[Organization logo]

[Organization name]

SALES PROCEDURE

Code:	
Version:	0.1
Created by:	
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Date of version:	
Signature:	

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Change history

Date	Version	Created by	Description of change
	0.1	16949Academy	Basic document outline

Table of contents

1. Purpose, scope and users

The purpose of this procedure is to describe all activities related to the sales process, from recording the customer's requests to delivery of product and service.

2. Reference documents

- IATF 16949:2016, clause 8.2
- Quality Manual
- Procedure for Production and Service Provision
- Procedure for Measuring Customer Satisfaction
- Procedure for Design and Development
- Procedure for Management of Nonconformities and Corrective actions

3. Sales process

3.1. Process flow


```
┌──────────────────────────────────────┐
│  Sending offers and communicating     │
│  with customers                        │
└──────────────────────────────────────┘
                  │
                  ▼
┌──────────────────────────────────────┐
│  Receiving and recording customer      │
│  requests                              │
└──────────────────────────────────────┘
                  │
                  ▼
┌──────────────────────────────────────┐
│  Customer request review               │
└──────────────────────────────────────┘
                  │
                  ▼
          Can organization meet
          customer requirements?
    No  ◇                         Document review
                  │ Yes
                  ▼
┌──────────────────────────────────────┐
│  Formulating contract                  │
└──────────────────────────────────────┘
                  │
                  ▼
     Changes after            Yes
     formulating   ◇
     contract?
                  │ No
                  ▼
┌──────────────────────────────────────┐
│  Delivery                              │
└──────────────────────────────────────┘
                  │
                  ▼
  Customer
  complaints?  ◇        Yes
                               Receiving customer complaint
                  │ No
                  ▼
              ┌─────────┐
              │   End   │
              └─────────┘
```
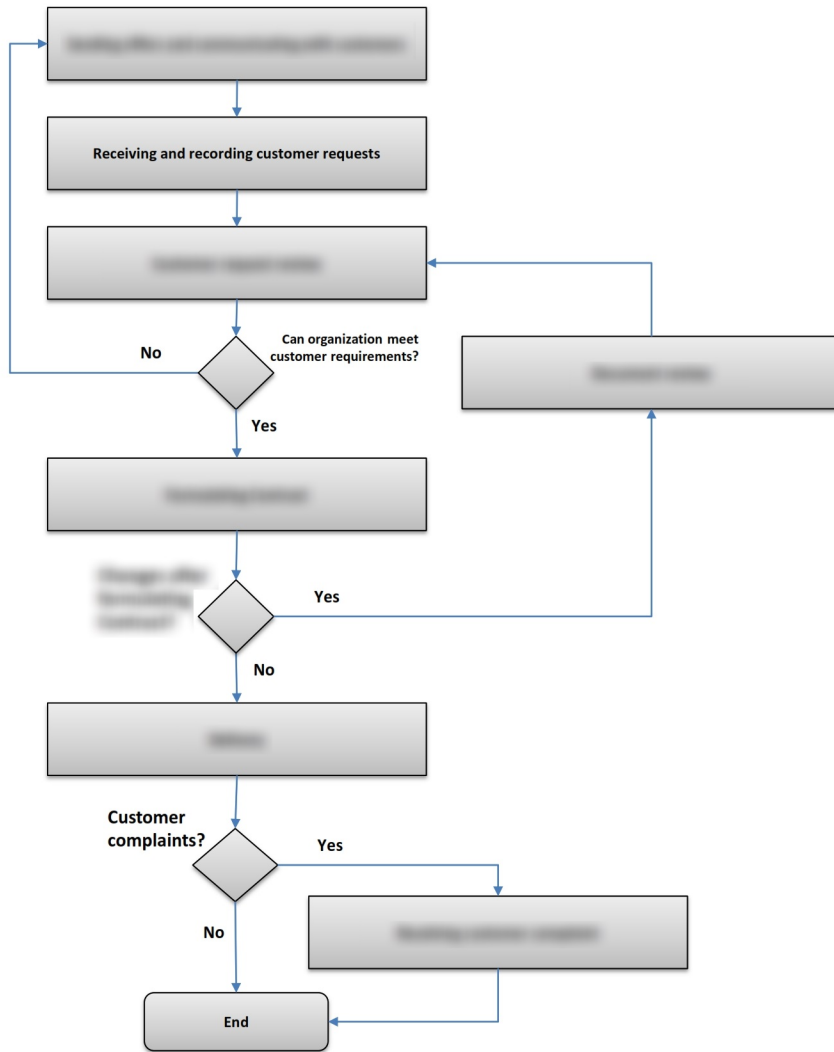
3.2. Sending offers and communication with customers

[Job title] notifies known customers, in agreed languages, about products and services they are ~~interested in, or delivers offers to potential and new customers by presenting a product or service through the company's website, phone calls, flyers, posters, etc.~~

3.3.   Receiving and recording customer's requests

[Job title] receives the customer's requests, and evaluates completeness and definition of requests. With a potential customer, [job title] clarifies potential ambiguities. Determining requirements for product includes:

- requirements for delivery and post-delivery activities;
- ~~requirements that the customer specified, and also requirements that the customer didn't state, but that are implied by intended use;~~
- ~~all statutory and regulatory requirements related to acquisition, storage, handling, recycling, elimination, or disposal of materials;~~
- requirements related to recycling, environmental impact, and other characteristics identified as part of the organization's knowledge about the product and production process; and
- ~~requirements for designation, approval documentation, and control of special characteristics.~~

[Job title] defines necessary activities after shipment of product. ~~The customer's requirements, including requirements for contingency actions, shall be confirmed by the organization before acceptance, when the customer does not provide a documented statement of their requirements.~~

If the customer changes its requests after signing a contract, [job title] treats changed requests as new requests and notifies [job title].

~~If waivers are issued by the customer regarding the requirements listed in this clause, [job title] is responsible for retaining and presenting them for formal review if requested.~~

3.4.   Customer's requests review

3.4.1.   Customer's request review for product and services from regular assortment

[Job title] consults [job title] regarding whether requested quantity of product or service can be delivered within the demanded deadline and according to requirements, and then notifies the ~~customer about possibilities of accepting a request, taking into account requirements specified by the organization. [Job title] checks stock status of ordered product and, if necessary, issues [name of document]~~ to provide ordered quantity of product.

~~[Job title] confirms the customer's request by signing the document received by the customer in which the requests are stated.~~

~~In case of changes in requirements for product and services, [job title] reviews the changes, enters~~ them into the Customer Requirements Review Checklist, and notifies all relevant persons about the change.

3.4.2.   Customer's request review for non-standard product and services and individual production

Non-standard product (service) is any product (service) which differs from the regular assortment of the organization regarding size, package, ingredients, weights, etc.

~~Individual production means that the organization produces one single product for one single customer according to the project provided by the customer.~~

[Job title] records such requests in the Customer Requirement Review Checklist, and [job title] analyzes it in order to determine necessary actions to meet the customer's request.

When a customer request involves manufacturing or product technology new to the organization, or ~~it involves changes in the manufacturing process or product design, [job title] must ensure that a multidisciplinary team conducts a manufacturing feasibility study, with the goal being to confirm that~~ [organization name] is capable of manufacturing and delivering parts in the quantities, prices, and ~~terms requested by the customer. The results of the feasibility study must be recorded by [job title] on the Feasibility Study Report.~~

[Job title] must ensure the manufacturing feasibility study is repeated for any change in product and/or process, and that it is validated by production trials.

~~If the customer's request cannot be met, [job title] informs the customer about [organization name] inability to meet the request.~~

If the organization is able to meet the customer's request, [job title] informs the customer and makes an offer. In the case of individual production, the customer delivers the project with all specified requests to [job title].

[Job title] communicates with customers related to accepting the offer. [Job title] decides whether ~~the additional requirements of the customer will be met. [Job title] records every new requirement~~ for the products and services in the Customer Requirement Review Checklist.

3.5. Formulating the contract

After reviewing the customer's requests and accepting an offer, [job title] creates the contract for ~~delivering product or service. The contract must contain all customer requests, activities after delivering product and way of solving customer's complaints.~~

If the contract or customer's order contains requests that differ from those previously stated, [job title] ~~undertakes actions described in section 3.3 and, if the request can be met, contacts the customer in order to adjust the contract and appropriate documents to the customer's requests.~~

After adjusting to changes, [job title] prepares a new contract or annex and [job title] issues new [name of document] and delivery documents.

3.6. Creating delivery documents

[Job title] creates appropriate delivery documents based on reviewed customer requests and delivers ~~them to [job title]. If delivery includes exporting to another country, [job title] makes necessary documents and, if necessary, hires an organization for handling freightage and/or customs clearance.~~

Commented [16A19]: Delete this paragraph if it's not applicable to organization

Commented [16A20]: Adapt to organization's business.

Commented [16A21]: Adapt to organization's practice; delete if organization doesn't produce such product.

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Commented [16A23]: E.g. Production Manager

Commented [16A24]: Add here your current practices, such as benchmarking, production tests, simulation.

Commented [16A25]: Delete this paragraph if it's not applicable to organization.

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Commented [16A27]: E.g. Head of legal department

Commented [16A28]: Adapt to organization's business.

Commented [16A29]: E.g. Sales Manager

Commented [16A30]: E.g. Working order

Commented [16A31]: E.g. Sales Manager

Commented [16A32]: E.g. Warehouse Operator

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3.7. Product delivery and service realization

According to delivery documents, [job title] organizes loading of product. Delivery is made by

After signing a contract, the organization starts with realization of service according to the contract.

3.8. Customer complaints

[Job title] records all customer complaints in the Registry of Customer Complaints, which is later used

employees of the organization.

When a complaint is received, [job title] requests a preliminary analysis to assign responsibility for it.

[Job title] approves the analysis results and requires the responsible person to start the Procedure

4. Managing records kept on the basis of this document

Record name	Code	Storage			Responsibility
		Retention time	Location	Protection	
Customer Requirement Review Checklist	PR.07.1	3 years	[office of Sales Manager]	Records are stored in file cabinet [describe name/location]	[job title]
Registry of Customer Complaints	PR.07.2	2 years	[office of Sales Manager]	Records are stored in file cabinet [describe name/location]	[job title]
Feasibility Study Report	PR.07.3	End Of Line (EOL) +15 years	[office of Sales Manager]	Records are stored in file cabinet [describe name/location]	[job title]

5. Appendices

Comments:

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Commented [16A42]: If the record is in electronic form, write the name of the folder on Sales Manager's computer.

- Appendix 1 – Customer Requirement Review Checklist
- Appendix 2 – Registry of Customer Complaints
- Appendix 3 – Feasibility Study Report