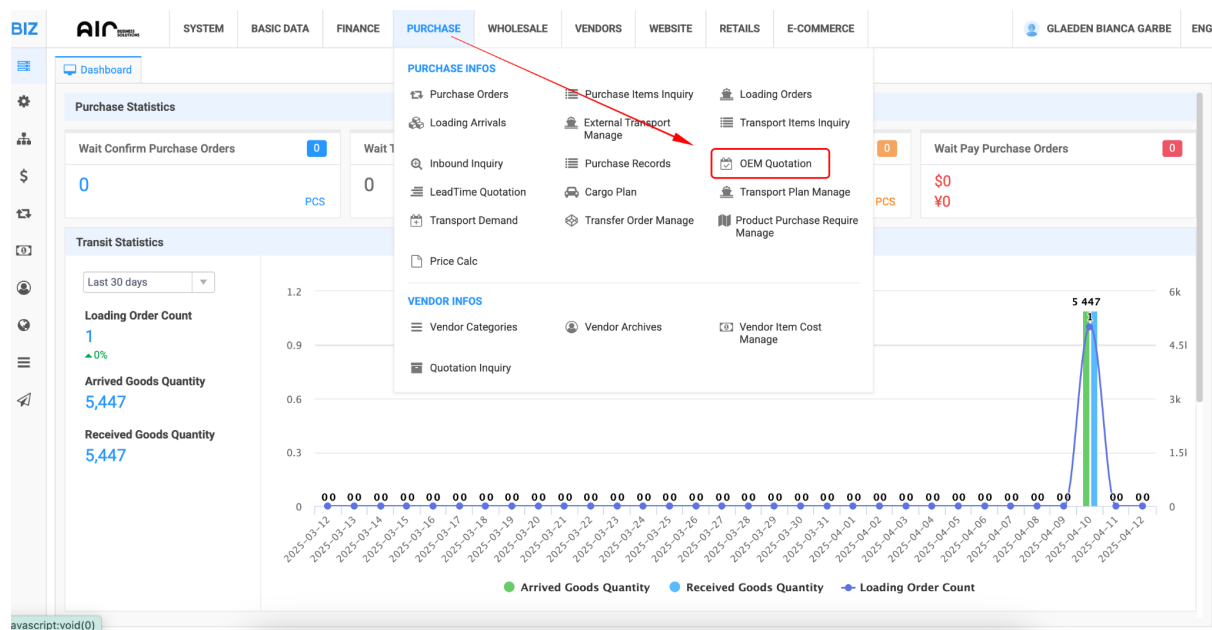


Purchase - OEM Quotation

The **OEM Quotation** tab in the ERP system provides a centralized location for managing all OEM-related quotations. It allows purchasing teams and account managers to create, track, and evaluate quotations sent to or received from vendors or customers under OEM (Original Equipment Manufacturer) terms. This helps streamline negotiation, transparency, and documentation in your procurement process.

Navigation

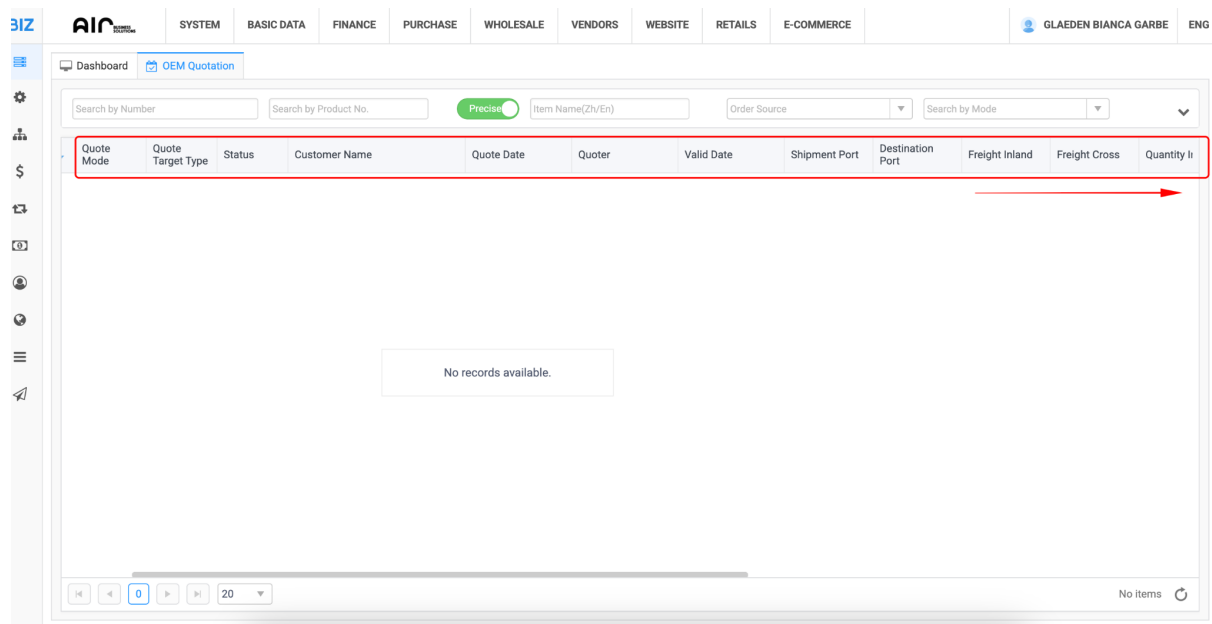
To access the **OEM Quotation** tab:



1. **Log in** to your ERP system.
2. Navigate to the **Purchase** module from the main dashboard or sidebar.
3. Select **OEM Quotation** to view the list of quotation records and details.

OEM Quotation Tab Fields

Each OEM quote includes comprehensive details covering quotation specifications, financials, and logistics.



Quotation Details:

- **Quotation No.** – Unique reference ID for the quotation.
- **Quote Mode** – Pricing structure (e.g., **EXW**, **FOB**, **C&F**).
- **Quote Target Type** – Defines the party receiving the quote (e.g., **Customer** or **Vendor**).
- **Status** – Indicates the current state (e.g., Draft, Sent, Confirmed).
- **Customer Name** – Name of the customer the quote is linked to.
- **Quote Date** – Date the quotation was created or submitted.
- **Quoter** – Person who prepared and submitted the quotation.
- **Valid Date** – Expiry date of the quotation.

Logistics & Freight:

- **Shipment Port** – Origin port for product dispatch.
- **Destination Port** – Target port for delivery.

- **Freight Inland** – Domestic freight charges.
- **Freight Cross** – International or cross-border freight costs.

Quantity & Financials:

- **Quantity Info** – Total item quantity details.
- **Total Pieces** – Number of individual units.
- **Purchase Amount** – Cost from supplier.
- **Sales Amount** – Quoted sale price to customer.

Other Information:

- **Type** – Category or classification of the quotation.
- **Remarks** – Any additional notes relevant to the quote.

Searching and Filtering Options

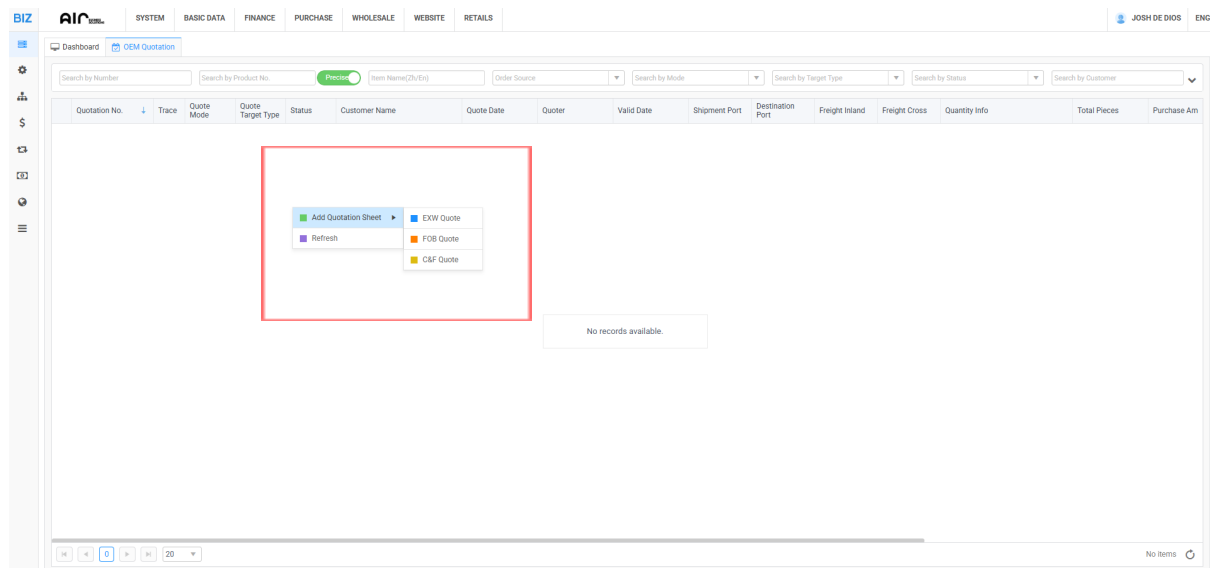
You can streamline your search and reporting using the following filters:

The screenshot shows the BIZ AIR CRM interface. The top navigation bar includes tabs for SYSTEM, BASIC DATA, FINANCE, PURCHASE, WHOLESale, VENDORS, WEBSITE, RETAILS, and E-COMMERCE. Below the navigation bar, there are search filters for Number, Product No., Item Name, Order Source, Target Type, Status, Customer, Shipment Port, and Destination Port. A table below the filters shows columns for Quote Mode, Quote Target Type, Status, Customer Name, Quote Date, Quoter, Valid Date, Shipment Port, Destination Port, Freight Inland, Freight Cross, and Quantity. The table currently displays 'No records available.'

- **Search by Number** – Enter the quotation number directly.

- **Search by Product Number** – Filter quotations by product SKU or reference.
- **Precise** – Enable precise match search for quicker results.
- **Item Name** – Search by product name associated with the quote.
- **Order Source** – Choose the origin of the request:
 - **Business System**
 - **Business App (Self-service)**
 - **Site**
- **Search by Mode** – Filter by quote type:
 - **EXW** (Ex Works)
 - **FOB** (Free on Board)
 - **C&F** (Cost and Freight)
- **Search by Type** – Internal or External quotations.
- **Search by Status** – Filter by:
 - **Enabled**
 - **Disabled**
 - **Questionable**
- **Search by Customer** – Lookup quotations by customer name.
- **Search by Shipment Port** – Filter by port of origin.
- **Search by Destination Port** – Filter by delivery port.
- **Quote Date** – Filter quotations by start and end date of creation.
- **Valid Date** – Filter by validity range.

Right Click Options:



The options under “**Add Quotation Sheet**” — **EXW Quote**, **FOB Quote**, **C&F Quote** — are **international trade terms (Incoterms)**. They define who (the buyer or the seller) is responsible for shipping, insurance, and costs at different stages of delivery. Here’s a simple breakdown:

1. EXW Quote (Ex Works)

- **Meaning:** The seller makes the goods available at their warehouse or factory.
- **Who handles shipping?** The **buyer** arranges and pays for all transport, insurance, customs, and delivery.
- **Simple view:** *Buyer takes care of everything after pickup.*

2. FOB Quote (Free On Board)

- **Meaning:** The seller is responsible for delivering goods to the port and loading them onto the ship.
- **Who handles shipping?** After loading, the **buyer** takes responsibility for freight, insurance, and delivery.
- **Simple view:** *Seller covers costs until the goods are on the ship; buyer handles from there.*

3. C&F Quote (Cost & Freight)

- **Meaning:** The seller pays for transport to the buyer's destination port (but **not insurance**).
- **Who handles shipping?** Seller pays freight to the port, but the **buyer covers insurance and risks once the goods are shipped**.
- **Simple view:** *Seller pays to get goods to your port, but buyer handles risks and insurance.*

For a detailed walkthrough, please refer to the video guide.

The **OEM Quotation** tab is a powerful tool for managing your OEM pricing lifecycle—from quote creation to status tracking. With comprehensive search filters and detailed quote breakdowns, it enables better communication with suppliers and customers, faster response times, and improved cost control.

If you have further questions or need help generating or managing OEM quotations, please contact your procurement lead or system administrator.