



PREPARATION OF QUOTATION

OVERVIEW

This procedure is to ensure that all enquiries received have generated a quotation to meet the customer's needs. To ensure that all quotations generated are in line with man day tables and adequate resources will be available.

PROCEDURE

- A request for preparation of quotation (F-Quest-001) will be submitted by the prospective client. All relevant information is to be filled in on this form to be able to generate a formal quotation.
- Sancert will review the application and ensure that we have the capability to meet the client's requirements in terms of technicality, possible location restraints and / or requirements, as well as resource requirements.
- If we are unable to quote on the request, a formal letter will be drafted, stating the reason, and forwarded to the prospective client.
- If we are able to quote, the following process will take place:
- The man day tables (WP-TABLE-01) will be used to calculate the amount of days needed for the audits required. A reduction (if justifiable) of no more than 30% will be given on audit man-days
- Complexity category (WP-COMPLEX-01) must be decided upon e.g.
 - High
 - Medium
 - Low
 - Limited
 - Special Cases
- Other factors must also be taken into account when generating a quotation, Examples of decrease factors: -
 - Small site for large number of employees (e.g.1 Office but 350 bus drivers)
 - Length of time system has been implemented within the company
 - Number of duplicated job functions
 - Prior knowledge of company.Examples of increase factors: -
 - Complicated logistics (more than one location)
 - Interpreter required
 - Large site for small number of employees
 - Complex system
 - Design responsibilities
 - Night shift

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- WP-MULTI-01 will be used when doing a quotation for Multi-Site organisations, this procedure outlines the sample size to be used and the methodology in auditing multi site organisations. F-QUOTE-005 (Quotation Calculation Sheet – Multi Site Organisation) will be used to document how audit man days were determined for Initial and surveillance audits.
- WP-NACE Codes-01 must be reviewed to get the correct NACE Code, Sancert will ensure that we have the correct NACE coded auditor before a quotation can be given. The scope and NACE code will be listed on all relevant documentation, NACE code review will form part of the steering committee assessment
- Calculations will be made on the above factors (4.4.3), using the Quotation Calculation Sheet (F-QUOTE-003 – for single organisations & F-QUOTE-005 – for Multi-site organisation) for justification of figures.
- A quotation will now be generated on F-QUOTE-001, using the next quotation number in the sequence on the quotation register (F-QUOTE-004).
- Once the quotation has been generated, it must be reviewed and signed off in the review block at the bottom of each page on the quotation.
- The quotation can now be issued to the prospective client.
- “Acceptance of Quotation” (F-QUOTE-002) will be attached to the quotation, this will enable the client to accept and send back with an order number or go ahead if quotation is acceptable (Email, fax letter).
- Once the acceptance has been received, planning can take place for the audits to take place.
- Quotation will be filed in the quotation file, in quotation number order. The new quotation information will be filled in on F-QUOTE-004 (Quotation Register). The newest quotation will be filed on top.
- The Quotation (F-QUOTE-001), Acceptance of Quotation (F-QUOTE-002), Calculation Sheet (F-QUOTE-003 or F-QUOTE-005) and the Preparation for Quotation (F-QUEST-001) will all be filed together in the quotation file.
- If approval is received, a copy of the quotation (F-QUOTE-001) as well as the original Acceptance of Quotation (F-QUOTE-002), Calculation Sheet (F-QUOTE-003 or F-QUOTE-005) and the Preparation for Quotation (F-QUEST-001) will be removed out of the quotation file and filed together with the “copy” quotation in a customer file all relevant information to the audit / order will be filed in this file.

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Contract Review

Upon the receiving of an enquiry the CEO or Financial Director will make a decision if the company has the ability to do the audit.

A quotation will be supplied on this basis. If the client accepts the quotation a further contract review will be carried out using form QF-CR-01. This will allow us to verify that all information is correct, any cost issues are resolved, and that the auditor is available to perform the services required.

In the event that the scope of the contract changes, form QF-CR-02 will be used to do an amendment. A copy will be forwarded to the customer requiring the client to agree on modifications.

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