


STANDARD ORDER

SALES meets with CUSTOMER – reviews Quote and finalizes all details, sets expectations

- SALES - or – ATR converts Quote to ORDER and prepares ORDER BUNDLE
 - EDMONTON – Assign CASE to ATR
 - BRANCHES – Email ORDER BUNDLE to orderbundle@durabuiltwindows.com 
- 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 - or - ATR
- CAD drawings – signed by CUSTOMER
- RUSH Order – Follow Salesforce process

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

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 and Delivery & Storage conditions – sign and date Buyer Acceptance

NOTE: Exceptions are not applicable for Consumer or Contractor Account type

*Dealer CX are responsible for their ORDER

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

SCHEDULING

- Schedules to Ship Date selected in CX ORDER – or – agreed to Ship Date by Release call to customer
- Emails SALES and CUSTOMER if date changes
- Sends Order file to SHIPPING

ORDER CHANGES

Refer to CX Change Order WORKFLOW

SHIPPING

- Shipment per the Job Site Shipping WORKFLOW

BACKORDERS

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

DEALER CX ORDER

- DEALER enters PO (if applicable), selects Ship Date and converts quote to ORDER
- ATR checks CX DEALER Order Report
- ATR builds ORDER BUNDLE file for EDM DEALER ORDERS
- SCHEDULING builds ORDER BUNDLE file for BRANCH ORDERS
- RUSH – DEALER to contact ATR or AM
 - Follow RUSH process in Salesforce
- CHANGES – DEALER to contact ATR or AM
 - Follow Change Order WORKFLOW

DAMAGED PRODUCT

- SHIPPING initiates RAF Application

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