

New Supplier Setup Information

CGX-SCM-F-014

PUBLISH DATE: 2024-11-01

*Completion of sections A and B required

A. GENERAL INFORMATION	
Company's Legal Name _____	() Issue payment to this name
DBA Name _____	() Issue payment to this name
Phone _____	Fax _____
Email _____	Website _____
Corporate Address _____	
City _____	PR/ST _____ Zip _____
Remit Address _____	
City _____	PR/ST _____ Zip _____
Ship FROM Address _____	
City _____	PR/ST _____ Zip _____
DUNS Number _____	Tax ID Number _____ (USA: Please provide W-9)
Has your company completed the Altman Z-Score financial assessment? _____ (If yes, please include copy of assessment)	

B. KEY CONTACTS			
Sales Send Purchase Order []	Name _____	AR Send Purchase Order []	Name _____
	Title _____		Title _____
	Phone _____		Phone _____
	Email _____		Email _____
Quality Send Purchase Order []	Name _____	Product Engineer Send Purchase Order []	Name _____
	Title _____		Title _____
	Phone _____		Phone _____
	Email _____		Email _____
Shipping Send Purchase Order []	Name _____	General Manager Send Purchase Order []	Name _____
	Title _____		Title _____
	Phone _____		Phone _____
	Email _____		Email _____

C. OWNERSHIP INFORMATION	
Parent Company Name _____	Ownership _____
Date Company Was Established _____	Is this company part of a group? _____ (If yes, please provide a list of different countries/facilities where group is located)
MBE/Minority Owned Business? _____ (If yes, please complete supplemental section 1)	

D. LOGISTICS INFORMATION	
Delivery service available? _____	Delivery days/times: _____
Delivery Charge: _____	

E. QUALITY ASSURANCE	
Is your company ISO 9001:2015 certified? _____	(If yes, please provide copies of all certifications)
Is your company IATF 16949:2016 certified? _____	
Is your company ITAR compliant? _____	
Does your company hold any other certifications? _____	

F. INSURANCE COVERAGE	
Carrier Name _____	(Please provide copy of certificate of liability insurance)

G. BANK INFORMATION	
Bank Name _____	Account Number _____
Bank Address _____	ACH ABA _____
_____	Wire ABA _____
Beneficiary Name _____	Swift Code _____

H. SALES				
<u>Product or Product Type</u>			<u>% of Sales</u>	
_____			_____	
_____			_____	
Largest Customers With Sales Data				
<u>Country</u>	<u>Customer Name</u>	<u>Annual Sales</u>	<u>% of Sales</u>	
_____	_____	_____	_____	
_____	_____	_____	_____	
Annual Sales (USD)				
	<u>Past Year</u>	<u>Current Year</u>	<u>Next Year (Planned)</u>	<u>Comments</u>
Local Market	_____	_____	_____	_____
Export	_____	_____	_____	_____
Total Annual Sales	_____	_____	_____	_____

I. PRODUCTION ORGANIZATION			
Does your company have any planned shutdown periods?		_____	Dates: _____
Number of working shifts	_____	Number of working days per week _____	
Daily working hours per shift	_____	Plant capacity utilization (percentage) _____	
Average inventory level (days or turns)	_____		
Do you have a linkable EDI system?	_____	If yes, what formats? _____	
Staff/Facility Size			
Manufacturing personnel	_____	Plant size (sq ft) _____	
Sales and administration personnel	_____		
Research and development personnel	_____	Total # of employees _____	
Quality personnel	_____	Employee turnover rate _____	
Other personnel	_____		

J. INTERNAL CONVERGIX AUTOMATION SOLUTIONS USE ONLY			
Payment Terms	_____	Commodity	_____
		Manufacturing Category	_____
Received Documents:		Additional Required Information:	
W-9 []		Tax Exempt () Yes () No	
Certificate of Liability Ins. []		Subcontract () Yes () No	
Confidentiality Agreement []			
Code of Conduct []			
CGX-SCM-F-011 []	Includes project/dept. mgr approval ()		
Screening Email Approval []			
Approval Criteria: Must meet criteria 1, 2, or 3 through 5			
[]	1. ISO/TS certified. Copy of certificate must be provided.		
[]	2. Customer Specified		
[]	3. Quality, Quantity, and Delivery - ability to meet specified requirements and deliver product or service requested on time		
[]	4. Service and Responsiveness to Corrective Action - ability to provide timely response to unexpected situations and respond to requests for corrective action		
[]	5. Pricing - ability to offer pricing that is competitive when compared with other similar vendors		

SUPPLEMENTAL SUPPLIER INFORMATION

1. DIVERSITY

**INSTRUCTIONS: Complete this page if you are located in the United States or Puerto Rico.
Check box for all that apply.
Please attach copy of SBA certification when required.**

Supplier Name _____
 Information Completed By _____
 Date _____

- Minority Business Enterprise (MBE)** - at least 51 percent minority owned, operated and controlled by one or more U.S. citizens from one of the ethnic minority groups listed below. Accepted certifications include affiliates of the National Minority Supplier Development Council and equivalent 3rd party certifying organizations (city/state)
If selecting MBE, please also select one of the following:
 African Alaskan Asian Asian Native Hispanic Other
 American Native Indian Pacific American American (Specify)
 American American
 () () () () () () ()
- Veteran Owned Business Enterprise (VBE)** - at least 51% owned by one or more veterans with management and daily business operations controlled by one or more veterans. Self Certification.
- Woman Business Enterprise (WBE)** - at least 51% owned, controlled operated and actively managed by one or more women with U.S. citizenship. Accepted certifications include Women's Business Enterprise National Council (WBENC), or equivalent 3rd party certifying organization (city/state).
- Small Business as defined by the SBA** - a business that is independently owned and operated, is organized for profit, and is not dominant in its field. Depending on the industry, size standard eligibility is based on the average number of employees for the preceding twelve months or on sales volume averaged over a three-year period. Self Certification.
- Woman Owned Small Business (WOSB)** as defined by the SBA - at least 51% owned by one or more women; or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and whose management and daily business operations are controlled by one or more women. Self Certification.
- Small Disadvantaged Business (SDB)** as defined by the SBA - A small business that must be at least 51% owned and controlled by a socially and economically disadvantaged individual or individuals. SBA 8 (a) Certification or Self Certification
- Veteran Owned Small Business (VOSB)** as defined by the SBA - at least 51% owned by one or more veterans with management and daily business operations controlled by one or more veterans. Self Certification/VA Registration
- Service Disabled Veteran Owned Small Business (SD-VOSB)** as defined by the SBA - one or more veterans with service-connected disability own at least 51% and control management and daily business operations. Self Certification/VA Registration
- Historically Underutilized Business Zone Business (HUB Zone)** as defined by the SBA - a small business, its principal office must be located within a Historically Underutilized business Zone and at least 35% of its employees must reside in a HUBZone. SBA HUBZone Certification

2. MANUFACTURING CAPABILITIES AND/OR SERVICES PROVIDED

INSTRUCTIONS: Check boxes for all that apply.

- | | | |
|--------------------------------------------|------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> 5 AXIS CNC | <input type="checkbox"/> A2LA | <input type="checkbox"/> ABRASION RESISTANT |
| <input type="checkbox"/> ALLOY STEEL | <input type="checkbox"/> ALUMINUM | <input type="checkbox"/> ANNEALING |
| <input type="checkbox"/> ANODIZE, BLACK | <input type="checkbox"/> ANODIZE, CLEAR | <input type="checkbox"/> ANODIZE, HARD |
| <input type="checkbox"/> ANODIZE, TITANIUM | <input type="checkbox"/> AS9100C AUDITED | <input type="checkbox"/> AS9100C CERTIFICATE HOLDER |
| <input type="checkbox"/> AS9100C COMPLIANT | <input type="checkbox"/> AS9120 AUDITED | <input type="checkbox"/> AS9120 CERTIFICATE HOLDER |

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2. MANUFACTURING CAPABILITIES AND/OR SERVICES PROVIDED (CONTINUED)

- | | | |
|----------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> AS9120 COMPLIANT | <input type="checkbox"/> AS9120A AUDITED | <input type="checkbox"/> AS9120A COMPLIANT |
| <input type="checkbox"/> AS9210A CERTIFICATE HOLDER | <input type="checkbox"/> ASIA / EUROPE | <input type="checkbox"/> ASME B31.3 |
| <input type="checkbox"/> ASME NQA-1 1989 | <input type="checkbox"/> ASME NQA-1 2008 | <input type="checkbox"/> ASME SECTION VIII DIV 1 CERT |
| <input type="checkbox"/> ASME SECTION VIII DIV1 AUDITED | <input type="checkbox"/> AWS D1.1 2008 STRUCTURAL | <input type="checkbox"/> AWS D1.3 2008 |
| <input type="checkbox"/> BENDING | <input type="checkbox"/> BEVELING | <input type="checkbox"/> BLACK OXIDE |
| <input type="checkbox"/> BORING MILL | <input type="checkbox"/> BRASS | <input type="checkbox"/> BRONZE |
| <input type="checkbox"/> CALIBRATION | <input type="checkbox"/> CARBIDE | <input type="checkbox"/> CARBON STEEL |
| <input type="checkbox"/> CASTING | <input type="checkbox"/> CHAMFERING | <input type="checkbox"/> CHROME PLATING |
| <input type="checkbox"/> CLEANROOM | <input type="checkbox"/> CNC MACHINING | <input type="checkbox"/> COBALT |
| <input type="checkbox"/> COI REQUIRED ON FILE | <input type="checkbox"/> COMMERCIAL | <input type="checkbox"/> CONDITIONAL |
| <input type="checkbox"/> CONTRACT LABOR | <input type="checkbox"/> CONTRACTOR | <input type="checkbox"/> CONTROLS |
| <input type="checkbox"/> COPPER | <input type="checkbox"/> DIE CUTS | <input type="checkbox"/> DIES |
| <input type="checkbox"/> DISTRIBUTOR | <input type="checkbox"/> DRILLING | <input type="checkbox"/> DYNAMIC BALANCING |
| <input type="checkbox"/> EDM, RAM | <input type="checkbox"/> EDM, SMALL HOLE | <input type="checkbox"/> EDM, WIRE |
| <input type="checkbox"/> ELECTRICAL COMPONENTS | <input type="checkbox"/> ELECTROLESS NICKEL | <input type="checkbox"/> ELECTRON BEAM WELDING |
| <input type="checkbox"/> ELECTRONIC HARDWARE & FASTENERS | <input type="checkbox"/> ELECTROPLATING | <input type="checkbox"/> ELECTROPOLISHING |
| <input type="checkbox"/> ENGINEERING | <input type="checkbox"/> ENGRAVING / LASER ETCHING | <input type="checkbox"/> EXPANDED METAL |
| <input type="checkbox"/> EXPORT CONTROL | <input type="checkbox"/> FABRICATION | <input type="checkbox"/> FDA |
| <input type="checkbox"/> FLAME CUTTING | <input type="checkbox"/> FLATTENING | <input type="checkbox"/> FLOOR MILL |
| <input type="checkbox"/> FLOW RESTRICTOR | <input type="checkbox"/> FORGING | <input type="checkbox"/> GANTRY FABRICATION |
| <input type="checkbox"/> GEAR CUTTING | <input type="checkbox"/> GRATING | <input type="checkbox"/> GRINDING, BLANCHARD |
| <input type="checkbox"/> GRINDING, CENTERLESS | <input type="checkbox"/> GRINDING, ROTARY | <input type="checkbox"/> GRINDING, SURFACE |
| <input type="checkbox"/> GUN DRILL | <input type="checkbox"/> HASTELLOY | <input type="checkbox"/> HEAT TREAT |
| <input type="checkbox"/> HEAVY FABRICATING | <input type="checkbox"/> HEAVY TUBE ROLLING | <input type="checkbox"/> HI-DEFINITION PLASMA |
| <input type="checkbox"/> HIGH STRENGTH LOW ALLOY | <input type="checkbox"/> HONE | <input type="checkbox"/> HUB ZONE |
| <input type="checkbox"/> ID / OD GRINDER | <input type="checkbox"/> INACTIVE | <input type="checkbox"/> INCONEL |
| <input type="checkbox"/> INDUSTRIAL ALIGNMENT | <input type="checkbox"/> INDUSTRIAL RUBBER | <input type="checkbox"/> INSPECTION / CERTIFICATION |
| <input type="checkbox"/> INSULATION PRODUCTS | <input type="checkbox"/> IRON | <input type="checkbox"/> ISO/TS 16949:2009 |
| <input type="checkbox"/> ISO13485:2003 CERT HOLDER | <input type="checkbox"/> ISO13485:2003 COMPLIANT | <input type="checkbox"/> ISO14001:2004 CERT HOLDER |
| <input type="checkbox"/> ISO14644 CERTIFICATE HOLDER | <input type="checkbox"/> ISO17025 AUDITED | <input type="checkbox"/> ISO17025 CERTIFICATE HOLDER |
| <input type="checkbox"/> ISO17025 COMPLIANT | <input type="checkbox"/> ISO9001:2000 AUDITED | <input type="checkbox"/> ISO9001:2000 CERT HOLDER |
| <input type="checkbox"/> ISO9001:2000 COMPLIANT | <input type="checkbox"/> ISO9001:2008 AUDITED | <input type="checkbox"/> ISO9001:2008 CERT HOLDER |
| <input type="checkbox"/> ISO9001:2008 COMPLIANT | <input type="checkbox"/> ISO9001:2015 AUDITED | <input type="checkbox"/> ISO9001:2015 CERT HOLDER |
| <input type="checkbox"/> ISO9001:2015 COMPLIANT | <input type="checkbox"/> ISPM-15 CERTIFIED | <input type="checkbox"/> ITAR REGISTERED |
| <input type="checkbox"/> JIG BORE | <input type="checkbox"/> JIG GRINDING | <input type="checkbox"/> LABOR CONTRACTOR |
| <input type="checkbox"/> LABORATORY TESTING | <input type="checkbox"/> LAMINATING | <input type="checkbox"/> LARGE HORIZONTAL GRINDER |
| <input type="checkbox"/> LARGE HORIZONTAL MILL | <input type="checkbox"/> LARGE STRUCTURAL FABRICATION | <input type="checkbox"/> LARGE WELDMENT |
| <input type="checkbox"/> LASER CUTTING | <input type="checkbox"/> LEASE-RENTAL | <input type="checkbox"/> LONG MANUAL / CNC TURNING |
| <input type="checkbox"/> LOW COST COUNTRY | <input type="checkbox"/> MACHINE BUILDING | <input type="checkbox"/> MACHINING |
| <input type="checkbox"/> MAINTENANCE, BUILDING | <input type="checkbox"/> MAINTENANCE, MACHINE | <input type="checkbox"/> MANUFACTURER |
| <input type="checkbox"/> MECHANICAL COMPONENTS | <input type="checkbox"/> MICRO MACHINING | <input type="checkbox"/> MILLING |
| <input type="checkbox"/> MINORITY OWNED | <input type="checkbox"/> MISCELLANEOUS | <input type="checkbox"/> MONEL |
| <input type="checkbox"/> MULTI SITE SUPPLIER | <input type="checkbox"/> NFPA 79 | <input type="checkbox"/> NICKEL |
| <input type="checkbox"/> NIST | <input type="checkbox"/> NITRONIC | <input type="checkbox"/> NORMALIZE |
| <input type="checkbox"/> NSF CERTIFIED | <input type="checkbox"/> PAINTING, POWDER COAT | <input type="checkbox"/> PAINTING, WET COAT |
| <input type="checkbox"/> PASSIVATION | <input type="checkbox"/> PERFORATED SHEET | <input type="checkbox"/> PHOSPHATE COATINGS |
| <input type="checkbox"/> PLANER MILLING | <input type="checkbox"/> PLASMA CUTTING | <input type="checkbox"/> PLASTIC FORMING |
| <input type="checkbox"/> PLASTIC MACHINING | <input type="checkbox"/> PLASTICS | <input type="checkbox"/> PLATE SAW |
| <input type="checkbox"/> POLISH / LAPPING | <input type="checkbox"/> POLISHING | <input type="checkbox"/> PRECISION SHEET METAL |
| <input type="checkbox"/> PRECISION WATER JET | <input type="checkbox"/> PRESS BRAKE / FORMING | <input type="checkbox"/> PRODUCTION |
| <input type="checkbox"/> QUENCH & TEMPER | <input type="checkbox"/> RAW MATERIAL | <input type="checkbox"/> ROBOTICS |
| <input type="checkbox"/> ROLLING | <input type="checkbox"/> RUBBER FORMING / MACHINING | <input type="checkbox"/> SAW CUT |
| <input type="checkbox"/> SAW CUT, PRECISION | <input type="checkbox"/> SCREW MACHINE | <input type="checkbox"/> SHAFTING |
| <input type="checkbox"/> SHEARING | <input type="checkbox"/> SHEET METAL | <input type="checkbox"/> SHOT BLAST |
| <input type="checkbox"/> SLITTING | <input type="checkbox"/> SMALL BUSINESS | <input type="checkbox"/> SMALL DISADVANTAGED BUSINESS |
| <input type="checkbox"/> SMALL WELDMENTS WITH MACHINING | <input type="checkbox"/> STAINLESS STEEL | <input type="checkbox"/> STAMPING & MACHINES |
| <input type="checkbox"/> STAMPING / SPRING | <input type="checkbox"/> STRAIGHTENING | <input type="checkbox"/> STRESS RELIEVE, THERMAL |
| <input type="checkbox"/> STRESS RELIEVE, VIBRATORY | <input type="checkbox"/> SUBCONTRACT | <input type="checkbox"/> SUSPENDED |
| <input type="checkbox"/> TESTING & ANALYSIS | <input type="checkbox"/> TESTING, NON DESTRUCTIVE EVAL | <input type="checkbox"/> THREADED ROD |

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2. MANUFACTURING CAPABILITIES AND/OR SERVICES PROVIDED (CONTINUED)

- | | | |
|----------------------------------------|------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> TIME SAVER | <input type="checkbox"/> TITANIUM | <input type="checkbox"/> TOOL STEEL |
| <input type="checkbox"/> TOOLING | <input type="checkbox"/> TOOLING PLATES | <input type="checkbox"/> TRANSPORTATION |
| <input type="checkbox"/> TRAVEL | <input type="checkbox"/> TREPANNING | <input type="checkbox"/> TUBE BENDING |
| <input type="checkbox"/> TUBE LASER | <input type="checkbox"/> TURN/MILL | <input type="checkbox"/> TURNING |
| <input type="checkbox"/> UT TESTING | <input type="checkbox"/> UTILITIES | <input type="checkbox"/> VERTICAL TURNING LATHE |
| <input type="checkbox"/> VESSEL / TANK | <input type="checkbox"/> VETERAN OWNED | <input type="checkbox"/> VETERAN OWNED SMALL BUSINESS |
| <input type="checkbox"/> VISION | <input type="checkbox"/> WATERJET SERVICES | <input type="checkbox"/> WATERJET SUPPLIES |
| <input type="checkbox"/> WELDING | <input type="checkbox"/> WELDING ONLY - NO MACHINING | <input type="checkbox"/> WELDING SUPPLIES |
| <input type="checkbox"/> WOMAN OWNED | <input type="checkbox"/> WOMEN OWNED SMALL BUSINESS | |

3. RAW MATERIAL SUPPLIERS

INSTRUCTIONS: Check boxes for all that apply.

- | | | |
|--------------------------------------------------|-----------------------------------------------------|---------------------------------------------------------|
| <input type="checkbox"/> ABRASION RESISTANT | <input type="checkbox"/> ALLOY | <input type="checkbox"/> ALUMINUM |
| <input type="checkbox"/> BRASS | <input type="checkbox"/> BRONZE | <input type="checkbox"/> CARBON STEEL |
| <input type="checkbox"/> COBALT | <input type="checkbox"/> COPPER | <input type="checkbox"/> CORROSION RESISTANT |
| <input type="checkbox"/> EXPANDED METAL | <input type="checkbox"/> HASTELLOY | <input type="checkbox"/> HIGH STRENGTH LOW ALLOY (HSLA) |
| <input type="checkbox"/> INCOLOY | <input type="checkbox"/> INCONEL | <input type="checkbox"/> INVAR |
| <input type="checkbox"/> IRON | <input type="checkbox"/> KOVAR | <input type="checkbox"/> LEAD |
| <input type="checkbox"/> MACOR | <input type="checkbox"/> MAGNESIUM | <input type="checkbox"/> MAGNET IRON |
| <input type="checkbox"/> MANGANESE BRONZE | <input type="checkbox"/> MARINE / SHIPBUILDING | <input type="checkbox"/> MOLYBDENUM |
| <input type="checkbox"/> MONEL | <input type="checkbox"/> NICHROME | <input type="checkbox"/> NICKEL |
| <input type="checkbox"/> NITRONIC | <input type="checkbox"/> PIPE, ALUMINUM | <input type="checkbox"/> PIPE, CARBON |
| <input type="checkbox"/> PIPE, STAINLESS | <input type="checkbox"/> PLASTICS | <input type="checkbox"/> POWDERED METAL |
| <input type="checkbox"/> PRESSURE VESSEL (PVQ) | <input type="checkbox"/> SHAFTING | <input type="checkbox"/> STAINLESS STEEL |
| <input type="checkbox"/> STELLITE | <input type="checkbox"/> TITANIUM | <input type="checkbox"/> TOOL AND MOLD STEEL |
| <input type="checkbox"/> TUBE, ALUMINUM | <input type="checkbox"/> TUBE, CARBON | <input type="checkbox"/> TUBE, STAINLESS |
| <input type="checkbox"/> TUBE, STRUCTURAL CARBON | <input type="checkbox"/> TUBE, STRUCTURAL STAINLESS | |