
Overview

This standard is about fulfilling customer requirements by ordering outof-stock or 'special order' motor vehicle items. Chasing the order and handling all relevant documentation is also included.

For this standard parts may be new, refurbished or recycled.

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Performance

criteria

- You must be able to:
- P1 check existing orders for delivery lead time prior to placing any new orders
 - P2 identify suppliers that:
 - P2.1 can supply the parts your customer requires
 - P2.2 can specify the delivery time
 - P3 confirm your customer's understanding of any conditions applying to their order and gain their agreement prior to raising the order
 - P4 gain your customer's agreement on price, discount and delivery dates and any necessary authorisation prior to placing an order
 - P5 gain authorisation for accepting and processing orders when the value exceeds the limit you are able to process, when necessary
 - P6 gain the appropriate payment, or the necessary authorisation for special items, prior to accepting your customer's order
 - P7 keep customers promptly informed if there are any anticipated delays in delivery accurately and
 - P8 offer customers suitable alternatives where applicable, if their original requirements cannot be met
 - P9 promptly record and report the reasons for any lost sales to the relevant person(s) accurately and
 - P10 follow up your customer's orders with suppliers when required
 - P11 promptly report any difficulties in supplying customer orders to the relevant person(s) if required
 - P12 update order records accurately upon receipt of customers order requirements
 - P13 promptly inform customers of the arrival of their order
 - P14 ensure documentation is accurate, complete and promptly forwarded to the relevant person(s) in the required format

Knowledge and understanding

You need to know and understand:

Legislative and organisational requirements and procedures

- K1 how to identify and access potential suppliers
- K2 how to operate the parts identification and order system used in your organisation
- K3 how to check the 'stock on order' situation
- K4 how to identify and calculate the price of special order parts with regards to mark up and gross profit/margin
- K5 how to process and complete documentation for orders
- K6 how to record and report lost sales
- K7 how to update stock records on receipt of goods
- K8 how to communicate clearly, politely and accurately with customers and suppliers
- K9 the company procedure on receipt of the order for non-stock parts
- K10 the types of vehicle and systems that your company supply parts for
- K11 the conditions applying to orders and the importance of informing customers and gaining their agreement to such conditions and which items must always be paid for in full prior to ordering
- K12 your organisation's systems and procedures for:
 - K12.1 the ordering of non-stock parts
 - K12.2 discount
 - K12.3 booking non-stock parts to customer accounts
 - K12.4 reporting and recording lost sales
 - K12.5 organising delivery and collection of parts from local suppliers
- K13 the person to whom you should report any problems or difficulties in meeting customer needs
- K14 suitable time scales and methods for progressing orders
- K15 the importance of keeping customers informed of the progress of their order
- K16 the order value you are able to accept without reference to your line manager/supervisor

Scope/range

1. Relevant persons include:

- 1.1. manager
- 1.2. supervisor
- 1.3. team leader
- 1.4. senior manager

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Additional information

This section contains examples and explanations of some of the terms used but does not form part of the standard.

Glossary**Conditions applying to orders:**

Examples include minimum order quantities, 'no return' policies, reduced purchase terms (e.g. VOR), 'payment with order only policies', authorisation by a named person only, etc.

Documentation

manual and/or computerised recording systems for ordering, receipt of goods and any payments

Non-stock parts:

items normally stocked but currently out of stock and special orders

Parts

These are motor vehicle parts (new, refurbished or recycled), any accessories and consumables

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