

 <p><b>POLICY &amp; PROCEDURE MANUAL</b></p>	<p>Effective Date: <b>Sept 30, 2015</b></p>	<p>SECTION: <b>07</b></p> <p>POLICY NO: <b>7.2</b></p> <p>PROCEDURE:</p>
<p>SUBJECT: Sales Process – Edmonton</p>	<p>Cancels Previous Policy Dated: Sept 1, 2014</p>	<p>Page 1 of 5</p>

## Policy Statement

This policy provides direction for Sales personnel to follow regarding the flow of equipment sales on into the production process.

## Procedure

The following is intended to summarize the procedure covering the flow of sales and work process after a Sales Representative receives a request to quote a customer and subsequently successfully receives an order from the customer.

## Process

Branch Manager	- BMGR (edm)
Production Foreman	- PF (ach)
Sales Coordinator	- SC (ach)
Technical Specialist	- TS (edm)
Sales Representative	- SR (edm)
Inside Sales Coordinator	- ISC (edm)
Parts & Purchasing Coordinator	- PPC (edm)

1. When the SR receives a request to quote a customer for equipment they record the following customer details as a minimum within the Company provided contact management system (ACT!):

- ✓ Full Name
- ✓ Position
- ✓ Company Name
- ✓ Tel #
- ✓ Cell#
- ✓ Email address

2. If the customer has an existing account then the SR confirms the details are current and correct both in the Company contact management system and within the business system. If the customer is new to the Company, the SR sends a request to the Office Manager to create the customer within the business system as either an account customer or a cash account customer.
3. The SR creates an excel "Sales Cost Worksheet" for a detailed cost work up of the appropriate equipment, parts and installation requested by the customer. The SR refers to any price guides available to bring across all appropriate costs.
4. All deals should have a layout, weight/payload and stability (where appropriate) review completed by the Engineering office to ensure the application is effective, safe and legal before any commitments are made to the customer. It is accepted that all regular & repetitive builds do not require this repeating more than once.
5. The SR must verify the agreed labour hours with the PF & BMGR for any deal where there is no historical and previously agreed labour hour component. The labour hours quoted on the "Quote Summary Sheet" (Controlled Doc# 7.2QSSv01) must reflect this agreement; the BMGR will have the final decision in any unresolved labour hours for a quotation or deal.
6. The SR completes a final review on the "Quote Summary Sheet" (Controlled Doc# 7.2QSSv01) to ensure all factors are taken into account, this could include but not limited to:
  - ✓ Major Component(s)
  - ✓ Freight
  - ✓ Chassis
  - ✓ Parts & Accessories
  - ✓ Labour @ current CTEC internal rate
  - ✓ Sublets
  - ✓ Shop supplies @ 8%
  - ✓ Completed Unit Delivery Cost
  - ✓ Exchange Factor
  - ✓ Mark-up
7. The SR must review the "Quote Summary Sheet" (Controlled Doc# 7.2QSSv03) with the BMGR prior to the customer receiving the quote for any deal that is outside the norm or regularly quoted margin, profit or cost (this means an already established and agreed regular deal).
8. The SR is to present the finalized quotation to the customer in a timely fashion utilizing the format within the "Template Quotation" (Controlled Doc# 7.2Qv01), along with any supporting documentation such as, product brochures, weight, stability studies and layout drawings etc.
  - ✓ Always quote in Canadian dollars
  - ✓ Quotes are valid for up to 15 days
  - ✓ Deposit of 10% and/or official customer purchase order
  - ✓ Strictly payment on delivery

9. The SR to ensure all sales information relating to the quote and subsequent deal are saved on the Company "U" drive and not the PC's hard drive ("C" drive). This will allow recovery of information should the PC hard drive suffer a catastrophic failure.
10. The SR is to maintain a "Quotation Log" (Controlled Doc# 7.2QLv01) on the branch shared ("S") drive detailing every quote issued to a potential customer.

**File Location > S:\Common\Sales\Sales Rep Quotation Logs**

11. The SR is to verify projected customer delivery dates verbally and/or via email with the PF & BMGR prior to making any commitment to the customer.
12. When a deal is successful, the Company will accept the customer's order the following ways:
  - ✓ The order acknowledgement portion of the quote is signed by the customer
  - ✓ An email written order confirmation
  - ✓ A purchase order is issued by an account customer
  - ✓ Where no purchase order is issued a minimum 10% deposit is to be secured and placed on the Company deposit account with a "Pro-Forma" deposit invoice being issued to the customer
  - ✓ All special order equipment must have a minimum of a 10% deposit on hands before an order is placed
13. The SR is to ensure the "Sales Cost Worksheet" indicates clearly which items are relating to Corp. purchased equipment; any equipment vendor quotation must be included with all documents presented to reduce any purchasing errors.
14. The SR will start a job order with a "quote" status. Costs are not required to be entered within the job order, within the job order the SR is to provide the following detail as a minimum but not limited to:
  - ✓ Manager text; As a minimum but not limited to, the chassis arrival date and expected customer completed unit delivery date
  - ✓ Purchasing text; Details as relevant, all equipment quotes sourced by SR must be provided and detailed here for the purchasing dept.
  - ✓ Shop text; Detail any customer specific instructions for the PF to relay to the installation team
  - ✓ Invoice text; This is the SR responsibility and must be included at this stage, failure to do so causes delay in the Company invoicing the customer in a timely fashion
15. The SR is responsible to provide the following final information to the BMGR to allow the job to progress into production:
  - ✓ Quote summary sheet
  - ✓ Job order
  - ✓ Sales cost worksheet
  - ✓ Equipment vendor quotation documentation
  - ✓ Chassis dealer line sheet and specifications for the chassis being used for build
  - ✓ Customer quote c/w signed order acknowledgement

- ✓ Tender document where applicable
- ✓ Chassis and equipment layout, payload & stability drawings where applicable

16. The BMGR will review the Corp equipment order request on the “Sales Cost Worksheet” and the request will be sent to the appropriate person within Corp purchasing.

17. The BMGR will enter the deal information onto the pre-production tab of the Acheson Production Report and the Edmonton Sales Backlog Report.

18. A Production Report will be accessible to the SR to show the details of all builds processed into production. The production report is to be stored for access by all on the branch shared (S) drive.

**File Location > S:\Common\Production\Acheson Production Center**

19. A Production Schedule will be accessible to the SR to indicate approximate build slots available for deals to be processed into production. The Production Schedule is to be stored for access by all on the branch shared (S) drive.

**File Location > S:\Common\Production\Acheson Production Center**

20. The BMGR will create a production job file and this will be stored for access by all on the branch shared (S) drive, all production information must be stored on the appropriate file. All documents, files and pictures for the deal must only be stored in this location.

**File Location > S:\Common\Production Dept\Production\Production Job Files\Active Jobs.**

21. Once a deal has been processed onto the production report, any subsequent change orders must be managed as follows:

- ✓ An email is to be sent to the PF, SC and cc'd to the BMGR using the provided change order sheet (Controlled Doc 7.2COv01)
- ✓ The subject line of the email must include the job order number, the customer name and a change order number (first change request starting with #1 and so on)

22. The SR is to verify the customer completed unit delivery or pick up date verbally and/or via email with the PF prior to making any commitment or arrangements with the customer.

23. Invoicing is to occur immediately upon final completion of the job, this is the responsibility of the SR with the assistance of the ISC. All completed units will be placed in Edmonton's on-hands inventory upon completion by Production.

24. No jobs are to leave the ownership or premises of CTEC without payment in full, unless other payment terms have been arranged and approved by the BMGR.

25. The SR is responsible for final delivery to the customer. Any deficiencies identified during delivery must be rectified without delay and must be managed as follows:
- ✓ An email is to be sent to the PF, Sales Coordinator and cc'd to the BMGR
  - ✓ The subject line of the email must be titled "Deficiencies" and include the job order number and the customer name
26. Any detailed product training for the customer is to be scheduled by the SR directly with the TS; basic equipment familiarisation training is to be carried out by the SR at time of delivery.
27. The SR is responsible for a follow up call to their customer one month after they took delivery of the completed unit, the follow up should review the level of customer satisfaction, any issues must be addressed in a timely fashion.