

Hardware Ordering Process - Steps in order

1. Request from client
2. Enter this information into Capsule
3. Hardware opportunity to be separate from software
4. We are explicit in the hardware required and pricing is current (see quote process)
5. Raise a quote in Quotient
6. Refer to template for standard orders (who owns and where) - they need to be up to date and easy to use? We can only have standard templates for certain things so the Director of Hardware to review and add small items to standard quotes. All other bits and pieces to be provided to the Operations Support Manager to add to the hardware register.
7. Refer to pricing list in the hardware register
8. Ask the Director of Hardware for Bespoke
9. Quote goes to the client via email PDF and CC the Operations Support Manager
10. Client raises a PO (purchase order) and provides to CSM and/or Operations Support Manager (not accounts) to confirm
11. CSM updates quotient with PO and quote in the order reference number box (as Xero doesn't connect the two) and approve quote
12. That goes to Xero P&L
13. CSM emails the PO to the Director of Hardware and the CSM and/or Operations Support Manager adds to the hardware register (see point 4 below)
14. CSM sends standard email with important set up information
15. Hardware register:
https://docs.google.com/spreadsheets/d/1KNYiNAchsVvQjKRuC8QAEftv5mjcn2_xg5Vs1hU9CNE/edit#gic
16. Operations Support Manager enter information provided by CSM's to **columns A-F**
17. The Director of Hardware has responsibility for columns **G-K**
18. CSM's needs confirmation of critical dates agreed with client and the Director of Hardware
19. on the hardware register, there is a due date column for VMS hardware and a separate due date column for Turnstiles
20. Hardware register must have very specific address details and contact people for the site
21. Delivery column must be kept current by the Director of Hardware
22. Every order needs to have a tracking number (the Director of Hardware to enquire about DHL etc. to set up a single courier service with routine pick-ups etc. and assess costs) we want one place for tracking VMS related hardware etc. For kiosks they are sent from AMP (supplier) by Cope. Add tracking number and courier account log in details.
23. Operations Support Manager to manage **columns J,K,L,M**
24. We need to have delivery confirmation updated in the Hardware Register
25. When we get confirmation we need to raise a ticket for VMS set-up and a separate tick for Turnstiles
26. Joel to plan a week ahead on Mondays for setup. When there are variation, send a slack message to the Operations Support Manager who will update software setup due date and inform the clients.
27. Anything that requires hardware must first set up as a project as the first trigger

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