

Standard Operating Procedure (SOP): Order Taking and POS System Operation

This SOP details the procedures for efficient **order taking and POS system operation**, covering customer interaction, accurate order entry, payment processing, handling of discounts and promotions, troubleshooting common POS issues, end-of-day reconciliation, and data security protocols. The goal is to ensure smooth transaction flow, enhance customer satisfaction, and maintain accurate sales records.

1. Customer Interaction & Order Taking

1. Greet the customer politely and offer assistance as needed.
2. Listen carefully to the customer's order preferences and confirm any special requests.
3. Clarify and repeat the order to ensure accuracy.
4. Inform the customer of current promotions, combo offers, or discounts if applicable.

2. Accurate Order Entry in the POS System

1. Select/Create the appropriate order type (dine-in, takeout, delivery) in the POS system.
2. Enter all items as specified by the customer, including modifiers or special instructions.
3. Double-check the order onscreen for accuracy with the customer before proceeding.

3. Payment Processing

1. Present the final amount to the customer.
2. Select the correct payment method in the POS (cash, card, digital wallet, etc.).
3. Process the payment as per POS prompts.
4. Hand the receipt and any change (if applicable) to the customer, thanking them for their purchase.

4. Handling Discounts and Promotions

1. Verify eligibility for any discounts or promotions (e.g. coupons, loyalty cards).
2. Apply the discount in the POS system following company guidelines.
3. Ensure the discounted price is reflected correctly before processing payment.
4. Retain or validate any required physical or digital promo codes/coupons.

5. Troubleshooting Common POS Issues

- **System hangs or unresponsive:** Reboot the POS terminal and log in again.
- **Payment processing errors:** Check internet connection; if problem persists, contact the supervisor or IT support.
- **Receipt printer jam:** Follow manufacturer instructions to clear jams and reload paper.
- **Incorrect item entry:** Void the item/order with supervisor authorization and re-enter correctly.

6. End-of-Day Reconciliation

1. Print the end-of-day sales report from the POS system.
2. Count and reconcile cash in the register with system totals, noting any discrepancies.
3. Ensure all card and digital payments have been successfully processed.
4. Submit sales reports and funds as per company policy.

7. Data Security Protocols

1. Log out or lock the POS terminal when not in use.
2. Do not share login credentials; use only assigned user accounts.
3. Shred or securely dispose of any sensitive customer information (e.g., printed credit card slips).
4. Regularly update passwords as per company IT policy.

Review & Updating

This SOP should be reviewed annually or after any changes to the POS system or operational procedures. Staff must be

trained accordingly.

Prepared by: _____
Effective date: _____