

Standard Operating Procedure (SOP)

Order Placement and Confirmation Procedures

This SOP details the **order placement and confirmation procedures**, covering the steps for accurate order entry, verification of order details, communication protocols with customers, confirmation methods, handling order modifications and cancellations, and record-keeping requirements. The objective is to ensure efficient and error-free processing of customer orders, enhancing customer satisfaction and operational accuracy.

1. Purpose

To provide clear instructions for processing customer orders, ensuring accuracy, proper communication, and complete documentation.

2. Scope

This procedure applies to all staff involved in sales, customer service, and order fulfillment.

3. Responsibilities

- **Sales/Order Entry Staff:** Accurately enter orders and confirm details.
- **Customer Service:** Communicate order status, handle modifications and cancellations.
- **Management:** Oversee compliance and handle escalations.

4. Procedures

4.1 Order Placement

1. Receive order from customer via approved channels (email, phone, online portal, etc.).
2. Collect all necessary order information:
 - Customer name and contact details
 - Product/service description and specifications
 - Quantity, pricing, and special instructions (if any)
 - Delivery address and preferred delivery date
 - Payment method
3. Enter order details into the Order Management System (OMS).

4.2 Order Verification

1. Review the entered order data for completeness and accuracy.
2. Validate product codes, quantities, prices, and customer information against submitted documentation or previous records.
3. Resolve any discrepancies before proceeding.

4.3 Customer Communication & Confirmation

1. Send written order confirmation to the customer, including:
 - Order summary
 - Expected delivery timeline
 - Terms and conditions
 - Order reference number
2. Document customer confirmation (via email, electronic signature, or phone call log).

4.4 Order Modifications & Cancellations

1. Receive modification or cancellation request from customer.
2. Verify requestor's authority and confirm details in writing.
3. Update the order and OMS accordingly.
4. Communicate updated status to all relevant parties.
5. Document the change/cancellation in the customer record.

4.5 Record-Keeping Requirements

- Maintain copies of order forms, confirmations, modifications, and correspondence for a minimum of **2 years** (or

- per company policy).
- Ensure documentation is stored securely and is easily retrievable for audits or customer inquiries.

5. Reference Table: Order Handling Process Overview

Step	Responsible Person	Documentation
Order Placement	Sales/Order Entry	Order Form, Email/Call Log
Order Verification	Order Entry/Manager	Order Entry Screen, Verification Checklist
Confirmation	Customer Service	Confirmation Email, Signed Acknowledgement
Modification/Cancellation	Customer Service	Modification/Cancellation Request, Updated Order
Record-Keeping	Sales Dept./Records Admin	Archived Orders, Communications

6. Revision History

Date	Version	Changes	Approved by
2024-06-10	1.0	Initial release	Operations Manager