Software Sales Process

PHX015

Contents

Purpose

The purpose of this process is to ensure that a customer requirement is accepted into the sales process and dealt with correctly.

Scope

This process applies to all Sales departments and all Sales personnel.

Responsibility

It is the responsibility of all Sales personnel to ensure that all stages of the sales process are followed correctly and that agreed contracted customer requirements are met.

Procedure

A customer contacts Phoenix and their contact is managed by their allocated Account Manager. The Account Manager ensures that new customer's details are entered on to the system correctly and that Terms and Conditions are signed and returned.

Quotes

When a new or existing customer requires a quote or pricing information the Account Manager or Sales Support person validates the customer requirements e.g., product, timescale, delivery location, etc.

The Account Manager creates a quote on the Oasis system where it is allocated a unique quote number. Product pricing for major vendors is already within the system however if the pricing has become redundant or is for a new product, the Account Manager checks the pricing with the supplier.

Quotes can be issued to the customer verbally however best practice is encouraged for quotes to be sent via email.

See Sales Order Process Flowchart

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Orders

Orders may be generated as a result of a previously requested quote or as a direct request from a customer. Orders are received and processed by the relevant Account Manager or Sales Support. An order received as a result of a quote will retain the same unique number (Sales Order Number). Most orders are processed utilising Customer Order Numbers: there are instances where a customer's processes do not issue official order numbers e.g., very small charities and churches – e-mail confirmation is attached to Oasis.

The customer purchase order or confirmation of purchase (received by e-mail) is attached to the Oasis Sales Order.

Any orders received following a quote are checked for changes or additions. All changes or additions are validated with the customer.

An order received without a prior quote is entered into the system where it allocated a unique sales order number (SON) and processed accordingly.

Once processed by the Account Manager or sales support, the order is automatically forwarded to the Operations Department where it appears on the Oasis Purchasing Shopping list which is the prompt for Operations personnel to place a Purchase Order with a supplier.

Microsoft reportable orders (i.e., reported to the vendor in a weekly basis) do not appear on the shopping list; these items are automatically forwarded to the Volume License Report section held in operations. These will be placed on Microsoft every Wednesday for orders relating to the prior Monday to Friday.

See Sales Order Process Flowchart

Renewals

Products that are purchased with a specified timespan are known as renewals. Towards the end of the timespan the Account Manager will run the Renewals report to prompt their customer regarding the requirement to re-purchase to maintain the current level of compliance.

The Account Manager contacts the customer to discuss the necessary requirements and creates quotes/orders following the normal sales procedures.

Software Asset Management Managed Service Quotes/Orders

A quote or order generated on a Managed Service Customer Account has the additional step of being verified by the Managed Service Team to avoid over licensing. The Managed Service personnel check the products on the quote/order to ascertain whether the customer needs to purchase these goods. This is checked against the records of the relevant customer stored within Licence Dashboard.

The Managed Service personnel can mark the quote/order as confirmed where the purchase is required or rejected if the customer already owns the relevant licences.

Once approved by the Managed Service personnel a quote/order can be processed normally.

Traceability

From this point, a customer's order request can be traced on either a Quote Number (if relevant), Sales Order Number, Customer Purchase Order Number or Phoenix Purchase Order Number.

Sales Order Process Flowchart
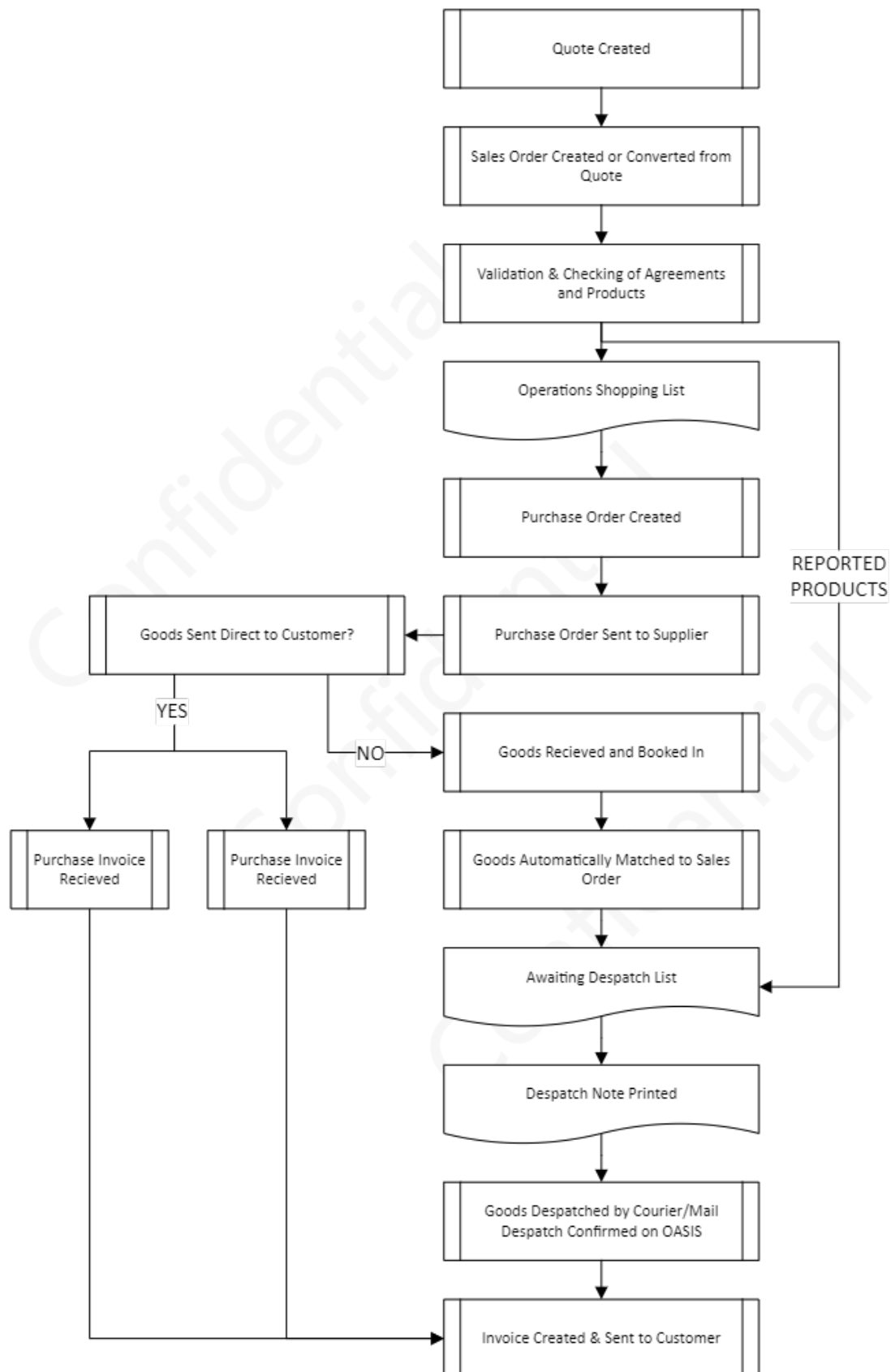
Version Control

Author	Version	Date	Description
QMS	1.0	01/05/2016	Original document
QMS	1.0	30/12/2017	Annual review – no changes
QMS	1.0	30/12/2018	Annual review – no changes
QMS	1.0	05/12/2019	Annual review – no changes
QMS	1.0	11/11/2020	Annual review – no changes
Fay Mercer	2.0	15/11/2021	Orders - removed reference to SBG and updated reportable orders to reference Microsoft Managed Service Quotes/Orders updated to Software Asset Management Managed Service Quotes/Order
Fay Mercer	2.0	15/11/2022	Annual review – no changes

Document Approval

Name	Version	Date	Position
Sam Mudd	1.0	01/05/2016	Managing Director
Sam Mudd	1.0	30/12/2017	Managing Director
Sam Mudd	1.0	30/12/2018	Managing Director
Sam Mudd	1.0	05/12/2019	Managing Director
Sam Mudd	1.0	11/11/2020	Managing Director
Sam Mudd	2.0	15/11/2021	Managing Director
Clare Metcalfe	2.0	18/11/2022	Operations Director

Signed: *Clare Metcalfe*   Clare Metcalfe, Operations Director

Dated: 18/11/2022

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