



## PREPARATION OF QUOTATIONS

### 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

Doc No: WP-QUOTE-01  
Version No: 005  
Date Reviewed: January 2021



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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-PCR-002 (Pre-client review and quote calculation multi-site) will be used to document how audit man days were determined for Initial and surveillance audits.
- WP-EACCODES-01 must be reviewed to get the correct EAC Code, Sancert will ensure that we have the correct EAC coded auditor before a quotation can be given. The scope and EAC code will be listed on all relevant documentation, EAC 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-PCR-001 – Pre-client review and quote calculation F-PCR-002 (Pre-client review and quote calculation multi-site for justification of figures.
- A quotation will now be generated on F-QUOTE-001, using the next quotation number in the sequence.
- Once the quotation has been generated, it must be reviewed and signed off in the review block at the bottom of the last page on the quotation.
- The quotation can now be issued to the prospective client. A copy of the Terms and Conditions F-T&C-001 will be emailed with the quotation. A copy is also available on [www.sancert.co.za](http://www.sancert.co.za), mention of this is made in the quotation.
- “Acceptance of Quotation” will be part of 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). It is noted that if a client sends an email or pays the invoice, it is deemed that the invoice and terms and conditions have been accepted.
- Once the acceptance has been received, planning can take place for the audits to take place.
- Quotation will be saved under the “quotation” tab as well as in the customer folder on google drive.
- If approval is received, a copy of the quotation (F-QUOTE-001) as well as the signed Acceptance of Quotation, Pre-Client Review and Quote Calculation Sheet (F-PCR-001 or F-PCR-002) and the Quotation Quest (F-QUEST-001) will be saved in the general folder for the applicable client.
- New quotations will be generated for all recertification clients, Pre-Client Review and Quote Calculation Sheet (F-PCR-001 or F-PCR-002) will be completed, this is to ensure customer details, staff compliment and scope of supply is still relevant. F-QUEST-001 is NOT required for recertification clients.

Doc No: WP-QUOTE-01  
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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. 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 may be used do an amendment. A copy will be forwarded to the customer requiring the client to agree on modifications.

Doc No: WP-QUOTE-01  
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*This document is deemed to be uncontrolled if printed.*