

[Organization logo]

[Organization name]

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SALES PROCEDURE

Commented [9A2]: If you want to find out more about ISO 9001:2015 visit free online course ISO 9001 Foundations Course <http://training.advisera.com/course/iso-90012015-foundations-course/>

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1. Purpose, scope and users

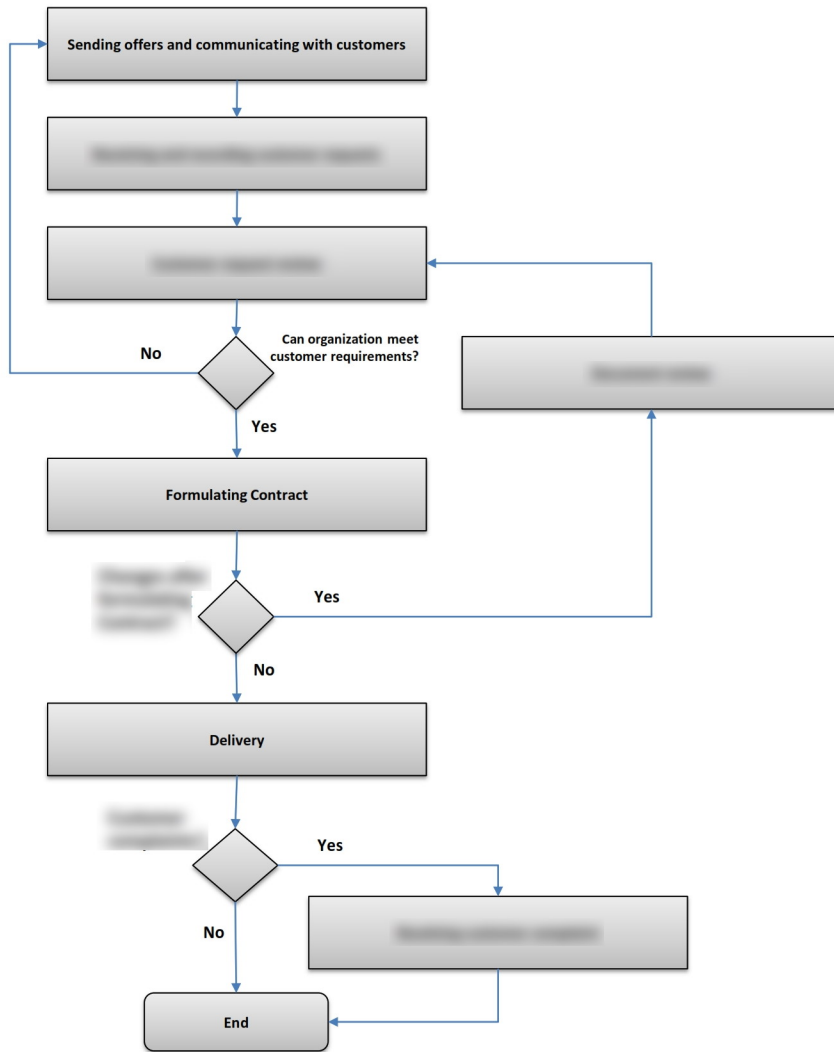
The purpose of this procedure is to describe all activities related to the sales process, from recording the customer's requests to delivery of product and service.

2. Reference documents

- ISO 9001:2015, 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 offer to

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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 product includes requirements for delivery and post-delivery activities, requirements that the

Commented [9A6]: E.g. Sales Manager or Sales representative.

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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 delivered within the demanded deadline and according to requirements, and then notifies the customer about

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

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Commented [9A13]: E.g. Warehouse Manager

Commented [9A14]: E.g. Production order

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Commented [9A16]: Name of document in which customer stated its request.

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

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.

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Commented [9A23]: E.g. Production Manager

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

[organization name]

If the organization is able to meet the customer's request, [job title] informs [redacted]

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[Job title] communicates with customers related to accepting the offer. [Job title] decides whether the

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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.

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[redacted]

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

Commented [9A29]: E.g. Working order

3.6. Creating delivery documents

[Job title] creates appropriate delivery documents based on reviewed customer requests and delivers them to [job title].

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Commented [9A31]: 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

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3.8. 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 about

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Commented [9A38]: E.g. CEO

4. Managing records kept on the basis of this document

[organization name]

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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5. Appendices

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