

# Standard Operating Procedure (SOP)

## Customer Order Taking and Service Guidelines

This SOP establishes **customer order taking and service guidelines** to ensure efficient, accurate, and courteous handling of customer orders. It covers the process of receiving and confirming orders, verifying product availability, addressing customer inquiries and concerns, and providing timely updates on order status. The guidelines emphasize clear communication, attention to detail, and a customer-centric approach to enhance satisfaction, minimize errors, and promote repeat business. Proper documentation and follow-up procedures are also included to maintain service quality and accountability.

### 1. Purpose

To standardize the process of taking customer orders and delivering high-quality customer service for every transaction.

### 2. Scope

This SOP applies to all staff involved in customer order management, including front-line service representatives and order processing teams.

### 3. Responsibilities

- **Customer Service Staff:** Receive and confirm orders, communicate clearly with customers, verify product availability, handle inquiries and complaints.
- **Order Processing Team:** Ensure accurate entry, documentation, and fulfillment of orders.
- **Supervisors/Managers:** Oversee process compliance and resolve escalated customer issues.

### 4. Procedure

Step	Description	Responsible Person
4.1 Receiving Orders	Greet the customer courteously and listen attentively. Capture order details clearly (product/service, quantity, specifications, etc.) via the designated system (phone, email, POS, online, etc.).	Customer Service Staff
4.2 Confirming Order Details	Repeat the order back to the customer to confirm accuracy. Clarify any ambiguities or special instructions.	Customer Service Staff
4.3 Verifying Product Availability	Check stock levels and product/service availability. Inform the customer of any delays or substitutions if necessary.	Customer Service Staff
4.4 Handling Inquiries and Concerns	Address customer questions promptly and courteously. Escalate complex issues to a supervisor as needed.	Customer Service Staff
4.5 Recording and Processing Orders	Enter the order into the system accurately with all necessary details. Generate order confirmation (number/receipt/email) and provide it to the customer.	Order Processing Team
4.6 Providing Updates	Keep the customer informed about the order status, especially for delays or changes. Send timely updates (text, email, phone call) as appropriate.	Customer Service Staff

Step	Description	Responsible Person
4.7 Documentation and Follow-Up	Maintain detailed records of each order, including communications and resolutions. Conduct post-order follow-up to ensure customer satisfaction if applicable.	Order Processing Team/Customer Service Staff

## 5. Communication Guidelines

- Use polite, professional language at all times.
- Explain next steps and timeframes clearly to the customer.
- Document all interactions and customer requests accurately.

## 6. Documentation & Records

- All orders and related communications must be documented in the order management system.
- Retain order records for at least the period required by company policy or regulatory guidelines.

## 7. Review & Revision

- This SOP will be reviewed annually and updated as necessary to reflect changes in products, services, or procedures.

## 8. References

- Customer Service Manual
- Order Management System User Guide