This procedure has been completely reviewed. Therefore no individual paragraphs have been starred (*) to indicate changes

1. AIM

To ensure that all quotes and orders are reviewed to ensure that the customer requirements are clear and can be provided within existing or available resources and that any amendments are recorded and actioned correctly and efficiently.

2. SCOPE

All Commercial Cover and Reel Systems.

3. RESPONSIBILITY

Production for ensuring all order details are clearly defined (matching those in the quote where appropriate) and the obligations undertaken can be achieved with current resources.

Production/Purchasing/Service Co-ordinator and Warehouse Manager: for provision of accurate information relating to lead times for manufactured items, bought in goods and transport delivery respectively.

4. ADMINISTRATION

Commercial Pack
Commercial Cover and Reel Order Form
Order Confirmation
Collection/Delivery Note
Project Drawings
Photos of Site

5. QUALITY RECORDS

Commercial Cover and Reel Order Form
Order Confirmation
Collection/Delivery Note
Project Drawings
Photos of Site

6. METHOD

All quotes into the company for motorised reels are first arranged by Customer Services and/or in conjunction with Production if required.

All original completed quotes for motorised reels will be scanned in full into the commercial folder, Customer Services will file the paperwork in quote files.

Order confirmation from Customer, Production to collect all relevant information.

Customer Service to enter order on AX.

If order price has to be altered to match quotation price, a hand written note on the order needs to explain why.

Production to complete reel and cover specification and pass to appropriate Manufacturing Department.

Production to inform Service Team Co-ordinator of any installation details.

Production to monitor progress of order and if any issues arise.

Production to confirm with despatch when almost ready.

Despatch to arrange delivery details with Customer, matching date with installation if applicable.

7. RECORDS

After completion the Project Manager – Extreme and Service holds the master records of the Installation. The manufacturing departments are held in the Finance Department with Sales Order/Invoice.

Cross Reference

Customer Enquiries W.I. 3.1
Sales Order Processing W.I. 3.2
Works Order Processing W.I. 9.1
Installation and Servicing W.I. 9.10