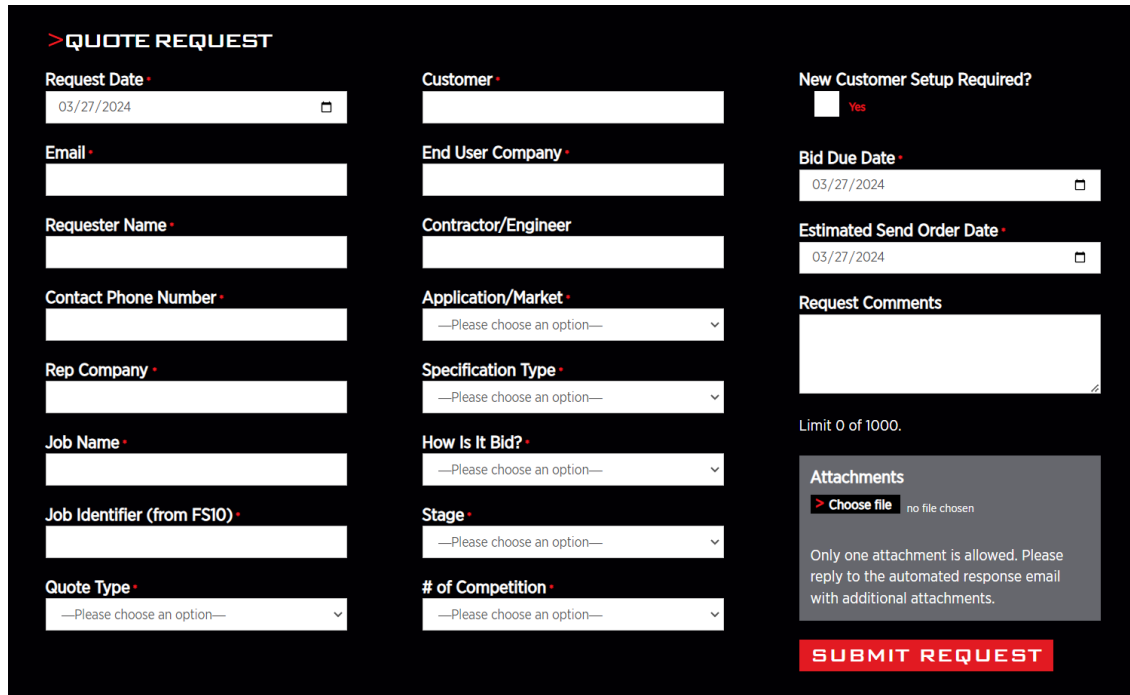


QUOTE REQUEST FORM GUIDE



The screenshot shows a web form titled ">QUOTE REQUEST" with the following fields and sections:

- Request Date:** 03/27/2024
- Customer:** [Empty field]
- New Customer Setup Required?:** Yes
- Email:** [Empty field]
- End User Company:** [Empty field]
- Bid Due Date:** 03/27/2024
- Requester Name:** [Empty field]
- Contractor/Engineer:** [Empty field]
- Estimated Send Order Date:** 03/27/2024
- Contact Phone Number:** [Empty field]
- Application/Market:** [Dropdown menu: Please choose an option]
- Request Comments:** [Text area]
- Rep Company:** [Empty field]
- Specification Type:** [Dropdown menu: Please choose an option]
- Limit 0 of 1000.**
- Job Name:** [Empty field]
- How Is It Bid?:** [Dropdown menu: Please choose an option]
- Attachments:**
 - > Choose file (no file chosen)
 - Only one attachment is allowed. Please reply to the automated response email with additional attachments.
- Job Identifier (from FS10):** [Empty field]
- Stage:** [Dropdown menu: Please choose an option]
- Quote Type:** [Dropdown menu: Please choose an option]
- # of Competition:** [Dropdown menu: Please choose an option]
- SUBMIT REQUEST** (Red button)

BASIC REQUEST ITEMS

Email = Your email address

Requester Name = Your full name

Rep Company = Your company name

Job Name/Rep Reference = Either field from Fan Selector

Job Identifier = "Job ID" field from Fan Selector (need exact match); allows us to link request with Fan Selector details.

Customer = Who will order the product

End User Company = The end customer who will receive the product

Contractor/Engineer = If you are working with a third-party company on this opportunity, please let us know so we can properly manage.

Application/Market = We require this information to help us identify the right resources to help with the request. With this information we can get the right people engaged in completing the request.

QUOTE TYPE

Multiplier Change/Discount = A discounted price is needed.

Special Accessory = A consult factory from our Fan Selector software or a price is required for a non-standard accessory or offering.

Special Material = A custom material is required for the opportunity.

Other = Any other pricing or special configuration or non-selectable offering from our Fan Selector software.

- If multiple selections, choose *Other* and enter details in *Request Comments*.

SPECIFICATION TYPE

Basis of Design = Are we the standard for the opportunity or have a lockout based on our product or offering?

Approved Equal = Are we pre-approved as an equal offering along with another manufacturer?

Not Listed = This is an open specification for all manufacturers.

N/A = This is an unknown specification or not communicated in end-user request.



QUOTE REQUEST FORM GUIDE

HOW IS IT BID?

Stock = This is for an order that would be acquired for stocking/inventorying ready-made, complete fans.

Plan & Spec = This is an engineer or consulting engineer led opportunity that will go out for formal bid.

Design Build = The engineer or designer builder are working directly with the end-customer to construct the project or offer a solution.

OEM = This is a request from a manufacturer that wants to utilize our offerings in their products or solution.

End-User = The customer has directly requested a bid.

STAGE

Estimate = Budgetary pricing, very early in sales cycle.

Quote = Firm pricing for procurement.

Last Look = First round of pricing was extended, an opportunity to get a revised quote.

Clean-Up for Release = Final review/update prior to order submission.

OF COMPETITION

We want to understand how many other manufacturers are bidding on the same opportunity.

NEW CUSTOMER SETUP REQUIRED?

This is a new customer and may require setup in our systems and credit review.

BID DUE DATE

When the response is needed for a quote. This should be your required date.

ESTIMATED SEND ORDER DATE

When the order submittal would be sent from our Fan Selector software.

ATTACHMENTS

The web form can only accept one file. You can compress multiple files (zip) to send or send one in the initial request and then reply back to the automated email response with "QR" in the subject line.

** to learn how to compress (zip) multiple files, click [here](#) for support.*

PROCESS SEQUENCE

1. Quote Request submitted from web form.
2. Automated email is sent from our system. The Subject Line will start with "QR" and a number.
 - a. Please reply back to this email with any additional information or attachments.
Example: Customer Specification Documents, RFQ/RFI, drawing, other Fan Selector Job Files, customer emails, etc.
3. Status will be "To Do" initially. When your assigned Account Manager has a chance to review it, it will change to "In Progress".
4. If additional information is required, your Account Manager will send an email with what is required and the status will change to "Awaiting Information" or "Waiting on Requester".
**No other work will be done on this until we hear back from you.*
5. When we have completed our quote, you will receive an email with the needed information or the completed quote details and the Fan Selector job file. The status will change to "Quoted/Done".
6. If you need additional support, please reply back to the final email.

We want you to always use the Quote Form or reply back to the associated "QR" email chain. This will allow us to have others support your request if your Account Manager is out of the office.

