

# SOP: Order Taking and Confirmation Procedures

This SOP details the **order taking and confirmation procedures**, including steps for receiving customer orders, verifying order accuracy, recording order details, confirming order receipt with customers, handling special requests, managing order amendments, and ensuring timely communication between sales, inventory, and fulfillment teams. The purpose is to streamline the order processing workflow, reduce errors, and enhance customer satisfaction by providing clear guidelines for efficient and accurate order handling.

## 1. Purpose

To ensure all customer orders are received, verified, recorded, and confirmed accurately and efficiently. This helps maintain high customer satisfaction, prevent errors, and optimize communication across departments.

## 2. Scope

This SOP applies to all staff involved in the order taking, confirmation, and processing workflow, including sales, customer service, inventory, and fulfillment teams.

## 3. Responsibilities

Role	Responsibility
Sales/Customer Service	Receive and verify customer orders; communicate with customers regarding order details and confirmation.
Inventory Team	Check product availability and update stock levels as required.
Fulfillment Team	Prepare and dispatch orders following confirmation and approval.
Order Processing Manager	Oversee order flow, resolve escalated issues, and ensure compliance with SOP.

## 4. Procedures

- Receiving Customer Orders**
  - Accept orders via approved channels (e.g., phone, email, online platform).
  - Gather all necessary information: customer details, product codes, quantity, delivery/pickup instructions.
- Verifying Order Accuracy**
  - Confirm product availability and pricing.
  - Cross-check order details with customer's previous records (if applicable).
- Recording Order Details**
  - Enter complete order details into the Order Management System (OMS).
  - Double-check entries for accuracy and completeness.
- Order Confirmation with Customers**
  - Send a confirmation (email/call/message) to the customer including:
    - Order summary
    - Estimated delivery/pickup date
    - Order number/reference
  - Address and confirm any special requests or customizations.
- Handling Special Requests**
  - Review all special requests for feasibility and document them in the OMS.
  - Communicate with relevant departments (inventory, fulfillment) as needed.
- Managing Order Amendments**
  - Accept amendment requests only via approved channels.
  - Verify changes with the customer and update OMS accordingly.
  - Re-confirm amended order details with the customer.
- Communication and Handover**
  - Notify inventory and fulfillment teams of new/updated orders promptly.
  - Maintain clear communication channels between all involved teams.

## **5. Documentation and Records**

- Ensure all order details and communication records are stored and accessible in the OMS.
- Keep a digital or paper trail of special requests, amendments, and confirmations for at least 12 months.

## **6. Review and Continuous Improvement**

- Conduct periodic reviews of order processing to identify bottlenecks or errors.
- Update this SOP as needed to incorporate best practices and process improvements.

## **7. References**

- Order Management System (OMS) User Guide
- Customer Service and Communication Policies