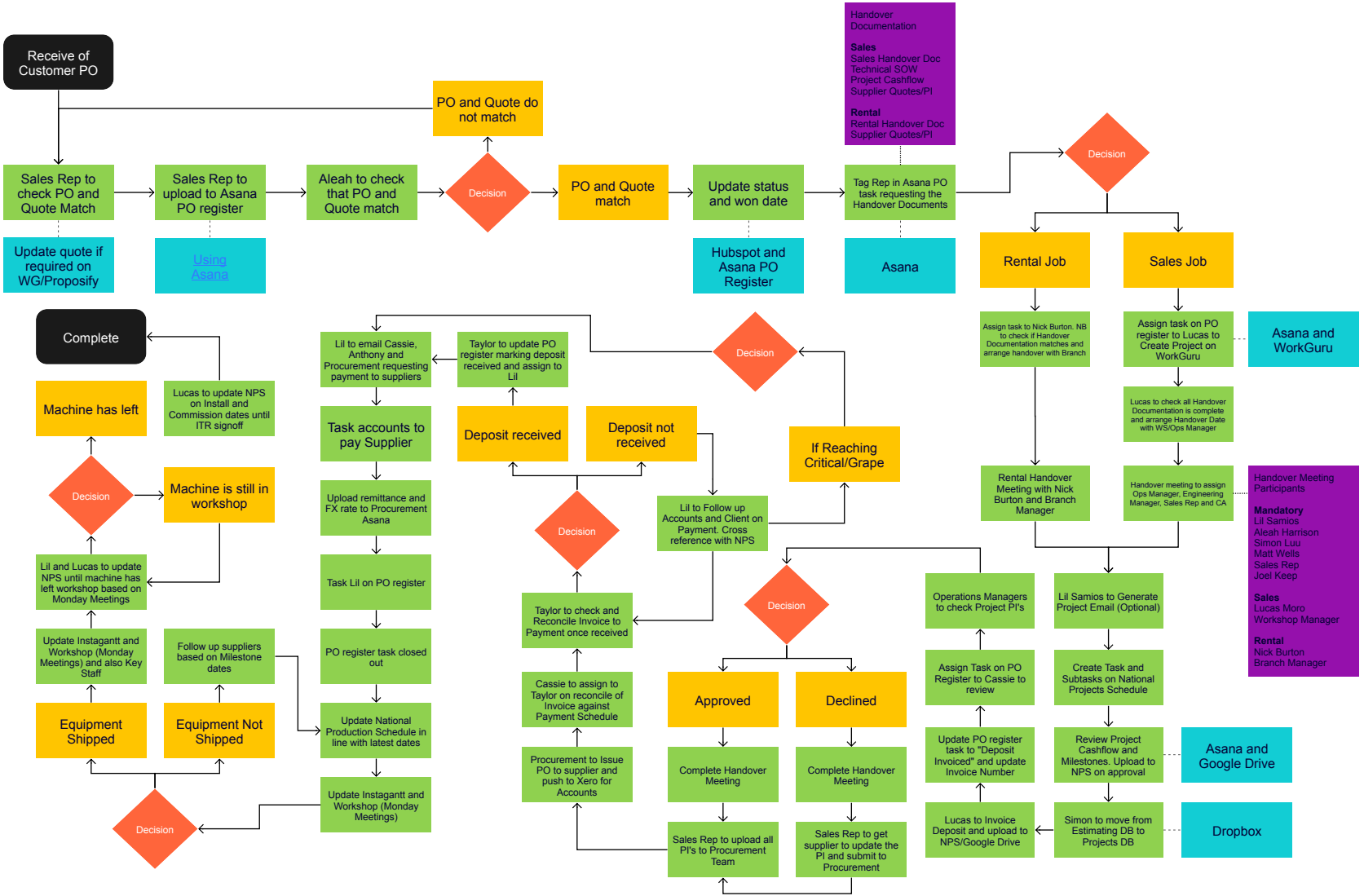
Receive of Customer PO
PO and Quote do not match
Sales Rep to check PO and Quote Match
Sales Rep to upload to Asana PO register
Aleah to check that PO and Quote match
Decision
PO and Quote match
Update status and won date
Tag Rep in Asana PO task requesting the Handover Documents
Handover Documentation
Sales
Sales Handover Doc
Technical SOW
Project Cashflow
Supplier Quotes/PI
Rental
Rental Handover Doc
Supplier Quotes/PI
Decision
Update quote if required on WG/Proposify
Using Asana
Hubspot and Asana PO Register
Asana
Rental Job
Sales Job
Assign task to Nick Burton. NB to check if Handover Documentation matches and arrange handover with Branch
Assign task on PO register to Lucas to Create Project on WorkGuru
Asana and WorkGuru
Lucas to check all Handover Documentation is complete and arrange Handover Date with WS/Ops Manager
Rental Handover Meeting with Nick Burton and Branch Manager
Handover meeting to assign Ops Manager, Engineering Manager, Sales Rep and CA
Handover Meeting Participants
Mandatory
Lil Samios
Aleah Harrison
Simon Luu
Matt Wells
Sales Rep
Joel Keep
Sales
Lucas Moro
Workshop Manager
Rental
Nick Burton
Branch Manager
Complete
Machine has left
Lucas to update NPS on Install and Commission dates until ITR signoff
Decision
Machine is still in workshop
Lil and Lucas to update NPS until machine has left workshop based on Monday Meetings
Update Instagantt and Workshop (Monday Meetings) and also Key Staff
Follow up suppliers based on Milestone dates
Equipment Shipped
Equipment Not Shipped
Decision
Lil to email Cassie, Anthony and Procurement requesting payment to suppliers
Taylor to update PO register marking deposit received and assign to Lil
Task accounts to pay Supplier
Upload remittance and FX rate to Procurement Asana
Task Lil on PO register
PO register task closed out
Update National Production Schedule in line with latest dates
Update Instagantt and Workshop (Monday Meetings)
Decision
Deposit received
Deposit not received
If Reaching Critical/Grape
Lil to Follow up Accounts and Client on Payment. Cross reference with NPS
Decision
Taylor to check and Reconcile Invoice to Payment once received
Cassie to assign to Taylor on reconcile of Invoice against Payment Schedule
Procurement to Issue PO to supplier and push to Xero for Accounts
Decision
Approved
Declined
Complete Handover Meeting
Complete Handover Meeting
Sales Rep to upload all PI's to Procurement Team
Sales Rep to get supplier to update the PI and submit to Procurement
Operations Managers to check Project PI's
Lil Samios to Generate Project Email (Optional)
Assign Task on PO Register to Cassie to review
Create Task and Subtasks on National Projects Schedule
Update PO register task to "Deposit Invoiced" and update Invoice Number
Review Project Cashflow and Milestones. Upload to NPS on approval
Asana and Google Drive
Lucas to Invoice Deposit and upload to NPS/Google Drive
Simon to move from Estimating DB to Projects DB
Dropbox