

Purpose

To ensure that:

1. all customer and internal documentation is correctly reviewed at the quotation stage and when accepting a customer purchase order
2. quotes are correctly filed for easy future reference

References

1. Flowchart – Quotation Preparation
2. Flowchart – Customer Orders-Contracts
3. Flowchart – Design
4. Form – Inspection and Testing Checklist

Procedure

The amount of documentation customers provide when requesting a quote or placing an order ranges in size depending on the size of the job.

Simple jobs are catalogue items purchased from a designated price-list. They can be received via email and via www.anodesonline.com.au or www.cathodicanodes.com.au. These orders are reviewed, packed and invoiced at despatch. Phone/verbal orders are discouraged.

Contract reviews for larger projects require resources as identified in the process flowcharts (ref 1, 2 and 3) in the Management Manual. This procedure provides details for reviewing larger projects.

Request for Quote (RFQ)

The main objective at the request for quote stage is to get a clear understanding of the scope of the job. For large jobs this will involve reviewing all documents supplied with the RFQ and identifying all relevant requirements. If there are any details that are ambiguous or missing, the customer is contacted to seek clarification.

For large projects, if inspection and testing details are not provided by the customer, we can email a checklist (ref 4) which identifies all inspection and testing options. The checklist must be returned to us prior to commencing quotation preparation. This is to ensure that all requirements can be costed accurately from the earliest stage of quotation.

Quotation Preparation

Once all project information is clearly defined, quotation preparation can commence. This involves technical drawing(s) of the product(s), which identify all manufacturing requirements. Once the technical and manufacturing aspects of the quotation are identified, the inspection and testing requirements, often in the form of an Inspection and Test Plan (ITP) are identified. The final stage of the quotation process is the preparation of the commercial submission.

The flowcharts (in the Management Manual) identify the staff resources required depending on the scope and nature of the project.

Purchase Order Award

When we are awarded a PO, the details are reviewed to ensure that product description, pricing, freight and all other details are clear and accurate. Clarification is sought if required.

Contract Award

Once awarded the contract, a secondary review is carried out to ensure that there is no conflict between the contract documents and the quotation documents prepared by us. If any ambiguity or conflict exists, they must be resolved prior to acceptance of the purchase order (contract).

Contract Amendments

The impact of amendments to the original contract must be reviewed and discussed with the customer to remove any misunderstandings. Amendments to the contract must be confirmed in writing by both the customer and us.

The commercial impact of the amendments must also be discussed and reviewed internally.

Contract Documents

Contract Documents can include:

- Customer's original RFQ
- Recognition of receipt of RFQ (if requested by customer)
- Records of quotation review, including clarifications
- Inspection and Testing Checklist ([ref 4](#))
- Quotation documents including technical drawings, specifications, ITP and commercial submission
- Customer's contract (P/O)
- Recognition of receipt of contract
- Records of review of contract, including clarifications
- Documented agreement of contract requirements
- Job sheet

Saving Quotes

1. Email the quote to the customer as:
 - email format
 - MYOB format (pdf)
 - Costing Spreadsheet format (pdf)
2. If the quote is in email format, save it to your desktop as a pdf.
3. Once completed save a copy of the quotation to the relevant months file on the OneDrive.

All quotes remain in the monthly files, whether won or lost or if no feedback from the customer is provided.

Requesting feedback: If a quote is not successful, the reason is documented on the file. In many cases, customers are not forthcoming in providing follow-up information. If this is the case, the file is noted with "No Feedback"

Reviewing Lost Jobs

At the annual Management Review Meeting, for some customers, the list of reasons for losing jobs is analysed, trends are noted and targets are set for reducing the cause of these losses.

Verbal/Telephone Orders

Verbal/telephone orders are discouraged. If we supply based on verbal instructions and the anode is incorrect, we have no way of verifying what was ordered and we become liable for the cost of supplying the replacement anodes. If a verbal/telephone order must be taken, email a quote or invoice so that the customer has the opportunity to review and accept/decline the anode type prior to dispatching.

Fulfilment

1. Most orders are received at sales@cathodicanodes.com.au. If an order is received via another email address it shall be forwarded to sales@cathodicanodes.com.au for processing.
2. Customer orders and MYOB orders are printed and the following must happen:
 - a. Special instructions shall be highlighted, including CAA drawing no., delivery instructions, custom strap configuration etc
 - b. Payment terms, especially noting if order is payment before release of goods (prepaid)

Procedure: Customer Purchase Orders/Contracts

- c. Quality Assurance documentation. Email [Sam Pohlman sam@cathodicanodes.com.au](mailto:sam@cathodicanodes.com.au) the order, any special instructions and the customer email address.
 - d. If there are special insert requirements please email [Sam Pohlman](mailto:sam@cathodicanodes.com.au) the PO and a description/drawing.
 - e. If a CAA drawing number is noted on the PO, print it and attach it to the PO.
3. [Adele Broomhead](#) (or person acting in her role) enters most customer POs into MYOB. If anyone other than [AB](#) enters an order into MYOB the responsibility directly falls to that person to make [AB](#) aware of any special requirements. **Make this as obvious as possible**, state any special instructions in **BOLD RED TEXT** or **highlight in yellow**. For example, this can be done once an order has been entered in MYOB. Save it as a pdf then use the highlight tool to **highlight** special instructions such as “Long strap required” before emailing it to sales@cathodicanodes.com.au
 4. The person who enters the order into MYOB then performs a quick stock volume check and writes up any order product requirements onto production board.
 5. Orders (and any attachments) are then placed on the relevant order pad on the packing bench.
 6. The Store person visually checks goods that are being packed against the relevant product drawing.

END OF DOCUMENT