Sales representatives receive customer enquiries via mail, email, fax, website and telephone.

Perform Contract Review

* The following is required for all orders:
  + Correct Vendor address on PO
  + Bill to address
  + Ship to address (with Doc Profile set up in BSD for the Order Verification and Invoicing)
  + Buyer contact name, phone and/or email address (if available)
  + End-user contact name, phone and/or email address (if available)
    - Name on quote should be assumed end user unless PO advises otherwise.
  + Customer Purchase Order number
  + Determine if a Quote (SM1003 Quotation) has been created
    - If a Quote has been created, confirm:
      * Model number and quantity
      * Price/Discounts/No Charge Code
      * Delivery – Requested & Due dates should be determined based on BSD and customer request (SM1036 International Consolidations)
    - If no Quote, you must also obtain:
      * Model number and quantity
      * Price (based on BSD with any applicable discounts per SM1024 Price & Discount spreadsheet)
      * Delivery – Requested & Due dates should be determined based on BSD and customer request (SM1036 International Consolidations)
  + Special Requirements – include, but are not limited to:
    - Source Inspection, First Article Inspection Report (F.A.I.R),
    - Supplier Portal product data uploading and performance monitoring,
    - packaging (SM023 Shipping & Packaging),
    - CRQC (SM1026 Special Customer Requests),
    - special testing/documentation, contract retention
    - Review of any notes on the customer’s master account in BSD
  + Review if model is noted for Military use.
  + Review if model is noted as Program.
  + Review if order is Government Rated (DPAS).
  + Order Payment Terms (SM1021 Credit and Terms)
    - Review the following:
      * The customer’s current terms in the BSD
      * The customer’s Credit Limit,
      * Any accounting holds on the customer’s account
  + Tax Status/Taxable County or Tax Exempt Cert on file (SM1022 Sales Tax)
  + Order INCO Terms
    - If the terms are not FCA- Orgin/Seller location, then the terms need to be addressed with the customer
    - If there is no reference to INCO Terms on the PO or in the T&Cs, the default is FCA- PCB Facility
  + Shipping Method and Collect Account # (if applicable)
  + EAR Prohibitions review (know the following)- use appropriate Declaration of Compliance Form (SM007) as needed.
    - Who is the Customer? (Denied Party Check)
    - What is the Application?
    - What is the Product?
    - What is the Country of Final use?
    - Are there any Red Flags?
  + International orders require:
    - At least one contact person’s full name and phone number.
    - The End User’s Company name, city, country and SIC code.
    - Statutory and regulatory requirements of the product, destination and end use need to be reviewed ex. Export Compliance, CE mark, intrinsic safety, etc.

* Review all documentation for Quality Requirements or Clauses
  + Review Quality requirements against the list of Customer Quality Clauses (QA034). If the Quality Clause is not addressed on this list then forward the Quality requirements to the Quality Director for review. The Quality Director will update QA034 accordingly.
* Review all documentation including Terms and Conditions, Legal Rquirements and anything else that accompanies the Purchase Order.
  + If the order is $100,000 or above, the DSM should complete the Legal-100K Order Review form in Outlook and receive approval from Legal before proceeding with order entry.
  + If the customer requirement relates to special shipping or packaging, first determine if PCB can adhere to the customer request, then discuss with Sales Management to determine if the request should be documented via SM023 to ensure repeatability of the customer requirement.

Orders received against a Quote:

* In CRM:
  + Change the status of the Opportunity to Closed/Won.
  + Change the PO Date field to today’s date.
  + In the “Explain” field, enter the Order # or the Purchase Order #.
* If **verbal order**:
  + Either print a copy of the Quote and perform Contract Review ***or*** use the Verbal Order Form

Once Contract Review has been completed, each order receives a Commercial (C) review. Evidence of this review being completed is stored in the BSD on each order referenced by the reviewer’s initials.

Proceed to Order Entry (SM1039 Entering an Order into the BSD)

* Attach all pertinent Quality Records per CS002 Document Index to contract and file.

For contracts involving products intended for use in potentially explosive atmospheres (ATEX), (EC-Type-Examination-Certificate hazardous location information for safe and proper installation may also be found in product User Manuals, Installation Drawing, and/or Product Specification Sheet).  Any ATEX requirements specified by the customer, or requirements not stated by the customer but required may confirmed for compatibility against customer’s proposed application, when known, by an Application Engineer, Regulatory Affairs Certification Specialist, or the ATEX Representative prior to acceptance of order (order acceptance by PCB is evidence of successful completion of this review). Not every order requires this level of review, but only when the customer asks for assistance or the end application is known.  Note: When ATEX product is custom manufactured for use by sole customer, this review is not necessary because ATEX Review and sign off by a qualified individual as part of Design Controls; any subsequent change in the product hazardous location parameters is handled by Engineering Change Orders (ECO), Quality System requirements, and/or Certification updates by the Notified Body (if applicable).

Note: In some situations, such as internet sales, a formal review is impractical for each order. Instead, the

review can be covered by availability of relevant product information, such as in catalogues, specification sheets, or user manuals.

Records for ATEX and Aerospace (Program models) are maintained for minimum 10 years from date of last manufacture (SM016 Sales and Marketing Quality Records) unless superseded by customer/regulatory requirements.

Discrepancies found during Contract Review must be resolved before completion of Order Entry (SM1039).

Sales may accept an order if the following information, ONLY, is not available at time of contract review.

Shipping Address

Email Address

Customers Purchase Order Number

Ship via method

Credit Card Information

Missing information must be obtained prior to the customer’s requested ship date. The order is placed on hold until the missing informaton is received. All other information contained in this procedure must be addressed before entry of the order.

\*\*\*DO NOT SHIP RELEASE/MARK SHIP EARLY until all information is received.\*\*\*