



Standard Operating Procedure for Sales Order Processing (China Warehouse)

I. China Warehouse


RESPONSIBLE PARTY	ACTION
Customer	1. Submit Purchase Order (PO) to Sales Assistant with Sales Account Manager on copy
Sales & Operations Specialist (AP)	2. Review PO for adequacy and completeness <ul style="list-style-type: none"> a. Such items to be reviewed: Billing Address, Shipping Address, Shipping Instructions, Freight Forwarder, Part Number, Part Description, Quantity (ensure the quantities result in full cartons), MOQ, Requested Ship Date, Price, and Terms b. If requirements are incomplete, then contact the Customer and obtain the necessary information
Sales Account Manager	3. For non-standard product orders, execute Standard Operating Procedure for Quoting a Non-Standard Product
Sales & Operations Specialist (AP)	4. Verify the inventory required to fulfill the order is available <ul style="list-style-type: none"> a. If the warehouse does not have adequate inventory, contact Materials Planner Specialist and Procurement Specialist and provide them the part number and quantity needed b. Materials Planner Specialist to provide lead-time for replenishment within 72 hours and to execute Standard Operating Procedure for Stock Replenishment (China Warehouse)
	5. Based on inventory status and replenishment lead-times, determine the ship date and enter/post Sales Order (SO) into the system <ul style="list-style-type: none"> a. If inventory is available, the ship date must be determined within 24 hours of receiving the PO b. If part number is not setup in the system, contact Product

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	Development Team to execute Standard Operating Procedure for Generating a New Part Number
Sales & Operations Specialist (AP)	6. Review the SO for accuracy
	7. Verify all products on the SO are listed on the warehouse product list <ul style="list-style-type: none"> a. If not listed on the product list, contact Product Development Team to update the list with the necessary information
	8. Provide SO/Order Form to the Warehouse, which includes ship date, shipping instructions, freight forwarder information, etc. <ul style="list-style-type: none"> a. Include Quality Specialist on the notification to the Warehouse b. For advanced payments orders, include a statement in the notification to the Warehouse to not ship the order without approval from KDI
Warehouse (CN)	9. Provide confirmation on ability to meet ship date within 12 hours to Sales & Operations Specialist (AP) <ul style="list-style-type: none"> a. Must provide firm ship date b. Must take order consolidation into consideration
Sales & Operations Specialist (AP)	10. Enter confirmed ship date into the system and send an Order Acknowledgement to the Customer with Sales Account Manager on copy
	11. For Advance Payment/Credit Card Orders, send a copy of the Proforma Invoice to the customer with the payment deadline to avoid delay in shipment
	12. If the customer requests a Change Order, enter changes into the system and repeat Steps 8-13 <ul style="list-style-type: none"> a. Highlight in yellow the changes on the SO/Order Form before providing to the Warehouse 13. If there are any shipment delays, notify Warehouse and Logistics team and repeat Steps #10-13 as needed <ul style="list-style-type: none"> a. Include Procurement Specialist, Materials Planner Specialist, and Sales Account Manager on notification

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Sales & Operations Specialist (AP)	<p>14. For orders with advanced payment terms, provide bank receipt to accountsreceivable@kentdisplays.com or submit the credit card information in token email sent by KDI accounts team</p> <p>a. <u>Note</u>: To avoid delays in shipment, it is suggested that the customer provide payment 3 days in advance</p> <p>b. For credit card orders, credit card information must be faxed, called in, or submit in the token email by the customer</p>
Sales & Operations Specialist (AP)	15. For order with advanced payment terms, provide approval to the Warehouse to release the shipment
Logistics Company/ Sales & Operations Specialist (AP)	16. Book the shipment with customer's freight forwarder 3 days in advance
	17. If approval has not been provided for an advance payment order, contact the Sales Assistant for an update
Warehouse (AP)	<p>18. Ship the order</p> <p>a. If the company chop is needed to generate the shipping documents, then the paperwork must be approved by the Sales & Operations Specialist (AP) prior to shipment</p> <p>b. If the original shipping documents are needed for shipment</p> <p>i. Sales & Operations Specialist (AP) to provide chopped/signed documents 3 days in advance to Warehouse</p> <p>ii. Warehouse to place documents in a sealed polybag and attach to cargo</p>
	<p>19. Provide confirmation that the order has physically shipped along with the shipping details, Tracking Number (if available) and photos of the shipment</p> <p>a. This information must be provided to KDI Sales Assistant no later than the same day as order has shipped</p> <p>b. If shipment is delayed unexpectedly, Warehouse must notify the Sales Assistant (AP) immediately.</p>
Sales & Operations Specialist	20. Verify the shipping details for accuracy

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(AP)	21. Create the Packing Slip (PS) and Commercial Invoice (CI) and send to the Customer within the same day the order has shipped a. Include Sales Account Manager on the email to the customer
	22. Provide the PS, CI and approval to internationalship@kentdisplays.com to release order in the system a. Include Sales Account Manager on the email
Accounting (HQ)	23. Process the order internally
	24. Invoice the Customer as necessary a. Include payment deadline in the notification to the Customer
Warehouse (AP)	25. Provide monthly billing summary including shipping details to Sales & Operations Specialist (AP) and Supplier Development Specialist
Sales & Operations Specialist (AP)	26. Review the invoice summary for accuracy and provide feedback to the Warehouse a. Include Supplier Development Specialist
Warehouse (CN)	27. Provide final invoice and billing summary for payment to accountspayables@kentdisplays.com a. Include Sales & Operations Specialist (AP), Supplier Development Specialist on the notification
Sales & Operations Specialist (AP)	28. Review the final invoice and billing summary and provide approval to the Warehouse a. Include Accounts Payable and Supplier Development Specialist b. Include the final invoice and billing summary on the approval
	29. Responsible for On Time Delivery (OTD) Performance out of China Warehouse a. Track and keep a report for each shipment using the Customer Order Tracking Report
	30. Monthly, compile data and submit an OTD/assessment summary report to Supplier Development Specialist and VP of Product Development/Management

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II. Definitions


- a. AP – Asia Pacific
- b. HQ – Headquarters
- c. CN – China

III. Related Documents


- a. Kent Displays Inc. Contact List
- b. Standard Operating Procedure for Quoting a Non-Standard Product
- c. Standard Operating Procedure for Stock Replenishment (Asia Pacific/Hong Kong Warehouse)
- d. KDI Late Shipment Reason Codes List
- e. Customer Order Tracking Report
- f. OTD/Assessment Summary Report

IV. Document Revision Details

REV	REVISIONS	DCN	DATE	REVIEW	BY
A	Initial Release	N/A	2015-01-30	N/A	NLV
B	Added VP of Operations to the list of recipients of the monthly invoice in Step #28, Added additional steps for shipments that require original shipping documents, Removed Materials Planner Specialist from the list of recipients on the order notification to the warehouse in Step #8, Added Step #14 regarding late shipment.	N/A	2015-05-02	N/A	NLV
C	Revised Responsible Party for Step #30 from Warehouse (HQ) to Warehouse (AP). Included list of recipients for invoice in Step #30.	N/A	2015-06-11	N/A	NLV
D	Added the billing summary as an item to provide to KDI along with the final invoice. Added Step#31 for the Sales Assistant to provide approval for payment to accounts payable.	N/A	2015-06-23	N/A	NLV

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E	Removed Accounts Payable from steps #29 and #30. Sales Assistant to only include Accounts Payable on the final approval email to warehouse. Revised response lead-time on replenishment schedule in Step #7b to 72 hours. Added a step (#15b) to enter the late reason code when the ship date is revised.	N/A	2015-10-21	N/A	NLV
F	Updated process to represent current process	N/A	2018-09-24	SS	NLV
G	Updated process to represent current process	N/A	2024-07-03	SS	NLV

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