

ILLUSTRATED TECHNICAL HANDBOOK 10

STEEL PROCUREMENT RFQ & QUOTATION DELIVERY TOOLKIT

Define the buying package, compare the stated scope, and connect the accepted order to a reconciled delivery.



AI-generated product illustration; not a documentary factory or shipment photograph.

METDAX INDUSTRIAL SUPPLY

MDX-TP-10 | VERSION 1.0 | 13 OCTOBER 2026

60 pages / 4 teaching cases / 8 fillable worksheets

START HERE

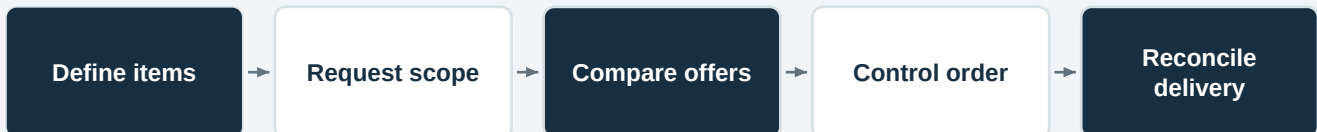
Turn the buying requirement into a reviewable delivery package

A visual working guide from the first item schedule to final receiving and closeout.

A useful steel RFQ identifies what the buyer wants, which evidence is required and which activities the proposed price must include. A useful comparison keeps those same boundaries visible. This toolkit connects the physical products, quotation units, processing and records, delivery responsibilities, accepted revisions and receiving balance so purchasing teams can review a complete package rather than a detached price.

The chapters explain enquiry preparation, quotation comparison, delivery terms, order control, packing readiness and receiving. Four two-page teaching cases demonstrate metre-versus-piece quotations, costs to a common comparison point, a quantity and length revision, and a mixed-component shortage. Eight fillable worksheets record actual requirements, item scope, offered differences, delivery roles, changes, release evidence, receipts and closure actions.

All eighteen product images are existing AI-generated METDAX concepts, and the diagrams are original explanatory maps. Cases use fictional quantities and CU, a teaching currency unit with no exchange rate or market price. The toolkit supplies no actual quotation, transport booking, import approval or payment instruction. Current accepted order documents and accountable project, commercial and logistics decisions establish the real supply package.



Original buyer workflow. Project requirements determine the actual review and release process.

Reading routes

RFQ and quotation review: pages 8-19. Delivery roles: pages 20-24. Order control: pages 25-29. Packing and receiving: pages 30-38. Cases: pages 39-46. Fillable worksheets: pages 47-54.

CONTENTS / READING PATHS

Find the buying, comparison or delivery step

Use the diagrams for orientation and the worksheets for your actual controlled project package.

Start Here	02
Scope, teaching currency and practical reading routes	
01 Define The Buying Package	04
Physical items, work, qualification and a controlled baseline	
02 Write The Rfq	08
Product, quantity, prepared scope, records and complete enquiry inputs	
03 Compare Quotations	14
Comparable units, inclusions, unknown costs and recommendation basis	
04 Delivery Terms And Work Roles	20
Named points, risk / cost, insurance, documents and route responsibilities	
05 Order And Change Control	25
Accepted package, acknowledgement, substitutions and milestones	
06 Packing And Shipment Readiness	30
Physical grouping, protection, wood, VGM and shipping-document functions	
07 Receiving And Closeout	35
Actual counts, component balance, issues and accountable closure	
08 Teaching Cases	39
Unit prices, common-point costs, quantity revisions and kit shortages	
09 Fillable Worksheets	47
Eight editable RFQ, item, offer, delivery, change, release and closure forms	
10 Quick Reference	55
Precise units, scope states and complete handover checks	
11 Reference Register	57
16 primary-source roles over pages 57-58	
12 Methods And Image Policy	59
Declared fictional inputs, cost boundaries and illustration limits	
Metdax Next Step	60
Prepare a defined steel product and record enquiry	

01 / DEFINE THE BUYING PACKAGE

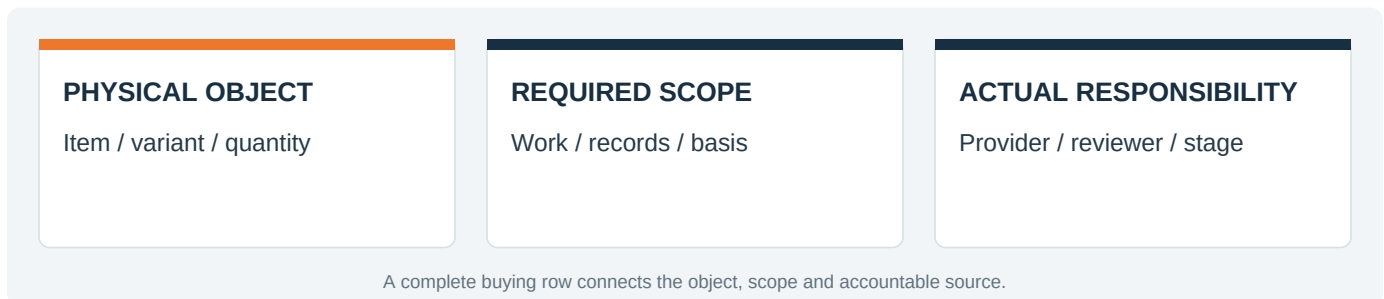
Start with a current item schedule and buying purpose

Give every requested product a stable buyer item and a controlled requirement source.

Create an item schedule that distinguishes product families, variants and required quantities. Identify the application and responsible technical basis without turning an initial enquiry into an unapproved design. Record selected specifications and editions, drawings, material and grade, dimensions, supplied condition and requested work. Assign preliminary entries to their decision owners so a supplier can identify what is fixed and what remains open.

Group items for administration without merging their identities. Pipe, hollow sections, rolled members, fabricated assemblies and associated components can have different product and evidence requirements. ASTM A530 and ASTM A6 illustrate the role of general requirements for their listed product scopes; neither applies to every steel object. The selected product documents, drawings and accepted order establish the actual basis for each line.

Keep the schedule revision, enquiry reference and attachment list together. A practical row connects the physical object, selected requirement, physical quantity, offered pricing unit and record deliverables. The buyer should be able to return to the same row after clarification, order change or receiving. A family description alone cannot establish every item, prepared detail or quantity included in a proposed supply package.



Buying entry	Define the actual source
Buyer item / purpose	Stable item reference and project requirement owner
Product / condition	Form, grade, geometry, route and actual supplied condition
Required quantity / work	Physical units, defined contents and included preparation
Controlled basis	Specification editions, drawings, records and current revision

Source scope: S11, S12 | Reference register: page 57

01 / DEFINE THE BUYING PACKAGE

Distinguish physical products from operations and deliverables

One steel object can carry several work and record requirements.

Identify what is physically supplied before listing the work applied to it. A pipe with prepared ends remains one pipe; its cutting, end preparation, treatment and inspection can have separate scope or price entries. A fabricated frame may contain several material-bearing components and additional joining operations. Preserve the actual BOM and work boundaries instead of multiplying the physical quantity by the number of operations.

A defined kit needs an explicit contents list. Rails and splices, clamps and fasteners, lead sections and extensions, or support members and connection pieces should retain their actual quantities, materials and interfaces. A picture of components does not establish a commercial set. Record the selected variants and mating references through actual documents and responsible technical review; the supplier catalogue cannot silently decide the project configuration.

Compare offers using separate product, work, evidence and logistics rows. The same physical package can carry different quoted inclusions, which must be resolved before ranking prices. A detailed worksheet helps identify whether a stated price includes the requested prepared product, required records and packing rather than just an unfinished material quantity. Keep the original physical count visible through every later change.



Prepared-end concept: product and work scope are separate



Component concept: identify actual rail and splice contents



Joint concept: define actual supplied parts and interfaces

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

Scope structure

Physical items + requested operations + required evidence + packing and delivery activities. Define each under the same current item schedule.

01 / DEFINE THE BUYING PACKAGE

Separate product decisions from supplier qualification

Qualification evidence and delivered-material evidence support different reviews.

Identify the supplier entity and proposed manufacturing or supply route using current enquiry information. Record the actual party responsible for products, preparation, original records and delivery activities. Qualification can include organizational evidence under the buyer's requirements, but it should be assessed for its own scope. An impressive facility image or certification mark cannot establish the offered source for every order line.

ISO CASCO distinguishes management-system certification from product certification. ISO itself does not issue certification. Where a QMS certificate is required, verify the identified organization, actual issuer, stated scope and status through the relevant sources. ISO 9001:2026 is the current publisher edition at this guide's research date; the applicability and transition status of an actual certificate require their own review rather than an automatic inference.

Request delivered-material and product-specific records separately. A qualification review cannot replace the actual heat or lot, product identity, required test or inspection scope, validation and physical allocation. Preserve both review functions beside the relevant item. The accepted quotation and order should identify actual offered sources, record arrangements and unresolved requirements without promising evidence that has not been established for the proposed supply.

ORGANIZATION	PRODUCT / MATERIAL	SUPPLY ROUTE
Qualification / actual scope	Delivered-object evidence	Actual work / record roles
Supplier qualification does not replace the required product and material records.		

Review function	Keep its own applicable evidence
Supplier qualification	Actual entity, requested organizational scope and issuer
Product / material evidence	Required product, source, identity and reported scope
Supply responsibility	Actual provider, processing, documentation and delivery roles

Source scope: S14, S15, S16 | Reference register: page 57

01 / DEFINE THE BUYING PACKAGE

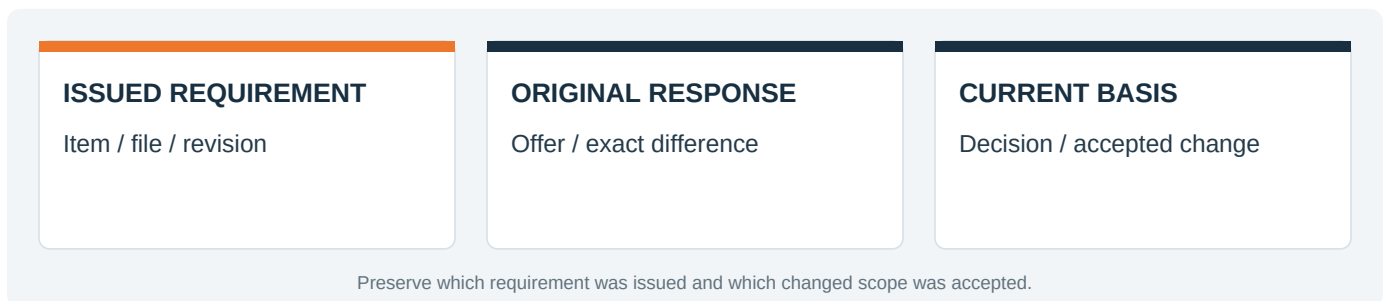
Give the enquiry a baseline and an open-question register

Stable references let every response be compared with the same current package.

Issue the enquiry with a revision and a controlled attachment list. Identify the item schedule, drawings, technical specifications, record requirements, quantities and delivery basis supplied to each respondent. State the requested response format and question route so missing information can be located by item. Keep questions that affect product scope, pricing or timing visible instead of leaving them in separate informal messages.

Configuration management provides a relevant lifecycle concept: ISO 10007 offers guidance for products and services. This toolkit's item baseline, change log and decision register are original practical workflows, not reproduced standard clauses. Their purpose is to retain which requirement version was issued, what the supplier proposed and which changes the responsible parties accepted.

When an input changes, identify the affected items and files, issue the controlled update and obtain the required acknowledgement. Preserve superseded enquiry versions for history while making the current comparison basis clear. Distinguish a clarification from an accepted change in product, quantity, work or responsibility. A complete baseline should let the team reconstruct the scope even if the person who first issued the RFQ is no longer handling the order.



Register field	A useful controlled entry
Requirement reference	Item, file, revision and selected basis
Open question	Exact unresolved input and affected scope
Response / owner	Original source, responsible party and decision stage
Current status	Accepted basis, provisional condition or remaining action

Source scope: S13 | Reference register: page 57

02 / WRITE THE RFQ

Define the exact product behind each buying line

A product family and a grade name leave important supply choices unresolved.

Give each item a stable reference and a complete product description. State the selected product specification and edition, grade, manufacturing route where required, supplied condition and geometry. Identify which information is fixed by the project and which needs a supplier proposal. Link every provisional input to an owner and response date. Keep application information sufficient to explain the requirement without asking a quotation to perform an unassigned design review.

Separate the applicable product specification from any general-requirement document. ASTM A530 concerns its listed specialized pipe products, while ASTM A6 concerns its listed rolled structural products. Neither provides a universal purchasing specification for every steel object. The enquiry should identify the actual applicable references together, including selected options and supplementary requirements, rather than presenting a collection of standard numbers as a complete product definition.

Require the respondent to identify the actual offered product and source against the buyer item. Where it proposes a different grade, route, condition or reference, request the difference explicitly. Leave that proposal open for the responsible review. An offer described as equivalent should still provide the original and proposed identities, affected requirements and supporting basis so the comparison can distinguish a match from an unresolved alternative.

ACTUAL PRODUCT	SELECTED BASIS	REQUESTED RESPONSE
Form / grade / condition	Specification / drawing	Exact offered match

A product family or nominal size cannot define every requested variant.

RFQ field	Make the requested identity explicit
Product / grade	Exact form, selected designation and supplied condition
Governing basis	Applicable product references, editions and options
Offered response	Actual source, item match and stated differences

Source scope: S11, S12 | Reference register: page 57

02 / WRITE THE RFQ

State physical quantities before asking for a price unit

Pieces, metres and mass describe different parts of the same buying requirement.

List the requested number of pieces and the defined length of each variant. State whether lengths are fixed, range-based or subject to an agreed schedule, and identify the required dimensional basis and units. For pipe and hollow sections, distinguish a nominal size designation from the actual dimensional information required by the selected product basis. Provide the relevant wall or thickness requirement without assuming a trade name resolves it.

Ask the supplier to return physical quantities and its offered pricing unit separately. A metre price needs the quoted total length and included preparation. A piece price needs the defined piece length or item configuration. A mass price needs the applicable mass basis, such as actual measured or an agreed theoretical calculation, with its source. Write metric tonne as 1,000 kg where that unit is intended; the unqualified word ton is ambiguous.

Keep tolerances, quantity variation and measurement arrangements visible under the actual selected requirements. Confirm how the accepted quantity will be established and which record supports invoicing. The concept image illustrates prepared lengths and proves no dimension or measured quantity. A comparison can use a common quantity basis only after the offered objects and measurement assumptions are understood; converting an unexplained unit price cannot resolve an undefined supply.



AI-generated concept illustration; not a factory, inspection or shipment photograph.

WHAT TO CONFIRM

- 1 Physical piece count
- 2 Defined lengths / units
- 3 Agreed price quantity
- 4 Actual measurement basis

02 / WRITE THE RFQ

Specify the finished supply and the controlling drawings

Prepared ends, interfaces and kit contents need their own clear requirements.

Identify which operations are included in the requested finished item: cutting, end preparation, holes, joining, surface treatment or other defined work. State the actual drawing and detail references controlling those operations. A supplier can price an unfinished length and a prepared component differently even when their base material descriptions match. Keep the requested product condition, work scope and separate commercial line items connected to the same buyer reference.

For assemblies and component sets, attach the current contents list and relevant interface documents. Name the supplied parts, variants and quantities, including any expressly required mating components. Distinguish a complete defined kit from a collection of similar-looking parts. The photographs show concept arrangements only; they cannot establish a fitting dimension, clamp compatibility or approved connection. Actual configuration and interface choices belong in the controlled technical package and responsible review.

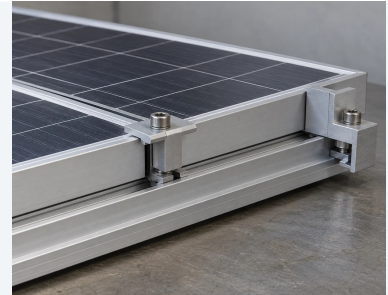
Send a drawing register with file names, revisions and item applicability. Identify whether a file is issued for enquiry, approved for the stated work or still awaiting review. Request a supplier response against the same register. A proposed fabrication detail or alternative component needs its own submission and decision. Keep accepted work boundaries visible so later inspection, packing and receiving can identify the actual prepared objects rather than an earlier catalogue description.



Prepared-end concept: define actual geometry and work



Fitting concept: specify sizes, ends and item basis



Clamp concept: identify actual variants and set contents

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

02 / WRITE THE RFQ

Request evidence by item, purpose and delivery stage

A general request for certificates does not define the needed record package.

Create an evidence schedule alongside the item schedule. State the record function, selected framework and type where applicable, represented product or material group, result scope and issue timing. Identify planned inspection involvement early enough for the activity. Ask the supplier to describe the proposed original issuer, validation route and availability against each requirement. Record any proposed alternative as a difference needing review before it becomes accepted scope.

EN 10204 supplies an inspection-document framework; EN 10168 organizes information that may be communicated in steel inspection documents. Their public identities help describe an enquiry but do not supply every project-specific test, field or acceptance condition. The actual product basis and order establish the selected evidence. Require physical allocation and relevant source relationships separately rather than assuming a document-type label demonstrates every requested characteristic or every supplied piece.

Set practical handover stages for proposed samples, current issued records, release information and final allocation. Distinguish an example document used to explain the format from an actual record representing supplied material. Specify the language, completeness and review route needed by the project. Link open evidence questions to affected items, owners and required response dates so missing information remains visible when the team considers production or shipment readiness.

REQUIRED FUNCTION	ACTUAL SOURCE	DELIVERY STAGE
Material / check / work	Issuer / scope / validation	Timing / review owner

Specify the evidence function and represented objects instead of only requesting a certificate.

Evidence entry	Describe its actual required role
Source / type	Framework, issuer and validation arrangement
Represented scope	Actual objects, identities, results and allocation
Handover stage	Format, timing, reviewer and unresolved conditions

Source scope: S09, S10 | Reference register: page 57

02 / WRITE THE RFQ

Give the commercial response a defined supply boundary

Quoted prices need quantities, inclusions, responsibilities and timing assumptions.

State the requested quotation currency, physical quantities, preferred price presentation and offer validity information. Ask for products, preparation, records, packing and delivery activities to be identified within or outside the proposed price. Where a cost depends on a later choice or quantity, request its assumption and adjustment basis. An unpriced requirement is an open question; it should not quietly become a zero-cost inclusion when the buyer compares offers.

Provide the actual delivery destination and requested sequence, site or receiving constraints, and relevant packing needs for the supplier and logistics providers to review. Retain the proposed delivery-entry source for its responsible review. The commercial-term chapter explains those distinctions. Request payment and timing proposals as separate terms, identifying the proposed triggers and documents rather than inferring them from a delivery abbreviation.

Ask which dates are firm commitments and which are estimates dependent on approval, input receipt or transport availability. Identify required buyer decisions and supplier responses. Keep the desired delivery date distinct from production completion or a proposed dispatch date. A complete response should make the offered supply boundary and timing understandable, with exclusions and pending assumptions that the responsible parties can resolve before the accepted order is established.

QUOTED BASIS	INCLUDED SCOPE	DELIVERY INPUTS
Unit / currency / validity	Work / records / services	Points / roles / sequence

Explicit inputs help every respondent price the same defined enquiry package.

Commercial input	Request an explicit offered response
Price / scope	Currency, quantities, inclusions and exclusions
Delivery / roles	Named points, sequence and proposed responsibilities
Validity / timing	Offer expiry, milestones and actual dependencies

Source scope: S02 | Reference register: page 57

02 / WRITE THE RFQ

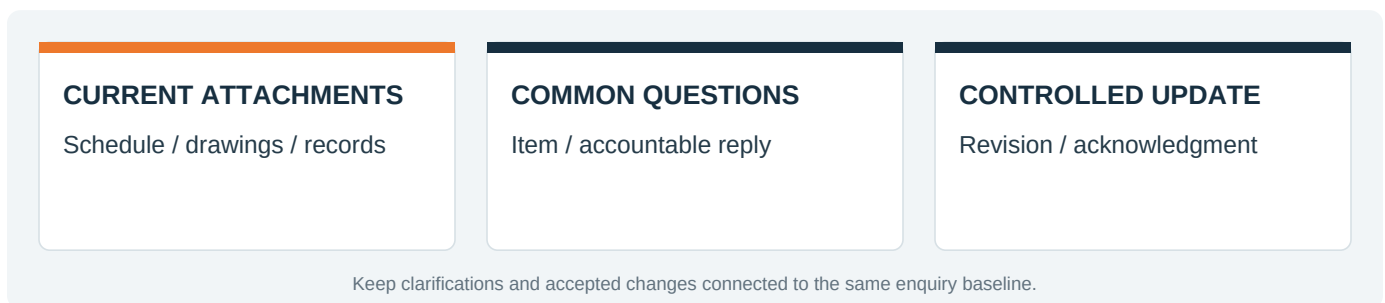
Issue one current RFQ package and retain its responses

Controlled attachments and item-linked questions make the enquiry reproducible.

Assemble the current item schedule, drawing register, technical references, evidence schedule and commercial response requirements. Give the package an enquiry reference and revision. Identify the issue date, requested response date and contact responsible for questions. Confirm that each respondent receives the same intended baseline. Keep any supplier-specific scope openly identified so the comparison does not mistake different enquiry packages for competing responses to one unchanged requirement.

Use an item-linked clarification register to capture the question, source response, affected files and accountable decision. When a clarification changes a shared requirement, issue the controlled update to affected respondents and request acknowledgement. Preserve earlier responses with their original dates and references. Revision management here is an original purchasing workflow consistent with the broad configuration-management purpose of ISO 10007; it is not a reproduction of that standard or a contract amendment by itself.

Before comparison, identify which offer revision responds to the current RFQ and which rows remain provisional. Request missing attachments or answers using exact item and requirement references. Keep the supplier reply separate from the buyer decision so a suggested change is not accepted automatically. The package should let a new team member reconstruct what was requested, what was offered and which differences need resolution without searching through an unstructured email history.



Issue control	Retain current relationships
Baseline	Enquiry revision and complete attachment register
Clarification	Question, response, affected scope and decision
Comparison input	Current offer revision and open items

Source scope: S13 | Reference register: page 57

03 / COMPARE QUOTATIONS

Check that offers address the current required package

Comparable price starts with comparable product, quantity and evidence scope.

Build a comparison row for each current buyer item and identify the received offer revision. Check the proposed product, grade, condition, dimensions, quantity, preparation and current drawing references before ranking prices. Record the actual offered source and required evidence route. Keep a proposed alternative in its own identified row. A familiar supplier name or a low headline price cannot resolve a different product or an incomplete response to the enquiry.

Give each comparison entry a clear status: explicitly included, explicitly excluded, offered alternative or not confirmed. An unanswered field belongs in the last category even if similar previous orders included it. Link missing information to a clarification owner and required reply. Decide which unresolved matters prevent a meaningful comparison and which can remain provisional within a stated decision. The responsible reviewers establish that distinction for the actual buying requirement.

Preserve technical and commercial reviews as separate decisions with a shared item reference. Technical acceptability does not establish a complete delivered-cost boundary, and a priced inclusion does not establish product conformity. Continue comparison using confirmed scope, showing unresolved entries visibly. Before recommending an offer, retain current responses and review conditions so an apparent advantage can be assessed against the actual requirement rather than a simplified version.

PRODUCT MATCH Actual variant / condition	PACKAGE MATCH Work / evidence / quantity	COMPARISON STATUS Ready / unresolved / decision
--	--	---

A price can be compared after its represented scope and open differences are understood.

Response status	Meaning within the comparison
Included / excluded	Supplier explicitly states the scope boundary
Alternative offered	Identified departure awaits accountable review
Not confirmed	Missing answer remains an open requirement

03 / COMPARE QUOTATIONS

Normalize pricing units using the same defined objects

A conversion needs the actual piece length, quantity and mass basis.

Start with the common physical scope established by the item schedule. For identical defined pieces, total length equals piece count multiplied by length per piece. A metre quote can then be extended by that total length; a piece quote can be extended by the matching count. Confirm included work before comparing the totals. A price per piece for one length cannot be applied to another length without an actual supplier response or stated comparison assumption.

For mass-priced offers, identify the quoted mass unit and the agreed basis. Separate net product mass from packaging or gross shipment mass. Do not convert using an unexplained catalogue figure when the offer is based on another method. Where a theoretical mass is explicitly used for comparison, retain the calculation source and mark it as an assumption. It does not establish measured delivery mass, allowable product variation or the final invoicing quantity.

Show the original offered unit price beside the normalized quantity and resulting amount. Record rounding and any supplier minimum or quantity allowance that affects the price. Leave an unresolvable unit basis open instead of generating a precise but unsupported total. The beam photograph is a concept image and contains no usable mass measurement. The first teaching case demonstrates transparent piece-versus-metre arithmetic using fictional quantities and a defined common supply scope.



AI-generated concept illustration; not a factory, inspection or shipment photograph.

WHAT TO CONFIRM

- 1 Original offered unit
- 2 Same physical objects
- 3 Explicit conversion basis
- 4 Extended comparison amount

03 / COMPARE QUOTATIONS

Expose preparation, components and records hidden in a price

Scope differences need item-level rows rather than a single quotation total.

Place the required supply beside each offer using product, work, evidence, packing and delivery rows. Name included operations and component contents rather than accepting complete supply as a description. For prepared items, check ends, holes, treatment and other selected work. For kits, compare quantities of each required component. A larger package count can still contain fewer complete sets when one mating part is missing or excluded.

Record the supplier response in its own words with the relevant offer reference, then assign the comparison status. Separate a priced exclusion from an included allowance with conditions. Where a needed operation or record is not confirmed, obtain a response before treating the offer as complete. A buyer-added allowance can support a provisional scenario only when its source and uncertainty are visible; it cannot amend the supplier quotation or guarantee that the missing work is available.

Use the matrix to direct questions and decisions. Ask which supplier can provide missing scope, at what cost and timing, and under which current requirements. Preserve any proposed substitution or separate procurement route. A recommendation should explain the remaining work and evidence responsibilities, including their effect on the project package. Counting product lines or comparing page totals cannot demonstrate that the offered finished supply is equivalent.

INCLUDED Written scope / price source	EXCLUDED Separate actual allowance	UNCONFIRMED Open source / decision
---	--	--

An unknown cost is not zero, and an included service should not be added twice.

Required scope	Offer differences
Product / components	Variants, quantity and defined contents
Work / evidence	Operations, records and involvement
Packing / delivery	Protection, allocation and activities

03 / COMPARE QUOTATIONS

Build a comparison ledger to one stated delivery point

Confirmed amounts and provisional assumptions must remain distinguishable.

Choose the same comparison destination or handover point for all offers and record the physical supply included. Start with the confirmed product amount, then identify required preparation, records, packing and transport activities within that boundary. For each cost row, state whether it is included, separately quoted, buyer-provided or unresolved. Keep original offer references beside the ledger so the comparison can be checked against the supplier documents.

Add a separate amount only where its scope is outside the base price and belongs within the stated comparison boundary. Check overlapping freight, packing and inspection entries before summing them. Where a supplier quotes a range or conditional amount, preserve that condition rather than converting it silently into a firm commitment. Use a documented common-currency assumption if conversion is required and retain the original currencies; a teaching calculation supplies no actual exchange rate.

Assign destination-specific clearance, tax and other charge questions to responsible parties and qualified providers. Do not invent a generic steel duty rate or assume a delivery label includes every cost. Mark unknown amounts openly and explain which recommendation depends on them. The second teaching case compares fictional amounts to a common point; its exclusions remain visible and its total represents only the defined teaching scope, rather than a universal final landed cost.

OFFERED BOUNDARY	ACTUAL ADJUSTMENTS	DEFINED SUBTOTAL
Exact price scope / endpoint	Added once / source refs	Current costs / exclusions
State which functions and comparison point the subtotal represents.		

Ledger control	Reproducible cost basis
Comparison boundary	Same physical scope and named point
Amount / inclusion	Source, currency and scope owner
Provisional entry	Assumption, uncertainty and action

Source scope: S02, S07, S08 | Reference register: page 57

03 / COMPARE QUOTATIONS

Compare timing and payment proposals by their actual triggers

A shorter lead time can depend on different approvals and completed activities.

Place proposed milestones on a common sequence: input receipt, review, production readiness, inspection or document review, dispatch readiness and delivery. Ask when stated lead time starts and which approvals or buyer inputs affect it. Identify whether a date is committed or estimated, and preserve the supplier response. A production-duration headline cannot be compared directly with a delivery date including different review and transport scope.

Record payment proposals as their own commercial entries. Identify the proposed currency, trigger, due timing and evidence, with the responsible review under the actual transaction. A request for payment against dispatch documents is different from one linked to another agreed milestone. The toolkit sets no preferred deposit percentage or universal payment structure. If documentary credit is proposed, the relevant chapter explains why bank document examination and physical product acceptance need distinct arrangements.

List dependencies beside each offer: current drawings, accepted variants, special records, third-party participation, booking inputs or receiving restrictions where applicable. Decide which questions require a firmer response before the recommendation is useful. Keep the comparison date and offer-validity deadline visible. The final choice should explain the timing and commercial conditions it relies on, including unresolved assumptions, so the order can establish actual commitments instead of carrying forward an ambiguous quotation headline.



Timing / terms	Same defined trigger
Milestone	Event, start basis and proposed date
Dependency	Input, responsible party and status
Payment proposal	Separate trigger, timing, evidence and review

Source scope: S02, S03 | Reference register: page 57

03 / COMPARE QUOTATIONS

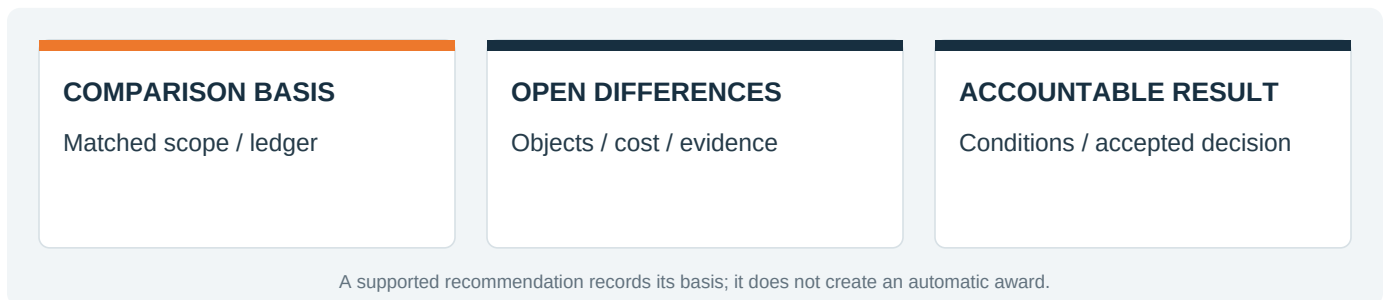
Record the recommendation with its evidence and conditions

The selected offer should connect to a complete accepted buying package.

Summarize the reviewed product and quantity scope, current offer revision, comparison boundary and main reasons for the recommendation. Cite the actual clarification and review records supporting those reasons. Identify meaningful differences in prepared scope, evidence, timing or responsibilities rather than ranking suppliers through an unexplained score. If a scoring method is used by the buyer, retain its agreed criteria and weights; this toolkit provides no universal supplier-rating threshold.

Separate confirmed inputs from conditions still requiring closure. Name the affected item, exact unresolved question, responsible decision maker and required evidence or response. A conditional recommendation must describe the condition rather than marking every comparison row accepted. Record any approved departure with its actual authority and scope. Keep the selected alternative visible through the subsequent order documents so a commercial choice cannot silently erase a technical difference or an excluded deliverable.

Before issue, reconcile the recommendation with the current item schedule, selected quotation, resolved differences and proposed order. Confirm that quantities, pricing units, work, records and delivery roles describe the same supply. Retain the decision date, reviewers and source references. Update the recommendation if a later accepted change affects its basis. Its purpose is to establish a reproducible purchasing decision and open-action trail, not to demonstrate inspections or delivery activities that have not occurred.



Decision record	Reviewable selected basis
Selected package	Items, offer and comparison scope
Decision basis	Reviewed differences and sources
Condition	Scope, owner, response and closure

04 / DELIVERY TERMS AND WORK ROLES

Write the selected rule with an exact named point

A delivery abbreviation needs a defined route, location and agreed edition.

ICC identifies Incoterms 2020 as its current set of eleven rules. The selected rule allocates delivery-related obligations, costs and risk between seller and buyer. Incorporate it with the named port, place or point and edition. A quotation that says only FOB, CIF or delivered leaves essential information unresolved and should remain an open comparison item until the actual arrangement is identified.

Record the proposed transport sequence before reviewing that entry: origin location, relevant terminal or port, main transport, destination and any onward movement. Identify the physical handover point intended by the parties, including the relevant facility or terminal detail where needed. Ask who can perform the required activities and what arrangements support that response. Different delivery arrangements can need different rules; the lowest headline price does not answer which arrangement matches the proposed transaction or who will actually perform each required activity.

Use the delivery-role worksheet to capture the original offer and requested clarification, then retain the accepted wording in the current order. If the location or route changes, review affected carriage, handling, evidence and cost entries rather than replacing a place name alone. Confirm the current response with the responsible commercial and logistics parties. The named point should be understandable to the people arranging transport and receiving, with a source reference they can use when checking the proposed work and handover against each issued comparison revision.

SELECTED RULE

Actual route / arrangement

EXACT NAMED POINT

Port / place / handover

EDITION / AGREEMENT

Current contract source

Rule selection begins with the actual transaction; no rule is universally best for steel.

Source scope: S01, S02 | Reference register: page 57

04 / DELIVERY TERMS AND WORK ROLES

Separate the risk point from the paid destination

Costed carriage and contractual delivery can describe different places.

Under the C-group rules, the named destination identifies where the seller arranges and pays for carriage; it is not the delivery and risk-transfer point. For example, CIF names a destination port while delivery occurs on board at the shipment port. This defined distinction should be visible when reviewing the offered route, without treating a destination in the price as proof that risk stays with the seller throughout transport.

Build two separate entries in the quotation review: the identified delivery and risk point, and the destination or service endpoint included in the offered transport scope. Attach the actual wording and responsible review. Add a third entry for the receipt location the buyer requires. These entries may coincide in some arrangements or describe different stages. The reviewer needs the actual relationship rather than one broad delivered label, especially where inland movement continues after the named port or several providers perform separate transport legs.

Compare priced inclusions with the same transport stages and keep any unresolved gap visible. Record who arranges the next service, the relevant provider response and the evidence expected at handover. A booking, transport document or receiving event should retain its own function and reference. This diagram illustrates distinct review fields, not a claim decision for a shipment. If a loss, delay or discrepancy occurs, use the actual accepted contracts and accountable review rather than inferring a remedy from the comparison worksheet.

ILLUSTRATIVE C-GROUP RELATIONSHIP / ACTUAL RULE AND POINTS CONTROL

DELIVERY / RISK



Actual delivery point

PAID CARRIAGE



Named destination

Relationship map only, not a route or rule-selection recommendation. No physical distance scale.

Source scope: S02 | Reference register: page 57

04 / DELIVERY TERMS AND WORK ROLES

Verify actual insurance and service arrangements

A trade rule, a provider instruction and a policy are separate sources.

ICC explains that Incoterms 2020 provides different insurance arrangements under CIF and CIP. A rule name alone does not show the actual issued policy or establish that a particular event or steel shipment is covered. Record whether insurance is part of the offered scope, who arranges it and which actual source will be available for review. Keep unresolved insurance information separate from the product price and carriage entry.

Where insurance is required, obtain the actual proposed arrangement from the responsible parties and route its scope to the appropriate reviewer. Identify the insured shipment or interest, route and duration, relevant policy or certificate, stated conditions and the required evidence handover. Record the decision and remaining questions without inserting assumed protection into the comparison. This toolkit supplies no recommended policy, cover amount or claims outcome. The review should preserve the actual insurance source and any agreed additional requirement beside the accepted delivery arrangement.

Likewise, confirm private work instructions with the actual carrier, packer, forwarder or other provider. Ask which activities are included, who provides required information and who acknowledges completion. A sales-contract term does not itself demonstrate a confirmed booking or approved provider instruction. If the proposed service differs from the accepted buying package, assign the difference to its owner and obtain the relevant current response. Keep product inspection, transport arrangements and insurance evidence individually identifiable so each decision can be assessed within its own actual scope.

COST LINE	ACTUAL POLICY	REVIEWED ARRANGEMENT
What the stated price includes	Party / coverage / exclusions	Source / condition / owner

An insurance price line cannot establish actual coverage or a claim outcome.

Source scope: S01, S02 | Reference register: page 57

04 / DELIVERY TERMS AND WORK ROLES

Keep payment and contract provisions explicit

Delivery roles do not settle every commercial term or establish product acceptance.

Incoterms does not replace a complete sales contract or determine product specifications, payment arrangements or ownership transfer. Retain the actual agreed provisions separately from the delivery-rule entry. The current order package needs identifiable references for commercial terms and responsible decision makers, alongside the accepted physical scope. Retain the original commercial response and its accountable decision trail.

Where a documentary credit expressly applies UCP 600, the credit and underlying sales contract have separate functions; banks deal with the required documents rather than inspecting the related goods. Keep documentary-credit requirements under the actual bank and commercial review. Identify the requested sources, responsible issuers and handover sequence, then confirm that the operational plan can produce the agreed evidence. This toolkit does not specify a financing arrangement, payment percentage or presentation deadline, and a documentary outcome must not be recorded as a physical product acceptance.

Maintain separate review rows for product requirements, required evidence, delivery work and commercial provisions. An inspection source can establish its reported scope without resolving a disputed invoice, while a completed payment event cannot create a missing material identity or required test. Preserve accountable decisions and the supporting sources for each row. When an arrangement changes, identify affected documents and work stages so the current package remains consistent. The worksheet organizes the actual agreed information; it does not supply legal terms for the parties to adopt automatically.

PRODUCT / ORDER

Actual goods / scope

SALES PROVISIONS

Payment / ownership / terms

**DOCUMENTARY
ARRANGEMENT**

Required records / parties

Document examination and physical product acceptance remain different review functions.

Source scope: S02, S03 | Reference register: page 57

04 / DELIVERY TERMS AND WORK ROLES

Assign routing, clearance and cost responsibilities

Each actual activity needs a provider, information source and accountable review.

Map the proposed shipment activities in sequence and identify the party arranging each one. Include relevant origin movement, terminal services, main carriage, destination handling and onward movement where applicable. Keep the provider response, service endpoint, quoted inclusion and unresolved condition beside the activity. A three-letter delivery rule does not establish the actual tariff, classification, booking or clearance outcome for a particular shipment.

For an actual U.S. import, CBP explains that using a broker does not remove the importer of record's responsibility for correct entry information and applicable duties and fees. Confirm the actual importing parties and their information needs through the relevant review. Supply current product descriptions and supporting manufacturer, origin, composition, use and pricing information as requested. The same purchasing worksheet can organize those inputs, but it cannot determine a commodity code, duty rate or permission to import for the transaction or any other destination.

Use a common comparison endpoint to examine the proposed service and cost scope. Record included amounts, separately priced activities and provisional estimates using their actual sources and validity conditions. Do not fill an unknown with zero or add a service already included in the offered total. If a routing or responsibility question changes, update the affected comparison and order entry. The useful output is a current role map and a reviewable cost basis, supported by the responsible parties rather than a general landed-price promise.

ACTUAL ROUTE Providers / handovers	CLEARANCE RESPONSIBILITY Relevant parties / sources	DESTINATION / ONWARD Named work / actual scope
--	---	--

Confirm responsibilities for the actual shipment and applicable destination.

Source scope: S02, S08 | Reference register: page 57

05 / ORDER AND CHANGE CONTROL

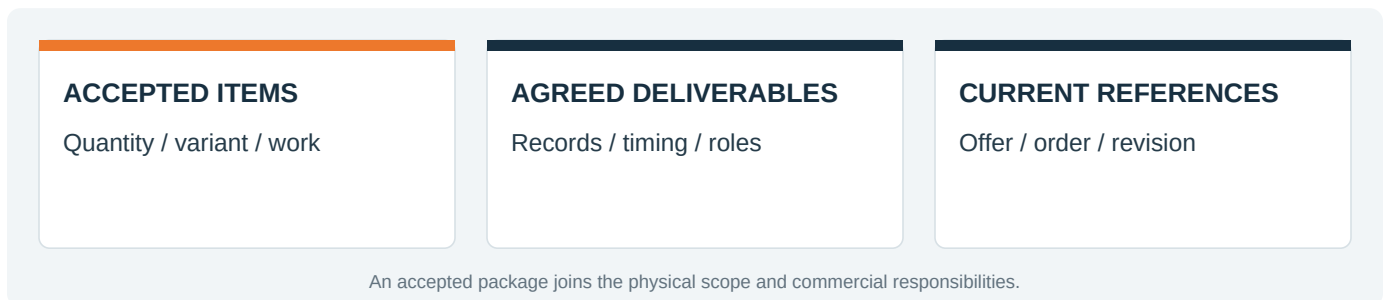
Make the accepted order a complete current package

Bring the products, quoted inclusions, record requirements and delivery roles together.

Record the accepted item schedule and its revision with the selected offer, resolved differences and order references. Identify quantities and pricing units, actual product variants, requested preparation, required sources and inspection involvement. Preserve the current drawings and technical basis. The order package should make the supplied objects and agreed commercial scope understandable without relying on an earlier unaccepted quotation.

Keep explicit inclusions, exclusions and provisional items beside the affected lines. Attach the current delivery-role entry and record-handover schedule. Link all accepted commercial provisions to the current order and responsible decision.

Maintain a clear distinction between accepted order scope, internal review status and operational progress. A quotation approval does not demonstrate completed production; a production update does not establish required inspection release. Record current responsibilities and open conditions. A future reviewer should be able to identify what was actually agreed, which sources support that basis and which work or evidence still remains to be completed.



Accepted package	Keep the current references
Items / selected basis	Products, quantities, variants, units and drawings
Work / records	Preparation, actual evidence, involvement and timing
Commercial / delivery	Agreed inclusions, terms, roles and named points
Remaining conditions	Actual provisional scope and accountable follow-up

Source scope: S02, S13 | Reference register: page 57

05 / ORDER AND CHANGE CONTROL

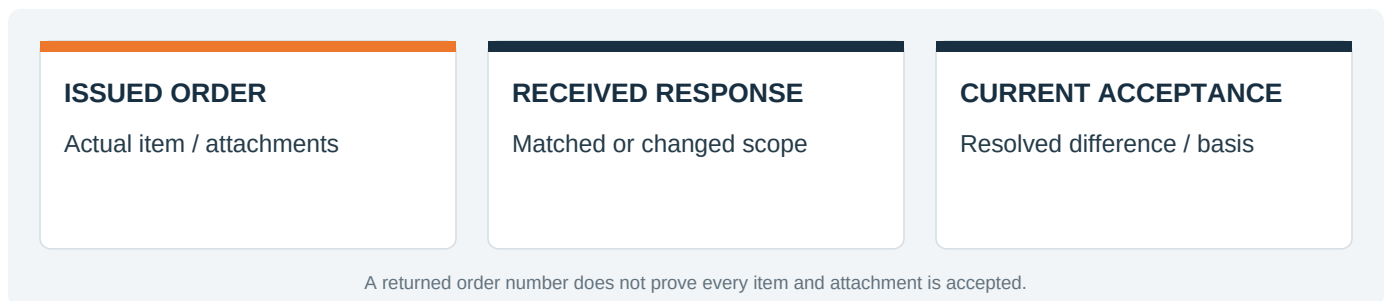
Require acknowledgement of the actual accepted scope

A returned order reference should resolve item and attachment differences.

Compare the supplier acknowledgement with the current order package. Verify the buyer items, quantities, pricing units, product and work descriptions, record requirements and requested delivery arrangement. Confirm the referenced drawings and attachments rather than reading an acknowledgement number as proof that all files were reviewed. A discrepancy should identify the specific order row and the proposed correction or alternative.

Keep open commercial and technical conditions visible while the responsible parties resolve them. An offered substitute, a changed source or a different record type can require separate reviews. Preserve the supplier response, accountable decision and affected file revisions. A purchasing system status does not establish technical approval, and a technical response does not by itself amend a commercial quantity or scope.

After accepted corrections, issue or retain the actual current acknowledgement and comparison history. Link operational milestones to that basis so later reports and shipments refer to the right quantities and configuration. The aim is a usable scope trail: issued order, received response, resolved differences and current accepted package. Do not overwrite the original acknowledgement to make the history appear simpler.



Acknowledgement check	Record the actual match or difference
Item / quantity / unit	Current physical scope and pricing basis
Drawing / product / work	Accepted revisions, variants and preparation
Records / delivery roles	Actual deliverables and named responsibilities
Resolution / status	Response, decision and current accepted references

05 / ORDER AND CHANGE CONTROL

Control substitutions across geometry, work and evidence

A proposed equivalent needs a complete affected-scope review.

Describe the proposed substitution against the current accepted item. Identify the actual changed product, grade, geometry, manufacturing route, material condition or supplied configuration, as applicable. Preserve original and proposed sources. A similar trade name or matching nominal dimension cannot establish that every required performance, interface and record condition is unchanged.

Assess the related preparation, mating parts, treatment and required evidence through the responsible reviewers. A revised connection or component can affect drawings, BOM contents, marking and packing allocation. A change in manufacturing or record route can affect validating parties, timing and original source scope. Record those dependencies beside the physical substitution rather than closing the request using a new product picture alone.

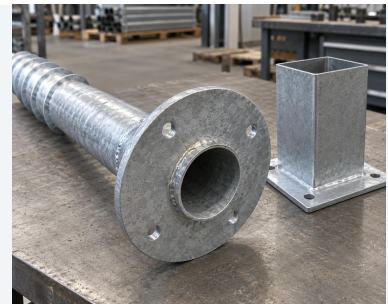
If the change is accepted, update the affected order, drawings, item schedule, work scope and record register with the decision and conditions. If it is not resolved, preserve the provisional status and response owner. Do not let a commercial substitute quietly become the shipped configuration while the controlled requirements still describe another product. Accepted configuration and actual delivered identities need a consistent current map.



HSS profile concept: current geometry and variants required



Reducer concept: define actual sizes, ends and requirements



Head-interface concept: review actual mating scope

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

Affected-scope review

Product + geometry / interfaces + work + evidence + pricing / timing + current drawings, BOM and packing allocation.

05 / ORDER AND CHANGE CONTROL

Reconcile changed quantities in every affected unit

A revision can change pieces, lengths, operations and package contents differently.

Compare the original and revised physical schedule before updating the price. Show pieces and individual lengths, defined set contents, surface or work quantities where applicable, and the agreed mass basis if one is used. A higher piece count can accompany a lower total length, while an unchanged total length can create more prepared ends. Each affected unit needs its own calculation and source.

Update the actual work and evidence requirements with the physical scope. More finished marks can require a revised identity and packing allocation even when the material source remains the same. A different length or component count can affect handling, sequencing and shipment grouping. Resolve those changes through the appropriate provider and project review; this toolkit assigns no transport capacity or universal processing allowance.

Preserve the commercial adjustment and accepted revision beside the changed quantities. Identify any credits, additional operations, remaining stock or partial work using actual evidence and agreed units. A quantity revision is not complete merely because one total value changed in a spreadsheet. The current order, work schedule, inspection and source maps, packing list and receiving balance should describe the same accepted objects.

PHYSICAL QUANTITY

Pieces / individual lengths

OPERATIONS / CONTENTS

Ends / actual components

COST / DELIVERY MAP

Agreed units / affected scope

A single percentage cannot describe every quantity affected by a revision.

Changed unit	Reconcile under the accepted basis
Physical pieces / lengths	Original and revised count and defined piece lengths
Work / components	Prepared ends, operations and actual set contents
Commercial quantity	Price unit, included scope and accepted adjustment
Delivery / evidence	Marks, source allocation, packages and balance

05 / ORDER AND CHANGE CONTROL

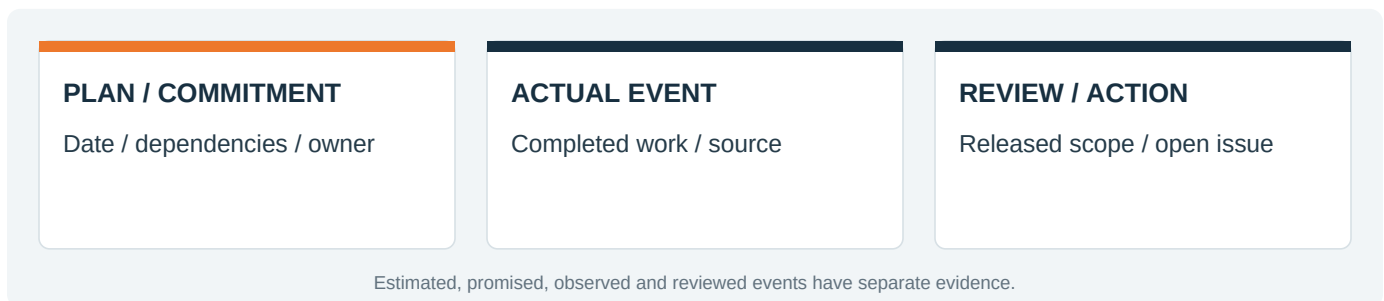
Track milestones through completed work and actual evidence

An estimated date, an observed event and an accepted release are different entries.

Use a milestone register tied to the accepted scope. Identify requirement release, material or product availability, required work stages, inspection involvement, dossier review, packing readiness, transport booking and shipment handover where relevant. Give each entry its actual responsible provider, predecessor conditions, requested date and required supporting source. A generic lead-time number can conceal important dependencies.

Separate estimated, promised, actual and reviewed dates. Preserve the quotation conditions and any change that affected the sequence. A production photo can support a communication but does not establish the whole order quantity, inspection completion or transport readiness. Require the actual identified source for the claimed milestone and keep unresolved blockers visible beside the affected items.

When a date changes, record its scope, reason and accountable response, including downstream receiving or site-sequence effects. Ask the responsible logistics parties to confirm current routing, booking and required document stages. Do not transform an estimated transit time into a guaranteed arrival. A useful progress register connects actual work evidence, current plan and accepted actions so the team can respond before an unresolved condition becomes a delivery gap.



Milestone entry	Keep its actual status
Planned basis	Scope, predecessor conditions and responsible provider
Required date / source	Current commitment and expected evidence
Actual event / review	Observed completion and relevant release decision
Change / blocker	Affected items, current action and accountable owner

06 / PACKING AND SHIPMENT READINESS

Define packing around the actual steel products

Protection, identities and transport preparation need a shipment-specific response.

Request a packing proposal using the current accepted item schedule, product condition and intended route. Identify the actual lengths, package quantities, prepared surfaces, ends and identity marks that need protection or access. Pipe, coated products and rolled members can present different packing questions. The packer and transport providers should respond to the real shipment inputs rather than select a method from an attractive concept photograph.

Keep product protection and safe transport preparation individually reviewable. Ask how the proposed arrangement preserves required marks, prevents avoidable surface or end damage and supports the agreed receiving sequence. Obtain the actual handling and transport plan through the responsible providers. The IMO/ILO/UNECE CTU Code is a non-mandatory global practice guide covering packing and handling across sea and land transport. Its existence does not approve a specific load or establish that a concept image shows a safe arrangement.

Record the proposed packages, provider responsibilities, required review and readiness evidence in the shipment register. If lengths, quantities, supplied condition or routing change, obtain the relevant revised response before treating the old packing proposal as current. The three AI-generated views below illustrate product-grouping themes only. They provide no verified shipment count, load capacity, securing design or METDAX delivery evidence. Actual packing readiness needs the identified current plan and completion records for the accepted objects.



Pipe bundle concept: preserve actual counts, marks and ends



Coated-pipe concept: confirm actual surface protection



Rolled-member concept: obtain the actual packing plan

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

Source scope: S04 | Reference register: page 57

06 / PACKING AND SHIPMENT READINESS

Keep mixed components and kit contents identifiable

Package grouping should preserve the current component schedule and receiving sequence.

Define the contents of each proposed package using the actual accepted BOM and item schedule. Rails, clamps, fasteners, pile sections, extensions and ground-screw accessories can belong to different buyer items or installation groups. Keep their actual variants and quantities visible. A package labelled kit or complete set should map to a defined contents list; a common box or bundle does not establish that every required mating part is present.

Allocate package identifiers to the physical contents and current order references. Show loose accessories separately where the actual arrangement requires it, and identify any source or work records that travel with the group. Preserve the link between the package list and finished-item or material identities. A packing quantity should not silently replace a BOM quantity, and the number of handling units should not be reported as the number of complete installation sets.

Coordinate grouping and receiving needs with the responsible providers and project team. Identify the required sequence, destination allocation and any accessible checks agreed before packing closes. Retain the reviewed package schedule and actual completion evidence so a later recipient can reconcile the contents. The AI-generated solar, pile and ground-screw images below are conceptual illustrations. They do not establish approved combinations, verified packing contents, transport suitability or installation readiness. The actual accepted component records and shipment-specific plan establish those relationships.



Solar-component concept: map actual BOM contents



Pile-component concept: retain sections and accessories



Ground-screw concept: define actual receiving groups

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

06 / PACKING AND SHIPMENT READINESS

Identify wood packaging and its applicable requirements

Phytosanitary scope is separate from package strength and product protection.

IPPC describes ISPM 15 as addressing phytosanitary risks associated with raw-wood packaging in international trade, including dunnage. Its public scope excludes wood processed so that it is free from pests, with plywood as an example, and states that the measures do not provide ongoing protection from subsequent contamination. Identify the actual packaging material before deciding which requirements need review; do not treat every material called wood as the same category.

Ask the responsible packing provider to identify wooden pallets, crates, blocks or dunnage actually proposed for the shipment. Record their material description, applicable treatment or marking requirements and the source used to confirm the destination arrangement. Resolve mixed-material and reused-package questions through the appropriate provider and importing review. Retain actual supporting evidence when required. The toolkit does not supply treatment instructions, chemical or temperature parameters, or permission to manufacture or apply an official mark.

Keep phytosanitary review beside the shipment inputs without using it as a substitute for the physical packing plan. Confirm the actual protection and handling arrangement through its responsible parties, and identify current requirements before dispatch. If packing materials change, update the reviewed package record and affected readiness conditions. The diagram shows three review functions: material category, applicable destination requirements and actual provider evidence. It reproduces no official mark and does not approve the package, its structural adequacy or its acceptance by any authority.



Source scope: S06 | Reference register: page 57

06 / PACKING AND SHIPMENT READINESS

Assign the VGM information and submission route

Verified container mass, cargo quantities and loading approval have different roles.

For packed containers within the applicable SOLAS requirements, IMO identifies the shipper as responsible for providing verified gross mass sufficiently in advance for the stowage plan. VGM is a loading prerequisite, but does not guarantee that a container will be accepted for loading. Confirm the actual shipper, responsible provider and submission route; a purchase-order mass estimate or product net mass should not be treated as the required verified container value.

IMO describes two methods: weighing the packed container, or summing weighed cargo, packages, pallets, dunnage and securing materials with container tare using a certified method approved by the competent authority of the State where packing was completed. Obtain the actual applicable method and evidence from the responsible provider. Record the container identifier, verified value and units, verification and issue references, submission recipient and current required timing. This toolkit sets no weighing tolerance, container payload, approved instrument, method certification or sample VGM value.

Keep that information distinct from the ordered physical quantities, commercial mass basis and packing-list values while checking their relevant relationships. A VGM record does not identify every component or validate the securing plan. If the packed contents or container changes, refer the affected information to the responsible parties for the required current action and retain the response. Record submission and acknowledgement as actual events, with outstanding conditions visible. A shipment-readiness decision needs its stated scope and accountable basis rather than one broad weight-approved label.

ACTUAL SHIPPER Applicable shipment / role	ACCEPTED MASS METHOD Source / responsible provider	SUBMISSION / LOADING Required stage / carrier decision
---	--	--

Verified gross mass is distinct from product mass, capacity and operational loading approval.

Source scope: S05 | Reference register: page 57

06 / PACKING AND SHIPMENT READINESS

Build the current shipping-document package

Invoices, packing lists, transport documents and product records answer different questions.

Trade.gov identifies common export documents including the commercial invoice, packing list and transport documents, while emphasizing that actual requirements depend on the shipment and destination. Its guidance states that a packing list is not a substitute for a commercial invoice. Confirm the required package with the actual buyer, logistics and importing parties rather than copying a general checklist and assuming it covers every shipment or its particular product requirements.

Create a current document register listing each required source, issuer or provider, relevant order and shipment references, required delivery stage and recipient. Check the actual party names, goods descriptions, quantities and units, package marks and referenced dates for consistency within their roles. Keep product inspection and material sources separately identifiable beside their physical allocation. An invoice or transport source cannot create an absent heat link or reported test, while a material certificate does not establish a completed shipping event.

Review drafts before the agreed issue stage where the actual workflow allows, and retain current complete issued sources with any correction history. Confirm the document handover channel and required receipt through the responsible parties. A documentary-credit package, if applicable, needs its separate bank and commercial review rather than an automatic product release. At dispatch, record which required files were actually issued or submitted and which remain outstanding. The current register should make shipment readiness and the next recipient's evidence needs understandable without turning a filename count into a complete-delivery claim.

COMMERCIAL INVOICE

Actual commercial transaction

PACKING / TRANSPORT

Allocation / carriage records

PRODUCT / ORIGIN SOURCES

Actual required evidence

Document functions differ; confirm the required current set for the actual shipment.

Source scope: S07, S03 | Reference register: page 57

07 / RECEIVING AND CLOSEOUT

Prepare receiving against the current delivery allocation

The receiving team needs the accepted scope, package map and required original records.

Before arrival, provide the current order and shipment item schedule, package references, quantities and required source register to the receiving team. Identify handling and access requirements through the responsible site and transport arrangements. Preserve which checks can be performed at receipt and which belong to a later technical stage. This toolkit supplies no lifting, storage-load or unpacking procedure.

Keep physical quantities in their actual units. A package number describes a handling unit, while a finished mark, material source or defined kit has a different purpose. Show mixed groups and loose components using their accepted allocation. Record required source availability and current revisions. An invoice quantity, gross shipment mass or booking record cannot establish the detailed piece and component identity on its own.

Use the receiving worksheet to capture actual counts, accessible identification and condition observations with supporting evidence. Retain the inspection and disposition owners for unclear identities, shortages or damage. The products in the concept images illustrate grouping themes only. The actual receiving record should let the team reconcile what arrived with the accepted order and identify any remaining quantity or evidence.



Pipe packing concept: actual shipment count and identity required



HSS bundle concept: preserve actual marks and allocation

AI-generated product illustrations. No product approval or inspected-lot evidence is implied.

Receiving preparation

Current order + shipment / package schedule + original required sources + agreed accessible checks + responsible disposition route.

07 / RECEIVING AND CLOSEOUT

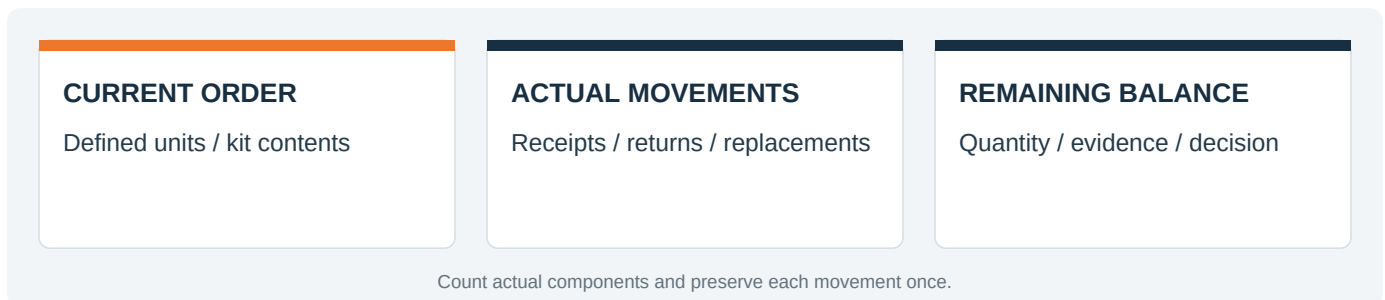
Reconcile partial deliveries and defined kit contents

Count the actual components before reporting that a set is complete.

Record each received group against the current ordered line and quantity basis. For a defined kit, compare every required component and variant with the actual contents before reporting completeness. Several posts, brackets or fasteners may belong to one set, but a box label does not establish the agreed ratio. Keep unused or loose components separately allocated when the actual supply arrangement requires it.

Maintain ordered, previously received, current received, returned or replaced, and remaining quantities without duplicating movements. A replacement should reference the original affected delivery and disposition so the same physical item is not counted twice. Separate a quantity balance from product conformity: a fully counted delivery can still have missing source scope, a wrong variant or another unresolved check.

For partial shipments, show which items and records travel together and which remain outstanding. Reconcile the source and physical maps with the accepted revision rather than the first enquiry quantity. A complete commercial shipment can contain several source groups, while a single source may represent material spread across deliveries when its actual scope permits. Preserve the required links and accountable review before declaring the package closed.



Balance entry	Use its actual quantity and role
Accepted order	Current items, variants, defined contents and physical units
Received / movements	Actual quantities, returns and replacement references
Remaining balance	Unreceived items and missing or incorrect components
Evidence / disposition	Source links, required checks and accountable status

07 / RECEIVING AND CLOSEOUT

Record discrepancies before deciding the commercial action

Keep the observation, affected quantity, source request and accountable response separate.

Describe the actual observed issue using item, mark, package and shipment references. Preserve quantities and units, relevant photographs or measurements, received document versions and the applicable requirement. Distinguish a shortage, visible condition issue, identity gap, incorrect configuration or missing record. An ambiguous not acceptable note can make it difficult for the provider and reviewer to identify the affected scope.

Notify the responsible parties through the agreed process and retain the current response and evidence. Required claim timing, inspection involvement, preservation and remedy arrangements depend on the actual accepted contract and transport or insurance terms. The toolkit prescribes no universal claim deadline or right to a particular compensation. Capture the actual applicable source and accountable commercial or technical decision instead.

Close each issue with evidence of the agreed action: original-source correction, accepted explanation, required additional inspection, replacement, return, adjustment or other actual disposition. Keep remaining conditions explicit and update quantities and document maps. A supplier response does not establish that the replacement arrived; a credit entry does not resolve a missing technical source. A reviewable record shows the original observation and completed current action.

ORIGINAL OBSERVATION	RESPONSIBLE RESPONSE	CURRENT CLOSURE
Object / quantity / evidence	Actual action / source	Completed result / conditions

A response or credit entry cannot establish that missing goods have arrived.

Issue entry	Record what actually happened
Original observation	Affected object, quantity, condition and source evidence
Required response	Applicable requirement, owner and agreed next action
Actual resolution	Supporting source, received movement or completed check
Current closure	Accountable decision, remaining conditions and updated balance

07 / RECEIVING AND CLOSEOUT

Close the order with current records and a reconciled balance

Administrative completion should identify its scope and any remaining obligations.

Prepare the final current index from the accepted order, revisions, shipment and receiving records, required original sources and dispositions. Identify which quantities and evidence functions are complete and which remain open. Preserve the final item and component allocation so a later reviewer can connect physical objects to the relevant material, work, inspection and delivery records.

Review commercial completion separately from technical release and later project responsibilities. Actual adjustments, invoices, transport services, accepted remedies and payment status have their own agreed basis. A closed purchase-system entry cannot create missing inspection evidence, while a completed technical review does not independently settle an unresolved commercial line. Record the actual accountable status for each function without merging them into one unsupported complete label.

Retain unresolved questions with their owners and source references, even if the planned delivery stage has ended. A handover can show accepted physical quantities together with outstanding documents, warranty terms or deferred site work under their actual arrangements. The final record should explain what was accepted, which sources support it and what still needs action. This provides a reliable basis for future procurement and follow-up.

PHYSICAL STATUS

Objects / final balance

TECHNICAL STATUS

Records / actual review

COMMERCIAL STATUS

Agreed service / adjustment

Administrative closeout should identify its scope and remaining obligations.

Closeout function	Keep its actual current result
Physical / quantity	Accepted scope, received movements and final balance
Technical / evidence	Original sources, required reviews and current dispositions
Commercial / services	Agreed adjustments, services and separate status
Remaining responsibilities	Actual deferred work, terms, owners and open actions

08 / TEACHING CASES

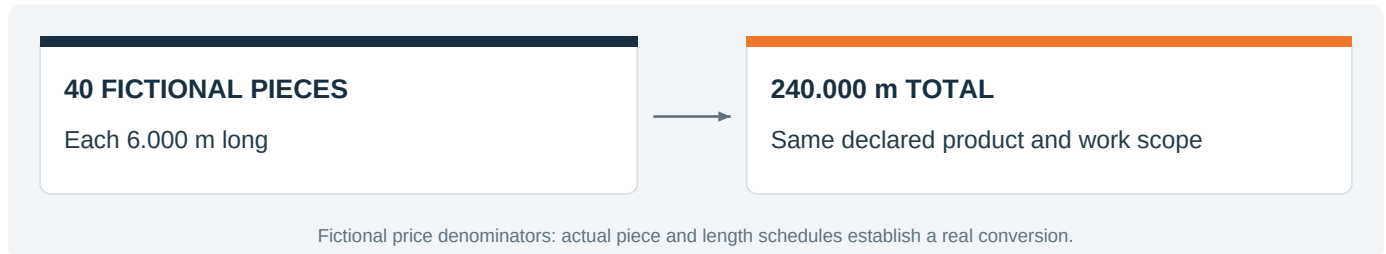
Case 1: compare metre and piece prices on the same scope

Fictional offers and CU teaching currency units; no current METDAX or market price.

A teaching enquiry requests forty pipes, each 6.000 m long, for 240.000 m total. Both fictional offers represent the same declared product, length and prepared-end requirement. Offer A prices the material at 42 CU per metre; Offer B prices forty pieces at 255 CU each. The units differ, so the reviewer first converts both offers using the explicitly declared physical schedule.

Offer A has a material subtotal of $240.000 \times 42 = 10,080$ CU. It separately adds 400 CU for the defined end work, 150 CU for the specified record package and 240 CU for the agreed packing. Offer B has a $40 \times 255 = 10,200$ CU line that already includes the same defined end work and packing, but separately adds the same 150 CU record package.

Preserve those written fictional inclusions rather than adding every possible charge to both offers. The comparison covers this declared product, end work, record package and packing only. Freight, insurance, destination services and any applicable taxes or other costs are outside the example and are not assumed to be zero. The next page compares the stated subtotals and their remaining review conditions.



Declared component	Offer A / CU	Offer B / CU
Material / base line	$240.000 \text{ m} \times 42 = 10,080$	$40 \text{ pieces} \times 255 = 10,200$
Defined end work	400 separately added	Included in the base line
Record package	150 separately added	150 separately added
Agreed packing	240 separately added	Included in the base line

08 / TEACHING CASES

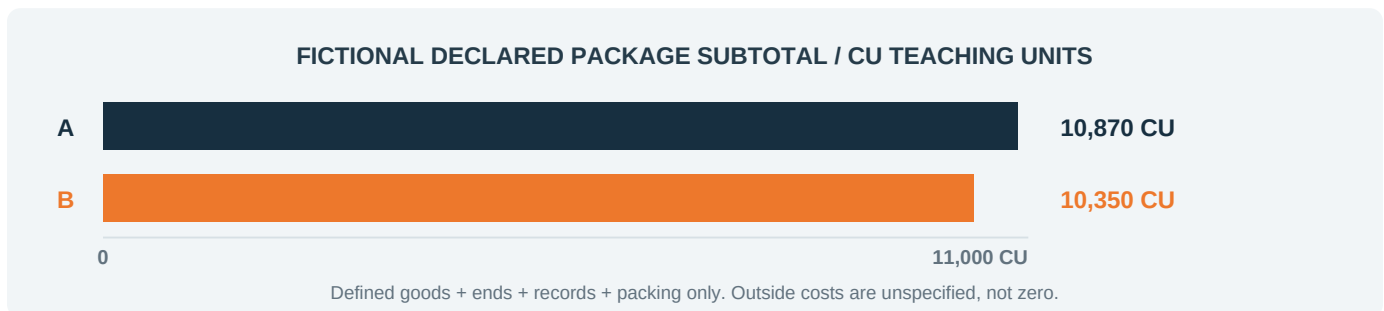
Case 1: keep included work from being counted twice

The comparison subtotal measures an explicit package, not every delivered cost.

Offer A totals $10,080 + 400 + 150 + 240 = 10,870$ CU for the declared package. Offer B totals $10,200 + 150 = 10,350$ CU for that same stated scope. The difference is 520 CU. The lower base line alone would have pointed to A, while the complete stated package subtotal is lower for B. That difference comes from the explicitly assumed inclusions, not from a universal pricing rule.

For this teaching schedule only, the package figures correspond to 271.75 CU per piece and 45.2917 CU per metre for A, and 258.75 CU per piece and 43.1250 CU per metre for B. Per-metre package figures are rounded to four decimal places. These derived ratios retain the declared forty-piece, 240.000 m denominator and do not create new quoted units or supplier prices.

Record the agreed inclusions and remaining questions before a real recommendation. Actual grade, condition, record scope, delivery responsibilities, quotation validity and schedule still require review. A comparable package subtotal supports a defined financial comparison; it does not establish product conformity or a purchasing award. A new offer or changed quantity would need its own current scope and calculation instead of reusing these fictional rates.



Fictional package measure	Offer A	Offer B
Defined subtotal	10,870 CU	10,350 CU
Derived CU per piece	271.75	258.75
Derived CU per metre	45.2917	43.1250
Excluded cost boundary	Freight and other unpriced items	Same stated outside scope

08 / TEACHING CASES

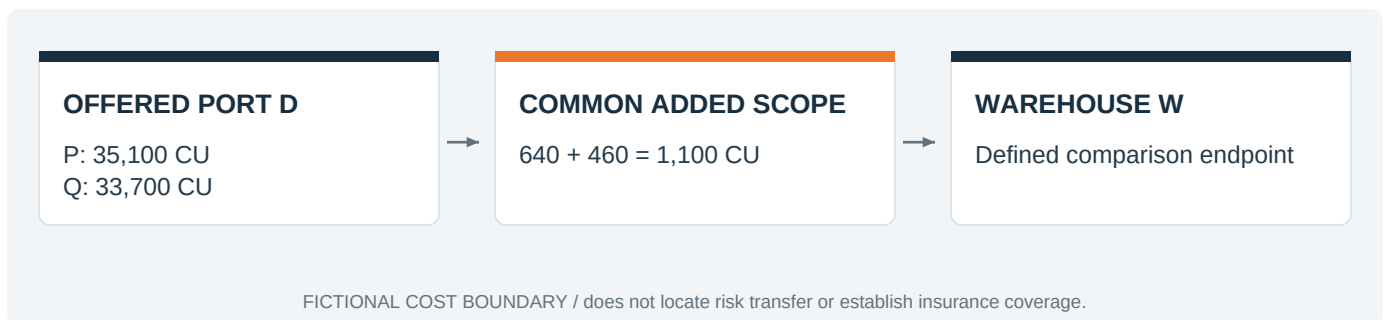
Case 2: extend both offers to one comparison point

Fictional route-cost ledger; no tariff, exchange rate, transport booking or insurance approval.

Two teaching offers cover the same declared goods and a written cost boundary ending at fictional Port D. Offer P states 32,000 CU for the goods, 880 CU for origin services, 2,100 CU for main carriage and 120 CU for the declared insurance item. Its stated Port D subtotal is 35,100 CU. Offer Q bundles those same declared cost functions into one 33,700 CU price to Port D.

The buyer wants to compare at fictional Warehouse W. The exercise explicitly adds 640 CU of destination services and 460 CU of onward movement to each offered boundary, for 1,100 CU per offer. Those amounts are fixed teaching assumptions. No actual service provider, freight rate, customs value, policy coverage or transport suitability is represented. Keep the common endpoint and cost functions visible before adding the comparison rows.

The ledger describes stated cost inclusions, not the delivery and risk allocation of an Incoterms rule. Keep the actual contract-role review separate and attach its accountable current sources. Duties, taxes, unlisted services and other unresolved costs are outside this teaching ledger; they remain unspecified and are not treated as zero. Accordingly, the example calculates a defined comparison subtotal rather than a complete landed total.



Declared cost row	Offer P / CU	Offer Q / CU
Goods + origin + carriage + insurance	32,000 + 880 + 2,100 + 120	Bundled stated price: 33,700
Stated Port D subtotal	35,100	33,700
Destination + onward to W	640 + 460 = 1,100	640 + 460 = 1,100

Source scope: S02 | Reference register: page 57

08 / TEACHING CASES

Case 2: keep cost arithmetic separate from risk and coverage

A cost comparison to Warehouse W does not establish every contract responsibility.

The declared Warehouse W comparison subtotal is $35,100 + 1,100 = 36,200$ CU for P and $33,700 + 1,100 = 34,800$ CU for Q. Q is lower by 1,400 CU within this explicitly defined ledger. All values use the same fictional CU basis. No currency conversion, import-tax calculation or probability estimate is included, and the two Port D prices are not assumed to be complete landed costs.

Keep a separate responsibility map for actual delivery, risk, carriage, insurance, clearance and destination activities. A named destination or invoice amount alone cannot establish all those roles. Likewise, an insurance line in a price does not show the actual insured party, policy coverage, exclusions or claim arrangements. Request the appropriate actual contract and policy sources through the responsible commercial and logistics parties.

Use the case to test a real comparison sheet: can a reviewer identify which services are included, which are added once, which are unresolved and which endpoint the subtotal represents? Retain each actual adjustment source. A supported comparison subtotal and accepted responsibility map can inform the responsible decision; other technical, transport and contractual conditions keep their own required reviews.

OFFER P 36,200 CU to Warehouse W	OFFER Q 34,800 CU to Warehouse W	DEFINED DIFFERENCE 1,400 CU / teaching ledger
FICTIONAL CU SUBTOTALS / duties, taxes and unlisted costs remain unspecified.		

Fictional measure	Offer P	Offer Q
Port D stated scope	35,100 CU	33,700 CU
Common added services	1,100 CU	1,100 CU
Warehouse W comparison subtotal	36,200 CU	34,800 CU
Unspecified outside ledger	Duties, taxes and other open costs	Same stated exclusions

Source scope: S02 | Reference register: page 57

08 / TEACHING CASES

Case 3: a length revision changes more than total metres

Fictional HSS schedule and work counts; no actual cutting plan or accepted order.

Teaching revision A contains sixty HSS pieces at 6.000 m each, for 360.000 m total. Teaching revision B contains seventy-two pieces at 5.500 m each, for 396.000 m total. The exercise declares the same product variant and two defined end operations for each finished piece. These are fictional schedule entries, not processing or acceptance requirements for real HSS.

Revision A therefore has 120 end operations, while revision B has 144. The change is twelve additional pieces, 36.000 m additional total length and twenty-four additional end operations. Pieces increase by 20% and total length increases by 10%, because the revised individual length differs. A single percentage cannot describe every affected quantity or define the correct commercial adjustment.

Preserve original and revised marks, length schedules, work counts and relevant sources. A real change could affect physical allocation, preparation, inspection, packing and transport arrangements even where one material specification remains the same. The fictional geometry says nothing about container fit, load capacity, material mass or process loss. The next page prices only the declared teaching metre and end-operation basis.

REVISION A 60 x 6.000 m = 360.000 m / 120 end operations

REVISION B 72 x 5.500 m = 396.000 m / 144 end operations

Fictional unit changes: +12 pieces / +36.000 m / +24 end operations; no cutting procedure.

Declared schedule measure	Revision A	Revision B
Physical pieces	60	72
Individual length	6.000 m	5.500 m
Total length	360.000 m	396.000 m
Two end operations per piece	120 operations	144 operations

08 / TEACHING CASES

Case 3: price the revised units and control the accepted package

Fictional constant rates demonstrate an adjustment; actual changes need their own agreement.

The teaching rate is 30 CU per metre plus 2 CU per declared end operation. Revision A calculates as $360.000 \times 30 + 120 \times 2 = 11,040$ CU. Revision B calculates as $396.000 \times 30 + 144 \times 2 = 12,168$ CU. The difference is 1,128 CU, consisting of 1,080 CU for additional metres and 48 CU for additional end operations.

These figures keep the metre and operation rates constant only because the exercise expressly does so. They include no material-mass conversion, revised setup charge, packing, freight or other unpriced cost. Actual quotations may use a different pricing basis or require new commercial agreement after a change. Record the offered adjustment, supporting units and responsible acceptance rather than assuming that a previous rate remains valid.

An accepted change should update the current order, item and work schedule, drawings, evidence requirements, physical identities and delivery allocation as affected. Preserve the original revision and the decision trail. The fictional case supplies no approved revision or shipment release. Its practical test is whether every relevant record now describes the same seventy-two pieces and agreed work, with remaining conditions assigned to accountable owners.

REVISION A	REVISION B	ADJUSTMENT
11,040 CU declared subtotal	12,168 CU declared subtotal	1,128 CU / same stated rates

Fictional metre and end-operation basis only; other costs are not priced.

Fictional price component	Revision A / CU	Revision B / CU
Metres at 30 CU / m	10,800	11,880
End operations at 2 CU each	240	288
Declared comparison subtotal	11,040	12,168
Change B minus A	1,080 metres-cost + 48 end-cost	1,128 CU total adjustment

08 / TEACHING CASES

Case 4: reconcile kit contents through two deliveries

Fictional BOM and receiving counts; a set label cannot establish completeness.

A teaching order defines twenty-four kits. Each kit contains one post, two braces, four brackets, six bolts, six nuts and twelve washers. The full order therefore contains 24 posts, 48 braces and 96 brackets, totaling 168 fabricated pieces; and 144 bolts, 144 nuts and 288 washers, totaling 576 hardware pieces. The defined kit count and its component counts are distinct quantities.

The first teaching delivery reports sixteen kits with all declared components: 16 posts, 32 braces, 64 brackets, 96 bolts, 96 nuts and 192 washers. The second planned group represents eight kits. Its receiving count shows 8 posts, 16 braces, 32 brackets, 48 bolts, 44 nuts and 96 washers. Four of the planned forty-eight nuts are missing.

The first group's quantities fit the declared BOM ratio, but this exercise supplies no product evidence or acceptance decision. The second group cannot be recorded as eight complete kits merely because its package label says so. Keep the actual counts and shortage linked to its shipment and kit allocation, then request the accountable action. No specific commercial set, customer project or real shipment is represented.

1 DEFINED KIT

1 post + 2 braces + 4 brackets

HARDWARE PER KIT

6 bolts + 6 nuts + 12 washers

24 PLANNED KITS

168 fabricated + 576 hardware

FICTIONAL BOM / no actual commercial set, project design or product acceptance represented.

Declared component	Ordered / delivery 1	Delivery 2 received
Post / brace / bracket	24 / 48 / 96; first 16 / 32 / 64	8 / 16 / 32
Bolt / nut / washer	144 / 144 / 288; first 96 / 96 / 192	48 / 44 / 96
Defined kit group	24 planned; first 16 by BOM ratio	8 planned; nuts short by 4

08 / TEACHING CASES

Case 4: close the shortage without double-counting a replacement

A quantity balance and technical acceptance need their own evidence.

Across both teaching deliveries, the fabricated counts are complete: 24 posts + 48 braces + 96 brackets = 168 pieces. Hardware counts are 144 bolts + 140 nuts + 288 washers = 572 pieces, four below the 576 ordered hardware pieces. The missing-nut line remains 144 ordered - 140 received = 4 outstanding. None of those count equations demonstrates grade, condition, inspection or accepted material performance.

Record the original shortage and affected eight-kit group, the agreed response owner and the current action. If a later replacement of four nuts arrives, connect it to that issue and record a separate receiving movement. The quantity balance would then become 144 nuts received in total, but closure still needs the required identity, variant and technical review. The exercise does not supply that replacement or a final release.

Preserve the current item and component map rather than adding another eight kits when four small components are replaced. A commercial credit would have a separate agreed function and would not deliver the missing nuts. The case ends with four nuts outstanding and kit-completeness status unresolved for the affected group. Its lesson is to record actual movements and responsible decisions instead of treating package labels or response emails as completed delivery.

FABRICATED PIECES 168 ordered / 168 received	HARDWARE PIECES 576 ordered / 572 received	OPEN SHORTAGE 4 nuts / no final acceptance
FICTIONAL QUANTITY BALANCE / kit labels do not establish complete contents.		

Fictional closing measure	Recorded count	Current meaning
Fabricated pieces	168 ordered / 168 received	Quantity balance only
Hardware pieces	576 ordered / 572 received	4 nuts outstanding
Nuts	144 ordered / 140 received	Replacement not supplied
Eight-kit affected group	Contents shortage remains open	No final acceptance supplied

09 / FILLABLE WORKSHEETS

Worksheet A: Project RFQ and attachment register

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one controlled sheet for the enquiry baseline. Identify the actual project, buyer items, selected technical basis, physical quantities, requested work and record requirements. Link current attachments by file and revision. Preserve preliminary inputs with their accountable owners so every supplier response can be compared with the same issued package.

State the requested response stage and delivery information without converting estimates into accepted commitments. Keep the open-question register attached when it grows beyond this sheet. This worksheet organizes the enquiry; the actual supplier response, responsible technical reviews and accepted quotation and order establish the final buying package.

Project / enquiry / current revision

Company / contact / reviewer

Buyer items / selected application

Specification / edition / drawing refs

Physical quantities / supply units

Requested work / prepared condition

Required records / inspection roles

Destination / delivery sequence

Response stage / timing source

Current attachment-register reference

Issued RFQ scope, current references and defined response requirements

Provisional inputs, open questions and accountable owners

09 / FILLABLE WORKSHEETS

Worksheet B: Item, quantities and finished supply scope

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for a buyer item or clearly defined variant. Capture actual product, grade, geometry, condition, individual lengths, physical quantities and any agreed mass basis. Define requested preparation, supplied components, treatment and evidence. For kits or assemblies, attach the controlled BOM and current drawings rather than inferring commercial contents from a product photograph.

Keep physical products separate from operations, price units and record deliverables. Record the included boundaries and unresolved interfaces with their responsible reviewers. This sheet captures a scope definition; it does not approve a product substitute, establish a process procedure or demonstrate that the supplied items meet the requirements.

Buyer item / product / variant

Grade / route / material condition

Geometry / size / individual length

Physical pieces / length / units

Actual or theoretical mass-basis ref

Defined kit / BOM / drawing revision

Preparation / ends / included work

Treatment / interface source refs

Required records / represented scope

Technical owner / current decision

Actual product, component contents, work boundaries and attachments

Excluded or provisional scope, questions and accountable decisions

09 / FILLABLE WORKSHEETS

Worksheet C: Quotation inclusions and comparison ledger

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for an offered package and its current comparison basis. Preserve the original offer, quantities, quoted units, currency, validity and written inclusions. Identify excluded and unconfirmed charges separately. Normalize only where the physical scope and unit conversion are established, and show the exact endpoint and cost functions represented by the comparison subtotal.

Link each added amount to the actual price and scope source and avoid counting included work twice. Keep unknown taxes, services and other unresolved costs visible. Record technical differences and responsible decisions beside the price. This worksheet supplies no market rate, exchange rate, supplier ranking or automatic purchasing approval.

Offer / supplier / revision / date

Buyer item / accepted comparison basis

Quoted unit / quantity / original price

Currency / validity / rate source

Written included cost functions

Excluded / unconfirmed cost functions

Exact comparison point / boundary

Added costs / supporting price refs

Comparable subtotal / assumptions

Reviewer / recommendation reference

Actual product differences, scope ledger and original offer references

Open costs, conditions, decisions and current comparison basis

09 / FILLABLE WORKSHEETS

Worksheet D: Delivery terms and responsibility map

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for the actual proposed or accepted delivery route. Capture any selected Incoterms rule and edition, exact named places or points, delivery and risk boundary, carriage destination and relevant service roles. Preserve the actual insurance, clearance, destination and onward arrangements through their accountable sources rather than relying on a short trade abbreviation.

Record open routing and responsibility questions with the required response owner. Keep the current commercial-source register attached for its responsible review. This worksheet maps the actual arrangement for review; it does not select a rule, approve insurance coverage or establish transport or import suitability.

Order / route / current scope ref

Selected rule / edition if applicable

Exact named port / place / point

Delivery / risk-boundary source

Paid-carriage destination / provider

Actual insurance / policy source refs

Export / import-clearance role refs

Destination / onward-service roles

Transport / booking / timing source

Responsible reviewer / decision

Actual handovers, cost functions, responsibility map and sources

Open route, coverage or contract questions and accountable action

09 / FILLABLE WORKSHEETS

Worksheet E: Order acknowledgement and change control

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for a defined acknowledgement difference or change request. Identify original and proposed scope, affected buyer items and revisions, physical quantities, work, records and commercial or delivery effects. Preserve the actual supplier response and sources. Distinguish a clarification, proposed substitution and accepted change using their accountable decisions.

After acceptance, link the current order, drawings, item and work schedule, evidence map and packing allocation as affected. Keep the superseded references for history and remaining conditions explicit. This sheet records the change trail without overwriting an original issuer source or independently authorizing production, purchasing or shipment release.

Order / acknowledgement / issue ref**Affected buyer items / original revision****Proposed product / scope revision****Original / revised quantities / units****Work / evidence / interface effects****Offered price / delivery adjustment****Original response / supporting files****Decision owner / accepted conditions****Current order / attachment references****Status / remaining-action owner****Actual difference, proposal, supporting evidence and acceptance trail****Updated item, work, record and delivery maps / remaining conditions**

09 / FILLABLE WORKSHEETS

Worksheet F: Packing and shipment-readiness review

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for an actual shipment group and its accepted scope. Capture product and package identities, counts, protection requirements, original records and required review status. Identify the actual packing and transport providers and their completed sources. Record applicable wood-packaging and packed-container information only under the confirmed shipment and destination requirements.

Keep dossier review, completed packing, VGM where applicable, booking and operational loading decisions as separate statuses. Preserve unresolved conditions and their release owners. This worksheet supplies no packing, lifting, securing or transport-capacity procedure and does not establish that an image, mass estimate or booking confirmation is a completed shipment.

Order / shipment group / revision

Actual items / marks / source groups

Packing units / counts / allocations

Protection / actual-provider sources

Completed work / inspection refs

Original required-record status

Wood-packaging / destination review

VGM role / source where applicable

Booking / carrier / terminal source

Release owner / current decision

Actual packing, dossier and operational-stage evidence / sources

Unresolved conditions, responsible providers and release status

09 / FILLABLE WORKSHEETS

Worksheet G: Receiving and component reconciliation

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for an actual receiving group and retain its link to the current order and shipment allocation. Record physical units, actual quantities, kit components, accessible identity and condition observations and the original sources received. Separate loose items, partial groups, returns and replacements so the same movement is not allocated twice.

Record shortages, incorrect variants, damage or missing records with the affected quantities and evidence. Preserve the remaining delivery balance and accountable action. A completed count is distinct from technical acceptance or commercial closure. This sheet records actual receiving information and does not turn a package label into a complete kit or accepted product.

Order / shipment / receiving group

Buyer item / package / actual marks

Received quantities / physical units

Defined kit contents / current BOM

Returns / replacements / movements

Remaining-delivery balance source

Actual observations / condition refs

Original records received / missing

Affected quantity / issue reference

Reviewer / actual disposition

Actual counts, component allocation, identity and source observations

Agreed action, responsible owner and updated current balance

09 / FILLABLE WORKSHEETS

Worksheet H: Issue resolution and final closeout

Save a working copy. Single-line fields: 255 characters; notes: 2,000 characters.

Use one sheet for a defined delivery issue or order-closeout group. Preserve the original observation, applicable requirement, affected quantity, actual response and supporting sources. Record separate physical, technical and commercial statuses with their accountable owners. Link any replacement, correction, adjustment or deferred work to its original issue and current accepted basis.

Keep remaining obligations and conditions explicit even when one administrative stage closes. Complete the current dossier and quantity map so the next reviewer can reconstruct the accepted scope and outstanding work. This sheet supplies no universal remedy or claim deadline and does not convert an unverified response into final closure.

Order / issue / closeout group

Affected items / quantities / units

Original observation / requirement

Actual response / supporting sources

Replacement / correction / movement

Current physical / quantity status

Current technical / record status

Separate commercial / service status

Decision owner / closure reference

Remaining-responsibility owner

Original issue, actual completed action and current accepted sources

Remaining obligations, deferred work and final maps / balances

10 / QUICK REFERENCE

Use precise buying units and status terms

Shared language helps the team identify exactly what a figure or status represents.

Define the units and source of each quantity before comparing figures. Physical pieces, total length, mass, defined kits, work operations and package counts can all appear in the same order with different purposes. Preserve original quoted units and accepted conversions. An unconfirmed theoretical or actual mass basis should remain an open commercial question rather than silently becoming a billable quantity.

Use status terms with their scope and responsible decision. Issued, offered, acknowledged, accepted, manufactured, reviewed, packed, booked, handed over, received and closed describe different stages. A convenient complete label can conceal which object, record or activity was assessed. Keep the current evidence and conditions beside the stage so a later reviewer can understand the claimed result.

The terminology below is a practical reading aid, not a contract glossary. Formal definitions and required actions come from the actual selected references and accepted arrangements. Keep the item schedule, scope comparison, current revisions and delivery balance linked throughout the process. This prevents an attractive unit price or a progress update from replacing a complete current buying package.

Working term	Practical review meaning
Physical quantity	Actual pieces, lengths, mass or defined component contents
Quoted unit	Unit used in the original offered price and agreed billing basis
Comparison subtotal	Specified cost functions at a defined comparison point
Included / excluded / unconfirmed	Three different scope states requiring actual source support
Delivery / risk / paid destination	Distinct responsibilities under the selected arrangement
Current revision	Controlled accepted scope with superseded history retained
Receiving balance	Actual quantities and movements against the accepted order
Disposition / closeout	Accountable result and any remaining obligations

10 / QUICK REFERENCE

Check the complete package at each handover

Move current scope, evidence and responsibility forward with the physical products.

At RFQ issue, check item identity, current basis, quantities, finished work, records, delivery inputs and unresolved questions. At offer comparison, preserve the offered variant, pricing unit, inclusions, exclusions, unconfirmed charges and dates. Record the exact cost boundary and relevant technical differences before presenting a recommendation. The comparison should be reproducible from actual current sources.

At order acceptance and change control, retain the decision, acknowledgement, current attachments and affected quantity, work, evidence and delivery maps. At packing readiness, identify original record availability, actual completed work, package allocation and responsible transport stages. Requirements such as wood-packaging compliance or packed-container VGM need their own actual scope and sources; a generic checklist cannot establish applicability or completion.

At receiving and closeout, record actual counts, identities, component contents, observations, source status and accountable dispositions. Reconcile returns, replacements and remaining balances without double-counting them. Keep physical, technical and commercial completion separate where they differ. The original source trail and current accepted package should remain understandable after every handover, including any unresolved conditions assigned for later action.

CURRENT SCOPE

Items / revisions / quantities

ORIGINAL SOURCES

Offers / records / observations

ACCOUNTABLE STATUS

Decisions / open conditions

Carry the same current buying package through every physical and document handover.

Handover	Current actual package
Enquiry / comparison	Defined requirements, original offers and scope-ledger decisions
Accepted order / change	Current attachments, acknowledgement and affected maps
Packing / shipment	Physical allocation, actual release sources and transport roles
Receipt / closeout	Counts, observations, dispositions and final balance

11 / REFERENCE REGISTER

Primary sources: delivery, transport and shipping-document roles

S01-S08 / official public frameworks and guidance / checked 13 October 2026.

Sources support the limited roles identified in the chapters. Selected full rules, actual contracts and applicable shipment requirements remain controlling. Public scope and guidance were read; complete paid standards are not reproduced. CBP guidance was read through the official indexed public text after a direct-fetch display error. ISPM 15 use is limited to its accessible public scope.

S01 ICC | Incoterms 2020 - Current official overview: eleven rules addressing delivery-related obligations, costs and risks.

S02 ICC | Incoterms and commercial contracts FAQ - Official public guidance: exact named points, delivery versus paid destination and sales-contract boundaries.

S03 ICC | UCP 600 (2007 Revision) - Public Articles 1, 4 and 5: conditional applicability, separate contracts and examination of documents.

S04 IMO | Code of Practice for Packing of CTUs - 2014 IMO / ILO / UNECE non-mandatory code. Actual packing and securing require responsible providers.

S05 IMO | Verification of packed-container gross mass - Applicable SOLAS VGM role and method framework; verified mass is a loading prerequisite, not loading approval.

S06 IPPC | ISPM 15 current publication page - Adopted publication route and public scope for wood packaging / dunnage; processed-material exclusions.

S07 Trade.gov | Common Export Documents - Commercial invoice, packing list, transport and origin-document functions; actual destination requirements vary.

S08 US CBP | Tips for New Importers and Exporters - Official indexed guidance, published June 2026: US importer responsibilities and accurate product information.

Reference register continues

Sources S09-S16 appear on page 58. Verify current applicability and actual destination, provider and contract requirements for each order.

11 / REFERENCE REGISTER

Primary sources: steel records, scope and configuration management

S09-S16 / official publisher and conformity-assessment sources / checked 13 October 2026.

A current publisher edition is a research snapshot, not an automatic revision of an accepted order. The selected product documents, drawings and contract establish the actual requirements. ASTM A530 public listing and scope were checked through the official search index after direct access failed. Original RFQ, comparison, change and receiving workflows are editorial guidance rather than reproduced normative clauses.

S09 BSI | BS EN 10204:2004 - Current publisher listing: selected inspection-document framework, type, represented scope and validation.

S10 BSI | BS EN 10168:2004 - Current publisher listing: information organization for steel inspection documents; actual requirements govern.

S11 ASTM | A530/A530M-18(2026) - Active listing, updated October 2026: common requirements for listed specialized carbon and alloy pipe products.

S12 ASTM | A6/A6M-26a - Active publisher listing: common requirements for listed rolled structural products and selected unit-system context.

S13 ISO | ISO 10007:2017 - Current edition 3, confirmed 2023: configuration-management guidance. Toolkit registers are original workflows.

S14 ISO | ISO 9001:2026 - Current publisher edition 6, September 2026: organizational QMS scope is distinct from delivered-product evidence.

S15 ISO CASCO | Attestations of conformity - Official explanation distinguishes management-system and product-certification evidence objects.

S16 ISO | Certification - ISO does not issue certification. Actual issuers, scope and current certificate status require verification.

Source use

A source role does not mean every listed reference applies to every steel product, or that the publisher endorses this METDAX toolkit.

12 / METHODS AND IMAGE POLICY

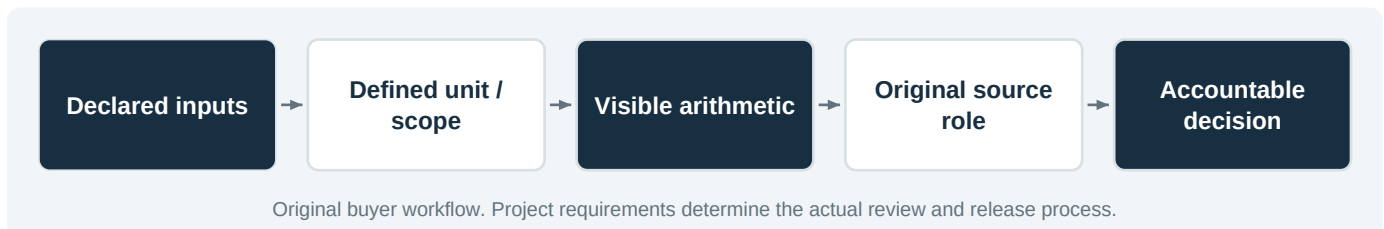
Read the costs, quantities and visual maps as declared examples

Original procurement guidance with transparent sources and explicit teaching boundaries.

This METDAX toolkit is version 1.0, dated 13 October 2026. Public official sources support named framework and evidence distinctions. Original workflows show how to organize enquiry inputs, compare stated packages and reconcile actual delivery. They do not reproduce complete standards, determine import classification or duties, select payment terms, approve insurance or prescribe packing and securing procedures.

All eighteen selected product assets are existing AI-generated METDAX concept illustrations. They are not documentary factory, inventory, customer, inspected-lot or shipment photographs. Original diagrams explain relationships and explicitly fictional quantities. No visual supplies a valid quotation, invoice, certificate, transport document, official treatment mark, loading approval or payment commitment. The METDAX Logo identifies the toolkit publisher.

All four cases are fictional and use CU, a teaching currency unit with no market value or exchange rate. Case 1 compares forty 6.000 m pieces with declared work inclusions; per-metre package ratios are rounded to four decimal places. Case 2 compares defined cost functions at Warehouse W and leaves taxes and unlisted costs unspecified. Case 3 fixes metre and end-operation rates for its declared revisions. Case 4 ends with four nuts outstanding and no final acceptance. None represents an actual order, supplier rate or completed delivery.



Actual supply commitments

Current products, preparation, document availability, pricing, lead time and delivery responsibilities are established in the accepted quotation and order.

METDAX / NEXT STEP

Send METDAX a defined steel buying package

A complete enquiry connects your physical products, work, records and delivery requirements.

METDAX INDUSTRIAL SUPPLY supports enquiries for steel pipe, hollow structural sections, structural and fabricated steel products and associated components. Send the current item schedule, selected specifications and drawings, grades, sizes, lengths, physical quantities and requested prepared condition. Define kit contents and relevant interfaces through the actual controlled sources rather than a generic product image.

Include required inspection documents and other records, validating-party or inspection involvement where applicable, packing requirements, destination and delivery sequence. Identify the actual quotation units and requested commercial inclusions. Preserve the proposed delivery entry and related commercial references for the responsible review. Mark preliminary inputs and unresolved questions with their responsible owners.

Actual offered products, manufacturing or supply sources, preparation, original records, validation, packing arrangements, prices, lead time, delivery roles and commercial responsibilities are established in the accepted quotation and order. This toolkit promises no stock availability, inspection certification, freight capacity or universal project approval. Use worksheets A-H to organize the current enquiry and review the complete proposed package with the responsible parties.



AI-generated concept illustration; not a factory, inspection or shipment photograph.

WHAT TO CONFIRM

- 1 Current item / quantity schedule
- 2 Defined work and records
- 3 Quoted unit / inclusion scope
- 4 Delivery points and roles

Contact METDAX

ruofan1901@gmail.com

Send your material schedule to METDAX