process maps for training simplicity
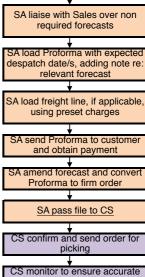
customer order process

CODES:

Sales/Sales Admin responsibilty	SA
Customer Service responsibility	CS

CREDIT AVAILABLE

- CS receive order
- CS reduce forecast
- CS load order
- CS load freight line, if applicable, using preset charges
- CS confirm and send order for picking
- CS monitor to ensure accurate despatch & invoicing
- CS file documents

CREDIT AVAILABLE NOT FORECAST

- CS receive order
- CS pass order to SA
- SA liaise with Sales over non required forecasts
- SA load firm order with exected despatch date/s
- SA load freight line, if applicable, using preset charges
- SA confirm order to customer and advise them of leadtime
- SA pass file to CS
- CS confirm and send order for picking
- CS monitor to ensure accurate despatch & invoicing
- CS file documents

NO CREDIT AVAILABLE FORECASTED

- CS receive order
- CS pass order to SA
- SA load Proforma with expected despatch date/s, adding note re: relevant forecast
- SA load freight line, if applicable, using preset charges
- SA send Proforma to customer and obtain payment
- SA amend forecast and convert Proforma to firm order
- SA pass file to CS
- CS confirm and send order for picking
- CS monitor to ensure accurate despatch & invoicing
- CS file documents

NO CREDIT AVAILABLE NOT FORECAST

- CS receive order
- CS pass order to SA
- SA liaise with Sales over non required forecasts
- SA load Proforma with expected despatch date/s, adding note re: relevant forecast
- SA load freight line, if applicable, using preset charges
- SA send Proforma to customer and obtain payment
- SA amend forecast and convert Proforma to firm order
- SA pass file to CS
- CS confirm and send order for picking
- CS monitor to ensure accurate despatch & invoicing
- CS file documents