

Procedure: Quoting

Purpose and Scope

To make sure that when we quote for a job, that we have the capacity to meet the customer's requirement, and that we provide an accurate quotation.

Company Policies

Quoting

- i] The amount of detail on a particular Quote may vary; it must be suitable for the nature of the job and the degree of commercial risk.
- ii] Each Quote is given a unique quote number.
- iii] When a quote is submitted, a copy of the quote must be stored in the relevant Quote file on the network, by Customer name. If accepted, the Quote is then used as input to the *Orders & Purchasing* procedure #2.
- iv] The Quote folder must contain *all* relevant information used for the quote. This includes copies of drawings, specifications, any calculations or assumptions used, etc.

Responsibilities

A Director will decide when a quote is required, and is also the final authority on whether to submit a quote for a particular job.

Either Director may do Quotes, or delegate authority to another employee (eg, Supervisor).

A Director will review Quotes before release.

Flowchart

