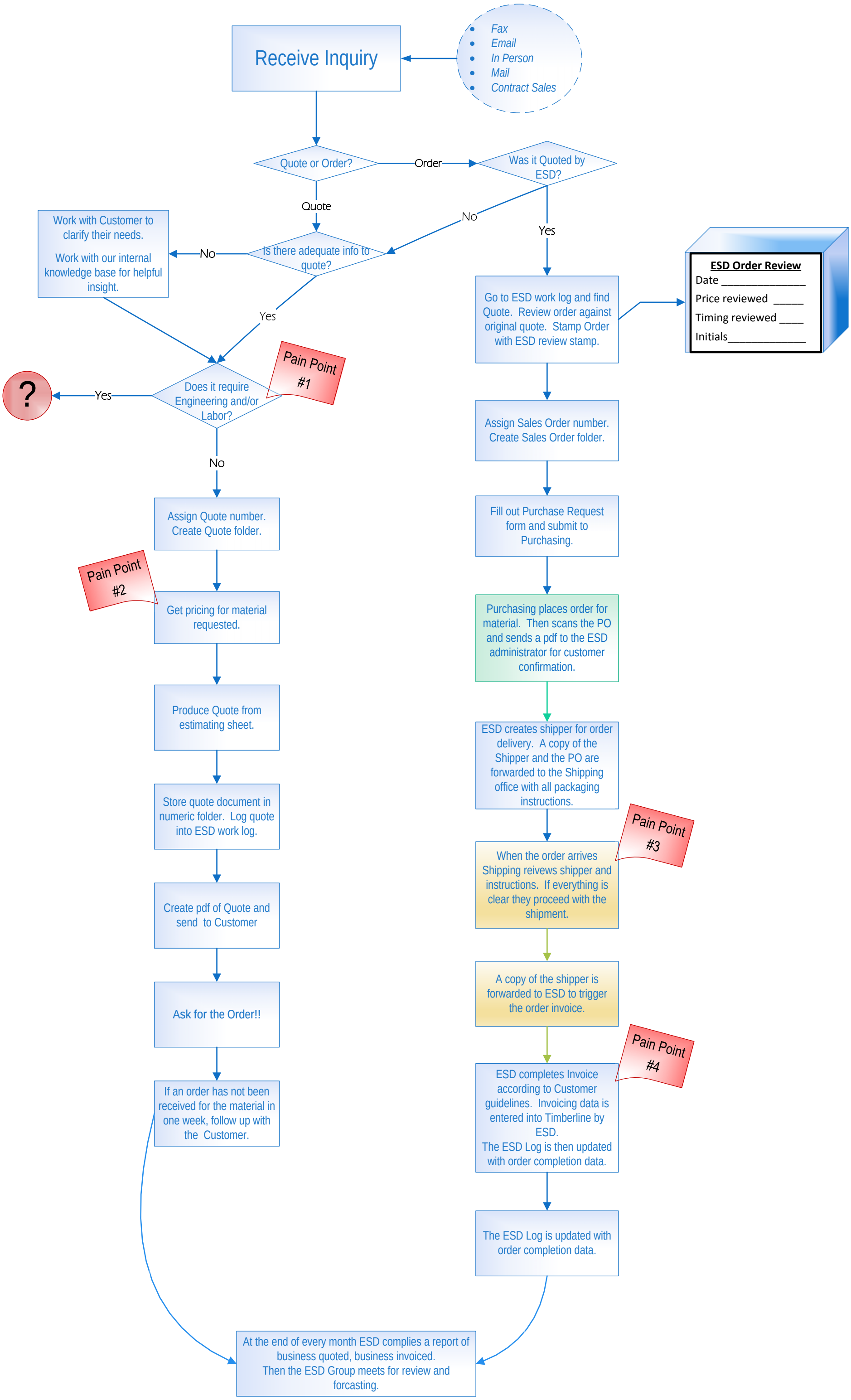
Receive Inquiry
Fax
Email
In Person
Mail
Contract Sales
Quote or Order?
Order
Was it Quoted by ESD?
Quote
No
Yes
Work with Customer to clarify their needs.
Work with our internal knowledge base for helpful insight.
No
Is there adequate info to quote?
Yes
Go to ESD work log and find Quote. Review order against original quote. Stamp Order with ESD review stamp.
ESD Order Review
Date _____
Price reviewed _____
Timing reviewed ____
Initials_____
Pain Point #1
?
Yes
Does it require Engineering and/or Labor?
No
Assign Sales Order number. Create Sales Order folder.
Assign Quote number. Create Quote folder.
Fill out Purchase Request form and submit to Purchasing.
Pain Point #2
Get pricing for material requested.
Purchasing places order for material. Then scans the PO and sends a pdf to the ESD administrator for customer confirmation.
Produce Quote from estimating sheet.
ESD creates shipper for order delivery. A copy of the Shipper and the PO are forwarded to the Shipping office with all packaging instructions.
Store quote document in numeric folder. Log quote into ESD work log.
Pain Point #3
When the order arrives Shipping reivews shipper and instructions. If everything is clear they proceed with the shipment.
Create pdf of Quote and send to Customer
A copy of the shipper is forwarded to ESD to trigger the order invoice.
Ask for the Order!!
Pain Point #4
ESD completes Invoice according to Customer guidelines. Invoicing data is entered into Timberline by ESD.
The ESD Log is then updated with order completion data.
If an order has not been received for the material in one week, follow up with the Customer.
The ESD Log is updated with order completion data.
At the end of every month ESD complies a report of business quoted, business invoiced.
Then the ESD Group meets for review and forcasting.