activities

- RFQ creation and management
- Supplier evaluation
- Quotation analysis
- Approval workflow

### Key Resources

- Technical infrastructure
- Trained personnel
- Supplier database
- Historical data

### Value Propositions

- Faster procurement cycle
- Transparent bidding process
- Cost savings
- Complete audit trail

### Customer Relationships

- Self-service platform
- Training and support
- Regular feedback
- Continuous improvement

## **Channels**

- Web application
- Email notifications
- System dashboards
- Reports and analytics

## **Customer Segments**

- Requesters
- Approvers
- Purchasing team
- Suppliers

## **Cost Structure**

- System development
- Infrastructure costs
- Training expenses
- Maintenance and support

## **Revenue Streams**

- Cost savings from efficiency
- Better negotiated prices
- Reduced manual errors
- Time savings

## Section 3: Data Classification & Handling

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### 3.1 Data Classification Levels

Classification	Description	Examples	Handling Requirements
<b>Confidential</b>	Highly sensitive business information	<ul style="list-style-type: none"><li>• Supplier quotation prices</li><li>• Winner selection reasons</li><li>• Special terms &amp; conditions</li><li>• Competitive analysis</li><li>• Negotiation strategies</li></ul>	<ul style="list-style-type: none"><li>• Need-to-know basis only</li><li>• No external sharing</li><li>• Encrypted storage required</li></ul>
<b>Internal</b>	Internal business operations data	<ul style="list-style-type: none"><li>• RFQ information</li><li>• Supplier lists</li><li>• Q&amp;A messages</li><li>• Approval workflows</li><li>• Supplier evaluation notes</li><li>• Internal reports</li></ul>	<ul style="list-style-type: none"><li>• Thai Union employees only</li><li>• No public disclosure</li><li>• Standard security controls</li></ul>
<b>Restricted</b>	Sensitive personal or financial data	<ul style="list-style-type: none"><li>• Personal data (PDPA)</li><li>• Supplier financial documents</li><li>• Bank account details</li><li>• Credit information</li></ul>	<ul style="list-style-type: none"><li>• Authorized personnel only</li><li>• Audit trail required</li><li>• Compliance with PDPA</li></ul>

Classification	Description	Examples	Handling Requirements
<b>Public</b>	Information approved for public release	<ul style="list-style-type: none"> <li>• General company policies</li> <li>• Public announcements</li> <li>• Product categories</li> <li>• Contact information</li> </ul>	<ul style="list-style-type: none"> <li>• Can be shared externally</li> <li>• No special restrictions</li> <li>• Standard handling</li> </ul>

### 3.2 Data Handling Guidelines

- All users must classify data appropriately before sharing or storing
- Follow the principle of least privilege for data access
- Report any suspected data breaches immediately
- Do not store sensitive data on personal devices
- Use secure channels for transmitting Confidential or Restricted data

### 3.3 System Access Levels

Role	Data Access Level
ADMIN	Full access to system configuration and user data
REQUESTER	Access to own RFQs and related information
APPROVER	Access to RFQs within approval scope
PURCHASING	Access to approved RFQs and supplier information
PURCHASING APPROVER	Access to all RFQs requiring final approval

Role	Data Access Level
SUPPLIER	Access to assigned RFQs and own quotations only
MANAGING DIRECTOR	Read-only access to all reports and dashboards

## Section 4: User Roles & Responsibilities

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### 4.1 Role Matrix

Role	Primary Responsibilities	SLA (Days)
ADMIN	User management, Exchange rates configuration	N/A
REQUESTER	Create RFQ, Track status, Respond to feedback	1
APPROVER	Review and approve RFQ requests	2
PURCHASING	Manage suppliers, Process approved RFQs, Handle Q&A	2
PURCHASING APPROVER	Final approval of purchasing decisions, Supplier registration approval	1
SUPPLIER	Submit quotations, Respond to RFQs, Ask questions	3
MANAGING DIRECTOR	View dashboards and reports only	N/A

### 4.2 Role Restrictions

- REQUESTER cannot be APPROVER for the same RFQ
- REQUESTER cannot be PURCHASING
- PURCHASING can be REQUESTER (create own RFQ)
- Maximum 3 approval levels
- 1 user = Primary Role + Secondary Role (switchable)



## Section 5: Business Process Workflows

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### 5.1 Complete RFQ Lifecycle

1. **RFQ Creation:** Requester creates and submits RFQ
2. **Approval Process:** RFQ goes through approval levels (max 3 levels)
3. **Purchasing Review:** Purchasing team processes approved RFQ
4. **Supplier Invitation:** Selected suppliers receive RFQ
5. **Quotation Submission:** Suppliers submit their quotations
6. **Q&A Process:** Suppliers can ask questions, Purchasing responds
7. **Winner Selection:** Purchasing selects winners
8. **Final Approval:** Purchasing Approver validates selection
9. **Completion:** Best quotation selected and RFQ completed

### 5.2 Status Flow

Status	Description
Save Draft	Saved but not submitted (auto-delete after 3 days)
Pending	Awaiting approval
Declined	Returned for revision
Rejected	Request denied
Completed	Process finished
Re-bid	New bidding round requested by Purchasing Approver

### 5.3 Supplier Registration Process (2-Step Approval)

#### Step 1: Initial Review by PURCHASING

- Review supplier documents and information

- Accept → Send to PURCHASING APPROVER
- Declined → Return to Supplier for corrections

### **Step 2: Final Approval by PURCHASING APPROVER**

- Final review of supplier registration
- Accept → Completed, send invitation emails
- Declined → Return to PURCHASING for review

## **5.4 Re-bid Process**

1. PURCHASING APPROVER determines need for re-bid
2. Request sent back to PURCHASING
3. PURCHASING invites additional suppliers or extends deadline
4. New quotation round begins
5. Process continues from quotation submission

## **5.5 Q&A Process**

1. Supplier submits question through system
2. Question status changes to "Awaiting"
3. PURCHASING receives notification
4. PURCHASING responds to question
5. Response status changes to "Responded"
6. Supplier receives notification of response

## Section 6: Business Rules & Policies

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### 6.1 General Rules

- All RFQs must have minimum 1 item
- RFQ Number Format: {CompanyShortName}-{YY}-{MM}-{XXXX} (Example: SKF-25-01-0001, resets monthly)
- Draft RFQs are automatically deleted after 3 days
- Quotations must be submitted before deadline
- All transactions are logged for audit purposes
- Exchange rates are locked at Submission Deadline

### 6.2 Approval Hierarchy

- **Level 1:** Department Head/Supervisor
- **Level 2:** Division Manager
- **Level 3:** Senior Management

### 6.3 Supplier Selection Criteria

- Must have complete registration documents
- Active status in the system
- No outstanding compliance issues
- Relevant product/service categories
- Can have multiple contacts but must have one primary contact

### 6.4 Date & Time Rules

- **Required Quotation Date:** Expected date to receive quotations
- **Submission Deadline:** Must be less than or equal to Required Quotation Date
- **Extension/Reduction:** Can be modified with reason

### 6.5 Document Requirements

#### Corporate Entity (5 specific documents):

- Company Registration Certificate
- Tax Registration (P.P.20)

- Financial Reports
- Company Profile
- NDA (Non-Disclosure Agreement)

#### Individual (2 specific documents):

- National ID Card
- NDA (Non-Disclosure Agreement)

## 6.6 Exchange Rate Lock Rule

### Key Points:

- **Lock Time:** Exchange rates are locked at Submission Deadline
- **Rate Source:** Uses active rate as of Submission Deadline
- **Comparison:** Compare prices using ConvertedPrice (not original)
- **Ranking:** Always rank by converted price
- **Display:** Show both original and converted prices
- **Immutable:** Locked rates never change, even with new rate updates

### Benefits:

- Fair comparison (everyone uses same rate)
- Transparent (see both original and converted)
- Predictable (Supplier knows deadline and rate lock)
- Auditable (history of rate locks)

## 6.7 Winner Selection Rules

- **System Auto-highlight:**
  - Purchase RFQ: Lowest price highlighted
  - Sales RFQ: Highest price highlighted
- **Manual Override:** If selecting different from system highlight, reason must be provided
- **Selection Requirement:** Must select 1 winner per item
- **Final Approval:** PURCHASING APPROVER can change selection with reason

## 6.8 Optional Fields for Suppliers

PURCHASING can require suppliers to provide:

- MOQ (Minimum Order Quantity)
- DLT (Delivery Lead Time)
- Credit Terms
- Warranty Period
- Inco Terms

## Section 7: Service Level Agreements

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### 7.1 Response Time Requirements

Role	Action Required	SLA (Days)
REQUESTER	Revise returned RFQ	1
APPROVER	Approve/Decline/Reject	2
PURCHASING	Process approved RFQ	2
PURCHASING APPROVER	Final approval	1
SUPPLIER	Submit quotation	3

### 7.2 Notification Rules (Internal Users)

#### Notification Rules Matrix:

RFQ Holder Role	Recipients
REQUESTER	Self + Approver Supervisor
APPROVER	Self + Requester
PURCHASING	Self + Requester + Purchasing Supervisor
PURCHASING APPROVER	Self + Requester + Purchasing

#### Notification Rules:

- Reminder every 2 days if no action taken
- Status Display: ONTIME (green) vs DELAY (red)

## 7.3 Supplier Rules & Notifications

### Rules:

- Can change decision before deadline (from "Not Participating" to "Participating")
- Can modify quotation until deadline
- Multiple contacts allowed, but only the one who accepts becomes responsible
- System auto-declines if no response by Required Quotation Date

### Notifications:

- 2 days: Reminder if no action
- 24 hours: Alert before deadline
- Auto-decline if no response by deadline

## 7.4 Ontime/Delay Status System

**IMPORTANT:** Status shows per role perspective

### Example Timeline:

- **Day 0:** Requester → Approver (start counting)
- **Day 3:** Approver approved (late 1 day) → Purchasing
  - Approver view: **DELAY** (exceeded 2 days)
  - Purchasing view: **ONTIME** (just received)

## 7.5 Two-Step Approval Process

Process	Step 1	Step 2	Total Time
Supplier Registration	PURCHASING (1 day)	PURCHASING APPROVER (1 day)	2 days

Process	Step 1	Step 2	Total Time
Winner Selection	PURCHASING selects	PURCHASING APPROVER approves	1 day

## 7.6 Re-bid Process Timeline

- PURCHASING APPROVER decision: 1 day
- PURCHASING re-invite suppliers: 2 days
- New quotation period: As defined by PURCHASING



## Section 8: Data Privacy & Security

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### 8.1 Security Measures

Component	Implementation
Authentication	JWT Token based authentication
Password Policy	Minimum 8 characters with complexity requirements
Data Encryption	TLS 1.3 for transmission, AES-256 for storage
Session Management	Auto-logout after 30 minutes of inactivity

### 8.2 Data Retention Policy

Data Type	Retention Period
Completed RFQs	5 years for audit
User Activity Logs	1 year
System Error Logs	90 days
Email/Notifications	90 days

### 8.3 Privacy Policy

- All data is confidential and proprietary to Thai Union Group
- User access is logged and monitored
- Personal data is protected according to PDPA regulations
- No sharing of credentials is permitted

## Section 9: System Usage Terms & Conditions

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### Acceptable Use Policy

- System must be used for authorized business purposes only
- Users must maintain confidentiality of login credentials
- Accurate and truthful information must be provided
- Comply with all company policies and procedures

### User Responsibilities

- Complete required training before system access
- Report any security incidents immediately
- Maintain data accuracy and completeness
- Follow SLA requirements for assigned role

### Prohibited Activities

- Unauthorized access attempts
- Sharing login credentials
- Manipulation of data or processes
- Circumventing approval workflows
- Using system for personal gain

### Violation Consequences

- First violation: Written warning
- Second violation: Temporary suspension
- Third violation: Permanent revocation of access
- Serious violations may result in termination

## Section 10: Change Management Process

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### 10.1 Change Request Categories

Category	Description	Examples	Approval Level	Timeline
Critical	Security patches, compliance updates	<ul style="list-style-type: none"><li>• PDPA compliance</li><li>• Security vulnerabilities</li><li>• Legal requirements</li></ul>	IT Manager + Business Owner	24-48 hours
Major	New features, workflow changes	<ul style="list-style-type: none"><li>• New approval levels</li><li>• Additional role types</li><li>• Process modifications</li></ul>	Steering Committee	2-4 weeks
Minor	UI improvements, report updates	<ul style="list-style-type: none"><li>• Dashboard changes</li><li>• New report formats</li><li>• Field additions</li></ul>	Business Owner	1-2 weeks
Standard	Configuration changes	<ul style="list-style-type: none"><li>• Email templates</li><li>• Notification settings</li><li>• Display preferences</li></ul>	System Admin	3-5 days

## 10.2 Change Implementation Phases

### Phase 1: Request & Assessment (Day 1-3)

- **Submit Request:** User submits change request via ticketing system
- **Initial Review:** IT team validates technical feasibility
- **Impact Analysis:** Assess affected users, systems, and processes
- **Risk Assessment:** Identify potential risks and mitigation plans

### Phase 2: Approval & Planning (Day 4-7)

- **Business Justification:** Document benefits and ROI
- **Stakeholder Review:** Gather feedback from affected departments
- **Approval Decision:** Obtain required approvals based on category
- **Implementation Plan:** Create detailed rollout schedule

### Phase 3: Development & Testing (Variable)

- **Development:** Make changes in development environment
- **Testing:** UAT with selected users
- **Documentation:** Update user guides and training materials
- **Sign-off:** Obtain user acceptance

### Phase 4: Deployment & Monitor (Day of Release + 7 days)

- **Communication:** Announce changes to all users
- **Deployment:** Release to production environment
- **Monitoring:** Track system performance and user feedback
- **Post-Implementation Review:** Evaluate success after 7 days

## 10.3 Special Change Scenarios

### Deadline Extension/Reduction:

- PURCHASING can request with reason
- Notifications sent to all affected suppliers
- Must not exceed Required Quotation Date

### Re-bid Approval:

- PURCHASING APPROVER initiates
- Returns to PURCHASING for new round
- All previous quotations archived

### Supplier Registration Revision:

- Can be requested at either approval step
- Supplier notified with specific requirements
- Resubmission starts approval process again

## 10.4 Communication Matrix

Stakeholder	When to Notify	Method	Content
All Users	7 days before major change	Email + System Banner	What's changing, when, and why
Affected Departments	14 days before	Department Meeting	Detailed impact and training schedule
Key Users	21 days before	Workshop	Preview and feedback session
Management	Monthly	Report	Change summary and metrics

## Section 11: Training & Support Structure

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### 11.1 Training Program Levels

Level	Target Audience	Duration	Format	Content
Foundation	All New Users	2 hours	Online + Quiz	<ul style="list-style-type: none"><li>• System overview</li><li>• Basic navigation</li><li>• Security awareness</li><li>• Data classification</li></ul>
Role-Specific	Based on assigned role	3-4 hours	Classroom	<ul style="list-style-type: none"><li>• Role workflows</li><li>• SLA requirements</li><li>• Common scenarios</li><li>• Best practices</li></ul>
Advanced	Power Users	1 day	Workshop	<ul style="list-style-type: none"><li>• Complex workflows</li><li>• Reports &amp; analytics</li><li>• Troubleshooting</li><li>• Tips &amp; tricks</li></ul>

Level	Target Audience	Duration	Format	Content
Admin	System Administrators	2 days	Hands-on Lab	<ul style="list-style-type: none"> <li>• User management</li> <li>• Configuration</li> <li>• Monitoring</li> <li>• Maintenance</li> </ul>

## 11.2 Role-Specific Training Topics

### PURCHASING Training:

- 2-step Supplier approval process
- Winner selection with justification
- Managing Q&A with Suppliers
- Re-bid scenarios and procedures
- Optional fields configuration
- Deadline modification process

### SUPPLIER Training:

- Multi-contact management
- Changing participation decision
- Q&A feature usage
- Quotation modification before deadline
- Understanding exchange rate locks
- Document upload requirements

## 11.3 Training Schedule Matrix

User Type	Onboarding	Refresher	Updates	Certification
REQUESTER	Day 1-2	Every 6 months	As needed	Annual

User Type	Onboarding	Refresher	Updates	Certification
APPROVER	Day 1-2	Every 6 months	As needed	Annual
PURCHASING	Week 1	Quarterly	Monthly briefing	Annual
SUPPLIER	Before first RFQ	On request	Email updates	Not required

## 11.4 Support Channels

### Level 1: Self-Service Portal

- **Available:** 24/7
- **Response:** Immediate
- **Resources:**
  - FAQs and knowledge base
  - Video tutorials
  - User guides (PDF)
  - Common error solutions

### Level 2: Help Desk

- **Available:** Monday-Friday, 08:00-18:00
- **Response:** Within 4 hours
- **Contact:** [erfx.support@bizdimension.com](mailto:erfx.support@bizdimension.com) or ext. 1234
- **Handles:**
  - Password resets
  - Access issues
  - Basic troubleshooting
  - Training requests



### Level 3: Business Support Team

- **Available:** Monday-Friday, 09:00-17:00
- **Response:** Within 1 business day
- **Handles:**
  - Process clarifications
  - Workflow issues
  - Business rule questions
  - Change requests

### Level 4: Technical Team

- **Available:** Escalation only
- **Response:** Based on priority
- **Handles:**
  - System errors
  - Performance issues
  - Integration problems
  - Critical incidents

## 11.5 Issue Escalation Matrix

Priority	Definition	Examples	Response Time	Resolution Time
P1 - Critical	System down, major function unavailable	<ul style="list-style-type: none"><li>• Cannot login</li><li>• Cannot submit RFQ</li><li>• Data loss</li></ul>	30 minutes	4 hours

Priority	Definition	Examples	Response Time	Resolution Time
P2 - High	Significant impact on operations	<ul style="list-style-type: none"> <li>• Reports not generating</li> <li>• Notifications not sending</li> <li>• Slow performance</li> </ul>	2 hours	8 hours
P3 - Medium	Limited impact, workaround available	<ul style="list-style-type: none"> <li>• UI issues</li> <li>• Non-critical features</li> <li>• Training needs</li> </ul>	4 hours	2 days
P4 - Low	Minor issues, enhancements	<ul style="list-style-type: none"> <li>• Cosmetic issues</li> <li>• Feature requests</li> <li>• General inquiries</li> </ul>	1 day	5 days

## 11.6 Knowledge Resources

Resource Type	Location	Update Frequency	Owner
User Manual	SharePoint/eRFX/Docs	Quarterly	Business Team
Quick Reference Cards	System Help Menu	As needed	Training Team
Video Tutorials	Learning Portal	Bi-annual	Training Team

Resource Type	Location	Update Frequency	Owner
FAQs	Support Portal	Monthly	Help Desk
Release Notes	Email + Portal	Per release	IT Team

## Section 12: Dashboard & Real-time Monitoring

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### 12.1 Dashboard Components by Role

#### REQUESTER Dashboard

- **Status Overview:** Total, Save Draft, Pending, Declined, Rejected, Completed
- **Urgent Items:** 5 RFQs approaching deadline this week
- **Notifications:** Draft expiry warnings, status updates
- **Date Range Filter:** Filter by creation date

#### APPROVER Dashboard

- **Status Overview:** Total, Pending
- **Urgent Items:** 5 RFQs approaching review deadline
- **Notifications:** New approvals required

#### PURCHASING Dashboard

- **Status Overview:** Total, Pending, Declined, Rejected, Completed
- **Supplier Activity:** 5 suppliers participating this week
- **New Registrations:** 5 latest supplier registrations
- **Q&A:** 5 unanswered questions from suppliers
- **Notifications:** Real-time updates

#### SUPPLIER Dashboard

- **Invitation Status:** Not Responded, Participating, Declined
- **Active RFQs:** 5 invitations to participate
- **Deadlines:** 5 quotations approaching deadline
- **Q&A:** Latest responses from purchasing

#### PURCHASING APPROVER Dashboard

- **Supplier Quotations:** Total, Pending, Declined, Rejected, Completed
- **Weekly Activity:** 5 suppliers submitted this week
- **New Registrations:** 5 latest supplier registrations
- **Notifications:** Approvals required

## 12.2 Real-time Update Indicators

- Just now
- 4 hours ago
- Yesterday
- This week

## 12.3 Notification Format

Icon + {RFQ Number} + {Project Name} + {Sender} + {Action} + {Status} + {Time}

Example:        SKF-25-01-0001 Office Supplies John Smith  
submitted for approval - 3 hours ago

## 12.4 KPI Tracking

Metric	Target	Measurement
Average Approval Time	< 2 days	Time from submission to approval
Supplier Participation Rate	> 70%	Accepted invitations / Total invitations
On-time Completion Rate	> 90%	Completed within SLA / Total completed
Re-bid Rate	< 10%	Re-bid requests / Total RFQs

## Section 13: User Acknowledgment & Sign-off

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### Declaration

Please check the boxes below to confirm that you have read and understood all requirements:

- ☐ I have read and understood this Business Process Documentation
- ☐ I accept all terms and conditions of the eRFX system
- ☐ I will comply with the Service Level Agreement for my assigned role
- ☐ I understand the notification rules and Ontime/Delay Status system
- ☐ I understand the 2-step Supplier approval process
- ☐ I understand the winner selection rules and justification requirements
- ☐ I understand the Re-bid process and procedures
- ☐ I understand the Q&A process between Suppliers and Purchasing
- ☐ I understand the exchange rate lock mechanism
- ☐ I will maintain confidentiality of information
- ☐ I will not share my login credentials with others
- ☐ I will immediately report any security issues
- ☐ I understand the consequences of violating usage terms

**By signing below, I acknowledge that I have read, understood, and agree to comply with all terms, conditions, policies, and procedures outlined in this eRFX System Business Process Documentation.**

**Employee - Thai Union Group**

Name: \_\_\_\_\_

Employee ID: \_\_\_\_\_

Department: \_\_\_\_\_

Position: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Employee - Biz Dimension**

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Employee - IT Biz Dimension**

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**For Office Use Only**

- ☐ User Account Created: ☐ Yes ☐ No
- ☐ Training Completed: ☐ Yes ☐ No
- ☐ System Access Granted: ☐ Yes ☐ No

Processed by: \_\_\_\_\_

Date: \_\_\_\_\_

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