Engineering Quote Process

1. Produce duct layout drawing or submit to duct vendor for drawing.
2. Upon completion of layout drawing, do a duct takeoff and fill out appropriate duct quote form. Include Customer name and date on duct quote form.
3. Find Internal Quote Form template on server and fill out to include customer name and date, duct, plenums, hoods and labor for install if applicable.
4. When complete, submit drawing, Duct quote and IQ form to project facilitator, engineer or engineering manager to review. Reviewer will approve or request modification.
5. Modify all as necessary. Reviewer to note "approved" on IQ form on server and enter name and date.
6. Save IQ form as a PDF and save along with the duct quote and drawing on the server under Internal Quotes and customer name. Create a new folder with customer name if necessary.
7. Send the IQ form to the salesman in PDF format.

Engineering Sales Orders/Drawing Duct Order Process

1. Sales order received with line item for duct.
2. Review Internal Quote folder on server to determine if quote was done prior to order. If yes, copy drawing and save under Projects- Cad Drawings/Projects on the server. Create a new folder by customer name if necessary.
3. Submit drawing to customer contact via email for approval, copy salesman on email.
4. If changes are requested, modify save as Rev.1 modify drawing date on drawing and resubmit to customer.
5. Upon final approval by customer, save the final drawing, save it as "approved drawing" in the Projects-Cad Drawings folder by customer name. Print a copy and insert into the hard copy of the project folder along with a copy of the email customer approval.
6. Locate the original Duct quote if one was completed and review against the "approved" drawing.
7. Modify the Duct quote as necessary, enter a Revision number, customer name and date on the duct quote and save in the Projects-Cad Drawings folder.
8. Submit layout drawing and Duct quote to project facilitator, engineer or engineering manager to review. Reviewer will ask for modification or sign off on Duct quote as an approval.
9. Modify Duct Quote as necessary follow the above review process and save on the server as “approved duct order”. Print a copy, have reviewer sign and date and place in the folder.
10. Submit folder to Purchasing so that a purchase order can be completed.