Endress+Hauser
People for Process Automation

Request for Quotation on Endress+Hauser Supplier Portal Provided by JAGGAER

People for Process Automation

Version: 3.2
Date: 2021-10-12

Table of Contents

1 General information ... 3
2 Endress+Hauser platform ... 4
3 Overview of the RFQ process ... 5
3.1 Types of RFQs ... 5
4 Information about RFQs & overview ... 6
5 RFQ and your quotation ... 8
5.1 First page of RFQ ... 8
5.2 Documents ... 9
5.3 General conditions ... 10
5.4 Quote ... 11
5.4.1 Position overview ... 11
5.4.2 Position details (to be filled in) ... 12
5.5 Send back ... 16
6 Further functions ... 18
6.1 Messages ... 18
6.2 Declining and other options ... 19
6.3 User settings ... 20

1 General information

Please note that the English version is considered as the master document.

2 Endress+Hauser platform

Endress+Hauser is using the Jaggaer platform with its suppliers as a supplier relationship management tool, for document exchange purposes, automatic purchase order management, requests for quotation and much more.

The link for the platform is:

https://app11.jaggaer.com/portal/eh

The portal is available in English, German and Chinese (only main functions); you can select the language on the top left.

We suggest you use Google Chrome as a browser for the platform; our experience shows Chrome is faster and some functions are easier.

3 Overview of the RFQ process

RFQ – Request for quotation – are all requests to suppliers in cases where Endress+Hauser requires a price quote for one or more items or services.

3.1 Types of RFQs

There are different types of RFQs, the most common ones are RFQs for…

- …a serial part where we are considering a new or additional supplier
- …new development part
- …quantity / time contract
- …benchmarking, especially for a new supplier, in order to understand their price level and core competences
- …changes to running parts
- …others

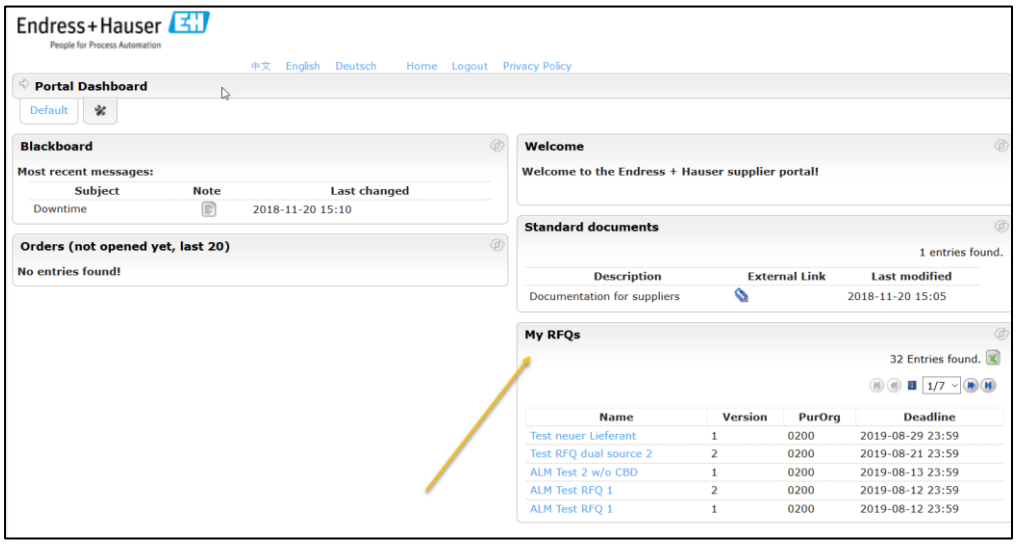
Up until now, most of the RFQ were sent out by e-mail. In future you will get RFQs via the Jaggaer platform where possible.

4 Information about RFQs & overview

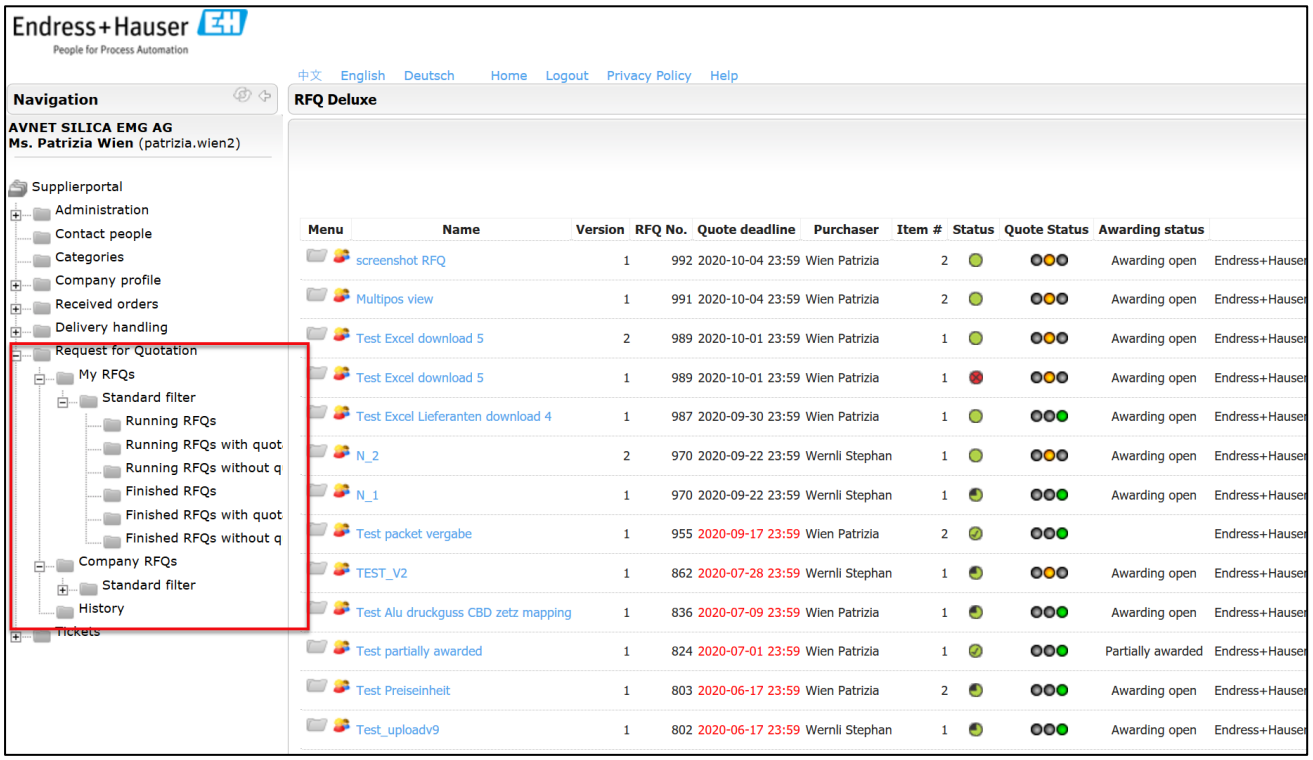
An e-mail will inform you about an invitation for an RFQ from Endress+Hauser. With the e-mail you will receive a link to access the RFQ directly. It will also be available on your platform if you log in.

Example of invitation e-mail

Example of the Dashboard



The RFQ will be visible on your portal homepage if Endress+Hauser has sent the request to your e-mail (or the e-mail address of this Jaggaer user). If you are looking for an RFQ sent to somebody else in your company, go to the “company RFQs” tab in the navigation (see next screenshot).



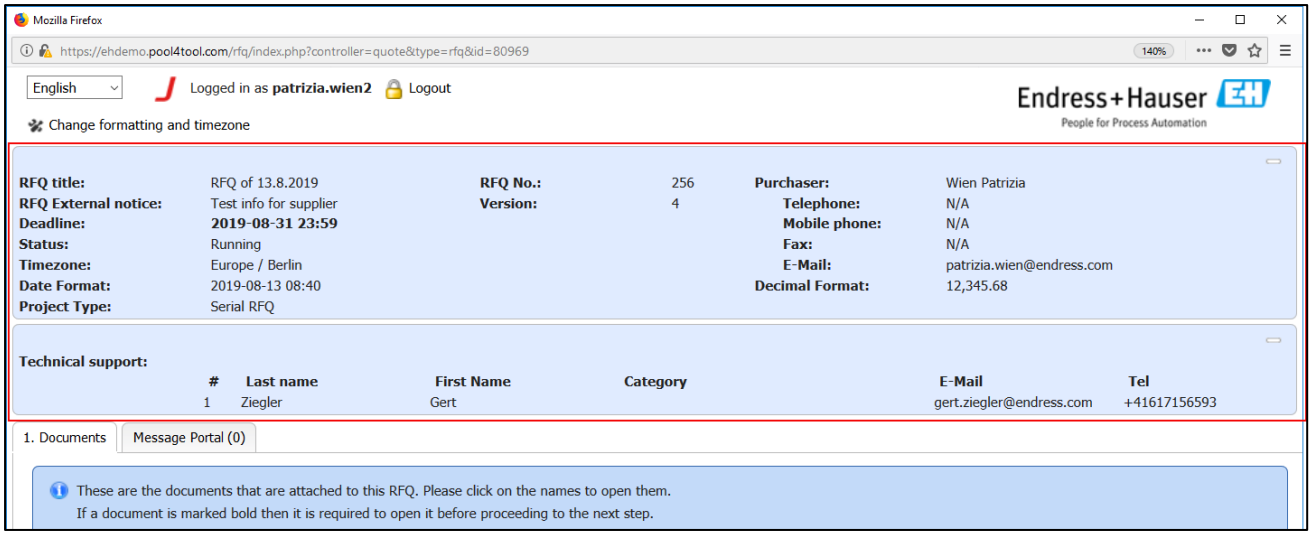
The “awarding status” column (either my RFQs or company RFQs) displays information Endress+Hauser’s decision regarding the quotations. It will indicate one of the following statuses:

- **fully awarded** – all parts are awarded to your company
- **partially awarded** – some of the business is awarded to your company (details in the awarding e-mail)
- **not awarded** – none of the business is awarded (Endress+Hauser has decided for another offer)
- **awarding open** – decision not yet finalized

5 RFQ and your quotation

5.1 First page of RFQ

If you open the RFQ you will find general information at the top.



RFQ title: Name of RFQ

External notes: Additional information about RFQ / project (if any)

Deadline: It is possible to send your feedback (quote) to Endress+Hauser until this date

If the deadline has passed, it is no longer possible to submit a quotation – you will need to contact an Endress+Hauser purchase contact person to request a deadline extension.

Status: Status of RFQ - “running” is the status where you can send quotes

Time information (zone and format)

RFQ type: This gives information on what kind of RFQ we have sent to you.

- **RFQ for serial parts** = the RFQ is for serial parts, where we are considering a dual source, transfer or similar. Parts will run in the given quantities from the beginning. In this case, it is difficult to change the design.
- **RFQ for contract** = a price request for a quantity or yearly contract
- **RFQ for a development project** = parts which Endress+Hauser is developing, technical feedback is very important, there might be an additional round with changed designs. It will take longer until the part is running at full quantity. However, the design can be adjusted more easily. The given RFQ quantity is an estimate at this stage and will be easier to specify once the part is fully running in serial phase.

- **Feasibility / Reference price request** = parts / design ideas where we are not sure if it is feasible, also in terms of cost. We would like to get your feedback on this. Rough analysis is sufficient – we do not require a detailed report. If we intend to produce this part, a serial or development RFQ for these parts will follow later after further review loop(s).
- **Package request** = a request where Endress+Hauser is considering the complete package.
- **RFQ for technical special products (TSP)** = parts which are specifically requested by an Endress+Hauser customer; there are often some slight changes to the serial part. Volumes and order frequency are normally low.
- **Benchmark RFQ** = is used for long-term and new suppliers to review competitiveness within Endress+Hauser supplier portfolio.
- **Change request** = a request for a change (often technical) of a running serial part at your company.

Contact details of responsible purchaser: This person is responsible for RFQs, and you can contact him/her anytime with contact details or with messages via the portal (see chapter 6.1)

(If available) an additional contact person: You can see here in which department this person works (quality, technical, logistics, purchasing). This person can be contacted if there are any specialist questions e.g., technical questions for technical person.

☛ *Persons from quality, technical or logistics* have no access to the details of the RFQ or the message portal. Please **contact these colleagues by e-mail or phone**.

☛ Additional *purchasing contact persons* have access to the details and can be contacted via the **message portal**, by **e-mail or phone**.

5.2 Documents

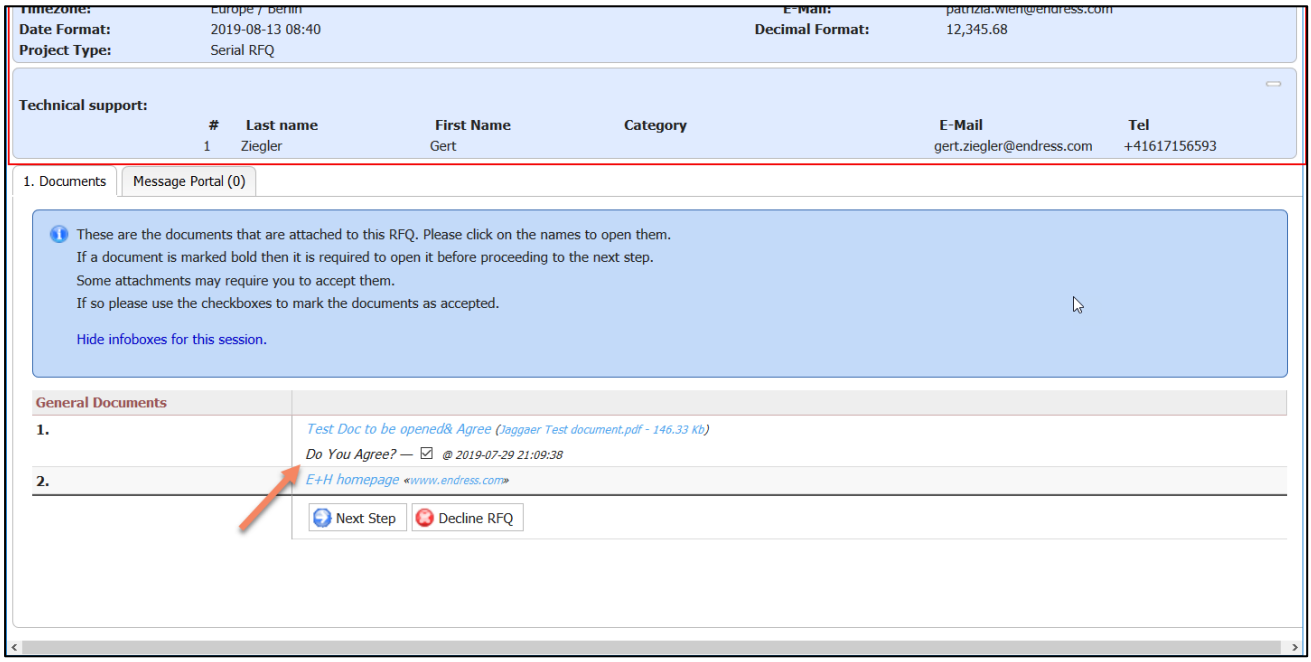
The bottom section of the first page shows general documents added by Endress+Hauser.

Depending on the Endress+Hauser configuration and the importance of a document, will determine whether the document has to be opened, approved, or neither of the above.

➔ Look at the document and when you finish, **click on next step.**
➔ If there is no document, **click on next step**

☛ If you do not click on “next step” the details on how to proceed with the RFQ will not be visible.

The position documents e.g., drawings, are shown later to provide more information.

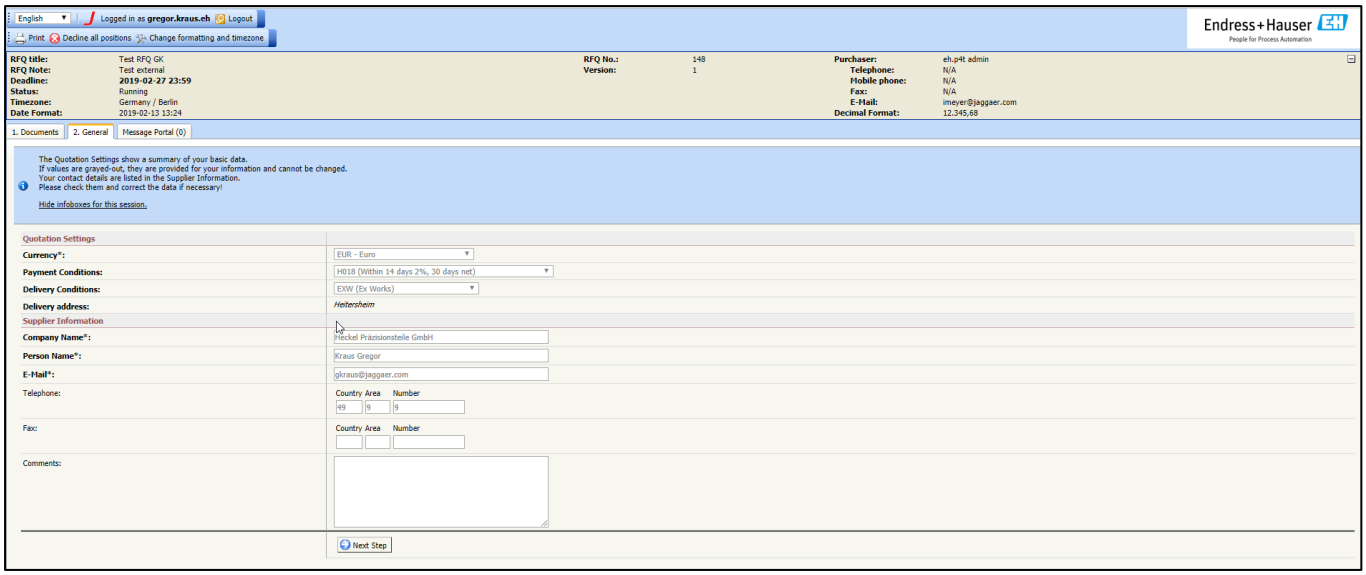


5.3 General conditions

➔ Please check your general data.

Here you can find all information regarding the conditions. Depending on the Endress+Hauser default settings for this RFQ, it may be possible to change the currency, payment, or delivery conditions.

➔ **Then click on Next step.**

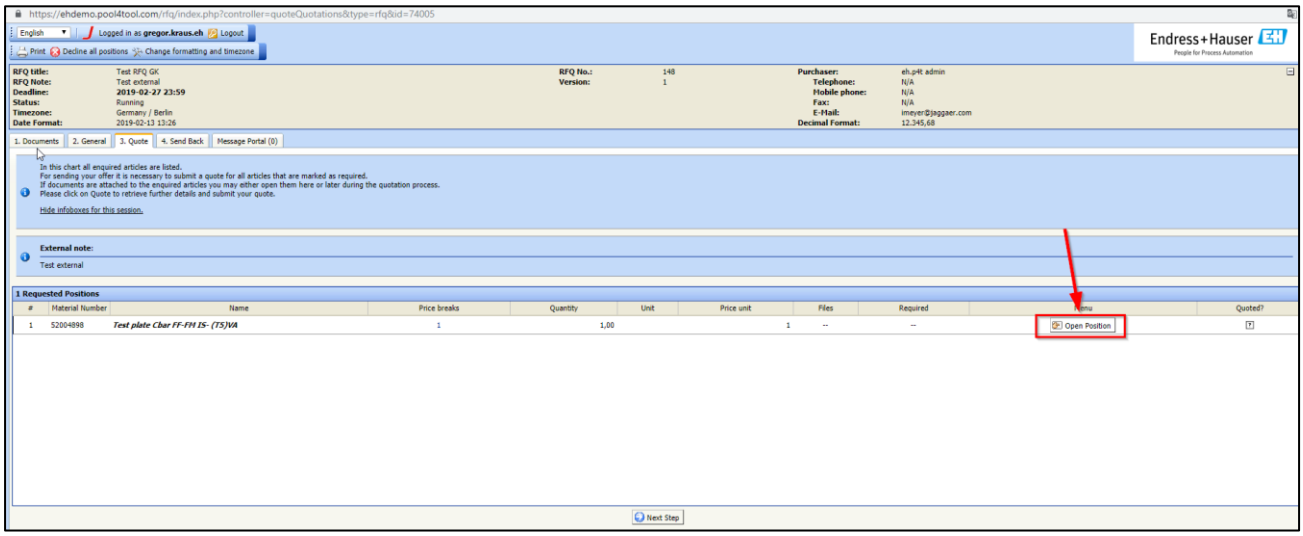


5.4 Quote

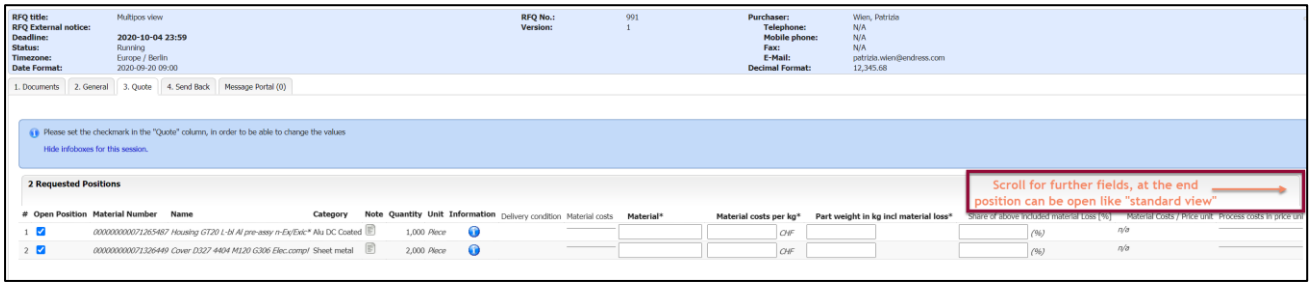
5.4.1 Position overview

On the next page “Quote”, you will see all positions for which Endress+Hauser requests a quotation. This overview may look different depending on Endress+Hauser settings. The positions have to be either opened by clicking on “open position” in the (standard view) or, for higher part numbers, fields can be filled in directly in the (multiple view) overview.

Standard:



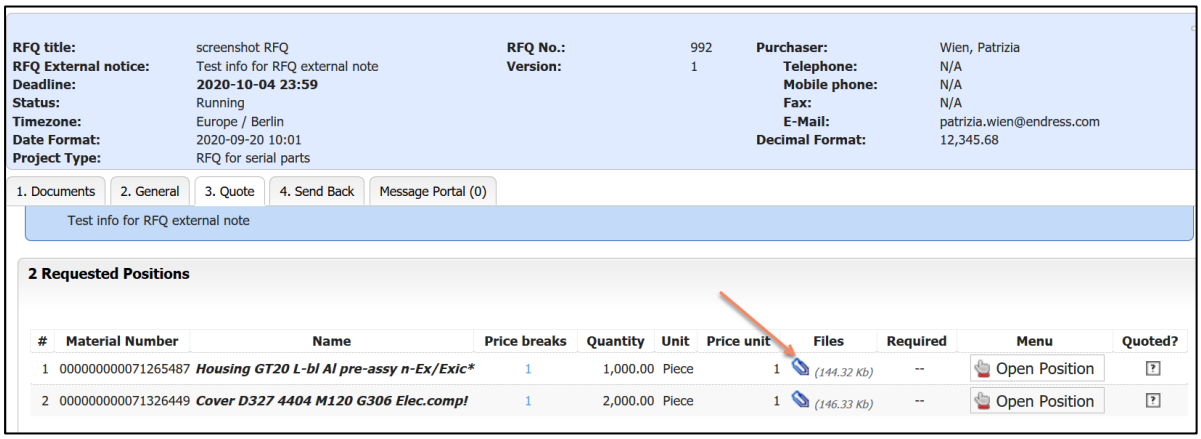
Multiple:



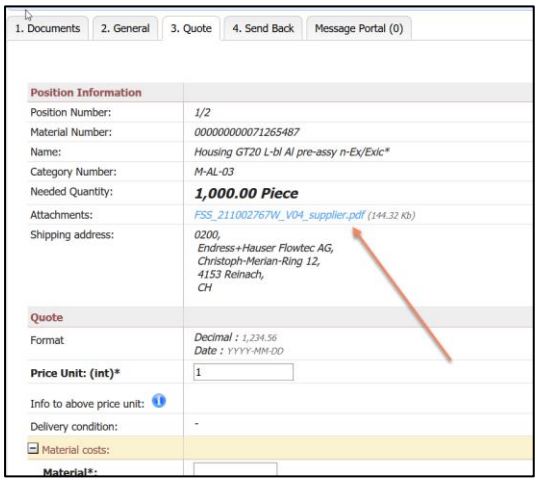
Where to find position documents

Position documents e.g., drawings, can be found in this overview or also in position details after clicking on “open position”.

Documents in the position overview:



Same documents in position details (after opening the position):



5.4.2 Position details (to be filled in)

Now you must fill out the fields. Depending on the technology and/or item / service Endress+Hauser requests, there are different cost and information fields to fill out. All fields in **bold with a "*"** are mandatory fields and must be filled out.

There are two different types of configurations for the details: web form or Excel download and upload.

☛ In the medium term, Endress+Hauser has decided to work solely with Excel download as it can be more clearly designed, and it offers familiarity, due to its widespread use in companies. Until Excel has been set up for all technology details, both options will still be available and are described below.

5.4.2.1 Web form

In the first section “position information” all details relating to this position can be found. If there are any comments from Endress+Hauser specific to this position, they will also be displayed in this section.

The quote section provides information about the price unit and how to understand it. This is followed by the cost and information fields to be filled out by you. The cost details need to be completed based on the above-mentioned quantity (position information)

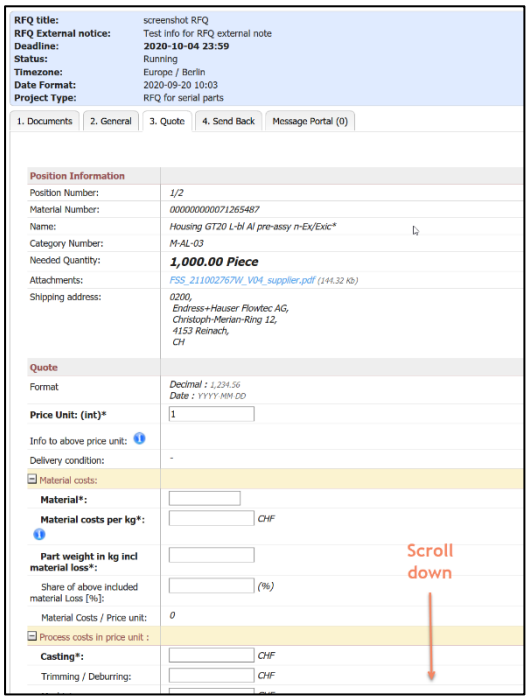
➔ The form calculates the total costs per part automatically. However, the costs still need to be transferred manually to the corresponding price break field at the end.
➔ If there are further quantities requested, add your total price for these as well but there is no need to give cost details for these additional price breaks.
For info: The smallest price break is always shown first, even if this is not the main RFQ quantity which is relevant for CBD.

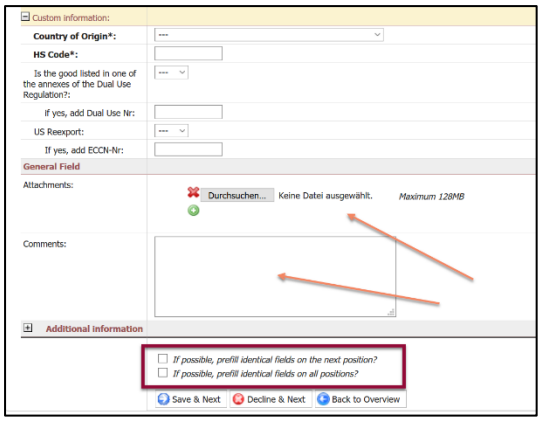
Attachments and comments can be added at the end of the position details.

If costs are very similar for the next position, you can copy it by ticking one of the boxes before selecting “save and next”.

➔ Save & next

At this stage, it will also be possible to decline a position. Please leave a comment, so we can understand your rejection.





5.4.2.2 Excel form

The first section of the position details contains all information about this position including position documents.

The second section contains a link to download the Excel file. In the Excel file all necessary details are again listed, as well as the requested cost details and necessary information.

➔ The Excel file must be filled in with the cost details based on the quantity listed at the beginning of the document, and the price unit.

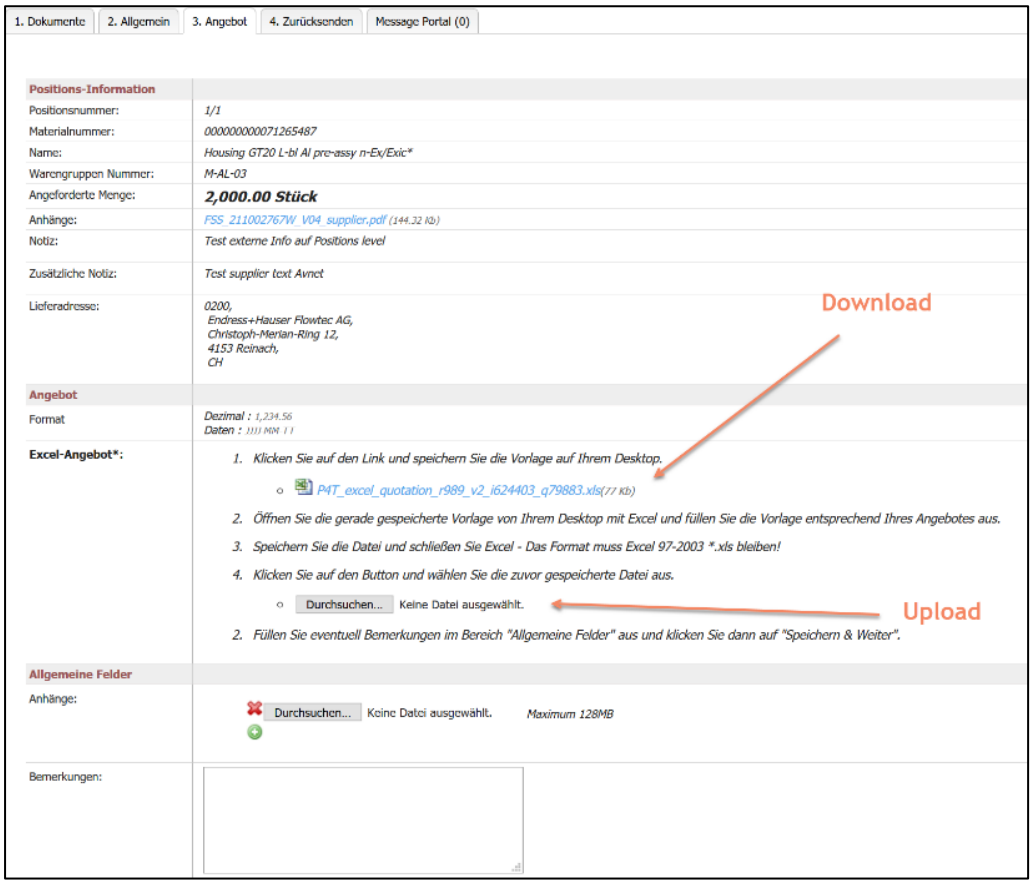
➔ The additional quantities requested are to be filled in, indicating the total price in the given price unit (without cost details).

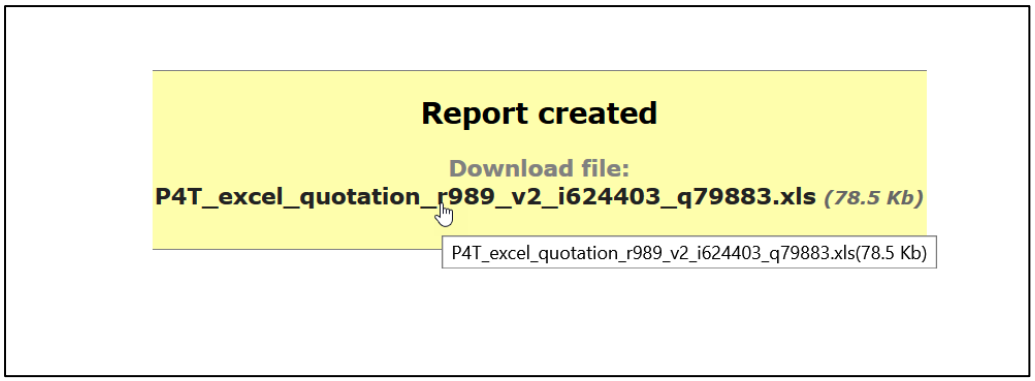
➔ Afterwards the Excel file can be uploaded again as .xls (**ATTENTION**, not xlsx)

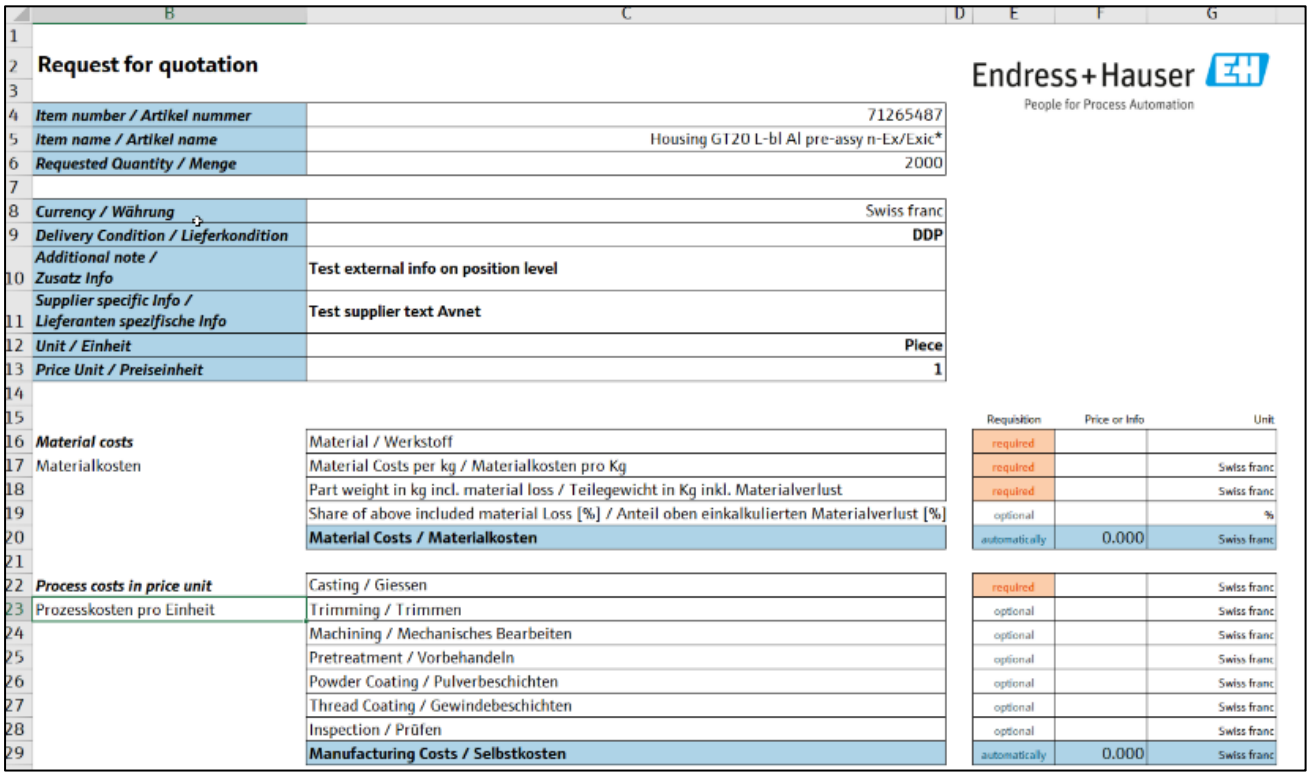
Attachments and comments can be added at the end of the position details.

➔ Save & next

At this stage, it will also be possible to decline a position. Please leave a comment, so we can understand your rejection.







Request for quotation

Endress+Hauser
People for Process Automation

		Requisition	Price or Info	Unit
Item number / Artikel nummer	71265487			
Item name / Artikel name	Housing GT20 L-bl Al pre-assy n-Ex/Exic*			
Requested Quantity / Menge	2000			
Currency / Währung	Swiss franc			
Delivery Condition / Lieferkondition	**DDP**			
Additional note / Zusatz Info	**Test external info on position level**			
Supplier specific Info / Lieferanten spezifische Info	**Test supplier text Avnet**			
Unit / Einheit	**Piece**			
Price Unit / Preiseinheit	**1**			
Material costs Materialkosten	Material / Werkstoff	required		
	Material Costs per kg / Materialkosten pro Kg	required		Swiss franc
	Part weight in kg incl. material loss / Teilegewicht in Kg inkl. Materialverlust	required		Swiss franc
	Share of above included material Loss [%] / Anteil oben einkalkulierten Materialverlust [%]	optional		%
	Material Costs / Materialkosten	automatically	0.000	Swiss franc
Process costs in price unit Prozesskosten pro Einheit	Casting / Giessen	required		Swiss franc
	Trimming / Trimmen	optional		Swiss franc
	Machining / Mechanisches Bearbeiten	optional		Swiss franc
	Pretreatment / Vorbehandeln	optional		Swiss franc
	Powder Coating / Pulverbeschichten	optional		Swiss franc
	Thread Coating / Gewindebeschichten	optional		Swiss franc
	Inspection / Prüfen	optional		Swiss franc
	Manufacturing Costs / Selbstkosten	automatically	0.000	Swiss franc

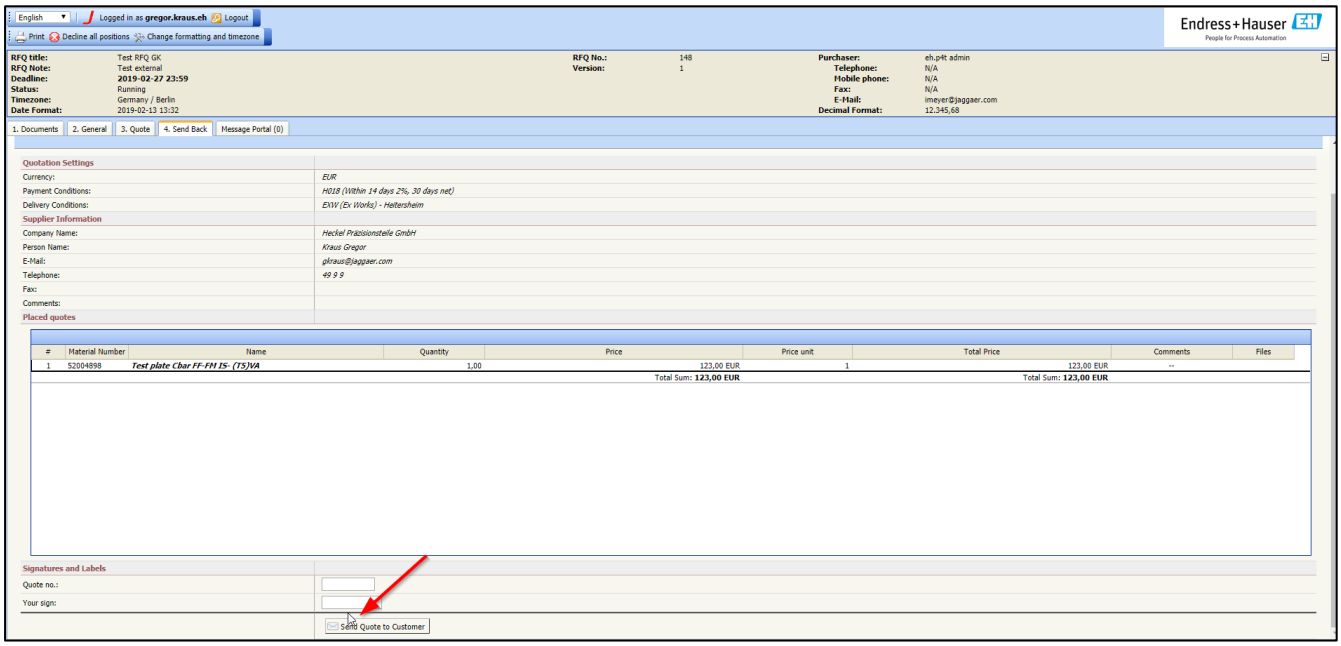
5.5 Send back

In the last step you can check your data for the last time. In addition, you can add your quote number and name.

If you send it back to the customer (Endress+Hauser), it is no longer possible to change the data unless Endress+Hauser rejects the quotation.

➔ Press “send back to customer” and wait until the quote is transmitted.

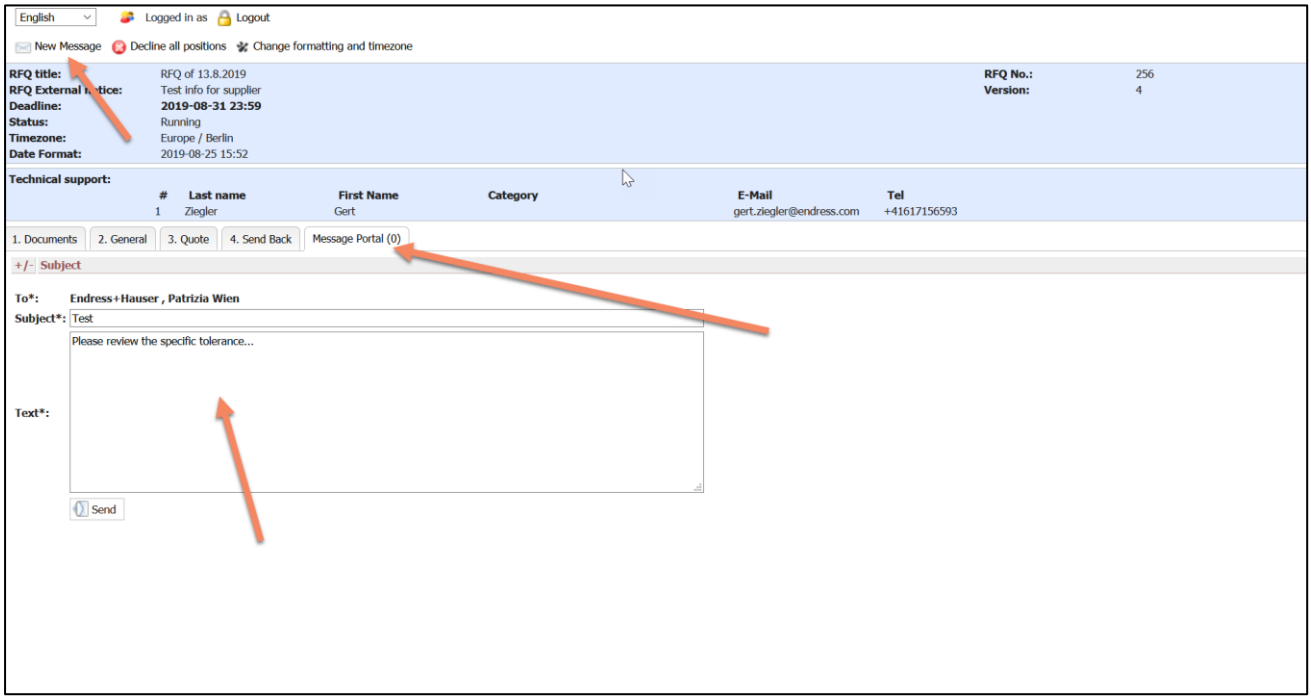
☛ If you need to change something, contact the purchasing person from Endress+Hauser to “reject” the quote and enable you to make the changes.


English
Logged in as gregor.kraus.ch
Logout
Print
Decline all positions
Change formatting and timezone
Endress+Hauser
People for Process Automation
RFQ title: Test RFQ GK
RFQ Note: Test external
Deadline: 2019-02-27 23:59
Status: Running
Timezone: Germany / Berlin
Date Format: 2019-02-13 13:32
RFQ No.: 148
Version: 1
Purchaser: eh.p4t admin
Telephone: N/A
Mobile phone: N/A
Fax: N/A
E-Mail: imeyer@jaggaer.com
Decimal Format: 12.345,68
1. Documents
2. General
3. Quote
4. Send Back
Message Portal (0)
Quotation Settings
Currency: EUR
Payment Conditions: H018 (Within 14 days 2%, 30 days net)
Delivery Conditions: EXW (Ex Works) - Heitersheim
Supplier Information
Company Name: Heckel Präzisionsteile GmbH
Person Name: Kraus Gregor
E-Mail: gkraus@jaggaer.com
Telephone: 49 9 9
Fax:
Comments:
Placed quotes
Material Number Name Quantity Price Price unit Total Price Comments Files
1 52004898 Test plate Cbar FF-FM IS- (T5)VA 1,00 123,00 EUR 1 123,00 EUR --
Total Sum: 123,00 EUR
Total Sum: 123,00 EUR
Signatures and Labels
Quote no.:
Your sign:
Send Quote to Customer

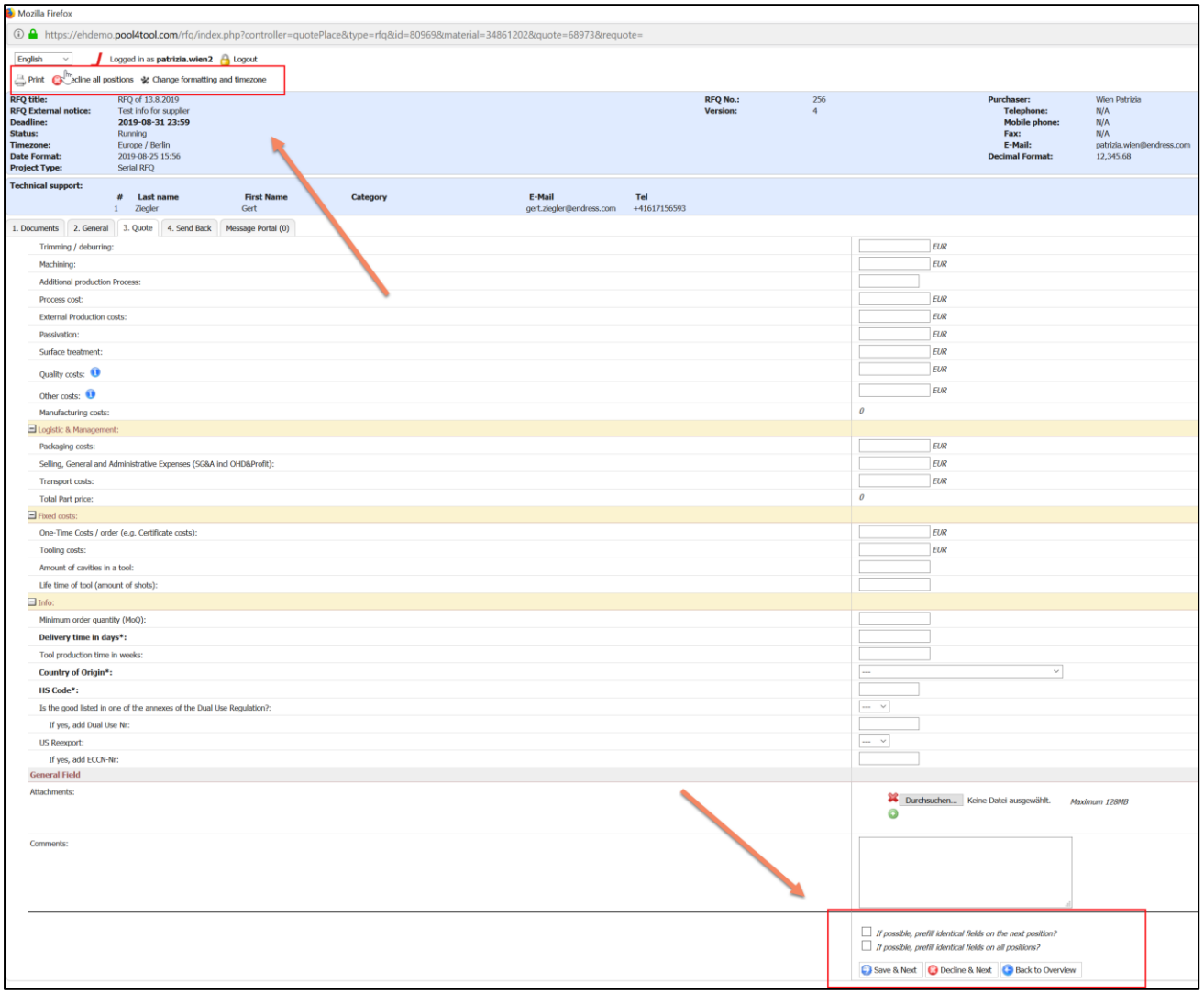
6 Further functions

6.1 Messages

At any point while the RFQ is active, you can send messages to the responsible purchaser. Go to the “message portal” tab or the “new message” button in the top left corner and use the form. The purchaser will get your message and can reply in the same way.

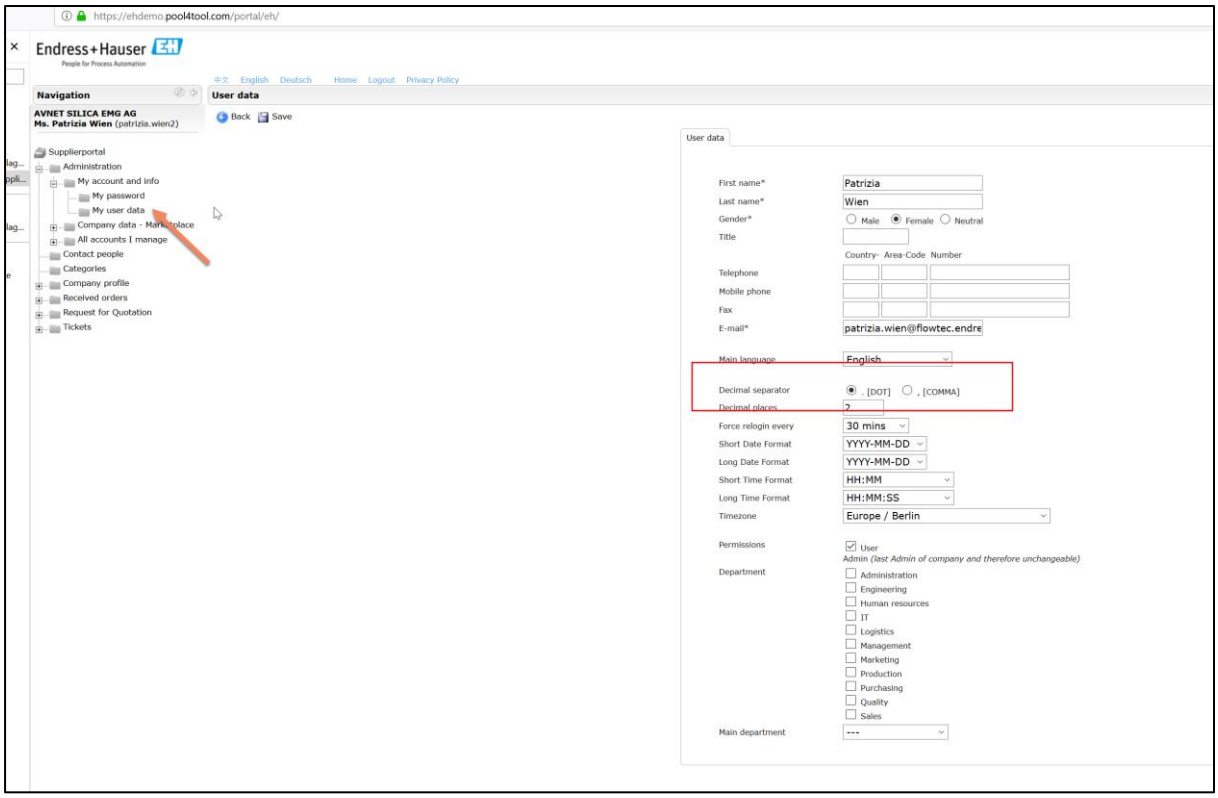


6.2 Declining and other options



In the top left corner or at the bottom of the position details (in each RFQ item) you have some additional options.

- Decline
- Copy the position cost details to the next position if costs are similar

6.3 User settings

The prices are displayed with a comma for the decimal as default. If you prefer a dot, it can be changed in the account settings.