

New Customer Sales Handover Approval Checklist (Approval Form A1)

No	Item	Pass/Fail	Notes
Section 1: Submission			
1.1	The new contract must be submitted with the new sale SHO		
1.2	A deposit payment from the customer must have been provided at the time that the SHO is submitted. The payment must be sufficient to cover all required 3 rd party order costs (at a minimum)		
1.3	The contract must be signed by a COINS authorised signatory and a Director of the customer		
1.4	<p>If there is a reason for the contract not being ready at the time that the SHO is submitted then a draft unsigned contract should be submitted anyway. This must be approved by the Sales Director (SD) (Bob Childs) and the Managing Director (MD) (Robert Brown) prior to the SHO being submitted. The approval must be documented and this documentation submitted with the SHO.</p> <p><i>Example: With Taylor Wimpey we delivered preliminary licences and consultancy to the customer while the contract was still being negotiated so some SHO's were required pre-contract</i></p>		
1.5	If the contract is submitted unsigned then a purchase order from the customer must be submitted with the SHO		
1.6	If the contract is submitted unsigned then a documented explanation must be provided		
1.7	Revisions of the SHO must be submitted with a corresponding revised contract and all checks in this section will apply		
Section 2: Checking the Contract			
2.1	The new Contract must have been approved by the SD, the MD and the COINS Lawyer (CL) (Fatima Raja.) Evidence of approval should be provided		
2.2	No editing of the standard definitions and clauses in the Contract is permitted		
2.3	The correct, current version of the standard contract document must have been used		
2.4	Agreed and approved amendments and additions to the standard terms must be set out in Schedule 1 of the contract under the heading "Additional Terms"		

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2.5	The total sale value plus V.A.T. must be documented in Schedule 1		
2.6	For multi-year deals, payment plans and rental, the full schedule of payments for the contracted term must be documented in Schedule 1. The total sum of these payments must correspond exactly to the sale value referred to in 2.5 above		
2.7	The COINS licence schedule that will be used to generate the branding must be documented in Schedule 2		
2.8	If the contract includes an agreement on the price of COINS licences for additional, future purchases this pricing must be documented in Schedule 2		
2.9	The Progress licence schedule and price of required Progress products must be documented in Schedule 2		
2.10	If there are multiple Progress licences then the purpose of each separate licence should be documented <i>Example: If the Customer has a separate test server and/or report servers</i>		
2.11	The product licence schedule, purpose and price of other, included 3 rd Party software products must be documented in Schedule 2 <i>Example: Epay</i>		
2.13	The schedule of and price of COINS Cloud delivery services included must be documented in Schedule 3		
2.14	The schedule of and price of COINS professional delivery services included must be documented in Schedule 4		
2.15	If the contract includes an agreement on the price of COINS professional services for additional, future purchases this pricing must be documented in Schedule 4		
Section 3: Checking the SHO			
3.1	The correct, latest version of the SHO document must be used		
3.2	Every SHO must include completed details in the following cells: 1. Territory		

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No	Item	Pass/Fail	Notes
	2. ALF% 3. Type 4. Company Name 5. Company Address 6. Contact 7. Phone Number 8. Date 9. Sales Person 10. Contract Manager 11. Financed (if applicable) 12. Sector 13. Order Number		
Section 4: Comparing the Contract and the SHO			
3.1	The term dates in the contract and in the SHO must correspond exactly. There are occasions when the dates may be moved after the contract is signed. In such cases the Contract and SHO revisions should be submitted		
3.2	The total Contract value must match exactly to the total sale value shown in the SHO		
3.3	For multi-year sales, the yearly Contract value must match exactly the yearly values in the SHO		
3.4	The schedules in the Contract for licences must match exactly to the SHO, for all licences: COINS Progress Other 3 rd Party		
3.5	The COINS Cloud values in the Contract must match exactly those in the SHO		
3.6	The Professional Services in the Contract must match exactly those in the SHO		