# Sales - Grant Transformers

## Purpose and Scope

To plan, determine, review and communicate all sales activities.

## Responsibility

The CEO ensures that this procedure is implemented and maintained.

## Operations

### Procedure

#### General

Sales activities focus on the standard products and custom configured items.

#### Tenders, Expressions, Quotations

Tenders, expressions of interest, requests for quotations, etc are received / forwarded from but limited to, established customers, word of mouth and referrals & website enquiries.

Quotations are prepared as per the flowchart in Figure 1

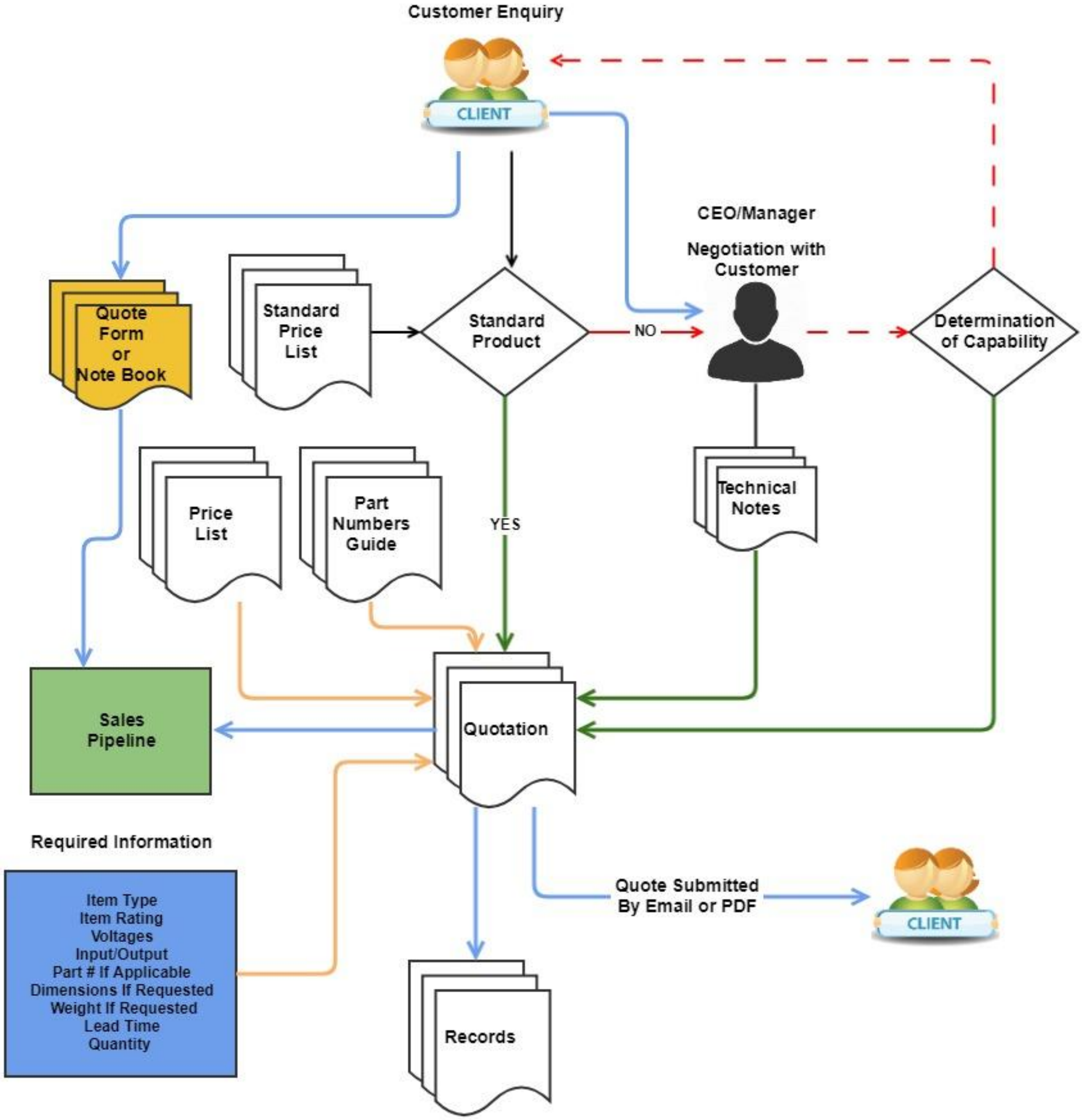
Customer Enquiry
CLIENT
CEO/Manager
Negotiation with Customer
Quote Form or Note Book
Standard Price List
Standard Product
NO
Determination of Capability
Price List
Part Numbers Guide
YES
Technical Notes
Sales Pipeline
Quotation
Required Information
Item Type
Item Rating
Voltages
Input/Output
Part # If Applicable
Dimensions If Requested
Weight If Requested
Lead Time
Quantity
Quote Submitted By Email or PDF
CLIENT
Records

Figure 1

## Order Receipt

Customer Orders are received as per the flowchart in Figure 2

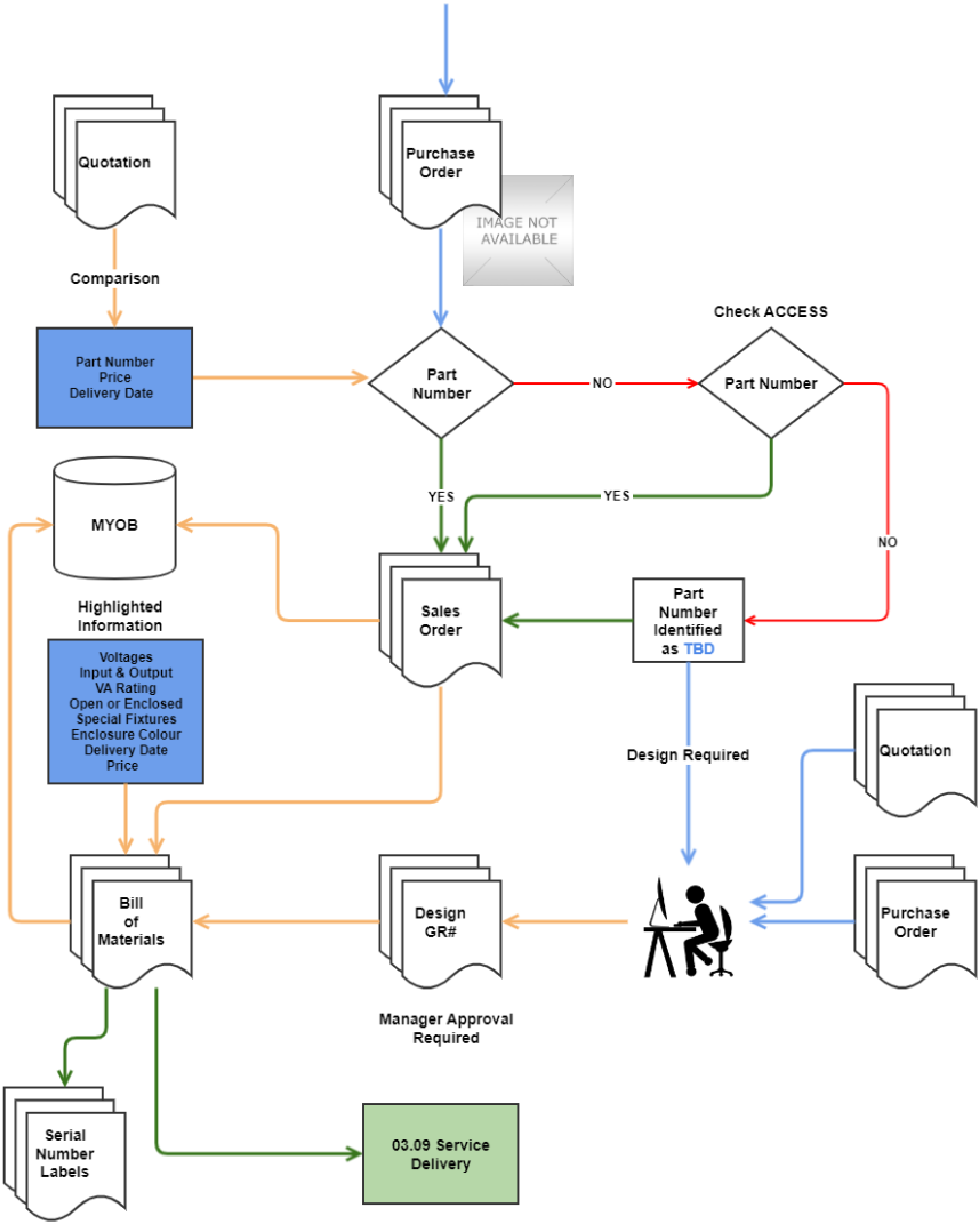


Figure 2

## Part Number Check

Parts Numbers are checked as follows:

1. MS Access Database
2. Password **SCR01**
3. Search
4. Type VA Twice
5. Show Selected Data
6. Reflects NB or Not

## Determination of Capability

For nonstandard products, the ability of the organisation to meet customer expectations the following criteria are considered:

1. Standards, Regulatory or Customer Requirements not detailed in the Legislation Register
2. Raw Materials availability.
3. Product performance in accordance the Procedure **Design**
4. Production capacity.
5. Logistics requirements, including packaging, transport and delivery requirements.
6. Any other special requirements.

Records are maintained accordingly.

## Design Check

Designs received from Star Delta are subject to the following review on receipt:

1. Review of voltage calculations by a competent person
2. Approval by the component person.
3. In process testing during production, as described in the procedure **Operations**
4. In the event that the manufactured item does not meet the specified requirements, the issue is managed as described in the Procedure **Corrective Action & Continual Improvement**

## Order Processing

1. Job details entered into MYOB. Order Form raised. **Responsibility** - Sales/Reception
2. Production Package created comprising the Order form, the Quote, relevant customer information, Production Sheet/ Assembly Schedule, Test Schedule/ Procedure, Bill of Materials and Labels.
3. Production in accordance with Procedure **Operations**
4. On completion:
    1. Delivery Docket is raised and recorded as an Open Invoice
    2. Invoice raised using Production Sheet and Test Reports.
    3. Originals of Test Certificates kept on file, and a copy is sent to the customer if requested.
    4. Delivery. Proof of delivery is retained.
    5. Final Review of Paperwork
    6. Filing by Invoice number.

# Records

The following records/documents are maintained:

- **Price List**
- **Part Numbers Guide** - Stored at Reception
- **Quote Forms**
- **Quotations**
    - **PDF Quotes** - Stored in Quoted Folder

- **Online Quotes** - Stored on Server - shared data/quotes/Grant txt
    - **Sales Pipeline**
- **Purchase Orders**
- **Bill of Materials - MYOB**
- **Design Requests** - Stored in Design Requests Tray
- **Approved Designs** - on the Server

## References

## Grant Transformers Process Flows:

1. Enquiry RFQ Capability
2. Quote
3. Orders & Production Packs