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ISO 9001:2015 Quality Procedures Manual

The Bizmanualz "ISO 9001 Quality Procedures for Quality Management Systems provides you with easy to use Procedures. You will learn what ISO 9001 is all about, how to produce an **ISO 9001 Quality Manual**, and how to write ISO 9001 Quality Procedures. The Bizmanualz ISO 9001 Manual comes with practical documentation in proper ISO format and reflects 2015 changes to the standard. You also get a detailed explanation of ISO 9000 and helpful information and guidance.

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| <ol style="list-style-type: none"> 1. A Sample Quality Manual covering common requirements and practices 2. ISO Manual Table of Contents 24 Procedures and 57 corresponding forms 3. 25 ISO Job Descriptions | <ol style="list-style-type: none"> 4. Introduction to ISO 9001 5. Guide to preparing a well written manual 6. Complete ISO Manual Index <ul style="list-style-type: none"> • Instant download • Available immediately • (no shipping required) |
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24 Prewritten Quality Procedures

<ol style="list-style-type: none"> 1. QP0500 Situational Analysis 2. QP0600 Risks & Opportunities Management 3. QP0700 Infrastructure Control 4. QP1000 Documented Information Control 5. QP1020 Internal Audits 6. QP1030 Nonconforming Outputs Control 7. QP1040 Nonconformity Corrective Action 8. QP1060 Management Review 9. QP1070 Competence Awareness 10. QP1080 Order Acceptance 11. QP1090 Project Planning 12. QP1100 Design Development 	<ol style="list-style-type: none"> 13. QP1110 Design Change 14. QP1120 External Provider Evaluation 15. QP1130 Preproduction Planning 16. QP1140 Manufacturing Control 17. QP1150 Identification and Traceability 18. QP1160 External Property Control 19. QP1170 Monitoring-Measuring Resources Control 20. QP1180 Monitoring-Measurement 21. QP1190 Customer Satisfaction 22. QP1200 Data Analysis-Continual Improvement 23. QP1210 Receiving Inspection 24. QP1220 Purchasing
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57 Corresponding Forms

<ol style="list-style-type: none"> 1. QP0500-1 SWOT Analysis Worksheet 2. QP0500-2 Competitive Analysis Worksheet 3. QP0500-3 Situational Analysis Report 4. QP0600-1 Risk Assessment / Management 5. QP0600-2 Risk Controls Cost-Benefit 6. QP0600-3 Preventive Action Report 7. QP0700-1 Asset Requisition/Disposal Form 8. QP0700-2 Asset Acquisition List 9. QP0700-4 Nonconforming Asset Form 10. QP0700-5 Asset Inventory Database 11. QP0700-6 Network Map 12. QP1000-1 Document Request 13. QP1000-2 Document Control Database 14. QP1020-1 Audit Program 15. QP1020-2 Audit Plan 16. QP1020-3 Quality Audit Checklist 17. QP1020-4 Audit Report 18. QP1030-1 Nonconformance Report 19. QP1030-2 Nonconforming Output Log 20. QP1030-3 Return Goods Authorization 21. QP1040-1 Corrective Action Report 22. QP1040-2 Corrective Action Log 23. QP1060-1 Management Review Meeting 	<ol style="list-style-type: none"> 30. QP1080-1 Customer Order 31. QP1090-1 Project Plan 32. QP1100-1 Design Review Checklist 33. QP1100-2 Design Completion Checklist for Electromechanical Devices 34. QP1100-3 Design Completion Checklist for Non-Electromechanical Devices 35. QP1100-4 Sample Verification Checklist 36. QP1100-5 Product Test 37. QP1110-1 Engineering Change Notice 38. QP1120-1 Approved External Provider List 39. QP1120-2 External Provider Audit Checklist 40. QP1120-3 Critical Provider- Evaluations 41. QP1120-4 External Provider Performance Log 42. QP1130-1 Product Design Release Form 43. QP1140-1 Inspection/Testing Checklist 44. QP1140-2 Product Release Authorization 45. QP1160-1 Material Problem Report 46. QP1170-1 Calibration Document 47. QP1170-2 Calibration Database 48. QP1190-1 Post-Sale Satisfaction Report 49. QP1190-2 Customer Satisfaction Survey 50. QP1190-3 Customer Service Log
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24. QP1070-1 Employee Competence Matrix	51. QP1210-1 Receiving Log
25. QP1070-2 Employee Development Plan	52. QP1210-2 First Article Inspection Report
26. QP1070-3 Employee Group Training Record	53. QP1210-3 Receiving and Inspection Report
27. QP1070-4 Individual Training Record	54. QP1220-1 Purchase Requisition
28. QP1070-5 Sample Job Descriptions	55. QP1220-2 Purchase Order
29. QP1070-6 Communication Plan	56. QP1220-3 Purchase Order Log
	57. QP1220-4 Purchase Order Follow-Up

Document ID QP1080	Title ORDER ACCEPTANCE	Print Date mm/dd/yyyy
Revision 0.0	Prepared By Preparer's Name / Title	Date Prepared mm/dd/yyyy
Effective Date mm/dd/yyyy	Reviewed By Reviewer's Name / Title	Date Reviewed mm/dd/yyyy
Standard ISO 9001:2015, clause 8.2.1-8.2.3	Approved By Final Approver's Name / Title	Date Approved mm/dd/yyyy

Policy: The Company will review all commitments to accept customer orders (sales orders) to ensure that customer expectations are met or exceeded.

Purpose: To define the methods and responsibilities for the preparation of documents, paperwork flow, by individuals and departments for processing sales orders.

Scope: This procedure applies to all individuals/departments involved in the sales process, especially the Sales Manager, Customer Service Representatives, and Accounts Receivable.

Responsibilities: The Sales Manager is responsible for initiating the sales process and for obtaining, providing, and reviewing all documents and information from a customer in order to complete the sales order.

Customer Service Representatives are responsible for reviewing sales orders to ensure requirements are adequately defined, that the order is consistent with the quotation if one was provided, and that the Company has the capability of meeting the defined requirements or else take appropriate action.

Accounts Receivable is responsible for facilitating customer financing and approving sales terms in accordance with Company policies.

Definitions: Sales Representative – Person (irrespective of title) who communicates with the customer regarding the sale/lease of the Company's products or services.

Procedure:

STARTING THE Sales PROCESS

- 1.1 The Company's Sales Representative (or "Sales") shall present information regarding the Company's products or services, answer questions, solicit orders, and enter sales information on the appropriate order document(s); form QP1080-1 CUSTOMER ORDER is one example.
- 1.2 The Sales Representative shall enter accurate and complete information on the customer order form, including terms, conditions, requirements, customer information, and order configuration.
- 1.3 The Sales Representative shall identify the customer's specified requirements:
 - including those for delivery and post-delivery activity,
 - requirements not stated by the customer but necessary for the product's specified or intended use,
 - applicable regulatory (statutory) product requirements, and
 - requirements the Company, from its unique vantage point, considers necessary.
- 1.4 The Sales Manager and Engineering shall review the customer's requirements **prior to** committing the Company and its resources to supplying products, ensuring that (a) requirements are clearly defined, (b) contract or order requirements that differ from those expressed earlier are resolved, and (c) the Company can meet the stated requirements and they shall record, in the project file:
 - The results of the requirements review; and
 - Any actions arising from that review.
- 1.5 The Sales Manager shall submit a copy of the customer order to Accounts Receivable to obtain credit pre-approval, if needed, and facilitate processing of applicable paperwork. Payment terms for the customer shall be in accordance with the Company's credit policies.
- 1.6 If applicable, Customer Service Representatives shall forward *lease-financing* documentation directly to Accounts Receivable, where it will be held for processing upon receipt of the Accounting copy of the completed sales order (i.e., after shipment).
- 1.7 Upon approving customer credit and terms, Accounts Receivable shall distribute copies of the customer order to the appropriate parties (which should be shown on the bottom of the form).

Customer Service

- 2.1 Customer Service Representatives shall review all orders against their corresponding proposals, statements of work, etc. (see QP1090 PROJECT PLANNING), to ensure that the information (Part number and revision, quantity, price, requested certifications or specifications, and delivery dates) is correct and no changes have been made, prior to accepting the customer's order. If there are differences between proposals and orders or the organization's ability to deliver as requested, then Customer Service Representatives shall contact the customer to request a waiver, keep a record of any such contact, and also notify the Sales Manager of such discrepancies.
- 2.2 Customer Service Representatives shall enter the information provided on the customer order form in the order management system and ensure that all customer information in the order management system is accurate.
- 2.3 Customer Service Representatives shall verify part inventories on the order management system to ensure adequate inventory is available. If there adequate inventory is not available, the system will estimate an availability date based on work in process (WIP) or production scheduling.

If there is any discrepancy or if the product is to be back-ordered, Customer Service Representatives should notify the customer immediately (by phone, IM, or other means) and follow that with a written confirmation (e.g., postal service, e-mail).

- 2.4 Customer Service Representatives should not issue an order acknowledgement until:
- the Sales Manager and Engineering have reviewed and approved the order with respect to product requirements; and
 - Accounts Receivable (A/R) has given notice that the customer has been approved (see Section 1.3).

When the order is accepted, Customer Service Representatives shall complete an order acknowledgement, sign it, and E-mail or fax it to the customer. A copy of the acknowledgement should be forwarded to the Sales Manager and one filed in the Customer file.

- 2.5 For custom products:
- Customer Service Representatives must notify Engineering to start the design process (see QP1100 DESIGN AND DEVELOPMENT) if the customer has not supplied design specifications and supporting documentation (e.g., technical drawings).
- Customer Service Representatives shall also forward a copy of the sales order and any additional information received after the quotation process to Engineering.
- 2.6 Customer Service Representatives shall maintain a customer file, which should contain copies of all communications between the company and the customer, as well as information relative to sales orders.
- 2.7 Customer Service Representatives shall address customer complaints and feedback in accordance with QP1190 CUSTOMER SATISFACTION.

Credit

- 3.1 If the customer is financing the order, Accounts Receivable shall process and forward all applicable documentation to the financing source.
- 3.2 If Accounts Receivable rejects the terms of the customer order, it shall notify the Sales Manager and the customer, as appropriate.
- 3.3 Accounts Receivable shall review the customer order and, if terms are approved, update the customer's credit status on the order management system, releasing the Sales Order for processing.

Internet (ELECTRONIC) Orders

- 4.1 The Company's product page must be reviewed by the Sales Manager, Marketing, Engineering, and Accounts Receivable and approved prior to its going live. The Sales Manager shall ensure that a record of the results of the product page review – as well as actions arising from such a review – is kept with the project file.
- 4.2 Orders placed through the Company web site (portal) or via e-mail require either a credit card or an account with the Company, established in advance.
- 4.3 The web site should interact directly with the order management system to verify customer orders, generate sales orders with ship-to information, and acknowledge shipment to the customer.
- 4.4 If customers run into problems with the Company web site or have technical questions regarding products, they should be provided with Customer Service Representatives contact information (phone number(s), e-mail addresses, web links, etc.). Customer Service Representatives should either assist the customer with the Internet order or handle the order as indicated elsewhere in this procedure.

Changes to orders

- 5.1 Customer Service Representatives shall process all requested changes to customer orders. For changes in quantity or delays in delivery date, Customer Service Representatives shall review the status of the order in the order management system and if the order has not shipped, makes the appropriate changes as a revision to the sales order. Customer Service Representatives shall contact Manufacturing, Shipping, and other interested parties to advise them of and to verify the revision.
- 5.3 For expediting the delivery date, Customer Service Representatives shall contact Manufacturing, Shipping, and other interested parties to verify that the new date is acceptable or to determine what the earliest delivery date may be. If the expedited date is acceptable, Customer Service Representatives shall send the customer an acknowledgement. If the customer's requested date is not acceptable (e.g., cannot be met because the customer did not provide enough lead time), Customer Service Representatives shall contact the customer to confirm a "best possible" date.
- 5.4 If the changes are technical changes to the product, the order is put on hold while the original proposal is reviewed in accordance with Section 1.3 of this document.
- 5.5 Records of changes to orders, as well as records of change reviews, shall be maintained in the customer's file.

Effectiveness Criteria:

- Sales orders *for standard products* – completed and shipped within time frame stated by Company (in marketing materials, etc.).
- Sales orders *for custom products* – filled and shipped within time frame quoted to, and agreed to by, the customer.
- Number of customer complaints due to order inaccuracies, order processing.

References:

- ISO 9001:2015, "Quality Management System - Requirements", International Organization for Standardization (ISO), Sept., 2015.

Quality Procedures:

- QP1090 PROJECT PLANNING
- QP1100 DESIGN AND DEVELOPMENT
- QP1190 CUSTOMER SATISFACTION

Records/Forms:

Form #	Documented Information	Satisfies ISO 9001 Clause
	Customer requirements	8.2.3.2
	Requirements review record(s)	8.2.3.2
	Product page review record(s)	8.2.3.2
QP1080-1	Customer Order form	
	Customer file	
	Order acknowledgement	
	Order changes	

Revision History:

Revision	Date	Description of changes	Requested By
0.0	mm/dd/yy	Initial Release	

QP1080-1 CUSTOMER ORDER

BILL TO:

SHIP TO:

Phone: () _____

Phone: () _____

Contact: _____

Contact: _____

Sales Contact	Purchase Order #	Date of Order	Date Required			Payment Terms	Shipped Via	Shipping Date
Model #	Description		Qty. Ord.	Qty. Ship	Qty. B/O	Serial #	Unit Price	Amount

No. _____

Cartons: _____

Total Weight: _____

Sub-Total

Sales Tax

Shipping

Total Due

Credit/Authorization _____

Date _____

INSTRUCTIONS/COMMENTS: _____
