

Quality management: goals, procedures and non-conformances

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Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

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Set quality goals, document procedures, log problems and record the actions taken.

Advanced · About 30 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Production** add-on, which any plan can add. Contact us to add it.

Overview

Beyond checking goods, you can manage quality as a system: set **goals**, write down **procedures**, record **non-conformances** when things go wrong, and review progress in meetings. This helps with standards such as ISO 9001.

> This module is for businesses that need formal quality records. A small shop may only need Quality inspections.

Steps

Quality goals

1. Search for **Quality Goal** and click **Add**.
2. Enter the goal, such as *Customer complaints below 2%*, a **Monitoring Frequency**, the **Procedure** and the **Objectives** with a measurable target and unit.
3. Save. Review progress in each meeting.

Quality procedures

1. Search for **Quality Procedure** and click **Add**.
2. Write the procedure name, such as *Handling returned goods*, and the **Process Owner**.
3. List the steps, or link sub-procedures in the **Processes** table. Add a parent procedure to build a tree.
4. Save. Staff can read it from the list.

Record a non-conformance

1. Search for **Non Conformance** and click **Add**.
2. Enter the **Subject**, the **Procedure** it relates to and the details of what happened.

3. Describe the **Corrective Action** and **Preventive Action**, the root cause and who is responsible.
4. Set the **Status**: *Open*, *Resolved* or *Cancelled*, and close it once fixed.

Quality actions and reviews

- Use **Quality Action** to track the work arising from a review or non-conformance.
- Use **Quality Review** to record goal results for a period, and **Quality Meeting** for minutes and decisions.

Practical example

A batch of juice was bottled with the wrong label. The quality officer logs a non-conformance, finds the root cause (labels stored together), changes the storage procedure, and links the corrective action. Next month's review shows no repeats.

Important notes

- Keep procedures short and clear, and keep them current. Old procedures cause harm.
- Use non-conformances to learn, not to blame.

Common mistakes

- Closing a non-conformance without root cause or action.
- Goals with no number.

Next steps

Return to Quality inspections.

Related documentation

- Quality inspections
- Logging and resolving customer issues
- Workflows and notifications