Standard Operating Procedure (SOP): Customer Order Taking and Point-of-Sale Procedures

Purpose

This SOP defines the standard processes for **customer order taking and point-of-sale procedures**, including accurate order entry, handling customer inquiries, processing payments, issuing receipts, managing returns and exchanges, and maintaining transaction records. The goal is to ensure efficient, accurate, and courteous service that enhances customer satisfaction and supports seamless sales operations.

Scope

This SOP applies to all staff members involved with sales transactions at the point-of-sale (POS) terminals, including cashiers, sales associates, and supervisors.

Responsibilities

- **Cashiers / Sales Associates:** Follow procedures for order taking and POS operations; ensure accuracy and courtesy.
- **Supervisors:** Provide support, resolve escalated issues, and ensure compliance with SOPs.
- **Store Manager:** Review processes and provide ongoing training as needed.

Procedures

1. **Customer Order Taking**
   a. Greet the customer courteously and offer assistance.
   b. Listen actively to the customer's request/order.
   c. Confirm order details by repeating back key information.
   d. Accurately enter the order into the POS system, selecting correct products, quantities, customizations, and applicable discounts.
   e. Address any customer inquiries or requests promptly and professionally.
2. **Order Review and Confirmation**
   a. Review the order summary with the customer.
   b. Confirm total amount, expected delivery/pick-up time (as applicable), and any special instructions.
3. **Processing Payment**
   a. Announce the total and payment options to the customer.
   b. Accept payment by cash, card, mobile payment, or other approved methods.
   c. Follow store policy for verifying large bills, checks, or ID for credit card payments as required.
   d. If payment is declined, inform the customer politely and request an alternative payment method.
4. **Issuing Receipt**
   a. Generate and provide a printed or electronic receipt for every transaction.
   b. Thank the customer and offer additional assistance if needed.
5. **Returns and Exchanges**
   a. Politely request the item(s) and receipt from the customer.
   b. Verify eligibility for return/exchange according to store policy.
   c. Process the return/exchange in the POS system and provide a confirmation receipt.
6. **Transaction Record Management**
   a. Ensure all sale, return, and exchange transactions are accurately recorded in the POS system.
   b. Secure cash drawer and deposit cash as per store policy at shift end or when required.

Documentation

- POS transaction logs and reports
- Receipts for all transactions
- Return and exchange forms (if paper-based)
- Record of deposited cash (end-of-day reconciliation)

References

- Store Customer Service Policy
- Returns and Exchanges Policy
- POS System User Manual

Revision History

Version	Date	Description	Author
1.0	2024-06-07	Initial SOP template release	Admin