

[Organization logo]

[Organization name]

Commented [9A1]: All fields in this document marked by square brackets [] must be filled in.

PROCEDURE FOR WHOLESALE AND RETAIL OPERATIONS

Commented [9A2]: If you want to find out more about the product realization process, see:

- article: ISO 9001:2015 clause 8.5 Product realization – Practical examples for compliance
<http://advisera.com/9001academy/blog/2015/11/03/iso-90012015-clause-8-5-product-realization-practical-examples-for-compliance/>
- free online course: ISO 9001 Foundations Course
<http://training.advisera.com/course/iso-90012015-foundations-course/>

Commented [9A3]: Adapt to the existing practice in organization.

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

Distribution list

Commented [9A4]: This is only necessary if document is in paper form; otherwise, this table should be deleted.

Copy No.	Distributed to	Date	Signature	Returned	
				Date	Signature

Change history

Date	Version	Created by	Description of change
	0.1	9001Academy	Basic document outline

Table of contents

1. PURPOSE, SCOPE AND USERS	3
2. REFERENCE DOCUMENTS	3
3. WHOLESALE AND RETAIL PROCESS	4
3.1. WHOLESALE PROCESS	4
3.1.1. <i>Process flow</i>	4
3.1.2. <i>Sending offers and communication with customers</i>	4
3.1.3. <i>Receiving and recording customer's requests</i>	5
3.1.4. <i>Customer's requests review</i>	5
3.1.5. <i>Stipulating the contract</i>	5
3.1.6. <i>Creating delivery documents</i>	6
3.1.7. <i>Delivery of goods</i>	6
3.2. RETAIL PROCESS	6
3.2.1. <i>Process flow</i>	6
3.2.2. <i>Stock review and internal purchasing</i>	7
3.2.3. <i>Receipt of goods</i>	7
3.2.4. <i>Storing in the retail facility</i>	8
3.2.5. <i>Arranging goods in retail store</i>	8
3.3. CUSTOMER COMPLAINTS	8
4. MANAGING RECORDS KEPT ON THE BASIS OF THIS DOCUMENT	9
5. APPENDICES	9

1. Purpose, scope and users

The purpose of this procedure is to describe all activities related to the wholesale and retail process, from recording the customer's requests to delivery of goods.

Users of this document are all employees in [wholesale and retail department].

2. Reference documents

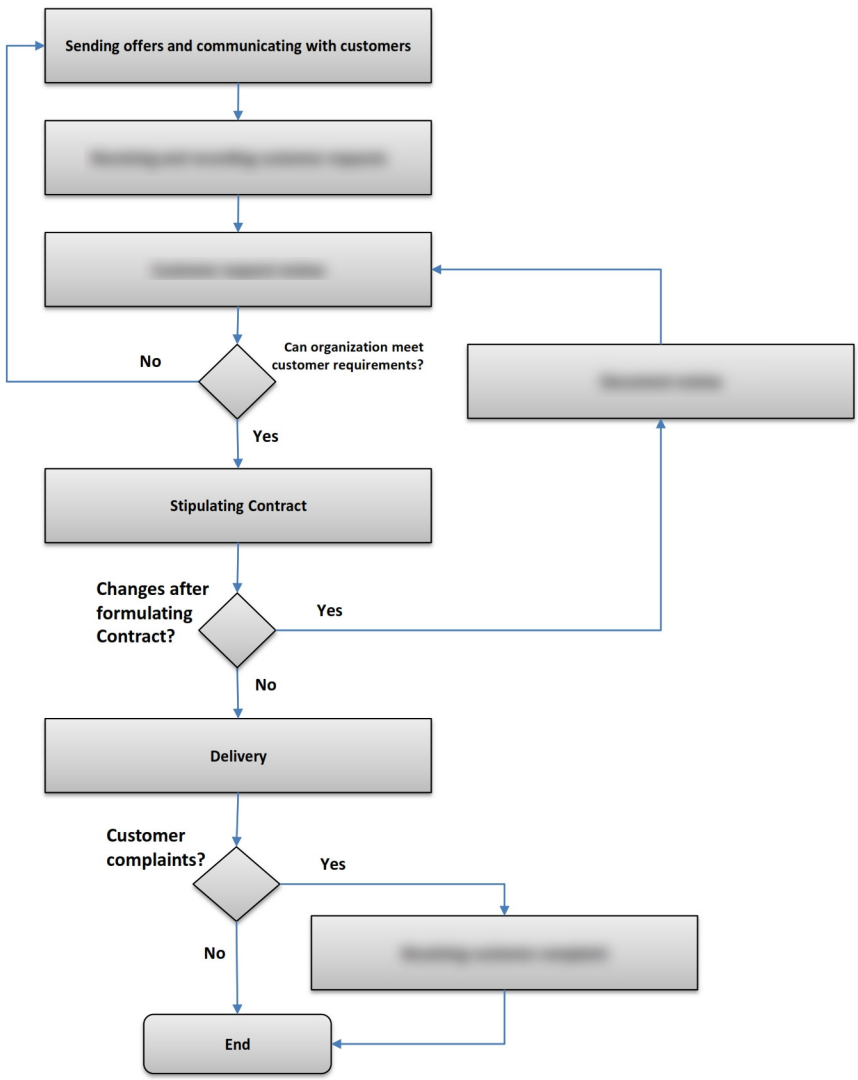
- ISO 9001:2015, clause 8.2
- Quality Manual
- Warehousing Procedure
- Procedure for Measuring Customer's Satisfaction

3. Wholesale and retail process

3.1. Wholesale process

3.1.1. Process flow

Commented [9A5]: Companies that conduct only wholesale and retail and do not have the production process use this procedure for describing their main process. If the company uses this procedure, then Sales procedure is not necessary.



3.1.2. Sending offers and communication with customers

[organization name]

[Redacted text]

Commented [9A6]: Adapt to organization's practice.

3.1.3. 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 goods includes requirements for delivery and post-delivery activities, requirements that the customer specified, and

Commented [9A7]: E.g. Sales Manager or Sales representative.

Commented [9A8]: E.g. Sales Manager

[Redacted text]

Commented [9A9]: Delete if such activities are not included in organization's business.

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

Commented [9A10]: E.g. CEO

3.1.4. Customer's requests review

[Job title] consults [job title] regarding whether requested quantity of goods can be delivered within the demanded deadline and according to requirements, and then notifies the customer about

Commented [9A11]: E.g. Sales Manager

Commented [9A12]: E.g. Warehouse Manager

Commented [9A13]: Adapt to organization's business.

Commented [9A14]: E.g. Warehouse Manager

Commented [9A15]: E.g. Purchasing order

[Redacted text]

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

Commented [9A16]: This should be deleted if organization is oriented toward service provision.

Commented [9A17]: Name of document in which customer stated its request.

[Redacted text]

[Redacted text]

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

[Redacted text]

Commented [9A18]: E.g. CEO

3.1.5. Stipulating the contract

After reviewing the customer's requests and accepting an offer, [job title] creates the contract for delivering product. The contract must

Commented [9A19]: E.g. Head of legal department

[Redacted text]

[organization name]

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.

Commented [9A20]: E.g. Sales Manager

[Redacted text]

Commented [9A21]: E.g. Working order

3.1.6. Creating delivery documents

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

Commented [9A22]: E.g. Sales Manager

[Redacted text]

Commented [9A23]: E.g. Warehouse Operator

Commented [9A24]: This doesn't refer to service and can be deleted if company only delivers services.

3.1.7. Delivery of goods

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

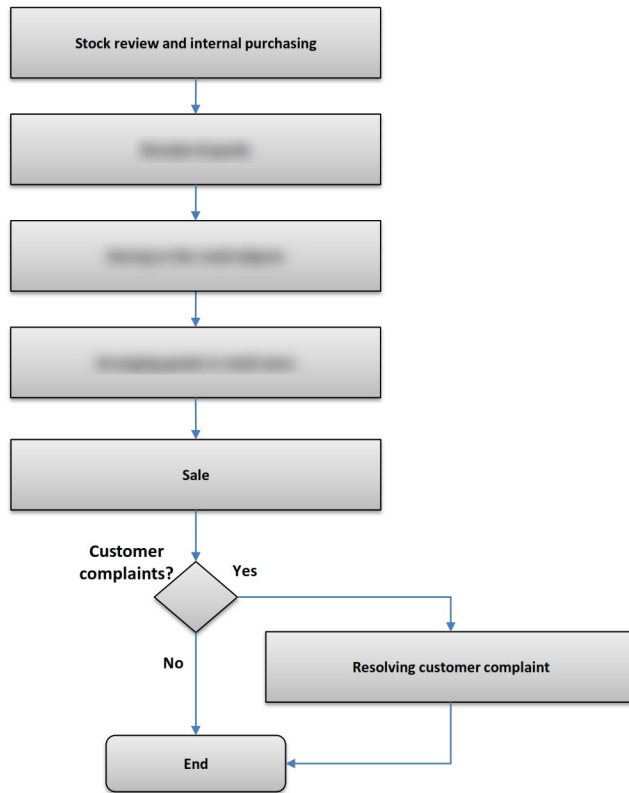
Commented [9A25]: E.g. Warehouse Operator

[Redacted text]

Commented [9A26]: Delete if the organization only deals with the provision of services.

3.2. Retail process

3.2.1. Process flow



3.2.2. Stock review and internal purchasing

[job title] reviews every [day] and creates internal purchasing order for main warehouse. If the

3.2.3. Receipt of goods

[organization name]

[Job title] controls receipt of goods and compares quantities of received goods with the delivery note

Commented [9A27]: E.g. Goods received note

[Job title] is responsible for monitoring the movement of goods as they are transported from the supplier and for the control of stock movement in the warehouse facility.

Commented [9A28]: E.g. Warehouse Manager

3.2.4. Storing in the retail facility

[Job title] is responsible to establish and enforce vertical and horizontal signalization in the storage in order to simplify and speed up the process of picking and sorting goods in the storage.

[Job title] is responsible for managing storage of goods that require special attention. [Special storage needs of products] are provided by [job title]. Evidences of monitoring and controlling of conditions

Commented [9A29]: Some relief items require special attention in terms of the type and security of the storage area. For example:

- Medical supplies and drug shipments can contain a large number of small, highly valued and, often, restricted items, many with a limited shelf life. Thus, a secure area is required, as well as judicious attention to expiry dates.

3.2.5. Arranging goods in retail store

[job title] is responsible for arranging merchandise in the store and must follow these rules:

- Place smaller brands, regional and gourmet brands in top shelf
- Put most attractive merchandise in customer eye level
- [redacted]
- [redacted]
- [redacted]

Commented [9A30]: Write in the special needs of product e.g. humidity, temperature, etc.

Commented [9A31]: E.g. Warehouse Operator

Commented [9A32]: E.g. Warehouse Manager

Commented [9A33]: Inflammable product, chemical products, toxic waste etc.

Commented [9A34]: Adapt to your organization practice.

Commented [9A35]: Adapt to organization's business.

Commented [9A36]: E.g. Sales Manager

Commented [9A37]: E.g. CEO

3.3. Customer complaints

[Job title] records all customer complaints in the Registry of Customer Complaints, which is later used as an input for management review and measurement of customer satisfaction. Complaints can be

In case of product returns from the customer, [job title], who received the returned product, fills in the [name of document] and sends one copy to [accounting department].

Commented [9A38]: E.g. Warehouse Operator

Commented [9A39]: E.g. internal delivery note

Commented [9A40]: Adapt to organization's practice.

[organization name]

[Job title] stores returned product in the space in the warehouse dedicated to non-conforming product and [job title] enters customers' complaint into the Registry of Customers Complaints.

Commented [9A41]: E.g. Sales Manager

4. Managing records kept on the basis of this document

Record name	Code	Storage			Responsibility
		Retention time	Location	Protection	
Customer Requirement Review Checklist	PR.10.1	3 years	[office of Sales Manager]	Records are stored in file cabinet [describe name/location]	[job title]
Registry of Customer Complaints	PR.10.2	2 years	[office of Sales Manager]	Records are stored in file cabinet [describe name/location]	[job title]

Commented [9A43]: Adapt the information in this column to the normal practice in your company.

Commented [9A42]: Adapt the information in this column to the normal practice in your company.

Commented [9A44]: If the record is in electronic form, write the name of the folder on Sales Manager's computer.

Commented [9A45]: 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

Commented [9A46]: These records are located in the folder 07_Sales_Procedure