

PROCESS MAPPING: A Sales Order Narrative

The process begins when an external salesperson makes a sales call on a customer and issues a price quote. A copy of the sales quote is given to the customer and another is sent to the internal sales office.

The customer calls the internal sales office to place the order. They ask for a delivery date. To get a delivery date, the internal sales office contacts the warehouse supervisor to find out if the order can be shipped from inventory. The warehouse supervisor must check the inventory and then respond with a date.

Next, the internal sales clerk must check the customer's credit to make sure the order does not exceed their credit limit. To do this, they fill out a credit-check form and send it to Accounting. Accounting performs the credit check, fills in the form and returns it to the internal sales office.

The internal sales clerk checks the available balance against the order and if there is sufficient credit, the sales clerk sends the customer the order form with the delivery date for approval. The customer signs the order and sends it back to internal sales.

The internal sales office receives the final order and generates a packing list and an invoice. The packing list is sent to the warehouse and the invoice is sent to accounting. At the warehouse, the products are picked from the shelves, packed, and shipped to the customer. The warehouse clerk sends a final packing list to Accounting showing the goods shipped.

Accounting receives the invoice from sales and the packing list from the warehouse and checks that they match. They then generate a final invoice and send it to the customer for payment.

Once the customer receives their goods and their invoice, they send a check to Accounting. Accounting receives the check and enters the payment into the system. They then send a final copy of the order back to the external sales person for their records. This closes the sales process

Who are all of the actors?

What are the steps each performs in the process – in sequence?

Map the process