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## Estimating & Quotation Work Instruction

### WEC -06

No.	Step	who	Document used/ stamps/ Database	Type of control/ verification
1	Initial enquiry received from the customer	All	Email, phone call, customer visits, fax, tender	The designated person need to be covered on days off
2	Administrator- book it on the system every enquiry  Create Folders  Save drawings in Drawings folder/Save the customer email into customer email folder  Input information on the Register	Administrator / nominated person	Quotation database( create quotation folders), quote spreadsheet, print off drawings and specifications  Quotation Folders  Quotation Register ( excel summary sheet)	Unique number
3	Send the email to Divisional Director to review if it is worth to process it ( the role to be covered on days off)	administrator	Email/ physical drawings and specifications	The designated person need to be covered on days off
4	In case of Decline	management	Email, phone/DS, GJ Will communicate the decision to the customer	Declined quotes need to be viewed by Derrick
5	In case of Accept	estimator	Email /Decision will be communicated to the customer	
6	Allocate an estimator for processing	management	Decision of the manager	Verify availability/capability/ capacity to manufacture/ capacity to quote/ delivery date achievable/prioritizing
7	For quoted to EN 1090 and EN 15085 the quote pack will be passed to the Welding Coordinator for Technical Review	welding responsible coordinator	Technical Review sheet	



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8	Response to the customer within 24 hours after analysing capabilities/capacity available	estimator	e-mail	Verify availability/capability/ capacity to manufacture/ capacity to quote/ delivery date achievable/prioritizing
9	Decide what type of Quote	management	<b>GUESS, BUDGET, DETAILED</b>	
10	Call the customer and complete Sales Enquiry Questions over the phone	estimator	Sales Enq. Questions doc.	
11	Secondary decision on Accept/Decline based on Sales Enquiry Questions as per item 4&5	management	Sales Enq. Questions doc.	
12	Verification of data contained within the quote pack, spec, drawings  Any additional data to be saved in the Quotation Folders	estimator	Quote pack ( quote+ customer spec + drawing)	estimator
13	Contact customer to clarify in case any discrepancies or unclear/ insufficient data	estimator	Quote pack ( quote+ customer spec + drawing)	Estimator/ customer
14	Breakdown the drawing / create the BOM to the drawing ( hand writing+ print forms for Lasers( yellow),Miscellaneous( green),Sections( pink) and Profiles ( blue)	estimator	Hand writing forms/ standard print forms colour coded:  for Lasers( yellow),Miscellaneous( green),Sections( pink) and Profiles ( blue)	estimator
15	All the BOM forms to be sent to Purchasing for suppliers/sub-contractors  <b>Note: For value over £5,000 the estimator shall look into guidelines for % of material cost to the job</b>	estimator	Email/ colour coded sheets	2nd estimator
16	Purchasing will send the standard BOM s to at least 3 suppliers/ sub-contractors in order to get the best price for the job	Purchasing	Standard prints colour coded/email	Purchasing
17	All enquiries to Purchasing to the estimator and to be saved by the estimator in RFQ s out files in Quotation files	estimator	RFQ s out file in Quotation files	estimator



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18	Save all replays received <b>even if declined-</b> on a spreadsheet stored in Z/	estimator	Quote Sheet blank/ Quote Folders	estimator
19	Produce a quote sheet per assembly , including material and labour	estimator	Quote sheet per drawing	estimator
20	Quote sheets completed will be passed for approval to the Sales Manager, or Commercial Manager and Director  Review of scope of supply ( inclusions, exclusions)	management	Quote sheets stamped	1 <sup>st</sup> check by Sales Manager and Commercial Manager for a value <£10,000  2 <sup>nd</sup> check mandatory at Commercial Manager if to involve the Director
21	The final price will be input on Quote finally checked by the checker. " The quotation will be printed out  Note: the estimator will sign on the quote doc	estimator	Quotation Database/ Quote doc. completed	Verified by DC
22	The signed quote will be saved into the Quotation digital folder ( top level)	estimator	Quotation Database/ Quotation Folders/ Quote signed doc.	DC, GJ, DS
23	The quote will be sent to the customer	estimator	Quote doc/ e-mail to customer	estimator
24	The quotation pack back to administrator to update the Quote Register on the system	administrator	Quotation register spreadsheet stored in Z files/ Administrator/Development /Quotation register ver1.00/ Quotation register vs1.00 test cycle/Quotation register ver.1.00 test1. Excel.sm	MP
25	The Quote Pack back to the estimator for follow-up with the customer/ call the customer and complete the Post Quotation Questions form- which will state if the quote is won/ lost/dead/ another chance	administrator, estimator	Quote pack ( quote, drawings, customer spec)  Post Quotation Questions form doc	estimator



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26	Post Quotation Questions form reviewed by the manager and analysis of the response	DS	Post Quotation Questions form doc	DS
26	Based on customer feed-back the status of Quote to be amended on the system from Issued to won/lost/dead  Same modification to be done on Quotation Register spreadsheet	administrator	Quotation register spreadsheet stored in Z files/ Michael Parker/Development/ Quotation register ver1.00/ Quotation register vs1.00 test cycle/Quotation register ver.1.00 test1. Excel.sm	
28	Quote pack filed in Files Cabinet	estimator	Quote pack/ Files Cabinet	estimator
29	Customer order received  “ ”	estimator	e-mail phone	
30	Hard copy of the file taken back from the File Cabinet	estimator	Quote pack- hard copy	
31	Basic verification of the order vs quotation by the estimator allocated to the job  Check:  - If quantity is correct - If price is correct - Drawing revision - Additional requirements - Lead time	Allocated estimator	Quote pack/ Customer specification/Drawings/ Additional Documents  <b>The estimator will separate the quote pack in :</b> <b>1.the initial data file</b> <b>2.The reference file for the hand -over</b>	
32	<b>For orders to EN 1090 or EN 15085 the File will be passed to the Welding coordinator for the second technical review</b>	welding coordinator	<b>Order File/ Technical review sheet</b>	
	Forward customer email with the order to Administrator for booking	estimator	Order File	Order File passed to administrator ( hard copy)



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34	Order booked onto Order Database	administrator	Order Database	Unique number
35	Create Order Folders  Save all documentation in the appropriate folder ( customer order, drawings , customer specification)	administrator	Order Database	
36	Print out the order acknowledgment	administrator	Order Acknowledgement doc.	Issued from the Database
37	Send the order acknowledgement to the customer for signature	administrator	e-mail the Order Acknowledgement doc ( pdf)	
38	Save the order acknowledgement in Order Acknowledgement folder ( in Contract Folders)	administrator	Order Database/ Contract Folders	
39	Transfer all existing data in Quotation to the Order under administrator s name in Controlled by name location	administrator	Quotation Database/Order Database	Unique number
40	Meeting with Engineering Operational Manager to define the responsible Project Engineer for the contract	administrator / Office Manager	meeting	
41	Change the name in Controlled by name to the new responsible Project Engineer s name	administrator	Order Database/ Controlled by name location	
42	Print out the Contract Review Sheet and attach it to the Contract File hard copy	administrator	Order Database/ Contract Review Sheet doc.	
43	Change selection on Quotation Database from issued to won	administrator	Quotation Database	





