

# RFQ TIP SHEETS FROM THOMAS

Whatever industrial product or service you are looking to quote/spec, we are here to help.

Let's start here. Which of the following categories best describes the general field you are looking to quote? Click the heading below to go directly to that pages custom quote form.

- [Standard Products](#)
- [Direct Services](#)
- [Indirect Services](#)
- [Materials](#)
- [Chemicals](#)
- [Custom Products](#)



# How to use the Thomas RFQ Tip Sheets



The Thomas RFQ Tip Sheets contained in this PDF document are contain editable fields which can be updated with your latest RFQ details and then saved or printed as needed. There are a total of six independent templates in this PDF file, one for each of the following categories:

- Standard Products
- Direct Services
- Indirect Services
- Materials
- Chemicals
- Custom Products



To use the Tip Sheet Templates, select the ones that most apply to your Request for Quote needs and then add your details to the templates.



To save the edited file, select the **File > Save As** command from the Adobe Reader toolbar, then choose a folder location and name the file as appropriate.



You can also print the file by selecting the **File > Print** command from the Adobe Reader toolbar, then choose the printer you wish to use, and select the printer settings desired.



If the PDF format is not ideal for your needs, you can also export the PDF Tip Sheet Templates and convert them into an alternative format for your use, such as a Word or EXCEL format. To convert the PDF, select the **File > Convert** to Word, Excel, or PowerPoint command from the Adobe Reader toolbar, and then choose the desired format from the dropdown menu below the words "**Convert To**" on a PC or "**Export To**" on a mac. The PDF content will then be exported to the file type of your choosing.



# Use our Request For Quote (RFQ) template below for **Standard Products** to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

### Standard Product Specific

A request for quote for a standard product is likely to be the easiest to formulate. A standard or “off-the-shelf” product is one that is produced by a manufacturer to a pre-existing set of specifications. In most cases, these items have established pricing and usually have part numbers or ordering numbers associated with them, making it simple to precisely define the item(s) for which a quote is being sought.

### General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

### All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

### Information to include in RFQs for Standard Products

The item(s) on which you need a quote

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The manufacturers part number for each item  
*(if available)*

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The supplier part numbers when requesting a quote from a distributor or a reseller  
*(these may differ from the manufacturer’s part number)*

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The quantity needed for each item

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The response date needed for the quote

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# Use our Request For Quote (RFQ) template below for **Direct Services** to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

## Direct Services Specific

Direct services, or manufacturing services, represent the type of fabrication services that are needed directly for the end product that a business produces, meaning the services are required for each and every item that is being produced. Some examples of these types of services include finishing services (grinding, painting, anodizing), assembly services (mechanical assembly, soldering, PCB kitting and assembly), or joining services (welding, brazing).

## General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

## All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

## Information to include in RFQs for Direct Services

- The specific service being sought

- A description of the work needed for each item to which the service is being supplied

- The quantity of items to which the service will apply

- The response date needed for the quote

- How the service is to be delivered

*(e.g. on site, parts delivered to the service provider and return shipped)*

- How the quote should be structured *(total cost, unit cost, per diem cost)*

- Lead time before available

- Estimated time to complete

# Use our Request For Quote (RFQ) template below for Indirect Services to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

## Indirect Services Specific

Indirect services are those that are required to operate a business that are ones that are not connected directly with the end product being manufactured by that business. These types of services can include general business services such as payroll, accounting, legal, Human Resources (e.g, recruiting), and may also include MRO related services. MRO, which stands for Maintenance, Repair, and Operations, includes a host of services relating to supporting the capital equipment or means of production within a facility. One area of MRO services is related to maintenance and upkeep of a building , examples being landscaping, roofing, plumbing, electrical, HVAC, or pest control. A second type of MRO services includes equipment or factory maintenance, such as machine repair, calibration, or management of tooling and supplies.

## General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

## All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

## Information to include in RFQs for Indirect Services

- The specific service being sought

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- A description of the work needed under the quote

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- A description of the scope for the quote

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- The deliverables expected

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- The response date needed for the quote

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- The needed start and end dates for the service

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- Lead time before available

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# Use our Request For Quote (RFQ) template below for **Materials** to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

## Materials Specific

Materials are often utilized in a production process as direct supplies or to support manufacturing of a product. When requesting a quote for these items, it is important to understand the packaging and form factors for the material since they are typically ordered in standard available dimensions and package sizes and cut, machined, or mixed as needed to achieve the final dimensions or proportions as part of the production process.

## General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

## All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

## Information to include in RFQs for Materials

### Form factor of the material

*(rod, sheet, block, plate, roll, etc.)*

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### Dimensions

*(length, width, depth, thickness, gauge)*

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### The quantity for which a quote is needed

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### The response date needed for the quote

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### Handling instructions or shipping restrictions

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# Use our Request For Quote (RFQ) template below for **Chemicals** to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

## Chemicals Specific

Chemicals are often utilized in a production process as direct supplies or to support manufacturing of a product. When requesting a quote for these items, it is important to understand the packaging and form factors for the material since they are typically ordered in standard available dimensions and package sizes and cut, machined, or mixed as needed to achieve the final dimensions or proportions as part of the production process.

## General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

## All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

## Information to include in RFQs for Materials

- CAS numbers of the items in the quote
- 

- Package size or volume of the chemical  
*(length, width, depth, thickness, gauge)*
- 

- Concentrations or strength needed as applicable to the application
- 

- The quantity for which a quote is needed
- 

- The response date needed for the quote
- 

- Request for handling or shipping restrictions
- 

- Request for HAZMAT requirements or regulations
-

# Use our Request For Quote (RFQ) template below for Custom Products to:

- Structure your requirements
- Create more effective RFQs
- Improve supplier response rates

## Custom Products Specific

Custom products can be variations on a standard item that a manufacturer may be able to provide or may represent a fully custom product built to order from a set of specifications that you provide. For example, a manufacturer of power supplies may be able to make a small modification to one of their existing off-the-shelf products to meet your requirements, thereby minimizing the one-time costs for retooling or redesign. Or, if there is not a suitable fit available from existing products, they may quote for you the cost to custom fabricate a new design against your specifications and drawings.

## General Best Practices

Regardless of the specific type of request being made, keep these points in mind when creating a request:

- Make your process as simple as possible for the supplier to follow
- Minimize the amount of information that you seek to collect from the supplier so that they can reply quickly at minimal cost to them
- Structure the information in your request so that the supplier can easily digest it and understand your needs

## All RFQs Should Include:

- Contact information such as your name, company, e-mail address, and phone number in the request form
- A technical contact on your team that to whom the supplier can direct any detailed questions if you are not comfortable fielding those inquiries

## Information to include in RFQs for Custom Products

- Performance and environmental specifications for the product needed
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- Details on the intended application for the item
- 
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- Copies of any engineering drawings or schematics relevant to the design you want, including CAD/CAM models
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- The motivation for why a custom product is needed over a standard product
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- The type of production run (*prototype, short-run, etc.*)
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- The quantity for which a quote is needed
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- The response date needed for the quote
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- How you want the quote supplier

*(non-recurring charges separate, unit production cost with NRE included)*

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