

[Organization logo]

[Organization name]

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SALES PROCEDURE

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

Commented [AS91002]: Adapt to the existing practice in organization.

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Change history

Date	Version	Created by	Description of change
	0.1	9100Academy	Basic document outline

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1. Purpose, scope and users

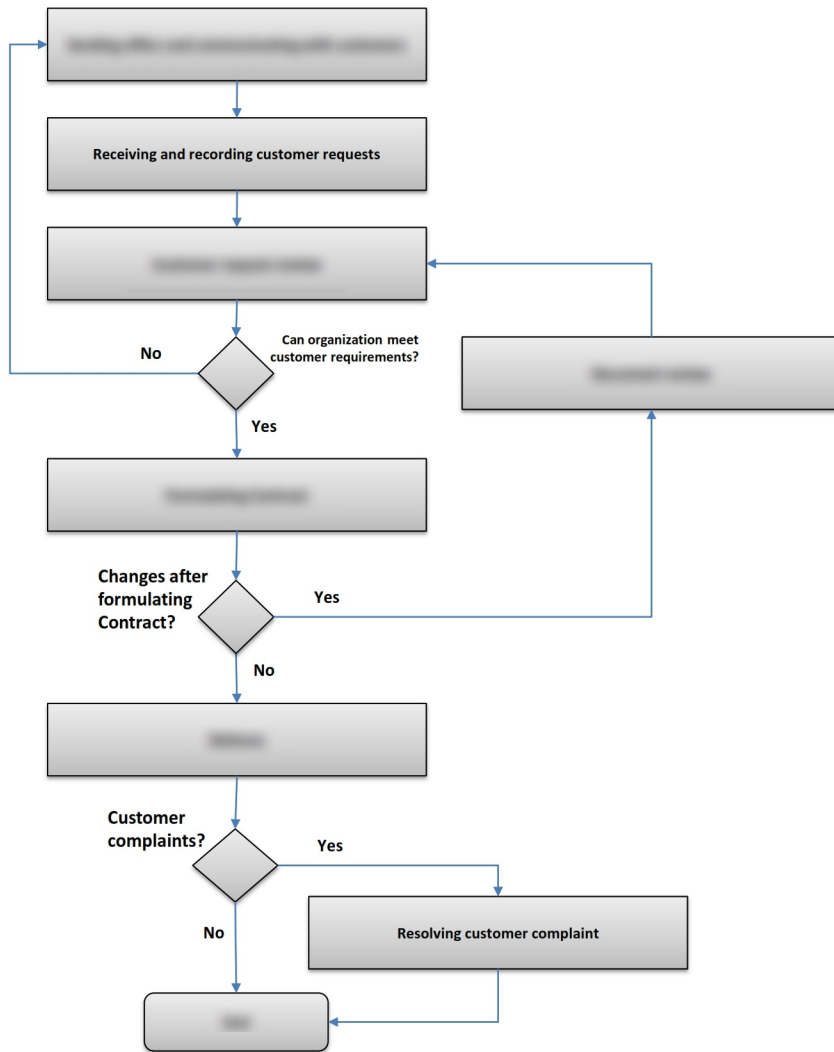
The purpose of this procedure is to describe all activities related to the sales process, from recording the customer's requests to delivery of product and service.

2. Reference documents

- AS9100 Rev D, clause 8.2
- Quality Manual
- Procedure for Production and Service Provision
- Procedure for Measuring Customer's Satisfaction

3. Sales process

3.1. Process flow



3.2. Sending offers and communication with customers

[organization name]

[Job title] notifies known customers about products and services they are interested in or delivers company's website, phone calls, flyers, posters, etc.

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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

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intended use and statutory and regulatory requirements. [Job title] defines necessary activities after shipment of product. The customer's requirements, including requirements for contingency actions,

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

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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

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Commented [AS910013]: Requirements at a high risk of not being met.

Commented [AS910014]: E.g. New technology, ability and capability to provide, short delivery time

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Commented [AS910016]: E.g. Sales Manager

Commented [AS910017]: E.g. Warehouse Manager

Commented [AS910018]: E.g. Production order

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the products and services. If upon review it is determined that some customer requirements cannot be met, [job title] notifies the customer.

[Job title] then notifies the customer about possibilities of accepting a request, taking into account 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,

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

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Non-standard product (service) is any product (service) which differs from the regular assortment of

Individual production means that the organization produces one single product for one single

[organization name]

[Job title] records such requests in the Customer Requirement Review Checklist, and [job title]

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Commented [AS910027]: E.g. Production Manager

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

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If the organization is able to meet the customer's request, [job title] informs the customer and makes requests to [job title].

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[Job title] communicates with customers related to accepting the offer. [Job title] decides whether for the products and services in the Customer Requirement Review Checklist.

Commented [AS910031]: E.g. CEO

3.5. Formulating the contract

After reviewing the customer's requests and accepting an offer, [job title] creates the contract for

Commented [AS910032]: E.g. Head of legal department

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If the contract or customer's order contains requests that differ from those previously stated, [job title] customer in order to adjust the contract and appropriate documents to the customer's requests.

Commented [AS910034]: E.g. Sales Manager

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

Commented [AS910035]: E.g. Working order

3.6. Creating delivery documents

[Job title] creates appropriate delivery documents based on reviewed customer requests and delivers

Commented [AS910036]: E.g. Sales Manager

Commented [AS910037]: 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 order to prevent spoiling or damaging of product or package.

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

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3.8. Customer complaints

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

Commented [AS910042]: E.g. Sales Manager

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[organization name]

After receiving complaints, [job title] assesses whether the complaint is reasonable and then suggests corrective action according to Procedure for Control of Non-Conforming Product is needed.

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Commented [AS910045]: E.g. CEO

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]

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Commented [AS910049]: If the record is in electronic form, write the name of the folder on Sales Manager's computer.

5. Appendices

- Appendix 1 – Customer Requirement Review Checklist
- Appendix 2 – Registry of Customer Complaints