Procedure: [Quoting and Orders Doc Title]

1. SUMMARY
   1. The purpose of this procedure is to define the methods for capturing customer requirements, and then reviewing those requirements to ensure [Short Client Name] has the capability to meet those requirements before committing to providing [Products or Services Plur.].
   2. The [who?] is responsible for implementation and management of this procedure.
2. REVISION AND APPROVAL

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| **Rev.** | **Date** | **Nature of Changes** | **Approved By** |
| [Rev Number] | [Date of Issue] | Original issue. | [Procedure Approver Name] |
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1. CAPTURE OF REQUIREMENTS
   1. During the [name of your quoting or business development process] process, customer requirements are captured and recorded.
   2. Details here on how such requirements are captured, typically by sales or other business development staff. Include a reference to whatever records are used to record this information.
   3. [Who?] will also ensure that [Short Client Name] has suitable access to all applicable statutory and regulatory requirements which may apply to the work.
   4. [Who?] will also document any requirements not specified by the customer, but for which [Short Client Name] knows will apply to the work.
2. REVIEW OF REQUIREMENTS
   1. [Who?] will oversee the review of incoming requirements, to ensure [Short Client Name] has the capability to meet those requirements. This must occur before any commitment to provide the [Products or Services Plur.] to the customer.
   2. Details here on how the review is conducted, and what records are kept of the review and approval.
   3. The review of requirements may require a formal risk assessment, at the discretion of management. If so, the risk assessment shall define the expected risks associated with the work, as well as a mitigation plan for each identified risk. If useful, risks may be ranked by likelihood of occurrence and severity of the impact of the risk, if it does occur. Management may elect to accept certain risks as a function of doing business, but if so, this must also be indicated. When a risk assessment is conducted, this will be filed with the appropriate requirements information where?.
   4. If a formal quotation is to be prepared for the customer, this shall be developed by the [who?] with input from all proper departments and staff, and released to the customer after reviewed and approved by [who].
   5. When a contract or purchase agreement is subsequently received, it shall be reviewed by [who?] to ensure there are no differences between it and any previously submitted quotations. If there are differences, the [who?] shall resolve these with the customer before the contract is accepted.
   6. Acceptance of a contract or purchase agreement is to be done by [who?] and recorded [how?].
3. CHANGES TO REQUIREMENTS
   1. Where the customer requests changes to active work, the changes must also be captured, reviewed and approved prior to committing to the change.
   2. The change will consider the impact on work already delivered, work underway, and planned work. Problems or concerns over implementing the change will be communicated by [who?] with the customer. Such changes may require renegotiation of contracts.
   3. If changes are agreed upon, the [who?] will work with the affected departments to implement the change. The disposition of existing work shall be determined by management, along with input from the customer.
   4. Where changes are required by [Short Client Name], these will be negotiated with the customer before implementation, and a record of the customer’s acceptance maintained.