



Directworks User Guide

Nexteer Users

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General Navigation

Dashboard

When a user first logs into Directworks, they are logged onto the dashboard. The dashboard will show you your active RFQs and Discussions (if any). Every page will have the following format:

- A. Tabs at the top for quick navigation
- B. Record list and information

The screenshot shows the Nexteer Automotive dashboard. At the top, there is a navigation bar with tabs: Dashboard, Discussion, Document, Item, RFQ, Supplier Company, and a More dropdown. A red box labeled 'A' highlights these tabs. Below the navigation bar is a 'Quick Links' section with buttons for '+ RFQ', '+ Supplier User', '+ Item', and '+ Discussion'. Below that is a section titled 'My Active RFQs'. A red box labeled 'B' highlights this section, which contains a table of RFQ records. The table has columns: RFQ NAME, PROJECT NAME, RFQ TYPE, QUOTE DUE DATE, COMMODITY, ORGANIZATION, and STATUS. It displays 4 records. Below the table is a pagination control showing 'Page 1 of 1' and a 'Rows' dropdown set to 10. A red arrow points from the 'Rows' dropdown in the 'My Active RFQs' section to a larger, detailed view of the dropdown menu shown in the next block.

| RFQ NAME | PROJECT NAME | RFQ TYPE | QUOTE DUE DATE | COMMODITY | ORGANIZATION | STATUS |
|---------------------|--------------|--------------------|--------------------|-----------|--------------|---------------------|
| Training Video. | - | M2M - Model to ... | 03/19/2015 17:0... | 2 | Training | Not Ready to Pub... |
| Training Video | - | M2M - Model to ... | 05/05/2015 08:4... | 1 | Training | On Hold |
| RFQ for China Bu... | - | Benchmark | 08/31/2015 00:0... | 1 | Training | On Hold |
| 87654321 | - | M2M - Model to ... | 07/30/2016 17:4... | 1 | Training | Published |

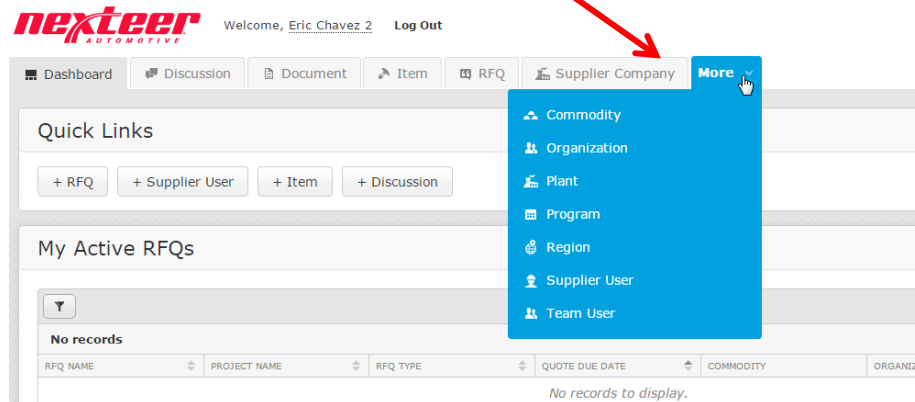
If you want to see more records in the record list you can change the number of rows that are shown by selecting a value from the dropdown.

A close-up of the 'Rows' dropdown menu from the previous screenshot. The dropdown is open, showing options: 10 (selected), 20, and 50. A red arrow points from the text in the previous block to this dropdown.

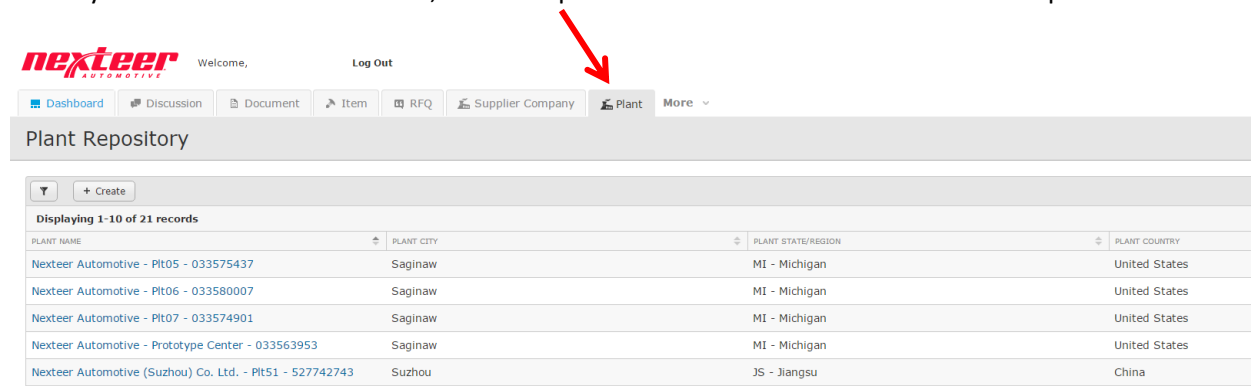
If you need to view other information such as Supplier Users, click on the “More” tab to see a listing of other information available. To access this information, click on the content you want to see.

Content Available:

- Commodity View
- Organization
- Plants
- Programs
- Regions
- Supplier Users
- Team (Nexteer) Users.



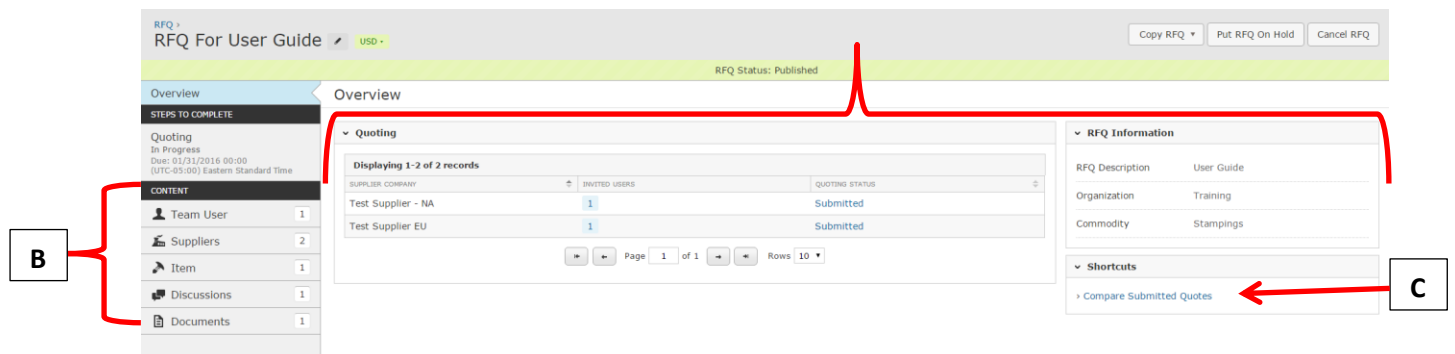
When you click on one of the items, this will open a new view and add the tab at the top.



Quote Details

When you go into a quote you are taken to the quote overview section. This is in the following format

- Overview: This will give some general information and also what steps still need to be performed or what the status is.
- This will also show the status of the content.
- You can compare quotes from this screen.



Quoting Information: To see this information click on the quoting box under the Steps to Complete header on the left. This will show what suppliers you have added to the RFQ and their quoting status. You will also use this to:

- i. View the suppliers quote status, view specific quotes, export supplier quotes
- ii. Re-open supplier quotes
- iii. See the parts added and some of the details
- iv. Create Scenarios & Print the F1054 Form

RFQ For User Guide USD

RFQ Status: Published

Overview

STEPS TO COMPLETE

Quoting In Progress Due: 01/31/2016 00:00 (UTC-05:00) Eastern Standard Time

CONTENT

- Team User 1
- Suppliers 2
- Item 1
- Discussions 1
- Documents 1

Quoting

SUPPLIERS ITEMS SCENARIOS

Displaying 1-2 of 2 records

| SUPPLIER COMPANY NAME | INVITED USERS | ASSIGNED ITEMS | STATUS | ACTIONS |
|-----------------------|---------------|----------------|-----------|--------------------|
| Test Supplier - NA | 1 | 1 | Submitted | View Quotes Export |
| Test Supplier - NA | 1 | 1 | Submitted | View Quotes Export |

Page 1 of 1 Rows 10

Quoting

SUPPLIERS ITEMS SCENARIOS

Displaying 1-1 of 1 records

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY | TOTAL VOLUME | SHIP TO/FINAL DES. | REGION | QUOTES SUBMITTED | VIEW QUOTES |
|-------------|-----------|---------|-------------|------------------------|-----------|------------------|--------------------|--------|------------------|-------------|
| 87654321 | 02A | - | - | Widget, Test Stampings | 945,000 | Nexteer Autom... | NA | 0 of 2 | - | |

Page 1 of 1 Rows 10

Quoting

SUPPLIERS ITEMS SCENARIOS

Displaying 1-1 of 1 records

| SCENARIO NAME | DESCRIPTION | ITEM | DESTINA. | REGION | TOTAL VOLUME | | |
|----------------|------------------|----------|------------------------|--------|--------------|------|--------|
| Recommendation | This is my F1054 | 87654321 | Nexteer Automotive ... | NA | 945,000 | Edit | Delete |

Form Lookups

When you are in a form creating/editing an item you may see some fields for looking up items. The will look like this image:

type here...

There are two ways to enter/pick data. The first is you can start typing (might have to wait a second) and select from the list that shows below where you are typing and then you can click on the one you want. The second way is the click the + icon next to the field. This will bring up the values screen where you can check which ones you want and click Ok.:

2. Type -> Select

U

- AUD - Australian Dollar
- CZK - Czech Koruna
- EUR - Euro
- GBP - British Pound
- INR - Indian Rupee
- KRW - South Korean Won
- ROL - Romanian Leu
- RUB - Russian Ruble
- TRY - Turkish Lira
- USD - US Dollar

1. + button -> Check -> Ok

Quoting Currencies

Displaying 1-10 of 20 records

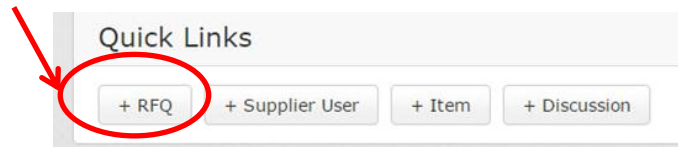
| CURRENCY NAME | ABBREVIATION |
|-------------------|--------------|
| Australian Dollar | AUD |
| British Pound | GBP |
| Canadian Dollar | CAD |
| China Renminbi | CNY |
| Czech Koruna | CZK |
| Euro | EUR |
| Indian Rupee | INR |
| Japanese Yen | JPY |
| Mexican Peso | MXN |

Page 1 of 2 Rows 10

OK Cancel

Creating Your RFQ

To create a RFQ click on the “+ RFQ” button located either at the top of your screen, or if you have a larger screen at the right. This will open up the RFQ Header creation screen. You can also click on the RFQ Tab and click the + Create Button.



RFQ Header Information

Once on the RFQ header, you will need to complete the form. Note, any field with a * is a required field. Once completed, click the Create button at the bottom of the form.

RFQ Header Fields:

RFQ Name: the title of the RFQ, and will show to the supplier.

RFQ Description: Additional information about the quote. The supplier does NOT see this.

Type: Quote Type – Model to Model (M2M), Early Sourcing, Resourcing, etc.

RFQ Currency: the reporting currency of the Quote**.

Hide Program from Supplier: Yes or No. Choose Yes if you do not want the supplier to see the Program Name.

Quote Template: used to select the type of breakdown the supplier will fill in, right now only Basic is available.

Quoting Due Date: when the suppliers need to submit their quote by.

Quoting Due Date Time Zone: Pick the timezone you want the quote date / time to be associated with.

Allow Quote Submission Past the Due Date: This should ALWAYS be No – it is also defaulted to No.

Sourcing Date: the date you plan to complete sourcing by. This is NOT seen by the supplier, but it will show on the F1054 form.

Quoting currencies: Choose which currency(ies) you want the supplier to quote in. This can be 1 or more**.

Launch Leader: Type in the Launch Leader from the PMD record this RFQ is for. This is for and shows on the F1054.

AQE: Type in the AQE from the PMD record this RFQ is for. This is for and shows on the F1054.

Regional Commodity Buyer: Type in the Regional Commodity Buyer, if it is you, type in your name. This is for and shows on the F1054.

ECM or Regional Director: Type in the ECM or if not an ECM part the Regional Director. This is for and shows on the F1054.

Commodity: Always choose Unassigned.

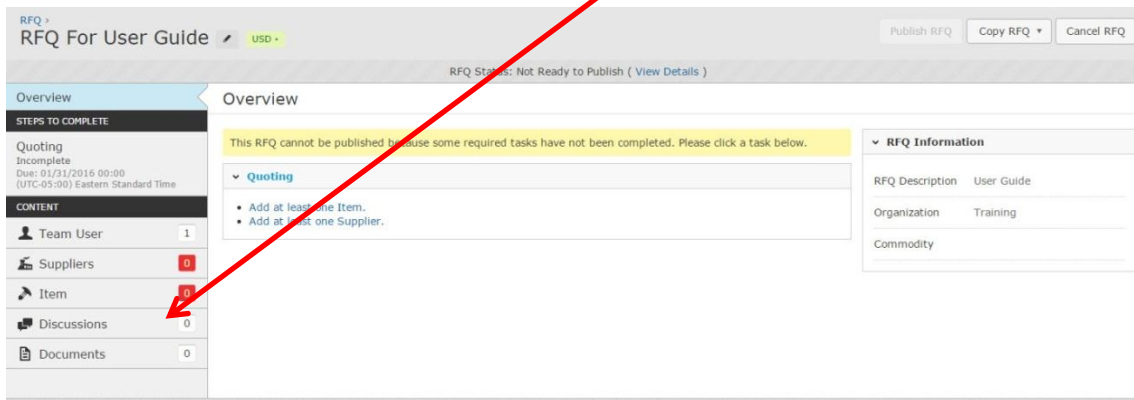
Organization: Always choose Commercial.

A screenshot of the 'Create RFQ' form in the Nexteer Automotive system. The form is divided into several sections: 'General Information' (RFQ Name, RFQ Description, Type, RFQ Currency, Hide Program Names from Supplier), 'Step Details: Quoting' (Quoting Template, Quoting Due Date, Quoting Due Date Time Zone, Allow Quote Submissions Past The Due Date, Sourcing Date, Quoting Currencies), 'Event Team' (Launch Leader, AQE, Regional Commodity Buyer, ECM or Regional Director), and 'Associations' (Organization). At the bottom right, there are 'Create' and 'Discard' buttons. The interface includes a top navigation bar with the Nexteer Automotive logo, user information, and various tabs like Dashboard, Discussion, Document, Item, RFQ, Supplier Company, Team User, and More.

** This indicates fields that currently cannot be changed once published, future updates will allow this to be changed after it is published.

RFQ Details (Part Information)

There are two different ways to add part information to your RFQ: Importing and Manual Entry. To enter in the part information, go into the RFQ and click on the **Items** tab on the left portion of the RFQ Overview screen.



Please see either Importing Part Details or Manual Entry of Part Details for adding parts.

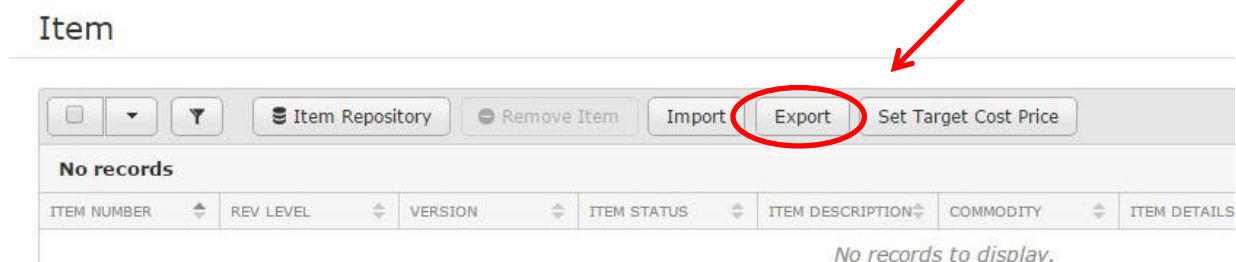
Importing Part Details

1. The easiest way to add part details is to import the information from a PMD record. In PMD, once you are in the part record, click the Export button.

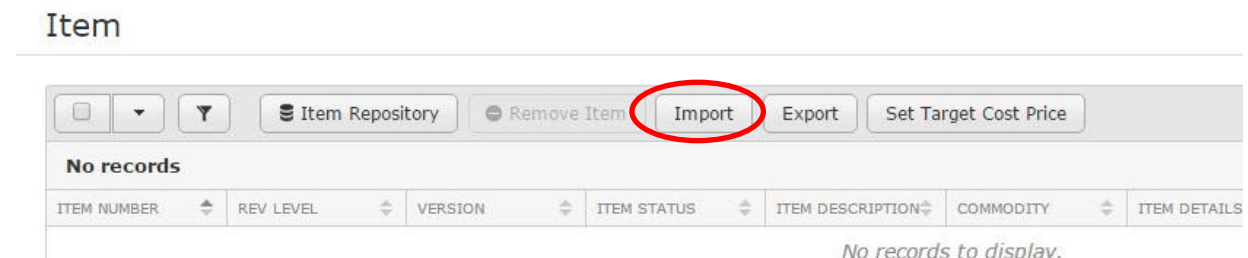


2. Once you have exported the file; either save the file to a new location, or if you are in Chrome look in your "Downloads" folder.

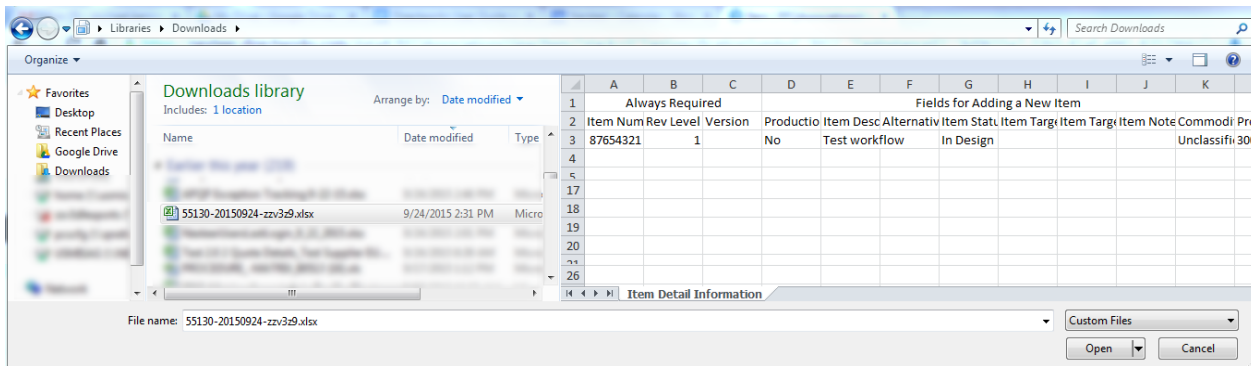
If you do not have a PMD Record you may download a blank template using the Export button in the Item section.



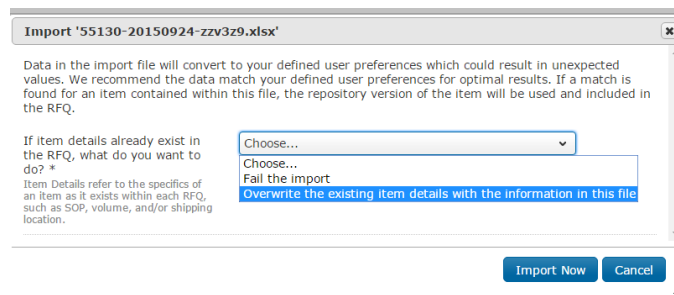
3. Once you have a complete import file or saved it from PMD, go into the Item section click on the Import button.



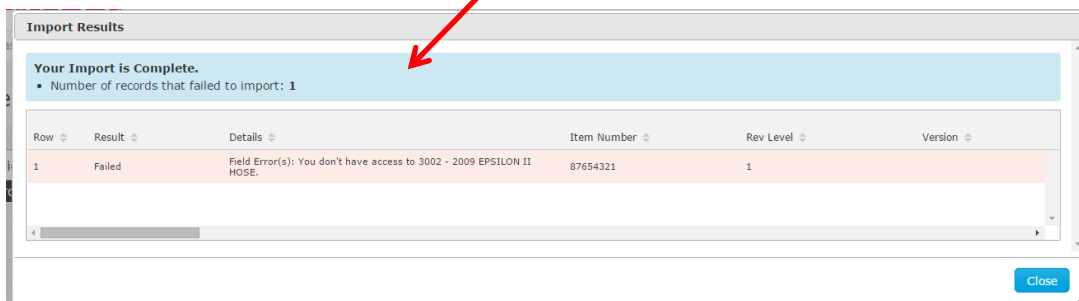
Select the file you either downloaded or created.



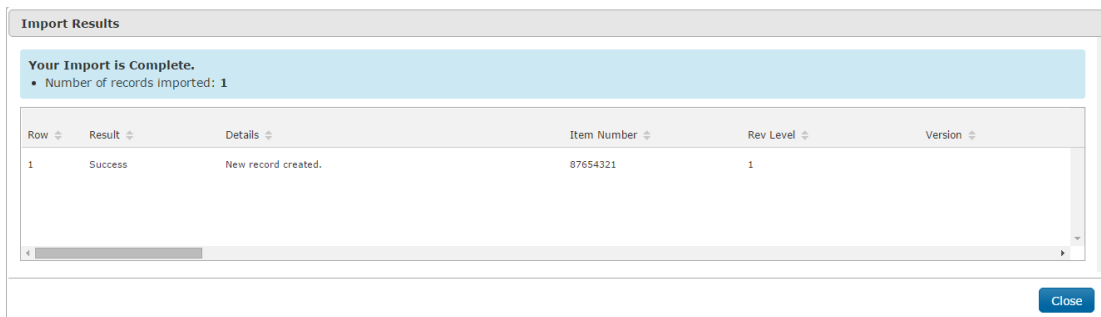
4. Choose Overwrite the Existing Item details. Note: If you had imported this information before or manually entered the information, this import data will overwrite the existing data. If you do not choose overwrite the file will not import.



5. If the import fails you will receive a Failed screen and the details of the issue will be stated. The most common failures are that there is no Cost Book for the Piece Price, the PPAP Due Date is blank, The volume is not fully filled in all 10 years (if no volume for out years 0 need to be entered), or the All using plants in PMD is blank.



If there are no issues with the import file, you will get a success record.



Item

Item Repository Remove Item Import Export Set Target Cost Price

Displaying 1-1 of 1 records

| | ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIP... | COMMODITY | ITEM DETAILS | TARGET COST ... | |
|--------------------------|-------------|-----------|---------|-------------|-----------------|--------------|--------------|-----------------|---------------------|
| <input type="checkbox"/> | 87654321 | 1 | - | In Design | Test workfl... | Unclassified | 1 | - | Manage It... Remove |

Page 1 of 1 Rows 10

6. If all the data was imported correctly, you should see the Item Details with a number and be white. If item details section is red, you will need to review the item details by clicking on the Mange Item Details link next to the Remove button on the right.
7. Once the import has been successful you will need to add the Target Cost (this is NOT seen by the supplier). You will also see that the Target Cost area is red, indicating this hasn't been completed yet. Click on the Set Target Cost Price button to enter in the Target Cost(this should be the same as the cost book value)

Item

Item Repository Remove Item Import Export Set Target Cost Price

Displaying 1-1 of 1 records

| | ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIP... | COMMODITY | ITEM DETAILS | TARGET COST ... | |
|--------------------------|-------------|-----------|---------|-------------|-----------------|--------------|--------------|-----------------|---------------------|
| <input type="checkbox"/> | 87654321 | 1 | - | In Design | Test workfl... | Unclassified | 1 | - | Manage It... Remove |

Page 1 of 1 Rows 10

Not Completed Yet, when completed this will turn white.

8. Enter in the total cost price for all the listed parts. Once done click the Save & Close button.

Set Target Cost Price

1 row below is incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

| Information | | | | Target Cost Price * |
|-------------|----------|-----------|---------|---------------------|
| | Item | Rev Level | Version | |
| 1 | 87654321 | 02A | - | |

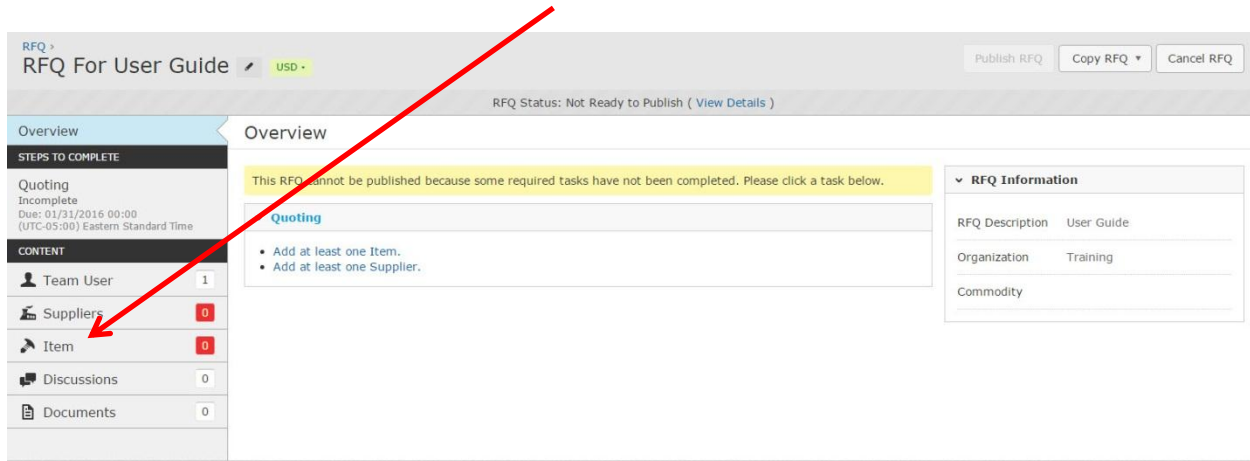
Save & Close

You have now completed the required information for the Item(s).

Manual Entry of Part Details

This section will walk you through how to manually enter part data onto your RFQ.

1. On the RFQ Overview screen, click on the Item Tab.



RFQ For User Guide USD

RFQ Status: Not Ready to Publish (View Details)

Overview

STEPS TO COMPLETE

Quoting
Incomplete
Due: 01/31/2016 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

- Team User 1
- Suppliers 0
- Item 0
- Discussions 0
- Documents 0

This RFQ cannot be published because some required tasks have not been completed. Please click a task below.

Quoting

- Add at least one Item.
- Add at least one Supplier.

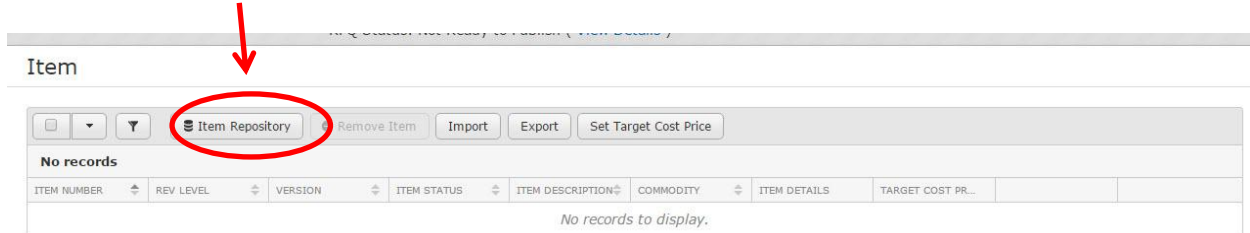
RFQ Information

RFQ Description User Guide

Organization Training

Commodity

2. On the Item details screen you will need to add the part number. To do this, click on the Item Repository button.



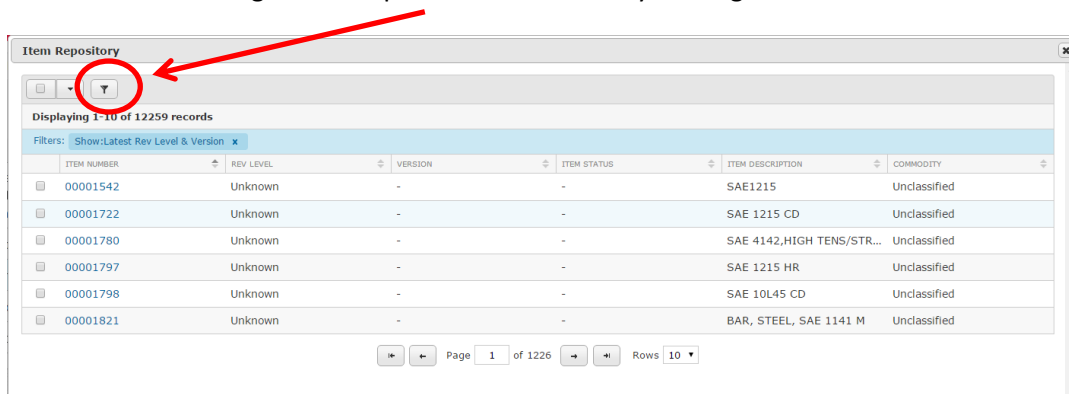
Item

Item Repository Remove Item Import Export Set Target Cost Price

No records

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY | ITEM DETAILS | TARGET COST PR... |
|------------------------|-----------|---------|-------------|------------------|-----------|--------------|-------------------|
| No records to display. | | | | | | | |

3. You will now see a listing of all the parts. Filter the list by clicking on the filter button.



Item Repository

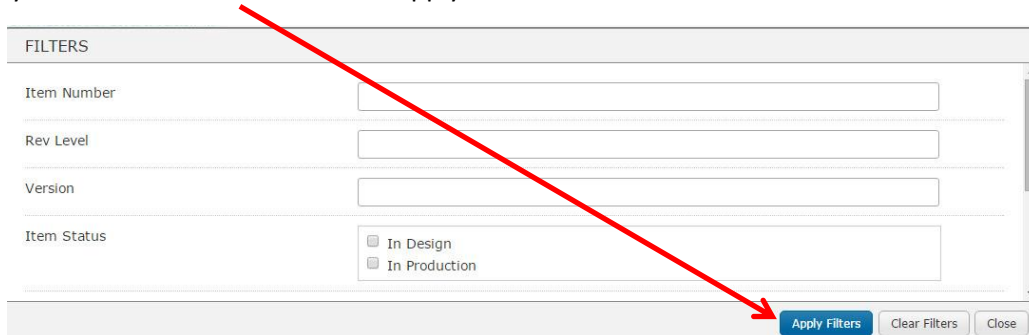
Displaying 1-10 of 12259 records

Filters: Show: Latest Rev Level & Version

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY |
|-------------|-----------|---------|-------------|---------------------------|--------------|
| 00001542 | Unknown | - | - | SAE1215 | Unclassified |
| 00001722 | Unknown | - | - | SAE 1215 CD | Unclassified |
| 00001780 | Unknown | - | - | SAE 4142,HIGH TENS/STR... | Unclassified |
| 00001797 | Unknown | - | - | SAE 1215 HR | Unclassified |
| 00001798 | Unknown | - | - | SAE 10L45 CD | Unclassified |
| 00001821 | Unknown | - | - | BAR, STEEL, SAE 1141 M | Unclassified |

Page 1 of 1226 Rows 10

4. You can filter by part (item) number, rev level or any of the other fields on the filter screen. Once you have your criteria in the box click the Apply Filters button.



FILTERS

Item Number

Rev Level

Version

Item Status

☐ In Design
☐ In Production

Apply Filters Clear Filters Close

5. Select/Check the part you want to add. If you have more than one part you may click on the filter again and follow steps 3, 4, and 5.
6. Once you have the part(s) checked, click the Done button.

Item Repository

Displaying 1-1 of 1 records

Filters: Item Number:87654321 x Show:Latest Rev Level & Version x

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY |
|-------------|-----------|---------|-------------|------------------|-----------|
| 87654321 | 02A | - | - | Widget, Test | Stampings |

Page 1 of 1 Rows 10

Done Discard

You have added the part(s). You must now complete the details for each part that you have added. You will see that the Item Details column shows there are 0 item details and the value is highlighted red. Once you have completed the details for the part this will show the number of details (ship to plants and other details) per item and will turn white.

7. Click on the Mange Item Details link to start filling in the details.

Item

Displaying 1-1 of 1 records

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY | ITEM DETAILS | TARGET COST | |
|-------------|-----------|---------|-------------|------------------|-----------|--------------|-------------|-----------------------|
| 87654321 | 02A | - | - | Widget, Test | Stampings | 0 | - | Manage Item... Remove |

Page 1 of 1 Rows 10

8. Since this is a new detail record, click the “+ Create Item Detail for RFQ” button.

Item > Manage Item Details for 87654321

+ Create Item Detail for RFQ Delete Item Details

No records

| SHIP TO/FINAL DESTINATION | REGION | TOTAL VOLUME | STATUS |
|---------------------------|--------|--------------|--------|
| No records to display. | | | |

9. Fill in the following, then click the Continue Button:

- a. Pick the Program that this is associated with. If the program does not exist, please email gsm.systems@nexteer.com to have it added, or you can just pick the program name “Total Program Volume”.
- b. The region of the Nexteer Plant that the supplier will ship this part to.
- c. The Nexteer Plant that the supplier will ship this part to.

Continue when the form is complete

Item > Manage Item Details for 87654321

Create Item Detail for 87654321

CREATE ITEM DETAIL show only required fields Show Item Information

Association Information

Program * Training type here...

Region * NA type here...

Ship To/Final Destination * Nexteer Automotive - Pto06 - 033580007 Saginaw, MI - Michigan United States type here...

Continue

9a-c

10. You will now need to fill in the details that pertain to this Part & Nexteer Plant.

11. When the information is completed, including the volume breakdown (you will see that the volume details have a green checkbox), you are now ready to click the Done button.

12. If all the information is filled in, when you click the done button, the Item Details number will be filled in and will have a white background.

Note: You will see that the Target Cost area is red, indicating this hasn't been completed yet.

13. Click on the Set Target Cost Price button to enter in the Target Cost (this should be the same as the cost book value).

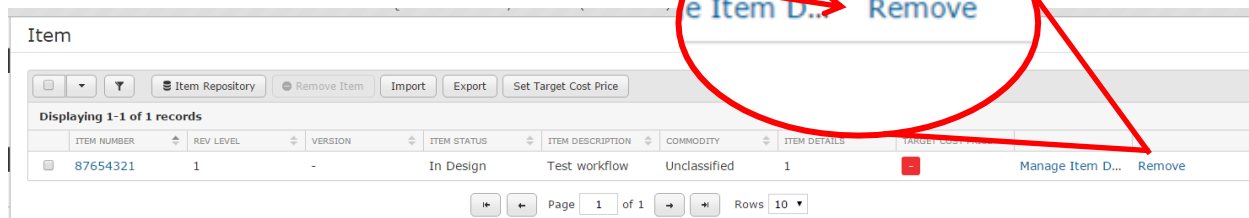
14. Enter in the total cost price for all the listed parts. Once done, click the Save & Close button.

You have now completed the required information for the Item(s).

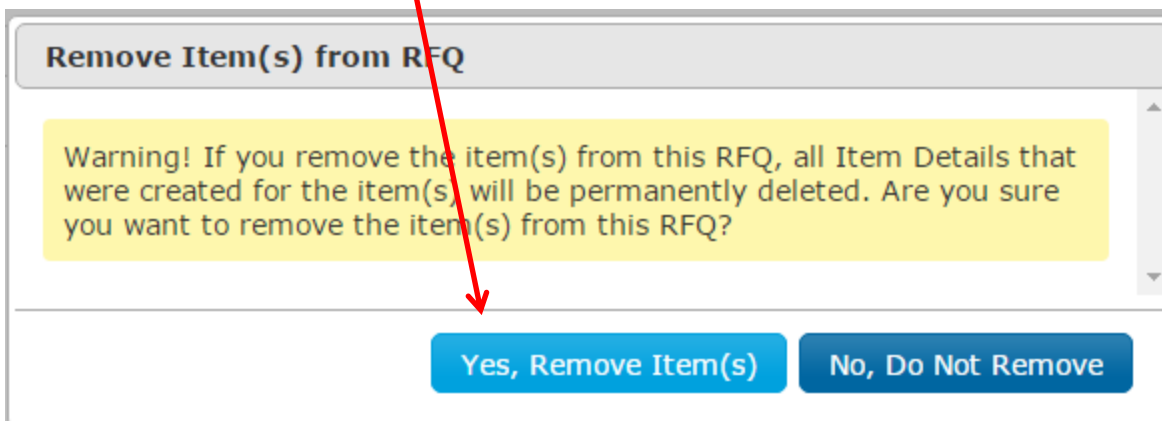
Removing Parts from the RFQ

Until you publish your RFQ, you have the ability to remove a part (item) you have added.

To remove the part, click on the Remove link.

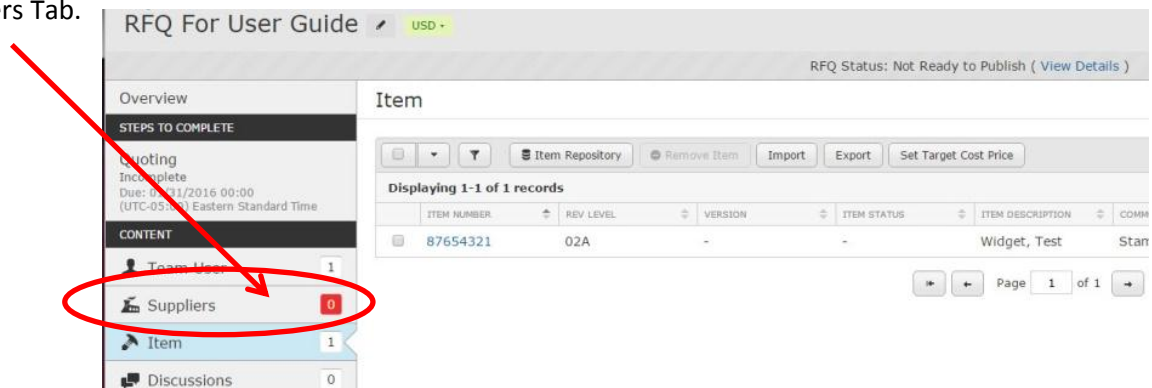


Confirm that you want to remove the parts.

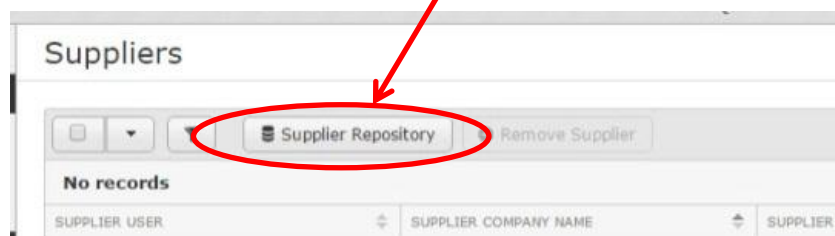


Adding Supplier Users to the RFQ

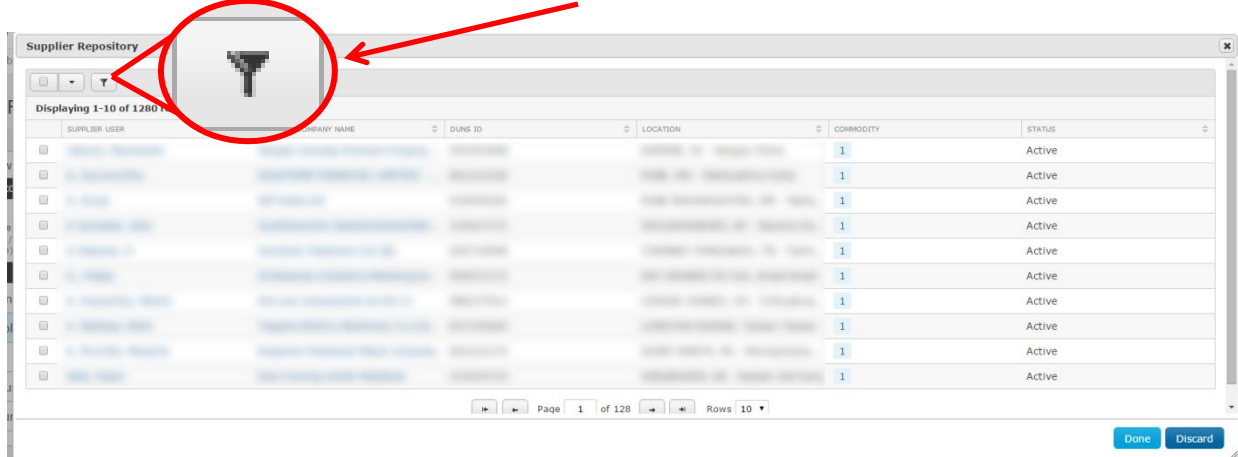
In order to submit your quote, you need to add what supplier(s) and supplier user(s) will be quoting this RFQ. Directworks will add the supplier to the RFQ when you add the supplier user. To add the supplier user first click on the Suppliers Tab.



1. On the supplier tab, click on the Supplier Repository button.



2. This will bring up the full list of supplier users. Use the filter button to filter on your supplier contact(s).



3. Use the fields in the filter to find the Supplier contact (Company and Duns might return the best results), then click the Apply Filters.

FILTERS

First Name

Last Name

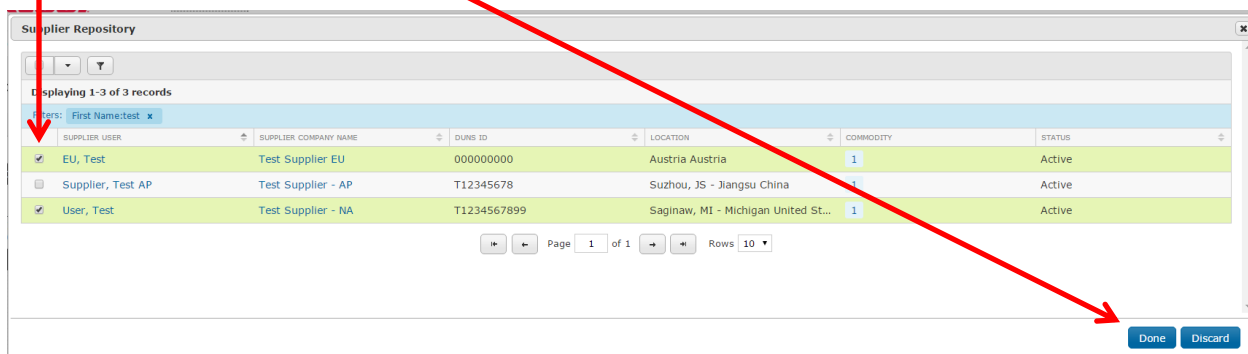
Supplier Company

Duns ID

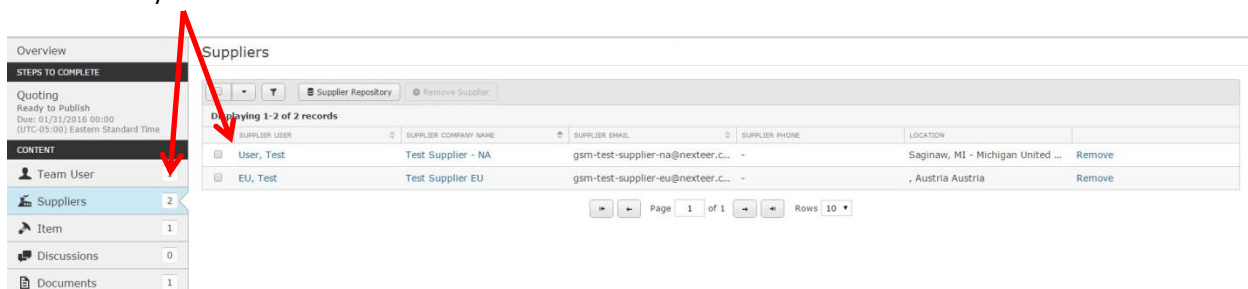
City

Apply Filters Clear Filters Close

4. Check the supplier contact(s) you want to add. Note: If you have more supplier contact to add, just re-filter and check all the ones that you want to bid. This will keep the previous checked contacts included. When you are done adding all the necessary contacts, click the Done button.



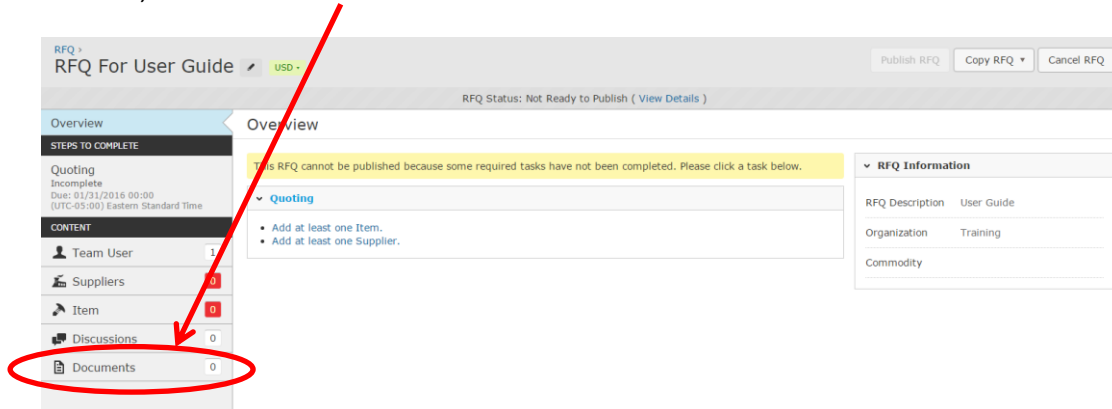
All the contacts you have checked will now show in the Suppliers list and the Suppliers tab will show how many contacts you have added.



Adding Documents

Many times you may want to add a document, such as a drawing or other information, to the RFQ. Note: this is not a requirement for publishing the RFQ.

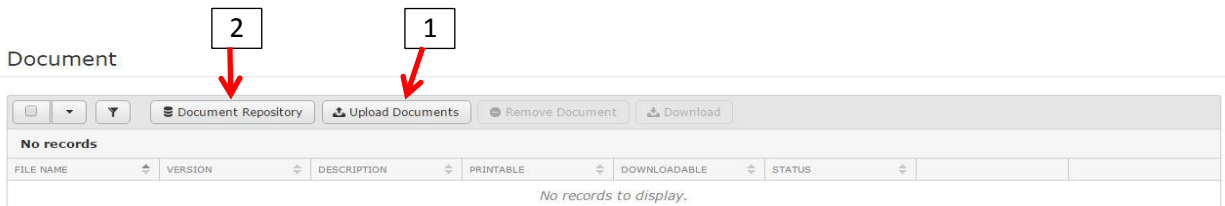
To add a document, click on the Documents tab.



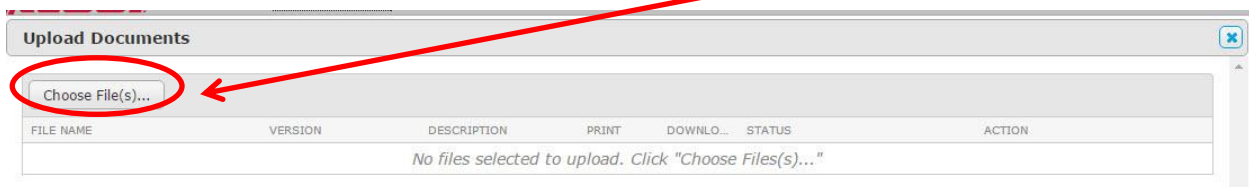
This will take you to the document screen. You can add a document two different ways. The first way is to Upload your document (which is most likely the way you will attach documents). The second way is to attach the document from the Document Repository (public documents available to all Nexteer users).

This guide will only walk you through uploading a document (from your computer).

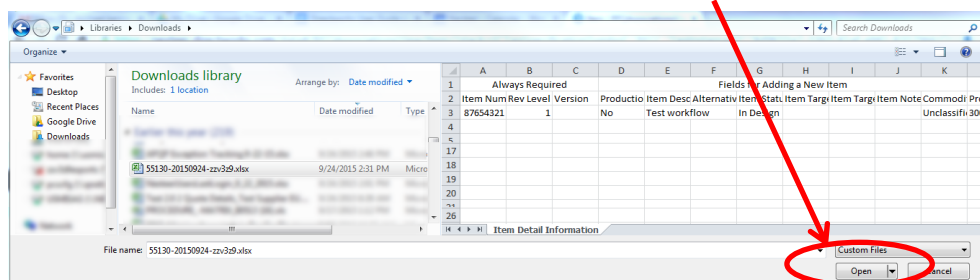
1. To upload your document, click on the Upload Documents button, indicated by the 1 below.



2. Next you will need to choose your file(s). To do that, click on Choose File(s) button.



3. Find the files on your computer, and select it/them. To select more than one, you can hold down the ctrl key and click on each file you want to add. Once the file(s) is/are selected click the Open Button.



4. It is a good idea to add a description so the supplier understands what that attachment is, choose the options below, then click the Upload button.

| FILE NAME | VERSION | DESCRIPTION | PRINT | DOWNLO... | STATUS | ACTION |
|-------------------------------|---------|-------------|-------------------------------------|-------------------------------------|--------|---------------------------------------------------------------|
| 87654321_drawing.jpg 24.6k | 1 | drawing | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> Mark Local - |

Upload Close

You have several options at this point for uploading a document.

- A. Can the Supplier Print the document (if you want them to print, leave it as default: checked).
 - B. Can the Supplier Download the document (if you want them to download it, leave it as default: checked).
 - C. Mark the document as Local (not add it to the public document repository, **ALWAYS leave this checked**).
 - D. Remove the document.
5. Once you click the upload button, because you have left the Mark Local checked (as we want you to), you will receive the below message. Click the Continue button.

Upload Local Document(s)

One or more files are marked as Local. Those files may only be used in this context and will not be added to the repository.

Continue Cancel

Adding Team Users

If you need other people to be able to **edit** your RFQ, you can add them as a team user. By default all Nexteer users should have access to the RFQ to view it. To add a user, click on the Team User tab on the RFQ


RFQ - RFQ For User Guide

RFQ Status: Not Ready to Publish (View Details)

Overview

This RFQ cannot be published because some required tasks have not been completed. Please click a task below.

Team User

1. On this screen, click on the Team User button. Use the filter  to find you user(s), check any user you want to have edit rights, once done click the Done button. If you are unsure how to use the filter and add users see the Adding Supplier Users section, as it is the same type of process.

Team User

Team User Repository

Displaying 1-1 of 1 records

| NAME | JOB TITLE | PHONE NUMBER | ORGANIZATION | COMMODITY | STATUS IN RFQ | |
|------------------|-----------|--------------|--------------|-----------|---------------|----------|
| Bennett, Michael | - | unknown | Training | 1 | Invited | Uninvite |

Publishing the RFQ

Once you have added your part(s), supplier users, and any documents you are ready to publish. You will also be able to tell because the background colors of all items will be white, the RFQ Status at the top will say “Ready to Publish”, and the Publish button is now active.

The screenshot shows the Nexteer RFQ interface. At the top, the status is "Ready to Publish". Below this, the "Item" table is displayed with a white background. The table has columns for Item Number, Rev Level, Version, Item Status, Item Description, Commodity, Item Details, Target Cost Price, and Manage Item Det... The table contains one record: Item Number 87654321, Rev Level 02A, Version -, Item Status -, Item Description Widget, Test, Commodity Stampings, Target Cost Price 1.100, and Manage Item Det... The "Publish RFQ" button is visible in the top right corner. A red arrow points from the "Publish RFQ" button to the "Ready to Publish" status. Another red arrow points from the "Item" table to the "Ready to Publish" status. A third red arrow points from the "Item" table to the "Ready to Publish" status.

Status is "Ready to Publish"

RFQ Status: Ready to Publish

Item

Displaying 1-1 of 1 records

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | ITEM DESCRIPTION | COMMODITY | ITEM DETAILS | TARGET COST PRICE | Manage Item Det... |
|-------------|-----------|---------|-------------|------------------|-----------|--------------|-------------------|--------------------|
| 87654321 | 02A | - | - | Widget, Test | Stampings | | 1.100 | Remove |

Page 1 of 1 Rows 10

Team User 1

Suppliers 2

Item 1

Discussions 0

Documents 1

All items have a white background

To publish your RFQ, click the Publish RFQ button.

The "Confirm Publish" dialog box asks: "Are you sure you want to publish this RFQ? After you publish, the RFQ will be available to the invited suppliers." There are two buttons: "Yes: Publish RFQ" and "No: Do Not Publish". A red arrow points from the "Yes: Publish RFQ" button to the "Publish RFQ" button in the previous screenshot.

Confirm Publish

Are you sure you want to publish this RFQ? After you publish, the RFQ will be available to the invited suppliers.

Yes: Publish RFQ No: Do Not Publish

Click the “Yes: Publish RFQ” button in the confirmation box.

Your RFQ is now published. Note: all supplier users added to the RFQ will receive an email invite to this RFQ. If they did not get an email, check the email address in the Supplier User repository, If the email is correct, have the Supplier check their Spam/Junk folder or have their IT trust this email address:

notification@messages.directworks.com

The screenshot shows the Nexteer RFQ interface after the RFQ has been published. The status is "Published". The "Quoting" table is displayed with a white background. The table has columns for Supplier Company, Invited Users, and Quoting Status. The table contains two records: Supplier Company Test Supplier - NA, Invited Users 1, Quoting Status Not Started; and Supplier Company Test Supplier EU, Invited Users 1, Quoting Status Not Started. The "Publish RFQ" button is visible in the top right corner. A red arrow points from the "Publish RFQ" button to the "Published" status.

RFQ Status: Published

Overview

Quoting

Displaying 1-2 of 2 records

| SUPPLIER COMPANY | INVITED USERS | QUOTING STATUS |
|--------------------|---------------|----------------|
| Test Supplier - NA | 1 | Not Started |
| Test Supplier EU | 1 | Not Started |

Page 1 of 1 Rows 10


RFQ Information

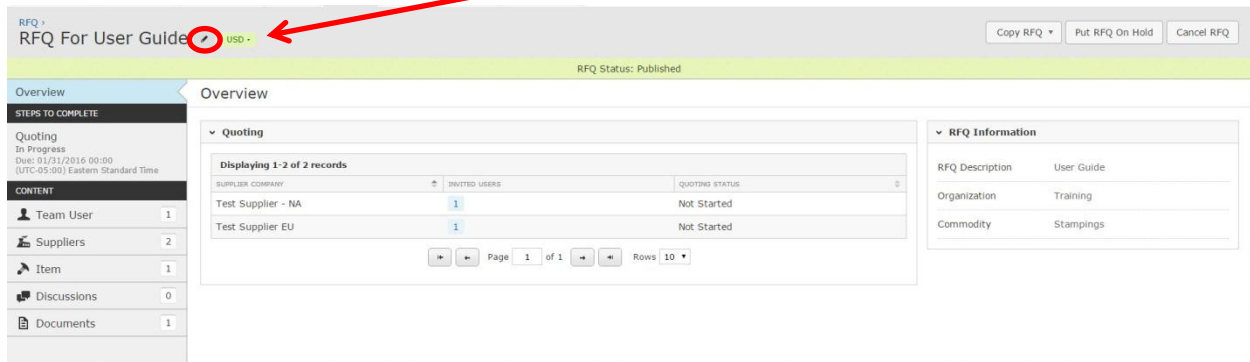
| RFQ Description | User Guide |
|-----------------|------------|
| Organization | Training |
| Commodity | Stampings |


A note on Suppliers responding to RFQs: Suppliers should enter 0 in the breakdowns fields if they don't have it or are unwilling to provide the details. This information will be shown on the F1054 so you will be responsible for explaining why the supplier did not provide breakdown details.

Post Publish RFQ Actions

Editing Information

Once you publish the RFQ, you may need to edit some of the information. To edit the RFQ header details (see the RFQ header creation section for more details), click on the pencil icon  after the RFQ name at the top by the currency. To edit the part details, go into the Item tab.



RFQ For User Guide  USD

RFQ Status: Published

Overview

STEPS TO COMPLETE

Quoting
In Progress
Due: 01/31/2016 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

- Team User 1
- Suppliers 2
- Item 1
- Discussions 0
- Documents 1

Quoting

Displaying 1-2 of 2 records


| SUPPLIER COMPANY | INVITED USERS | QUOTING STATUS |
|--------------------|---------------|----------------|
| Test Supplier - NA | 1 | Not Started |
| Test Supplier EU | 1 | Not Started |

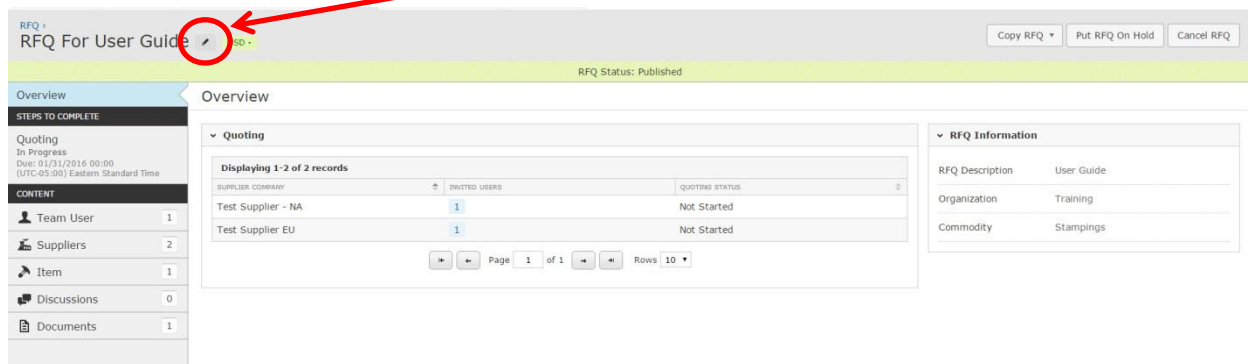
Page 1 of 1 Rows 10


RFQ Information

| | |
|-----------------|------------|
| RFQ Description | User Guide |
| Organization | Training |
| Commodity | Stampings |

Extending Quote Due Dates

If you need to extend the Quote Due Date for your suppliers, click on the pencil icon  after the RFQ name at the top by the currency.



RFQ For User Guide  USD

RFQ Status: Published

Overview

STEPS TO COMPLETE

Quoting
In Progress
Due: 01/31/2016 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

- Team User 1
- Suppliers 2
- Item 1
- Discussions 0
- Documents 1

Quoting

Displaying 1-2 of 2 records

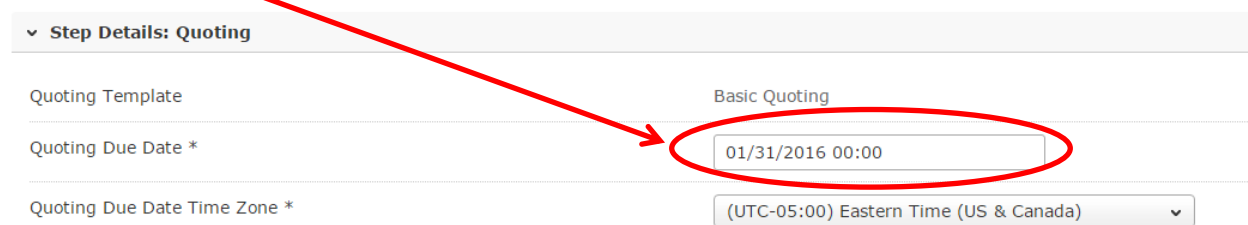
| SUPPLIER COMPANY | INVITED USERS | QUOTING STATUS |
|--------------------|---------------|----------------|
| Test Supplier - NA | 1 | Not Started |
| Test Supplier EU | 1 | Not Started |

Page 1 of 1 Rows 10

RFQ Information

| | |
|-----------------|------------|
| RFQ Description | User Guide |
| Organization | Training |
| Commodity | Stampings |

On the Edit screen, go down to the “Step Details: Quoting” section and change the Due Date to the new date you want to extend it to.



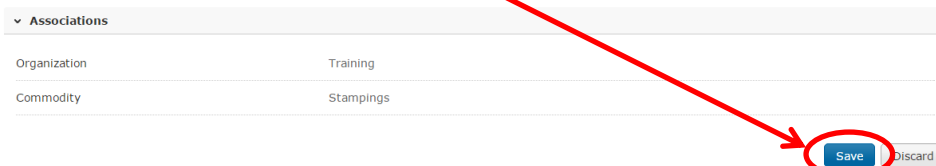
Step Details: Quoting

Quoting Template Basic Quoting

Quoting Due Date * 01/31/2016 00:00

Quoting Due Date Time Zone * (UTC-05:00) Eastern Time (US & Canada)

Click on the save button to commit the change(s) entered.



Associations

| | |
|--------------|-----------|
| Organization | Training |
| Commodity | Stampings |

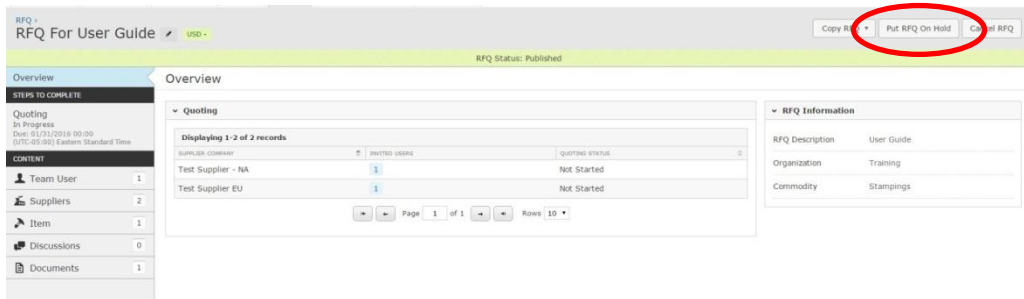
Save Discard

On-Hold for additional editing

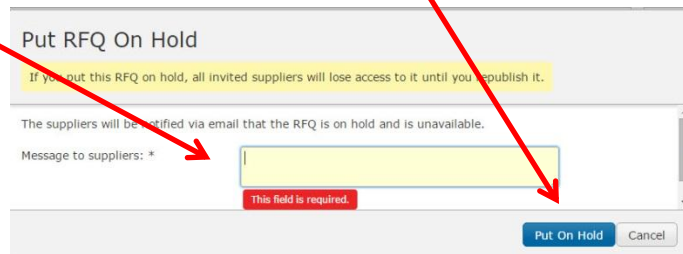
This will allow you to edit the part details (cost book, SOP, PPAP Date, Volumes, anything on the Manage Details -> Details Page).

If you need to make any of the above changes, you will need to put the RFQ on hold.

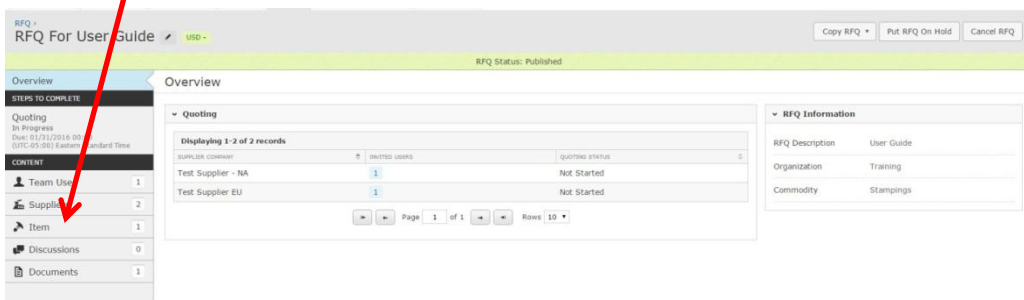
1. To put the RFQ on hold, navigate to your RFQ and on the main page, click on the “Put RFQ On Hold” button.



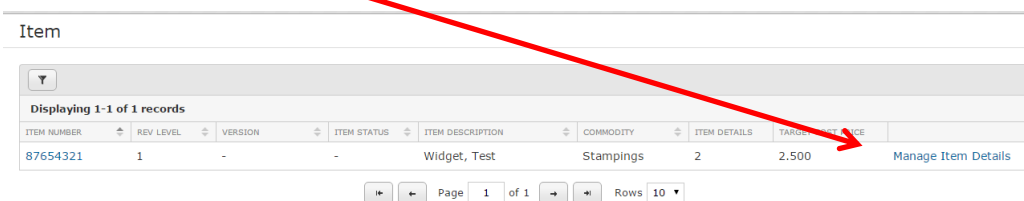
2. Enter in your reason for putting the RFQ on hold and click the “Put On Hold” Button. Note, a message will go out to the suppliers that the quote is “unavailable”.



3. Click on the Item tab on the RFQ.



4. Click on the Manage Item Details link

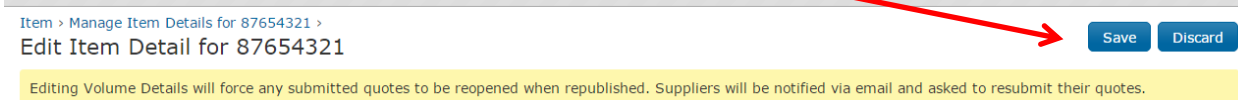


5. Click on the Edit link.



| SHIP TO/FINAL DESTINATION | REGION | TOTAL VOLUME | STATUS | |
|-----------------------------------|--------|--------------|----------|----------------------|
| Nexteer Automotive - Plt03 - 0... | NA | 18,000 | Complete | Edit |

6. Edit any of the details that need changing and click the Save button at the top right. Note: If you change the volumes this will re-open all the submitted quotes.



Item > Manage Item Details for 87654321 >
Edit Item Detail for 87654321

Editing Volume Details will force any submitted quotes to be reopened when republished. Suppliers will be notified via email and asked to resubmit their quotes.

[Save](#) [Discard](#)

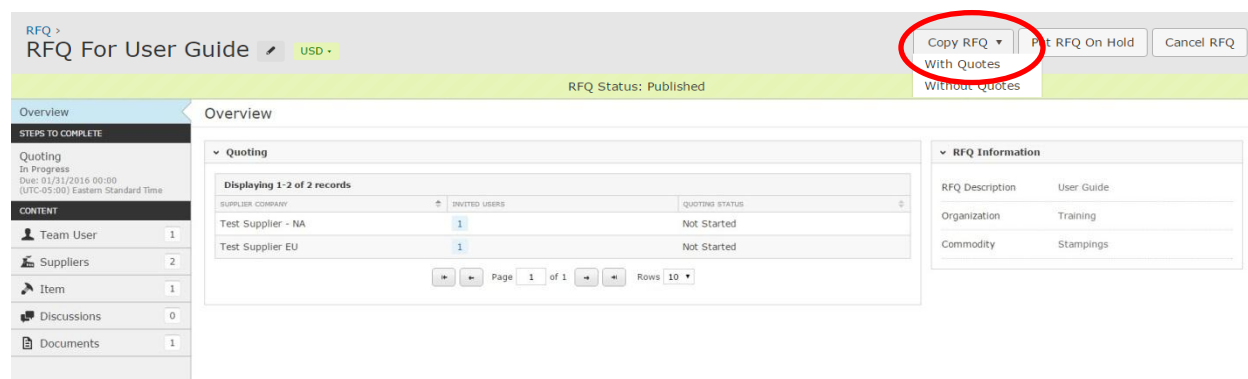
Copying a Quote

If you need to copy a quote, you can do two different types of copies (with quotes and without quotes). If you copy with quotes all of the content will be brought over, including the supplier responses, but not the discussions (if any). Note: Some fields such as the **currency fields will not be editable**.

Copying the RFQ without quotes will copy the content, but not the quotes nor the discussions. This will allow you to change **ANY** of the RFQ data.

With quotes

To copy with quotes, go into the RFQ screen and click on the Copy RFQ, and click on With Quotes.



RFQ > RFQ For User Guide USD

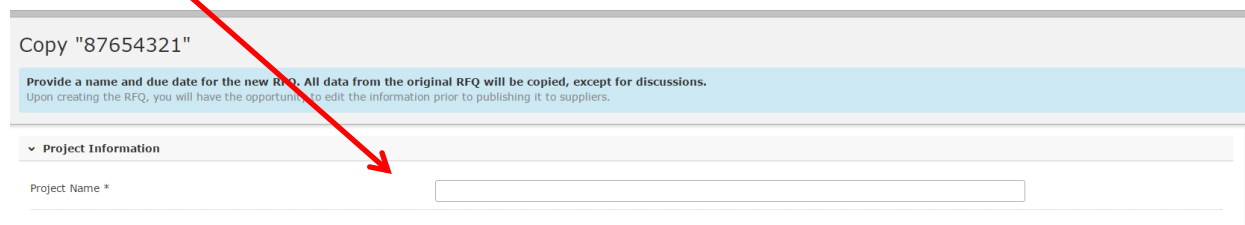
RFQ Status: Published

Copy RFQ ▼
With Quotes
Without Quotes

RFQ Description: User Guide
Organization: Training
Commodity: Stampings

This will bring up the RFQ header (with some additional information)

If this is the first time doing a “copy with quotes” for this RFQ (or sub-sequence copied RFQs that have a project already associated to it) you will be asked to provide a Project Name. If you already have a project name associated to your RFQ this will be pre-populated and will not be able to change it.



Copy "87654321"

Provide a name and due date for the new RFQ. All data from the original RFQ will be copied, except for discussions. Upon creating the RFQ, you will have the opportunity to edit the information prior to publishing it to suppliers.

Project Information

Project Name *

Once you enter that, change any of the RFQ header information. Note: You will not be able to change the RFQ or the Supplier Quoting currencies. Click the Create RFQ button in the bottom right of the screen when the form is complete.



[Create RFQ](#) [Cancel](#)

Without Quotes

If you need a similar RFQ as a previous one and don't want to start from the beginning, or you need to change the either the RFQ currency or the quoting currencies, you can copy the RFQ Without Quotes.

The screenshot shows the 'RFQ For User Guide' interface. At the top right, there are buttons: 'Copy RFQ', 'Put RFQ On Hold', and 'Cancel RFQ'. Below 'Copy RFQ' is a dropdown menu with 'With Quotes' and 'Without Quotes' options. The 'Without Quotes' option is circled in red. The main content area shows 'RFQ Status: Published' and a table of quoting records. The table has columns for 'SUPPLIER COMPANY', 'INVITED USERS', and 'QUOTING STATUS'. It lists 'Test Supplier - NA' and 'Test Supplier EU', both with 1 invited user and 'Not Started' status. A sidebar on the left shows 'STEPS TO COMPLETE' and 'CONTENT' sections.

This will then bring up the RFQ header screen, pre-populated from the original RFQ, for you to modify. See the RFQ Header section of this guide for more details on the available fields and what they are used for. When you are done making your changes click the Create RFQ button.

A close-up of the 'Create RFQ' button, which is blue with white text. It is circled in red. To its right is a 'Cancel' button.

Cancelling the RFQ

If it is determined that you no longer need the RFQ, either business direction changed, part is no longer being quoted, or some other reason, you can cancel the RFQ. To cancel the RFQ, click the Cancel RFQ Button.

The screenshot shows the 'RFQ For User Guide' interface, similar to the one above. At the top right, there are buttons: 'Copy RFQ', 'Put RFQ On Hold', and 'Cancel RFQ'. The 'Cancel RFQ' button is circled in red. The main content area shows 'RFQ Status: Published' and a table of quoting records. The table has columns for 'SUPPLIER COMPANY', 'INVITED USERS', and 'QUOTING STATUS'. It lists 'Test Supplier - NA' and 'Test Supplier EU', both with 1 invited user and 'Not Started' status. A sidebar on the left shows 'STEPS TO COMPLETE' and 'CONTENT' sections.

It will then ask you to put in a reason for cancellation.

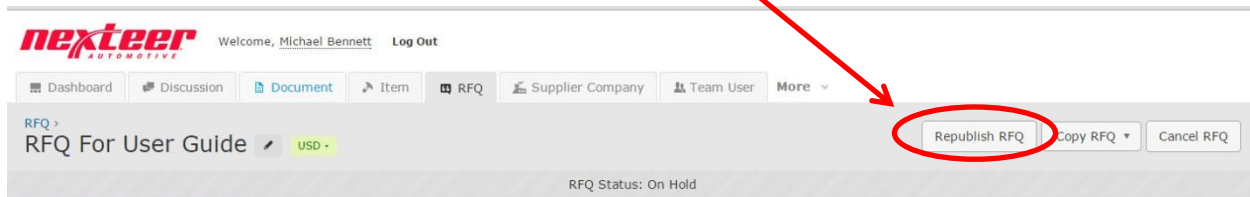
The screenshot shows a 'Cancel RFQ' dialog box. It has a title bar with a close button. The main text says 'You are about to cancel this RFQ and make it inactive.' Below this, it says 'Please explain why you are cancelling this RFQ.' There is a text input field labeled 'Reason For Cancellation *'. At the bottom right, there are two buttons: 'Cancel RFQ' and 'Discard'. A red arrow points from the 'Cancel RFQ' button in the previous screenshot to this 'Cancel RFQ' button.

Enter in the reason and click the Cancel RFQ button.

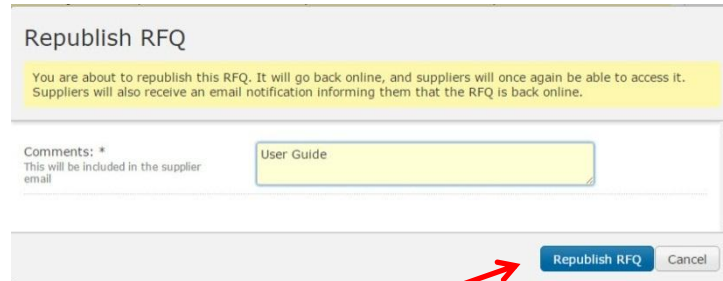
Note: The invited supplier users will be notified that the RFQ has been cancelled (if it has been published).

Republishing an On-Hold RFQ

If you put your RFQ On-Hold for changing details or some other reason, you will need to republish the RFQ before the supplier can submit their quotes again. To republish, click the “Republish RFQ” button at the top.



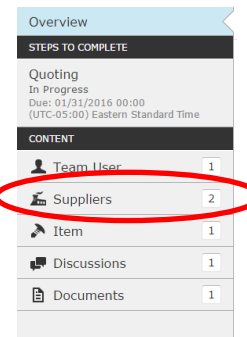
A box will now pop up for you to enter in any comments for the supplier. Suggested comments should be a summary of the changes you made to the RFQ.



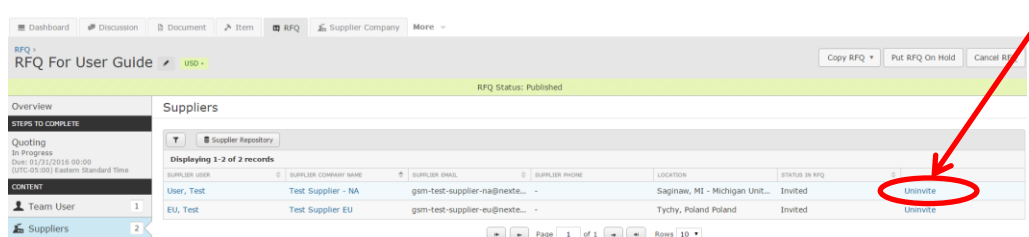
Once you have entered in the comments, click the Republish RFQ button. This will then send an email to all **invited** supplier users that the event is now available.

Uninviting Supplier Users (Contacts)

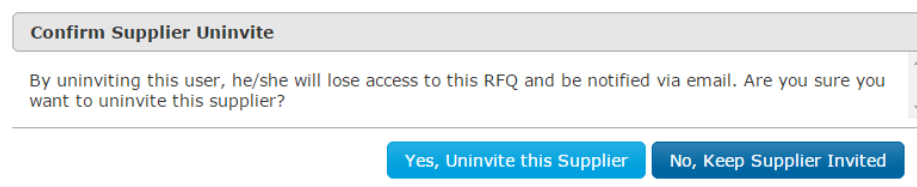
If you need to uninvite a supplier user, either because they were incorrectly added, left the company, or you are doing down selecting, you can do so by going into the RFQ Suppliers tab.



Once on the supplier screen, click the Uninvite link on the supplier user that you want to uninvite.



Acknowledge that you want to remove the user by clicking the “Yes, Uninvite this Supplier” button.



Note: The supplier **will** receive an email stating they have been removed from the RFQ.

Re-inviting Supplier Users

If you have uninvited a supplier, but now need to re-invite them. You follow the same process as uninviting them, but you will now see the re-invite option on the suppliers tab RFQ page.



Acknowledge that you want to re-invite the user by clicking the “Yes, Re-invite this Supplier” button.



Note: The supplier will receive an email stating they have been reactivated on the RFQ.

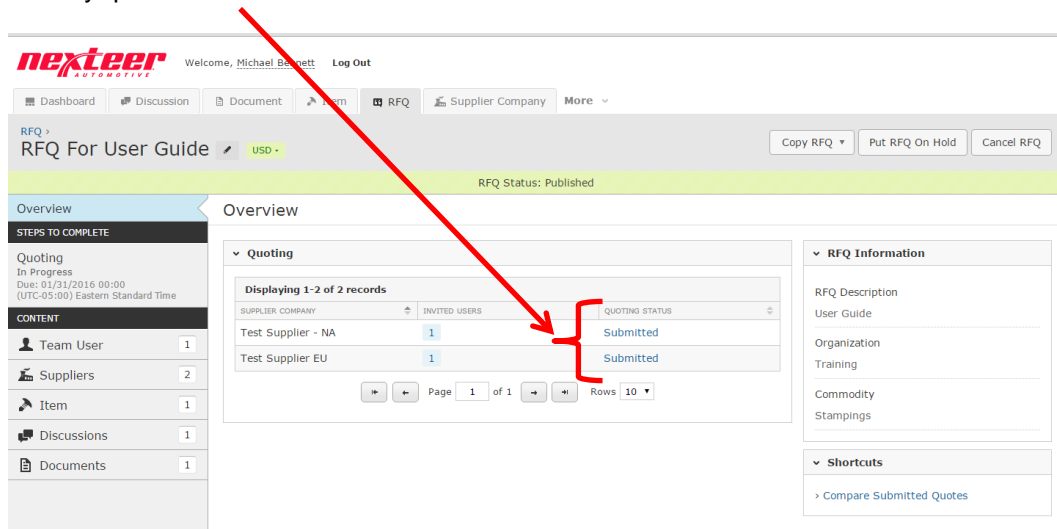
Quote Review

Reviewing Quotes

As suppliers start submitting their quotes into Directworks, you have access to view them.

A note on Suppliers responding to RFQs: suppliers should enter 0 in the breakdown fields if they don't have it or are unwilling to provide the details. This information will be shown on the F1054, so you will be responsible for explaining why the supplier did not provide breakdown details.

When you go into your RFQ, you will be taken to the Overview page, on this page you can see if the suppliers have submitted any quotes or not.



If you want to view the quotes, click on the Quoting section of the RFQ and click on the “View Quotes” link.

Nexteer Automotive

Welcome, Michael Bennett Log Out

Dashboard Discussion Document Item RFQ Supplier Company More

RFQ > RFQ For User Guide USD

Copy RFQ Put RFQ On Hold Cancel RFQ

RFQ Status: Published

Overview

STEPS TO COMPLETE

Quoting
In Progress
Due: 01/31/2016 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

Team User 1

Suppliers 2

Item 1

Discussions 1

Documents 1

Quoting

SUPPLIERS ITEMS SCENARIOS

Reopen Quotes

Displaying 1-2 of 2 records

| SUPPLIER COMPANY NAME | INVITED USERS | ASSIGNED ITEMS | STATUS | ACTIONS |
|-----------------------|---------------|----------------|-----------|--------------------|
| Test Supplier - NA | 1 | 1 | Submitted | View Quotes Export |
| Test Supplier EU | 1 | 1 | Submitted | View Quotes Export |

Page 1 of 1 Rows 10

This will take you to the parts list to view the individual quotes for any parts that you have added to the RFQ.

Click on the View Quote link on the line of the part to see the actual quote from the selected supplier.

Nexteer Automotive

Welcome, Michael Bennett Log Out

Dashboard Discussion Document Item RFQ Supplier Company More

RFQ > RFQ For User Guide USD

Copy RFQ Put RFQ On Hold Cancel RFQ

RFQ Status: Published

Overview

STEPS TO COMPLETE

Quoting
In Progress
Due: 01/31/2016 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

Team User 1

Suppliers 2

Item 1

Discussions 1

Documents 1

Quoting > View Quotes for Test Supplier - NA

Displaying 1-1 of 1 records

| ITEM NUMBER | REV LEVEL | VERSION | ITEM STATUS | SHIP TO/FINAL DEST. | REGION | TOTAL SELL PRICE | STATUS | ACTION |
|-------------|-----------|---------|-------------|----------------------|--------|------------------|-----------|------------|
| 87654321 | 02A | - | - | Nexteer Automotiv... | NA | 3.86276 | Submitted | View Quote |

Page 1 of 1 Rows 10

The below image is the quote screen. If you see that the summary (at the top) is missing some data and the supplier says they cannot submit the quote, it might be because they haven't put in the breakdown. If you need to export the quote, see the section on exporting the quotes.

87654321, Rev Level: 02A Version: - (Nexteer Automotive - Plt06 - 033580007 Saginaw, MI - Michigan United States | NA)
Test Supplier - NA

Summary

| | |
|--------------------------------------------|-------------|
| Total Net Raw Material Cost | 2.49980 USD |
| Total Purchased Components | - |
| Total Setup Cost | 0.00004 USD |
| Total Burden Cost | 0.00281 USD |
| Total Direct Labor Cost | 0.01685 USD |
| Total Manufacturing Cost | 2.51950 USD |
| Total Sell Price (Supplier Local Currency) | 3.86276 USD |

Commercial Terms

Do you agree to Nexteer's General Terms & Conditions? Yes

If you answered No to the question above, please provide details as to what is not agreed to. Responses must be provided in English. Please note: Answering No to this question may remove your organization from final Supplier selection for this Event.

Do you agree with Nexteer's Supplier Requirements? Yes

Close

Exporting Supplier Quotes

If you need to export the quotes for viewing or analysis, you first need to go into the RFQ and click on the Quoting section of the RFQ. On the Quoting page, you have the option to export any submitted quotes by clicking on the Export button. This will download the quote into an excel document.

The screenshot shows the 'RFQ For User Guide' page with the 'Quoting' section selected. The 'Export' button is visible in the 'View Quotes' column for both 'Test Supplier - NA' and 'Test Supplier EU'.

Comparing Quotes

If you want to compare supplier quotes within Directworks, go into the RFQ. Once on the main "Overview" page click on the Compare Submitted Quotes link under the Shortcuts frame on the right side.

The screenshot shows the 'RFQ Overview' page. The 'Compare Submitted Quotes' link is located under the 'Shortcuts' section on the right side of the page.

This will bring up a screen for you to select your data. You must pick your item/part (only one), and select the suppliers that you want compare. Once you have selected your data, click the Compare Quotes button.

The form has two main sections: 'Choose Item: *' and 'Choose Supplier(s) to Compare: *'. The 'Choose Item' section contains a text input field with the value '87654321, Rev Level: 02A Version: - (Nexteer Automotive - Pkt06 - 033580007 Saginaw, MI - Michigan United States | NA)'. The 'Choose Supplier(s) to Compare' section contains two text input fields with the values 'Test Supplier - NA' and 'Test Supplier EU'. A red arrow points from the 'Compare Submitted Quotes' button to the 'Compare Submitted Quotes' button.

This will bring up a side by side comparison of the quotes. If you need to add or remove suppliers, click the Adjust Suppliers button and select/de-select the suppliers.

Nexteer Automotive

Welcome, Michael Bennett Log Out

Dashboard Discussion Document Item RFQ Supplier Company More

RFQ > RFQ For User Guide USD

Copy RFQ Put RFQ On Hold Cancel RFQ

RFQ Status: Published

Overview Quoting > View Quotes for "87654321, Rev Level: 02A Version: - (Nexteer Automotive - Pit06 - 033580007 Saginaw, MI - Michigan United States | NA)" >

Compare Quotes


Adjust Suppliers

Item: 87654321, Rev Level: 02A Version: - (Nexteer Automotive - Pit06 - 033580007 Saginaw, MI - Michigan United States | NA)

| | Test Supplier - NA (USD) | Test Supplier EU (USD) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|------------------------|
| Summary | | |
| Total Net Raw Material Cost | 2.49980 | 2.57225 |
| Total Purchased Components | 0.00000 | 0.00000 |
| Total Setup Cost | 0.00004 | 0.00002 |
| Total Burden Cost | 0.00281 | 0.00248 |
| Total Direct Labor Cost | 0.01685 | 0.01145 |
| Total Manufacturing Cost | 2.51950 | 2.58620 |
| Total Sell Price (Supplier Local Currency) | 3.86276 | 3.92956 |
| Commercial Terms | | |
| Do you agree to Nexteer's General Terms & Conditions? | Yes | Yes |
| If you answered No to the question above, please provide details as to what is not agreed to. Responses must be provided in English. Please note: Answering No to this question may remove your organization from final Supplier Selection for this RFQ. | | |
| Do you agree with Nexteer's Supplier Requirements? | Yes | Yes |
| If you answered No to the question above, please provide details as to what is not agreed to. Responses must be provided in English. Please note: Answering No to this question may remove your organization from final Supplier Selection for this RFQ. | | |
| Manufacturing DUNS Number | 987654321 | 987654321 |
| INCO Terms | PCA - Free Carrier | PCA - Free Carrier |
| Named Place | Saginaw | Saginaw |

Re-opening Quotes

If a supplier has submitted a quote and needs to adjust the information, you will need to re-open the quote.

There are 2 ways to re-open a quote. The first is individually, by clicking on the reopen icon  next to the supplier name.

Nexteer Automotive

Welcome, Michael Bennett Log Out

Dashboard Discussion Document Item RFQ Supplier Company More

RFQ > RFQ For User Guide USD

Copy RFQ Put RFQ On Hold Cancel RFQ

RFQ Status: Published

Overview Quoting

ITEMS SCENARIOS

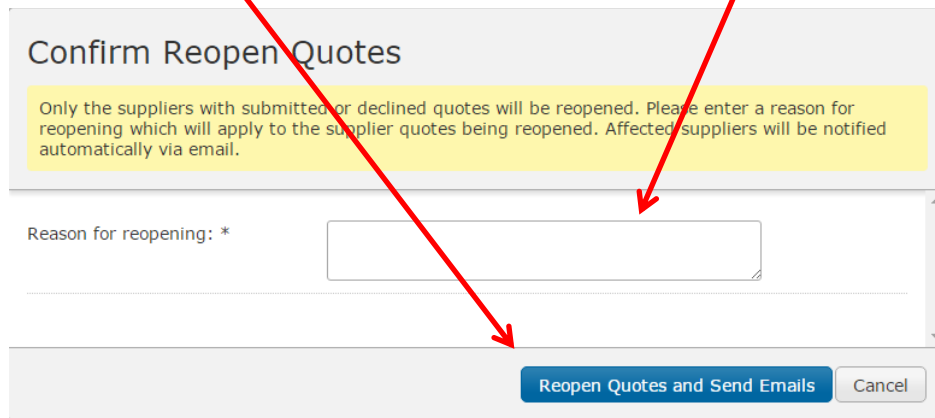
Reopen Quotes

| SUPPLIER COMPANY NAME | INVITED USERS | ASSIGNED ITEMS | STATUS | ACTIONS |
|-----------------------|---------------|----------------|-----------|--------------------|
| Test Supplier - NA | 1 | 1 | Submitted | View Quotes Export |
| Test Supplier EU | 1 | 1 | Submitted | View Quotes Export |

Page 1 of 1 Rows 10

The second way is to check which supplier(s) you want to re-open and click the "Reopen Quotes" button at the top of the supplier listing.

Once you have selected your supplier(s) and clicked the reopen quotes button, or individually click the reopen icon, you will need to confirm the reopening of the quote. You must first enter in a reason for re-opening and then click the Reopen Quotes and Send Emails button.



The image shows a 'Confirm Reopen Quotes' dialog box. At the top, a yellow banner contains the text: 'Only the suppliers with submitted or declined quotes will be reopened. Please enter a reason for reopening which will apply to the supplier quotes being reopened. Affected suppliers will be notified automatically via email.' Below this is a text input field labeled 'Reason for reopening: *'. At the bottom right, there are two buttons: 'Reopen Quotes and Send Emails' (highlighted in blue) and 'Cancel'. Two red arrows point from the text above to the input field and the blue button.

Note: this will email the supplier a new invitation to re-submit their quote.

Quoting Rounds

If you need to go into round of negotiations, you have 2 different methods to do this in Directworks. The first is to uninvite supplier users and then reopen the quotes for the specific suppliers you want to have additional rounds with. See the sections pertaining to these activities above.

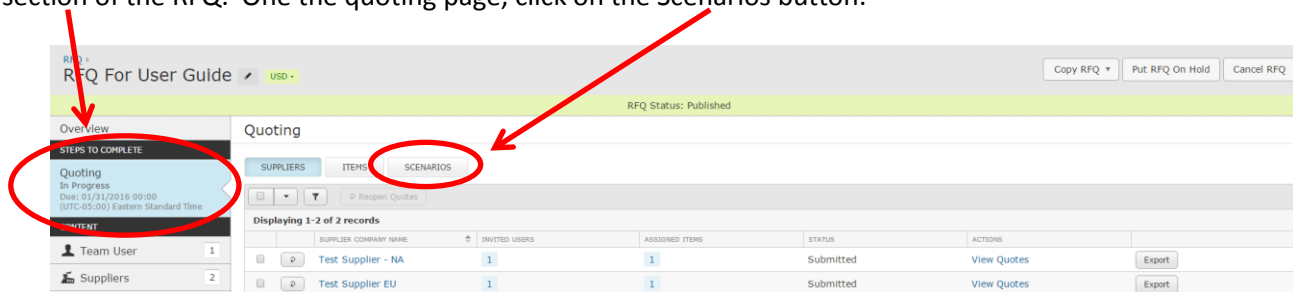
The second way is to copy the RFQ **with quotes**. This will then group the RFQs together in a project for linkage.

Recommendation

Once your suppliers have finalized their quotes, and you are ready to recommend a supplier, you will need to create a scenario and also print the F1054 form. See the instructions below for how to perform these steps.

Creating Scenarios

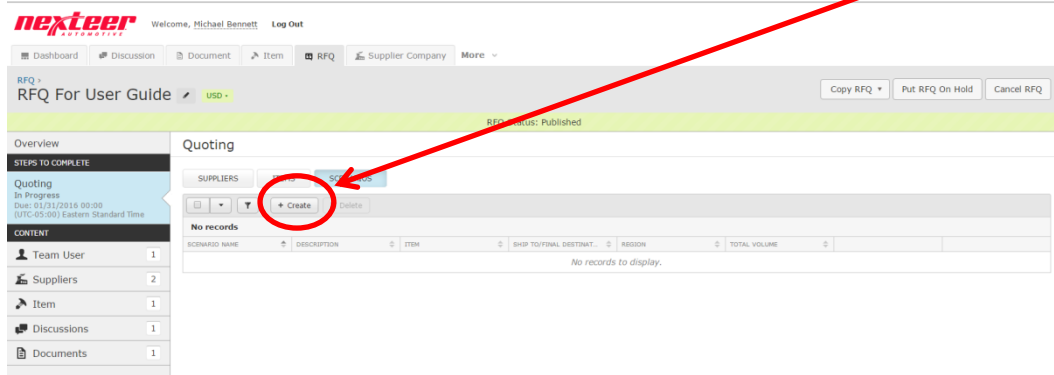
In order to recommend a supplier you must first create a scenario. To create a scenario, click on the Quoting section of the RFQ. One the quoting page, click on the Scenarios button.



The image shows the 'RFQ For User Guide' interface. On the left, a sidebar has a 'Quoting' section highlighted with a red circle. In the main area, the 'Quoting' tab is active, and the 'SCENARIOS' button is circled in red. Below the tabs, a table displays 'Displaying 1-2 of 2 records' with columns for Supplier Company Name, Invited Users, Assigned Items, Status, and Actions. Two records are shown: 'Test Supplier - NA' and 'Test Supplier EU', both with status 'Submitted'.

| SUPPLIER COMPANY NAME | INVITED USERS | ASSIGNED ITEMS | STATUS | ACTIONS |
|-----------------------|---------------|----------------|-----------|--------------------|
| Test Supplier - NA | 1 | 1 | Submitted | View Quotes Export |
| Test Supplier EU | 1 | 1 | Submitted | View Quotes Export |

This screen will list any scenarios you have created. You may create more than one scenario for analysis or you will need to create one scenario for each part you have on the RFQ. To create a new scenario, click the + Create button.



On the next screen, enter in the scenario name, a description (if desired), choose your part (item), and choose the suppliers. Once you have entered in that information, click the Save button.

Create Scenario

Scenario Name *

Description

Choose Item *
type here...

Choose Supplier(s)

This will bring up the suppliers for you to:

A: select the supplier for recommendation and specify if the MAPP (Manufacturing Assessment Process Plan) and SPI (Supplier Packaging Information) are approved, and any MCA (Manufacturing Capability Assessment) action plans open for that recommended supplier.

| | TEST SUPPLIER - NA | TEST SUPPLIER EU |
|-----------------------------------------------------|-------------------------------------|--------------------------|
| Selected Supplier | <input type="radio"/> | <input type="radio"/> |
| MAPP Approved | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| SPI Approved | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| MCA Action Plan? | No | No |
| Highest Year APV | 1,738,243.02 USD | 1,768,300.20 USD |
| Piece Price in Quoted Currency | | |
| Supplier Quoted Price | 3.86276 USD | 3.92956 USD |
| Supplier Quoted Logistics Cost | 0.00000 USD | 0.00000 USD |
| Total Landed Piece Price | 3.86276 USD | 3.92956 USD |
| Supplier Quoted Tooling in Quoting Currency | 0.00000 USD | 0.00000 USD |
| Reported Currency (USD) | | |
| Supplier Quoted Price | 3.86276 USD | 3.92956 USD |
| Total Landed Piece Price | 3.86276 USD | 3.92956 USD |
| Supplier Quoted Tooling | 0.00 USD | 0.00 USD |
| 5-Year Spend (1st 5 years only) | 3,650,310.35 USD | 3,713,430.43 USD |
| Total NPV at 15% discount rate (1st 5 years only) | 3,174,182.91 USD | 3,229,069.94 USD |
| Difference Non Landed Quoted Pc. Price vs. Costbook | 2.76276 USD | 2.82956 USD |
| Difference Quoted Tooling vs. Costbook | -15,000.00 USD | -15,000.00 USD |

B: add additional information such as logistic costs, currency risk %, price fluctuation potential, and comments for each supplier.

| Additional Information | |
|-----------------------------------------------------|-----------------------------------------------------|
| Nexteer Logistics Cost | USD 0.75 |
| Nexteer Fx Risk Factor % | USD 0.00 |
| Est. Supplier Tooling Amt Recoverable from Customer | USD 0.00 |
| Price Fluctuation Potential | <input type="checkbox"/> |
| Spend Value | USD |
| Comments | Test BR adds a new line This is a third line. |
| Down Select | xxxx xxxxxxxx x x xxx xxx xx x xxx xxx |
| Final Recommendation | xxxx xxxxxxxx x x xxx xxx xx x xxx xxx |
| Miscellaneous | |
| Productivity | Edit |

C: add productivity (price down %) for the supplier. To add % price downs click on the edit button on the productivity line that the supplier is giving price downs. This will bring up a screen for you to enter in the % for any of the years the supplier is giving productivity.

Productivity
Test Supplier - NA

10 rows below are incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

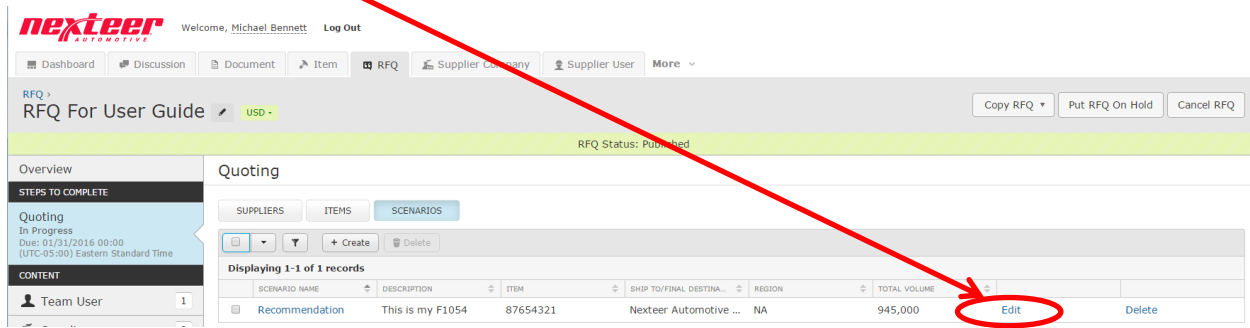
| | | | Productivity | |
|----|------|---------------|--------------|--|
| | Year | % Reduction * | Sell Price | |
| 1 | 1 | | 3.86276 | |
| 2 | 2 | | 3.86276 | |
| 3 | 3 | | 3.86276 | |
| 4 | 4 | | 3.86276 | |
| 5 | 5 | | 3.86276 | |
| 6 | 6 | | 3.86276 | |
| 7 | 7 | | 3.86276 | |
| 8 | 8 | | 3.86276 | |
| 9 | 9 | | 3.86276 | |
| 10 | 10 | | 3.86276 | |

[Close](#)

When you are done entering in the %, click the Close button. Repeat this step for each supplier you have price downs for.

Editing Scenario – Header Information

If you need to edit the scenario information such as name, description or suppliers, go into the scenario section on the RFQ and click the Edit link.

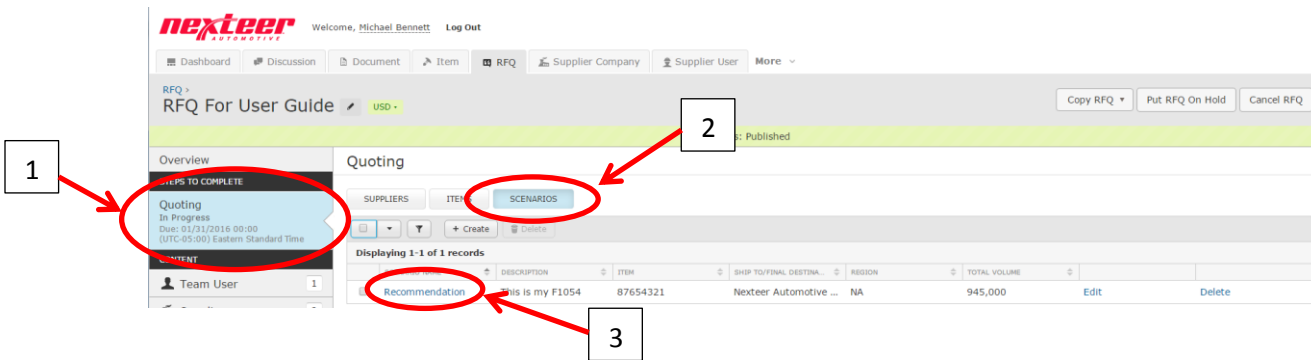


Edit any of the information that needs changing and click the save button.

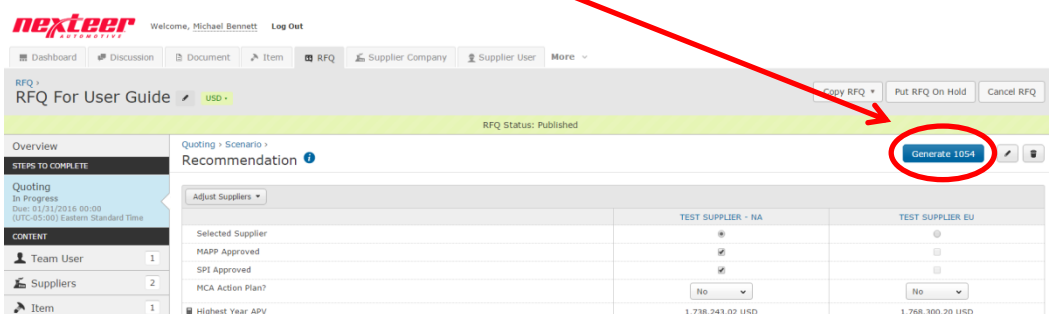
The 'Edit Scenario' form is shown. It contains fields for 'Scenario Name *' (set to 'Recommendation'), 'Description' (set to 'This is my F1054'), 'Choose Item' (set to '87654321-02A--Nexteer Automotive - Pit06 - 033580007 Saginaw, MI - Michigan United States-NA'), and 'Choose Supplier(s)' (with 'Test Supplier - NA' and 'Test Supplier EU' selected). The 'Save' button is circled in red. A red arrow points from the 'Save' button to the 'Generate 1054' button in the next image.

F1054 Generation and Printing

Once you have the scenario created, you may now generate the F1054 form for signatures. To get to the place to print the F1054 form, you must first (1) go to the Quoting section of the RFQ, (2) click on the Scenarios button, and (3) click on the name of the scenario you want to create the F1054 form for.



This will take you to the scenario. You can make any adjustments you need to make. When you are ready to create the F1054 form, click on the Generate 1054 button. Note: you can reprint the F1054 at any time with any changes you have made.



This will bring up the F1054 form for you to view. To print this, click the Print button.

1054 Report
87654321-02A--Nexiteer Automotive - Pit06 - 033580007 Saginaw, MI - Michigan United States-NA

Print

Programs: Training
RFQ Name: RFQ For User Guide
Sourcing Date: 10/29/2015
1st Yr Vol: 450,000
6th Yr Vol: 0
Reporting Currency: USD - US Dollar

Item Number: 87654321
Launch Leader: XXXXXXXXX
Sourcing Type: MCM - Model to Model
2nd Yr Vol: 15,000
7th Yr Vol: 0
Cost Book Piece Price: 1,100,000 US Dollar

Item Description: Widget, Test
ACE: XXXXXXXXX
SOP Date: 06/30/2016
3rd Yr Vol: 15,000
8th Yr Vol: 0
Cost Book Tooling: 15,000,000 US Dollar

Rev Level: B2A
Regional Buyer: XXXXXXXXX
PPAP Date: 04/27/2016
4th Yr Vol: 450,000
9th Yr Vol: 0

Currency of Sale: US Dollar
ECM or Regional Director: XXXXXXXXX
5th Yr Vol: 15,000
10th Yr Vol: 0

Selected Supplier: Test Supplier - NA
Duns ID: T123456789
MAPP Approved: Yes
SPI Approved: Yes

| Award | Supplier | Place Cost in Quoted Currency | | | | | Supplier Quoted Tooling in Quoting Currency | Est. Supplier Tooling Amt Recoverable from Customer | Reported Currency | | | | | Non Landed Quoted Piece Price vs Costbook | Quoted Tooling vs Costbook | Inco Terms | Payment Terms | Price Fluctuation Potential (Y/N) | Comments | |
|-------|--------------------|-------------------------------|-----------------------|--------------------------------|-------------------------|--------------------------|---------------------------------------------|-----------------------------------------------------|--------------------------|-----------------------|--------------------------|-------------------------|-------------------------------|-------------------------------------------|----------------------------|------------|--------------------|-----------------------------------|----------|-------------------------------------------------|
| | | Supplier Quoted Currency | Supplier Quoted Price | Supplier Quoted Logistics Cost | Nexiteer Logistics Cost | Nexiteer P/R Risk Factor | | | Total Landed Piece Price | Supplier Quoted Price | Total Landed Piece Price | Supplier Quoted Tooling | 5 Year Spend (1st 5 yrs only) | | | | | | | Total NPV at 15% Discount Rate (1st 5 yrs only) |
| x | Test Supplier - NA | USD | 3.86276 | 0.00000 | 0.75 | 0.00 | 4.61276 | 0.00 | 0.00 | 3.86276 | 4.61276 | 0.00 | 4,359,060.35 | 3,790,467.26 | 2.76276 | -15,000.00 | FCA - Free Carrier | 47 days Weekly | N | Test BR adds a new line |
| | Test Supplier EU | USD | 3.92956 | 0.00000 | 0.75 | 0.00 | 4.67956 | 0.00 | 0.00 | 3.92956 | 4.67956 | 0.00 | 4,422,180.43 | 3,845,374.28 | 2.82956 | -15,000.00 | FCA - Free Carrier | 47 days Weekly | N | XXXX XXXXXXX X X XXX XXX XXX X XXX XXX |

| Award | Minority Owned? | Supplier | Supplier Address | Current Supplier (Y/N) | New Business Init? | Country (Mfg. Location) | Quality Certificate Expiration Date | Quality Certificate Status | Agree to TFC? | Agree to Nexiteer Standards? | Required PPAP Submission from Kickoff | Supplier Quoted Leadtime for PPAP Submittal (in weeks) | Quality Assessment MCA (score) | MCA Action Plan | Nexiteer Global Spend w/ Supplier % of Supplier's Annual Revenue | Annual Supplier Revenue (USD) | Yesth Score | Quality Score | Cost Management Score | Delivery Score | Response (Current Month's Score) | 6 Month Score |
|-------|-----------------|--------------------|----------------------------------------------------------------------|------------------------|--------------------|-------------------------|-------------------------------------|----------------------------|---------------|------------------------------|---------------------------------------|--------------------------------------------------------|--------------------------------|-----------------|------------------------------------------------------------------|-------------------------------|-------------|---------------|-----------------------|----------------|----------------------------------|---------------|
| x | | Test Supplier - NA | 3900 E. Holland Rd. PL199 Saginaw, MI - Michigan 48601 United States | No | | US | | | Yes | Yes | 04/27/2016 | 8 | | No | 0.00 | 0.00 | | | | | | |
| | | Test Supplier EU | Austria Austria | No | | US | | | Yes | Yes | 04/27/2016 | 8 | | No | 0.00 | 0.00 | | | | | | |

Selection Justification:
Down Select:
XXXX XXXXXXX X X XXX XXX X XXX XXX
Final Recommendation:
Test
BR adds a new line

Highest Year APV: 1,738,243.02
Approvals: Comply with Delegation of Authority Policy for Annual Dollar Spend and Tooling Cost
Regional Commodity Buyer: _____
Commercial Manager of Buyer: _____

Close

Printing the 1054 Form

When printing the 1054 form, we ask that users define the following Print options for optimal results:

- Landscape mode
- Allow background colors (under + more settings)

Print

Total 2 sheets of paper

Print Cancel

Destination

\\USAPGH-PRDPDC0...

Change...

Pages

☒ All
☐ e.g. 1-5, 8, 11-13

Color

Black and white

Paper size

8 1/2x14

Margins

Default

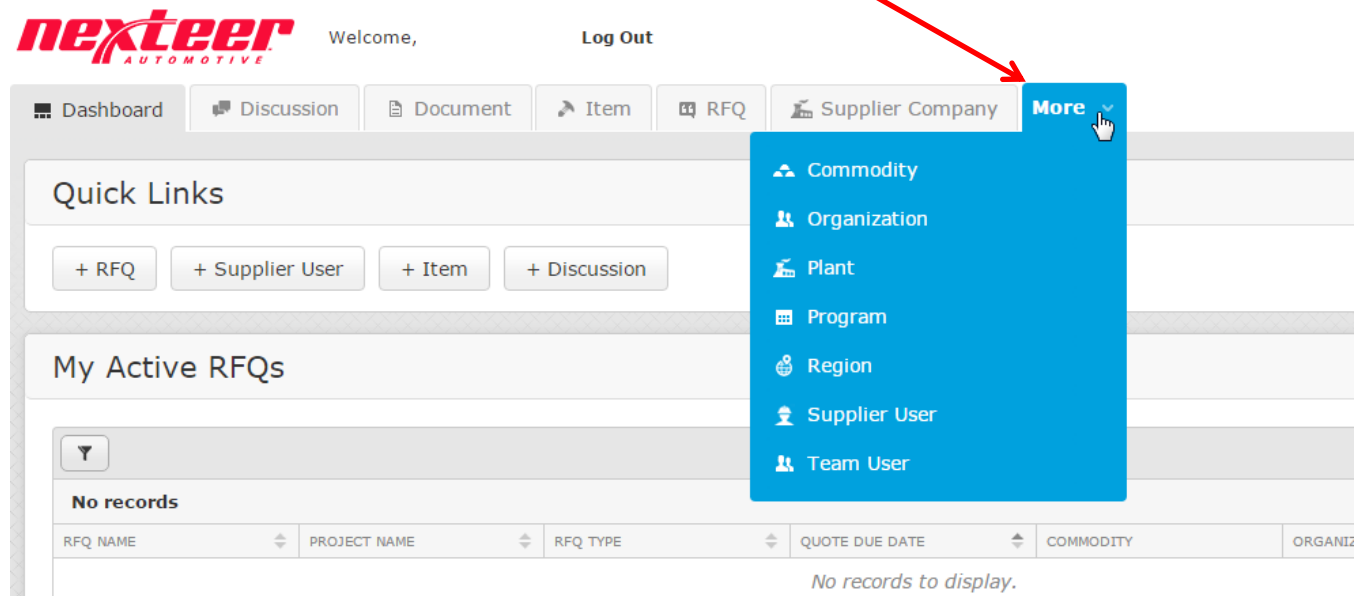
Options


☐ Headers and footers
☐ Two-sided
☒ Background graphics

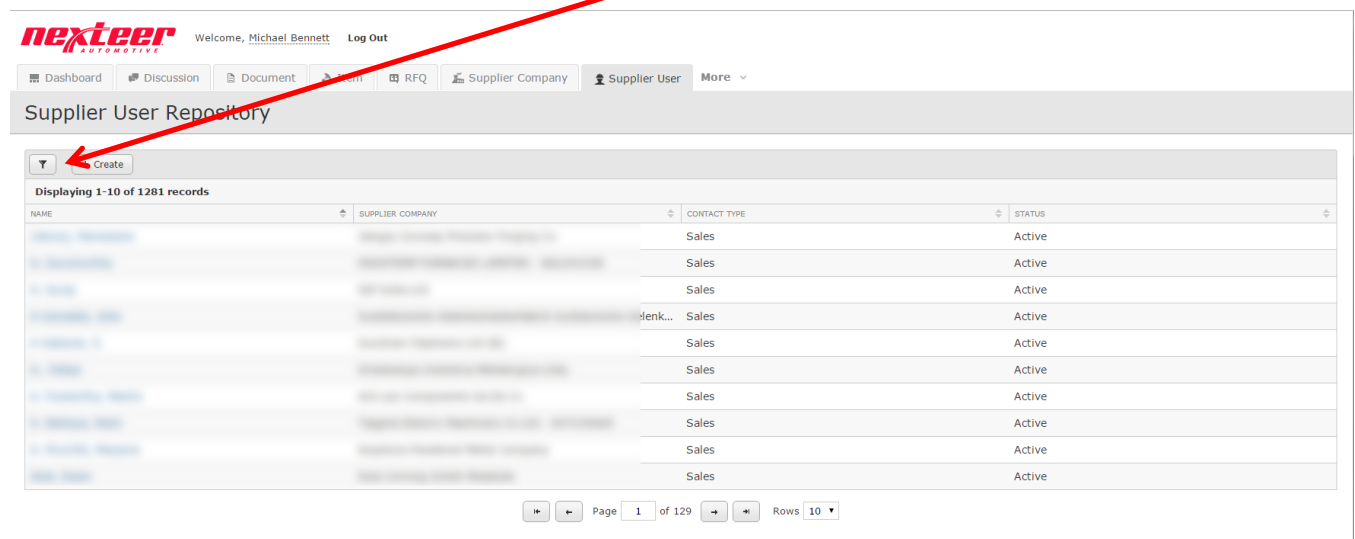
Fewer settings

Adding Supplier Users (Contacts)

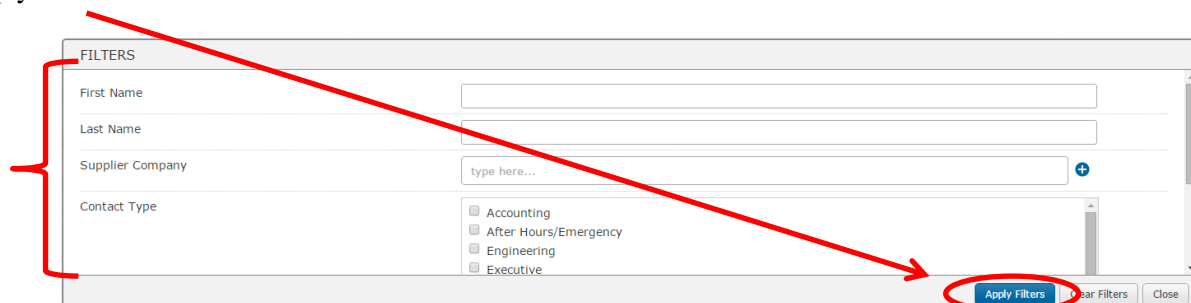
If you are trying to add a supplier user to your RFQ and you cannot find the person, you will need to add him/her. To do this click on the “More ~” tab at the top of the Directworks screen and click on Supplier User.



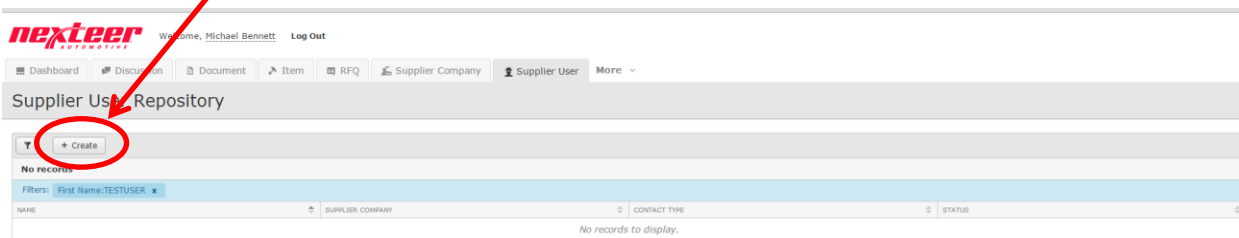
It is a good idea to double check that the supplier is not there, so you should try filtering for the Supplier Contact before you add it. To search for your contact, click on the filter button .



On the filter screen, enter in the first name, last name, or select a company (or any combination of) and click on Apply Filters.



If you get “No records to display”, and you are certain the user is not in Directworks, click on the “+ Create” button to start creating the new user.



On the create screen, you will need to fill in the required fields. Note that the **User Name** is the supplier contact's email address.

The screenshot shows the 'Create Supplier User' form. It has two main sections: 'Supplier User Details' and 'Associations'. In the 'Details' section, there are fields for 'Contact Type *' (Sales), 'User Name *' (user name is email), 'First Name *' (First Name), 'Last Name *' (Last Name), 'Job Title', 'Work Phone Number', 'Fax Number', 'Mobile Phone Number', 'Email *' (email), and 'Located At *' (Sales). In the 'Associations' section, there is a 'Supplier Company *' dropdown menu showing 'Test Supplier - NA'. At the bottom right, there are two buttons: 'Create' and 'Discard'. The 'Create' button is circled in red, and a red arrow points to it from the text below.

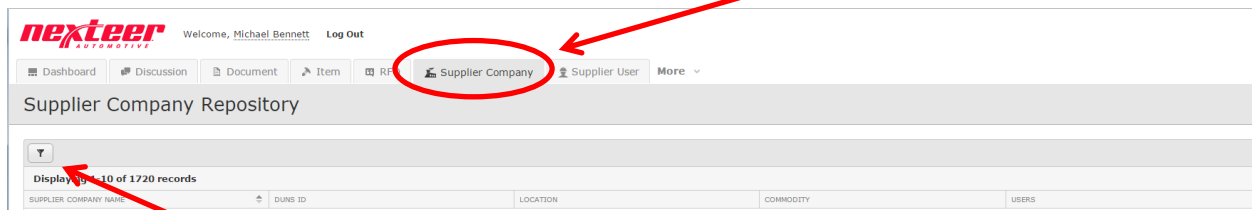
When you have completed the form, click the “Create” button at the bottom of the form. If you do not want to create the supplier contact, click the “Discard” button.

If you receive an error that the username already exists, you should add a 2 (or other number) on the **user name only**. Leave the email address field as the real email address.

The screenshot shows the 'Create Supplier User' form with the 'User Name' field highlighted in yellow. A red arrow points to this field from the text above. The 'User Name' field contains the text 'user.email2@supplier.com'. The 'Email' field contains the text 'user.email@supplier.com'. The 'Contact Type' is set to 'Sales' and 'Located At' is set to 'Sales'. The 'Supplier Company' dropdown shows 'Test Supplier - NA'.

Checking for Suppliers

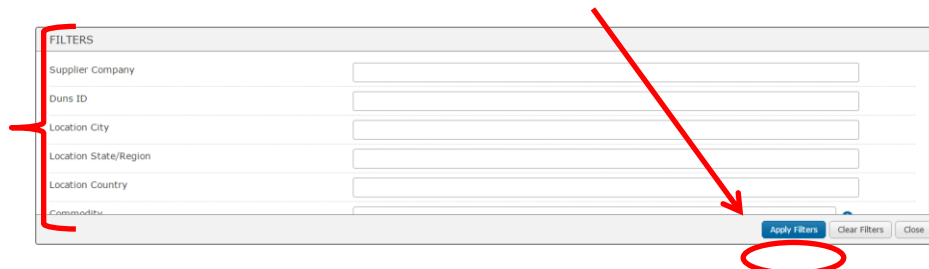
Before you begin your quote, it may be a good idea to check and make sure your suppliers are in Directworks. To check if your supplier is in Directworks, click on the “Supplier Company” Tab at the top.



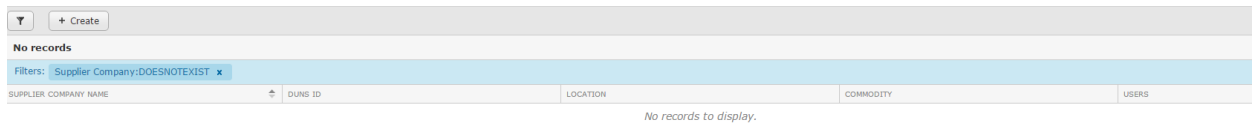
Click on the filter button



Enter in any of the search criteria. Note that the Duns ID field requires all 9 numbers; the other fields are partial word searches. Click on the “Apply Filters” button when you have entered in your filter criteria.



If any suppliers match your criteria they will be returned in the list. If there are no results, you will see *No Records to display* in the results pane:



If the supplier does not exist, you will need to email gsm.systems@nexteer.com and provide the following information:

Supplier’s Name:

Full Address:

Duns number:

Supplier Information

If you want to see what users and RFQ a supplier has, go into the “Supplier Company” tab and filter on your supplier. If you do not know how to do this see the section above on Checking for Suppliers.

When you get the results back you want, click on the supplier’s name to see their data.



Supplier Company Overview

This screen will show the general supplier information, including the supplier data that shows on the F1054 form such as Vontik score, MCA score, cert status and other information in the Overview section. If you want to see the RFQs that the supplier has associated to them, click on the RFQ tab. If you want to see what users are associated to this location click on the Supplier User Tab.

Supplier Company >
Test Supplier EU

Last Updated: 10/27/2015 09:04 (UTC-04:00) Eastern Daylight Time by Michael Bennett

Overview

CONTENT

Supplier User 1

RFQ 9

General Information

Supplier Company Name Test Supplier EU

Duns ID 00000000X

Supplier Company RFQ Tab

The Supplier Company RFQ Tab will list all of the RFQs that have been assigned to this supplier location. Note: these are not linked to the actual RFQ, just a listing of them.

Supplier Company >
Test Supplier EU

Last Updated: 10/27/2015 09:04 (UTC-04:00) Eastern Daylight Time by Mich

Overview

CONTENT

Supplier User 1

RFQ 9

RFQ

Displaying 1-9 of 9 records

| RFQ NAME | RFQ TYPE | RFQ STATUS | COMMODITY |
|------------|--------------------------------|------------|-----------|
| RFQ TEST 1 | M2M - Model to Model | Published | 1 |
| RFQ TEST 2 | ESS - Early Supplier Selection | Cancelled | 1 |
| RFQ TEST 3 | M2M - Model to Model | Published | 1 |

Supplier Company Users Tab

The Supplier Users tab will list all of the Supplier Contacts that have been assigned to this supplier location.

Supplier Company >
Test Supplier EU

Last Updated: 10/27/2015 09:04 (UTC-04:00) Eastern Daylight Time by Michael Bennett

Overview

CONTENT

Supplier User 1

RFQ 9

Supplier User

Displaying 1-1 of 1 records

| NAME | CONTACT TYPE | STATUS | TOTAL # OF RFQS INVITED |
|----------|--------------|--------|-------------------------|
| EU, Test | Sales | Active | 5 |

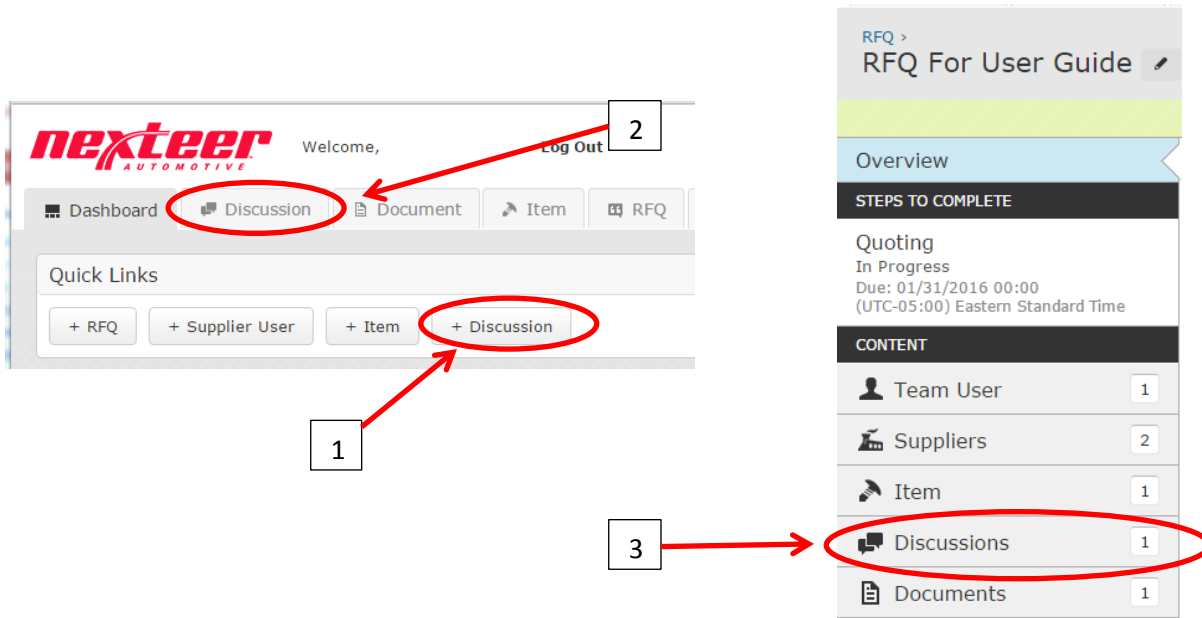
Page 1 of 1 Rows 10

Discussions

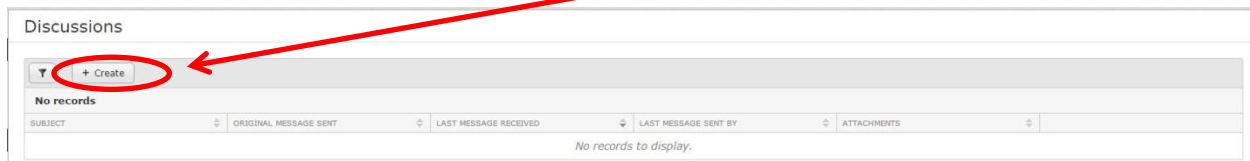
If you want to provide additional details after you have published your RFQ, either with the supplier(s) or team member(s), or you want to ask/answer some general questions you can start a discussion. Note: A discussion can be started independently from or within the RFQ.

There are 3 ways to start a discussion:

1. Use the “+ Discussion” button in the Quick Links bar on the Dashboard.
2. Click on the Discussion Tab
3. On the RFQ, click the Discussion Tab in the Content section.



If you are using option 2 or 3 above, you will need to click on the “+ Create” button on the discussion screen.



Once you click the button to start the Discussion, you need to add your recipient(s) (Nexteer Team or Supplier). Fill in the Subject, Message, and if needed attach any documents. Once you have it filled out, click the “Start Discussion” button.

This screenshot shows the form for creating a new discussion. A red bracket on the left groups the 'Recipients', 'Message', and 'Documents' sections. The 'Start Discussion' button at the bottom right is circled in red, with a red arrow pointing to it from the text above.

Recipients * at least 1 is required

Supplier User: type here... [Add]

Team User: Michael Bennett type here... [Add]

Message

Subject *: [Text Box]

Message *: [Text Box]

Documents: Attach File: From Repository... From My Computer...

[Start Discussion] [Discard]

This will then show the original discussion and any responses. Note: Suppliers will not see any comments made by other suppliers, only you will see them.

Discussions >
USER GUIDE

Michael Bennett
Training

This is a discussion for the user guide.
Sent 10/26/2015 12:57 (UTC-04:00) Eastern Daylight Time to 1 Team User

CONVERSATIONS (2)

All Users
1 Team User

Team Users Only
1 Team User

Reply *

Supplier Users type here...

Team Users Michael Bennett type here...

Attachments **Attach File:** From Repository... From My Computer... From RFQ...

Send Reply Discard

Annotate drawings / documents

If you need to annotate a drawing, you will first have to attach it to a discussion. If you don't know how to do the discussion, see the section on Discussions. Add the document for any of the choices (Repository, your computer, or RFQ).

1. Upload/Attach your document(s).
2. When the Image graphic shows (BEFORE YOU START OR SEND REPLY), click on the image box – you may have to wait a short period of time for the image to show.

Reply See attached document for marked up info.


Supplier Users Test User type here...

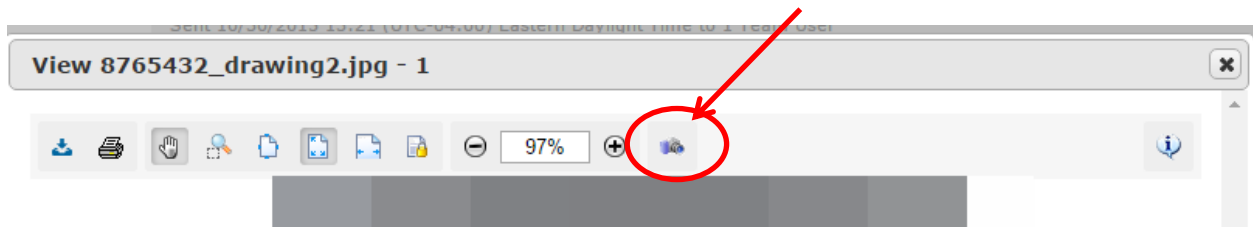
Team Users Michael Bennett type here...


Attachments **Attach File:** From Repository... From My Computer... From RFQ...

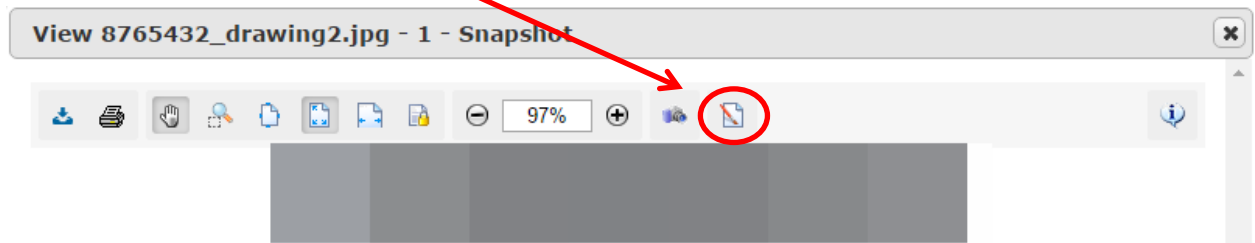
8765432_drawing2.jpg - 1

Send Reply Discard

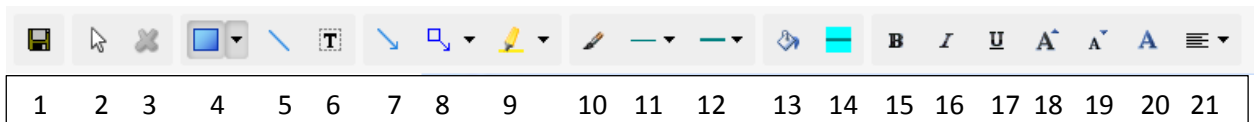
3. This will open up a view window of the image. Click on the “snap shot” icon .



4. This will add a markup icon  next to the snap shot icon. Click on the Markup Icon.

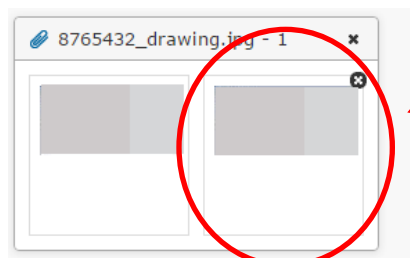


5. This will bring up a toolbar where you can draw on the image. See below for toolbar description.



1. Save button: Use this to save your annotations.
2. Arrow: This will allow you to move the drawing objects.
3. X: This will allow you to delete the selected element.
4. Shapes: This will allow you to add shapes.
5. Line: This will add a line.
6. Text: This will allow you to add a text box. To edit the text, double click on the box.
7. Pointer: This is a line with an arrow for pointing to something.
8. Text Point: This will allow you to add a call out – text box with a pointer. To edit the text, double click on the box.
9. Highlighter: Allows you to highlight something.
10. Border Color
11. Border Thickness
12. Border Style: Solid, Dashed, Dotted
13. Fill Color
14. Transparency
15. Bold
16. Italic
17. Underline
18. Increase Text Size
19. Decrease Text Size
20. Text Color
21. Text Alignment

When you are done, click the Save button and click the Done button. This will add a second image to the attachment view.



Notes: