DOWNLOAD FOR MODULE 4 · EXAMPLE

Process sheet V1 Order handling (completed)

Example from a manufacturing company with 14 employees (fictitious).

V1 Order handling

Owner: head of sales · Status 2026-10 · Approved MD/hg

Purpose: Every enquiry becomes an order that is delivered on time, complete and paid.
Input: Enquiry (e-mail, phone, messenger, portal), customer purchase order, change request.
Output: Quotation, order confirmation, order file for V2, delivery note, invoice.

No.	Step	Who	How / with what	Record
1	Record the enquiry	Sales	ERP: customer, subject, date; clarify open points	Enquiry number, call note
2	Check feasibility	Sales + workshop manager	Capacity, material, drawing. What to do if not feasible: decline with reasons	Note on the enquiry
3	Prepare the quotation	Sales	Costing sheet; scope (what is not included)	Quotation with number
4	Accept the order	Sales	Compare purchase order with quotation; clarify differences	Order confirmation
5	Open the order file	Sales	Eight sections; check drawing revision against the purchase order; hand over to V2	Order file, work order
6	Change requested by the customer	Sales	What to do if: change note, new order confirmation, inform the workshop, withdraw the old drawing	Change note, section 2
7	Deadline at risk	Sales	What to do if: inform the customer before the date (reason, new date)	E-mail in section 2
8	Deliver and invoice	Shipping, administration	Check release from V2; delivery note; invoice against the order confirmation (ERP)	Delivery note, invoice

With what: ERP, CAD, costing sheet, 2 sales staff. **KPI:** on-time delivery ≥ 95 % (ERP/delivery notes, head of sales, monthly); quotation hit rate (for information). **Risks/opportunities:** analysis, rows V1-1 (drawing check), V1-2 (capacity), V1-O1 (tenders). **Related:** PR-02 Changes to the order, FO-03 Order file, WI-04 Final inspection (V2).

The step table is what the auditor walks along with the last order. Two “what to do if” steps (6, 7) cover the most frequent deviations and the communication with the customer under clause 8.2.1 (informing about changes and delays).

These documents were created with AI support. The contents are reviewed by the project manager.