



STANDARD ORDER

April 2017

SALES meets with CUSTOMER – reviews Quote and finalizes all details

- Upload ORDER - Confirm Salesforce Opportunity with Quote to be uploaded prior to ORDER upload 
- EDMONTON – ORDER BUNDLE to ATR for review and submittal
- BRANCHES – Email ORDER BUNDLE to orderbundle@durabuiltwindows.com
- BRANCHES – File ORDER BUNDLE in Opportunity Note & Attachments in Salesforce 

ORDER BUNDLE contents

- Copy of initialed and signed Quote
 - EXCEPTION 1** – Copy of PO
 - EXCEPTION 2** – Copy of last page and Buyer Acceptance
- Job Site delivery address, postal code, map (if required)
- Order Recap – signed by SALES
- CAD drawings – signed by CUSTOMER
- Custom Product Approval
- Price Request
- RUSH Request Form – signed by Manager
- CONTACTS** – Name, phone number, email
- Release for production -----
- Job Site delivery – provide an email address for notifications
- PAYMENT**
- Terms Account order – verify account status -----
- Pre-Paid – deposit and balance due information
 - Pre-Paid orders under \$500. require full payment

SALES requests appropriate Desired Date (DQ360) based on LEAD TIME

CUSTOMER initials all pages – signs and dates Buyer Acceptance

EXCEPTIONS – Requires Manager Approval

1. Volume Builder or Buying Group Dealer member – PO referencing Quote No. and Quote date
2. Builder or independent Dealer – Initials last page of Quote (quantities and price), Delivery & Storage conditions – sign and date Buyer Acceptance

NOTE: Exceptions are not applicable for any Consumer or Contractor account type orders

*Dealer uploading from DQ360 are responsible for their Quote

RELEASE ORDER FOR PRODUCTION

ORDER RECAP select;

- Call Customer
- No call, Customer will call
- No call, schedule as requested

NOTE: Outsourced / Custom items are ordered – no changes allowed

ORDER HOLD

- ACCOUNTS RECEIVABLES contacts SALES
- SALES contacts CUSTOMER for payment – or MANAGER to gain release

SCHEDULING analyses and sets an *Est. Delivery Date within 24 hours

- Email to SALES if *Est. Delivery Date is different than the Desired Date (DQ360) - SALES informs CUSTOMER of revised date
- SCHEDULING sends Order file to SHIPPING

Go to DuraNET to check Order Status

* Date can change with notice. Allow for next truck for branch orders

SHIPPING

- 72 hour notice auto email to Builder Job Site delivery CONTACT and SALES to inform produce is in production
- SHIPPING (DRIVER) contacts Job Site delivery CONTACT one (1) hour prior to delivery
- CUSTOMER inspects product and signs PACKING SLIP – if no one on site CUSTOMER to receive an email stating time of delivery

SITE NOT READY

- SHIPPING advises CUSTOMER of Delivery & Storage conditions – reschedules delivery date

BACKORDERS

- Auto email to CUSTOMER and SALES advising of backorder and projected delivery date

ORDER CHANGE

- Changes are not permitted unless order is on HOLD for production release
- If change approved – Upload ORDER with changes and re-submit ORDER BUNDLE
- Dealer with DQ360 uploaded order must provide an initialed and signed copy to the Order Desk.

DAMAGED PRODUCT

- SHIPPING initiates RAF Application
- NOTE:** SALES responsible for RAF Application if damage reported after the delivery is completed.