GRANT

Modern People

QUOTE

ACTIVITY	APPROVAL	DEFIN. OF DONE	ONGOING TASKS	OUTPUT
SEND RFQ TO SUPPLIERS (LOCAL)	KEVIN	QUOTE BACK		
SEND RFQ TO SUPPLIERS (OVERSEAS)	SAI	QUOTE BACK		SAVE TO PRICE LIST FOLDER
COMPARE TO SIMILAR PAST PROJECT	POINT OF CONTACT	CHERRA CHECK		CHERRA NUMBERS
CALCUL. PROJECT TEAM RESOURCING	SAGAR	SUPPLY FEEDBACK		LEAD TIME CONFIRM
CALCUL. LOCAL TEAM RESOURCES	BERNARDO	PROD. SCHEDULE CHECK		LEAD TIME CONFIRM
EXISTING CLIENTS PAST QUOTE CHECK	CHERRA	CHERRA CHECK	MYOB SYSTEM	CHERRA NUMBERS
PREPARE QUOTE SPEC (LOCAL)	KEV	MARCO REVIEW	OVER $5000 CRM QUOTE UNDER EMAIL SERV.	SEND TO CUSTOMER "CC" MARCO
PREPARE DRAFT QUOTE (PROJECT)	SAI	COSTING ANALYSIS	OVER $5000 CRM QUOTE UNDER EMAIL SERV.	SEND TO MARCO FOR APPROVAL
DRAFT PRICELIST QUOTE	CHERRA ⬇️ RECEPTION	SENT TO CLIENT	OVER $5000 CRM QUOTE UNDER EMAIL SERV.	SAVE TO SERVER
LEAD TIME + MARGIN CHECK (QUOTE REVIEW)	MARCO	MAX Ⓛ 60% MIN 30% MAX Ⓞ 35% MIN 15%	$20K THRESHOLD	"APPROVE" EMAIL OR FEEDBACK

QUOTE

ACTIVITY	APPROVAL	DEFIN. OF DONE	ONGOING TASKS	OUTPUT
FINALISE QUOTE (PROJECTS)	MARCO	APPROVAL TO SAI + ARCHIVE	CRM > $5K EMAIL < $5K -ATTACH ORIG RFQ'S	SAI SENDS THROUGH TRADEIFY