

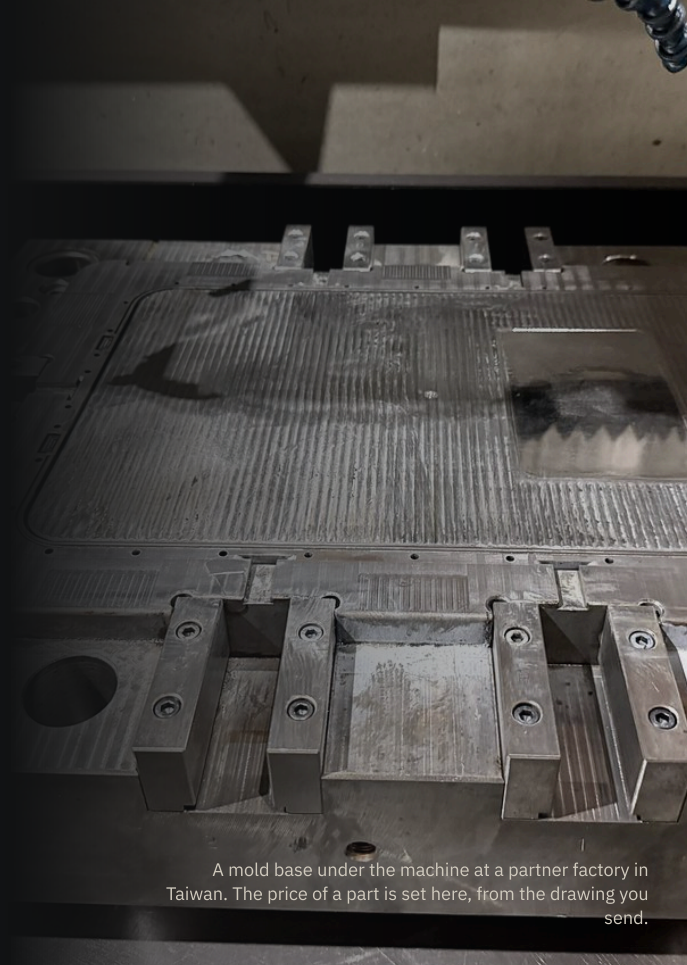


— RFQ CHECKLIST · SECOND SOURCE

# The Second-Source RFQ Checklist

What to send a Taiwan manufacturer to get an accurate quote the first time.

FILES · QUANTITIES · MATERIAL · FINISH · PACKAGING · PRICE ·  
TIMELINE · COMPLIANCE · INSPECTION



## — WHY THIS EXISTS

**A quote is only as good as the package behind it.**

Your current factory knows things about your part that were never written down: which dimension really matters, which color chip was approved, how the cartons are packed. A second source knows none of it. It quotes from what you send.

Send a thin package and the answer comes back as a wide range, or as a list of questions, or as a low number that grows once the real requirements surface. Send a complete one and the factory can price the tool, the part and the pack-out against the same facts your current supplier works from.

Tick what you have. Anything you can't tick yet is a question the factory will ask anyway.

## The short version

- 1 3D file plus a toleranced drawing**  
STEP for the geometry, a 2D drawing for what has to be held.
- 2 Real quantities**  
First order, annual volume, and two or three price breaks.
- 3 Material, color and finish**  
Grade, Pantone or RAL, texture, and any secondary work.
- 4 Target price and dates**  
What it has to cost, where it lands, and when.
- 5 Compliance and inspection**  
Where it sells, what it must pass, and how lots are accepted.

### Moving a running part?

Send the current supplier's price, the last inspection report, and a production sample. The new factory then quotes against a proven part, not a description.

### Tooling already exists?

Say who owns it, the cavity count, the steel and the shot count. A tool that can transfer changes the quote completely.

### Don't have all of it?

Send what you have. A photograph, a sample or a sketch is enough to start the conversation; the gaps get filled before anyone quotes a firm number.

## 01 Files

*The geometry prices the tool. The drawing prices the part.*

- ☐ **3D CAD as STEP (.stp / .step).** The neutral format almost every toolroom opens. IGES (.igs) works if it is all you have; add the native file (SolidWorks, Creo, NX) as a bonus, not a substitute.
- ☐ **Tolerances on the features that matter.** Mark the critical-to-function dimensions. Tight tolerances everywhere raise the price; tight tolerances only where they count do not.
- ☐ **Photos and a physical sample.** The current production part, and the approved "golden" sample if one exists. Photos of the cosmetic faces help even when a sample is on its way.
- ☐ **2D drawing as PDF, plus DWG or DXF.** Dimensions, tolerances, datums, material callout and title block. A 3D file with no drawing leaves the factory to guess what "close enough" means.
- ☐ **One revision, everywhere.** The 3D file and the drawing carry the same revision letter and date, and the drawing states which one governs if they disagree.
- ☐ **Assembly drawing and bill of materials.** For anything with more than one part: fasteners, inserts, labels, electronics, each with a part number or a spec.

## 02 Quantities, price and timeline

*Volume decides the cavity count, and the cavity count decides the tool.*

- ☐ **First order quantity.** The number on the first purchase order, per SKU and per color.
- ☐ **Two or three price breaks.** For example 1,000 / 5,000 / 20,000, so you can see where the piece price steps down.
- ☐ **Price basis (Incoterm).** Say which price you want: ex-works, FOB the port in Taiwan, or delivered to your door. Otherwise two quotes that look alike are not.
- ☐ **Dates.** When you need samples, when you need production, and the date it has to be in the US. Mark which dates are fixed and which are wishes.
- ☐ **Annual volume.** A realistic yearly figure, and whether orders come monthly, quarterly or once.
- ☐ **Target price per unit.** What the part has to cost for the program to work. It is not a weakness to share it; it tells the factory which tool to propose.
- ☐ **Current price, if you are second-sourcing.** Optional, but it keeps everyone honest about whether a move pays for itself.
- ☐ **Ship-to point.** City and ZIP code of the warehouse, distribution center or Amazon destination.

## 03 Material, color and finish

*"Black ABS" is not a spec. A grade, a color number and a texture are.*

- ☐ **Material grade.** Resin family and grade (and flame rating if one applies), metal alloy and temper, or fabric spec. Say whether an equivalent grade is acceptable.
- ☐ **Surface finish and texture.** Gloss level and a texture reference, such as an SPI polish grade or a named texture, for each visible face.
- ☐ **Secondary operations.** Pad or screen printing, laser marking, plating, powder coating, inserts or overmolding, assembly, each with its artwork or spec.
- ☐ **Color reference.** A Pantone or RAL number, and a physical chip or approved part to match to. Screens and printers do not agree on color.
- ☐ **Cosmetic faces.** Mark which surfaces the customer sees. Gates, ejector marks and parting lines go on the faces they don't.
- ☐ **Logo and marking artwork.** Vector files (AI, EPS, SVG or PDF) for anything printed or molded in, with size and position.

## — ASK FOR THE QUOTE BACK IN THIS SHAPE

**Tooling** cost, cavity count, steel, and who owns the tool.**Samples:** cost, quantity and the date they ship.**Piece price** at each of your price breaks, on the Incoterm you named.**Lead times** for the tool, first article and each production lot.

**Second-sourcing out of China?** Say so. Origin follows where the part is substantially transformed, not the port it ships from, and it changes the duty on the US entry. A licensed customs broker should read your HTS line before you price the move.  
[jchtrade.com/taiwan](http://jchtrade.com/taiwan)

## 04 Packaging and labeling

*Packaging is often priced last and changes the landed cost the most.*

- ☐ **Unit pack.** Poly bag, printed retail box, blister or clamshell, insert, with the dieline or artwork.
- ☐ **Barcodes and labels.** UPC or EAN, Amazon FNSKU labels if you sell there, and where each label goes.
- ☐ **Transit testing.** Say if the retail box has to pass a test such as ISTA 6-Amazon SIOC, so the carton is designed for it.

- ☐ **Master carton.** Units per carton, carton marks, and any weight or size limit from your warehouse.
- ☐ **Country of origin marking.** On the part, the pack or both. Origin has to match where the part is actually made.
- ☐ **Pallets and loading.** Pallet type and height, and whether you expect a full container or a shared (LCL) load.

## 05 Compliance

*Testing costs money and time. Name it up front so it is in the quote.*

- ☐ **Where it sells.** US only, California, the EU, Amazon, or a retailer with its own spec. Each adds its own requirements.
- ☐ **California Prop 65.** Whether the product needs a lab screen, a warning label, or both.
- ☐ **Documents you need back.** The test report, the certificate or a material declaration, and who pays for which lab. Ask to see it in writing before an order is placed.

- ☐ **Restricted substances.** RoHS (lead, mercury, cadmium and others in electronics) and REACH (the EU list of substances of very high concern).
- ☐ **Product-specific rules.** CPSIA for children's products, FCC and UL for anything that plugs in or holds a battery, food-contact rules for anything that touches food.

## 06 Inspection and acceptance

*Agree how a lot passes before the first lot is made.*

- ☐ **First article.** The first parts off a new tool measured against your drawing, with the numbers sent to you before volume is released.
- ☐ **Defect list.** What counts as critical, major and minor, with photos. "No visible defects" is a wish, not a standard.
- ☐ **Who inspects.** Your team, a third-party inspector, or a line watch on the floor. In-process and pre-shipment, not only at the end.

- ☐ **Sampling plan.** For example ANSI/ASQ Z1.4 (ISO 2859-1) General Level II, with an AQL for critical, major and minor defects.
- ☐ **Functional checks.** Fit, assembly, power-on, drop or pull tests, and how many units get them.

— SEND IT TO JACK

## Send the package. Get a straight answer.

Jack reads inquiries himself. If the part suits the factories he uses, he'll say so and explain why; if it doesn't, he'll say that just as plainly. We'll sign your NDA, or use ours, before you share details. Quoting a part against a drawing costs nothing.

QUOTE FORM

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EMAIL

[jack@jchtrade.com](mailto:jack@jchtrade.com)

CALL OR TEXT

(321) 323-4474