

Request for Quotation (RfQ) with 3D PDF

RFQ creation, distribution, and final disposition is the quintessential communications and collaboration environment. Throughout, the purchasing department is in intensive and extensive communications with departments within the company, such as design and engineering, sales, and finance. The purchasing department also acts as a clearinghouse for information to third-party partners.

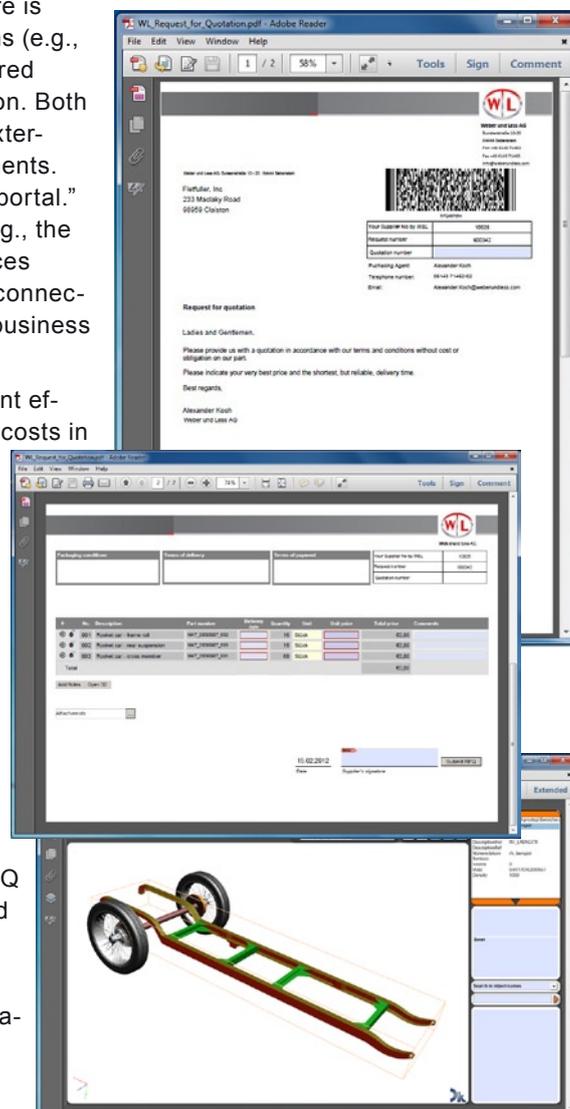
The information for RFQ exists in many forms. There is the structured information found in software systems (e.g., CAD, CAE, PDM/PLM, and ERP) and the unstructured information delivered by fax, email, phone, and so on. Both forms need to be captured and exchanged for an external partner to get a true sense of the RFQ requirements. Moreover, some companies operate a “purchasing portal.” While portals help standardize the RFQ process (e.g., the completeness and structure of the response), it forces suppliers to work with disparate online systems disconnected from their own corporate information systems, business processes, and workflows.

Two types of integration are key to gaining significant efficiencies, increased responsiveness, and reduced costs in the RFQ process. First, integrate the RFQ process with existing information systems—both within a company and at its supplier sites. Second, implement an integration technology that does not require reorganizing the existing business processes at both ends of the RFQ process.

The PDF solution

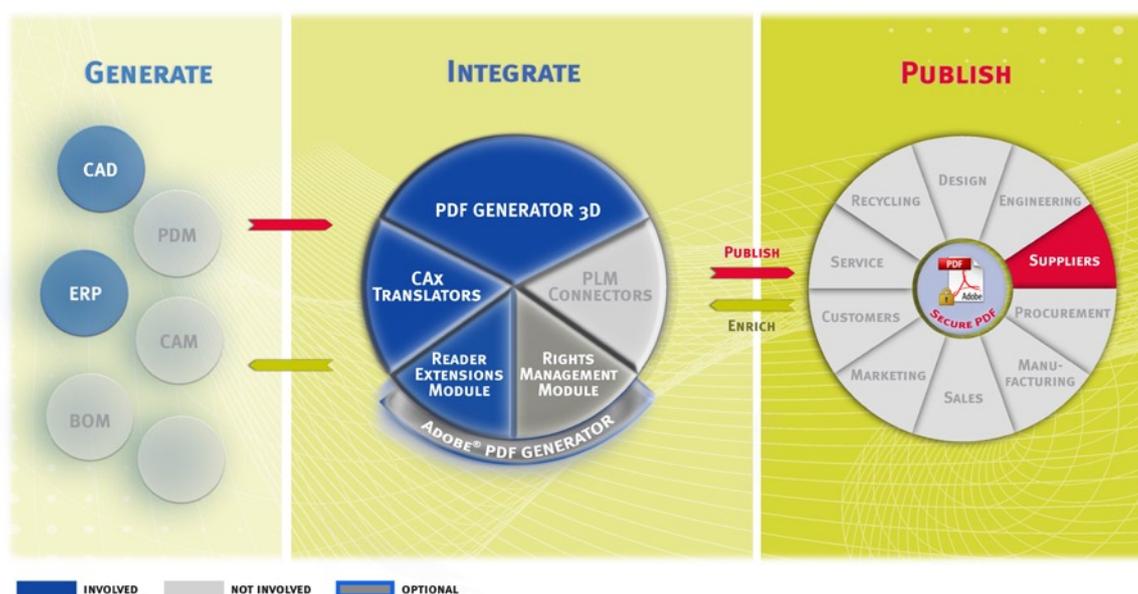
3D PDF technology can automatically combine all the information required for RFQs, including 2D and 3D drawings, material properties, parts lists, specification sheets, annotations, and other PMI. This automation works regardless of authoring and information systems. The result: All the relevant RFQ information in a uniform, accessible, structured, and secure format.

3D PDF technology automates some of the workflows related to RFQ preparation, response, and evaluation. This automation relies on intelligent forms templates that—at the touch of a button—can be filled automatically with information from the back-end information systems (e.g., CAD, CAE, PDM/PLM, and ERP). These templates can also contain interactive fields to be manually completed online or offline. The embedded template intelligence can ensure the quality of the entered data and automatically evaluate some of the supplier’s credentials upon receipt of the RFQ.



Structured 3D PDF document can contain all the relevant RFQ information in a uniform, accessible, and secure format, making RFQ processing significantly faster.

- >> Purchase requisitions can be captured in the existing enterprise information system (e.g., purchasing-specific system, project management system, and ERP), and RFQs can be automatically generated once the requisition is released.
- >> 3D models—in native or neutral CAD formats, or both—drawings, parts lists, specification sheets, and other PMI are provided in a uniform format.
- >> RFQ can be available online in a web portal or sent through email for resolution offline.
- >> An optional RFQ dashboard displays relevant and current information about RFQ status.
- >> Suppliers only need Adobe Reader to view the PDF-based RFQs and to add their own information (e.g., trucking information, delivery dates, and prices).
- >> Password protection and digital signatures ensure that only authorized persons have access to RFQ contents. Optional Adobe Reader functions permit user-specific security settings (e.g., what individual recipients may do with individual portions of the RFQ). Optional security mechanisms (namely, DRM) can control expiration dates associated with the RFQ.
- >> Automatically including 2D barcodes to RFQs helps maintain the automated workflow for incoming RFQs when the PDF-based document have been printed (such as for signatures).
- >> Information entered in the PDF forms templates can be automatically captured in structured form for the issuing company's back-end information systems.



The benefits

- >> RFQs available without manual intervention in a uniform format comprising of information from disparate authoring systems.
- >> Significantly faster RFQ creation, distribution, response, processing, and evaluation—many of those tasks now automated.
- >> More up-to-date and complete RFQs.
- >> High level of protection for the information exchanged.
- >> A uniform structure for respondent's information, leading to processing incoming RFQs faster (easier to compare and evaluate).
- >> Simpler communications to colleagues in and outside the company through Adobe Reader, which typically exists already on compute devices and requires no additional software installation.

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