

# Standard Operating Procedure (SOP)

## Order Verification and Documentation Procedures

This SOP details the **order verification and documentation procedures**, encompassing the processes for confirming customer orders, validating order accuracy, updating inventory records, generating and maintaining order documentation, and ensuring compliance with company policies. The objective is to streamline order processing, minimize errors, and enhance customer satisfaction through systematic verification and thorough record-keeping.

### 1. Purpose

The purpose of this SOP is to ensure the accuracy and completeness of customer orders, proper documentation, and adherence to company protocols. These procedures are designed to reduce errors, improve efficiency, and maintain high customer satisfaction.

### 2. Scope

This SOP applies to all staff involved in order processing, warehouse, sales, and documentation within the organization.

### 3. Responsibilities

- **Sales Team:** Initiate and confirm orders with customers.
- **Order Processing Staff:** Verify order details and accuracy.
- **Inventory Team:** Update inventory records.
- **Documentation Staff:** Generate and preserve all documentation related to orders.
- **Supervisors/Managers:** Monitor compliance and audit processes regularly.

### 4. Procedure

- 1. Order Receipt and Confirmation**
  - Receive order through approved channels (e.g., email, phone, online portal).
  - Send order confirmation to customer within **24 hours** of receipt.
- 2. Order Verification**
  - Cross-check order details against customer account information and product availability.
  - Confirm product codes, quantities, pricing, and delivery/billing addresses.
  - Contact customer for clarification if discrepancies are found.
- 3. Inventory Update**
  - Reserve or deduct ordered items from inventory management system upon verification.
  - Flag low inventory items for replenishment, if necessary.
- 4. Documentation Generation and Maintenance**
  - Prepare order confirmation, invoice, and delivery documentation as per company template.
  - Save digital copies in the appropriate folder or system according to **naming conventions**.
  - Store physical documents (if any) in secure, labeled files.
- 5. Compliance and Record-Keeping**
  - Ensure all documents are signed and dated where applicable.
  - Periodically audit order files to ensure consistency and completeness.
  - Retain records for the required duration as specified by company policy.

### 5. Documentation Checklist

Document	Required At	Retention Period
Order Confirmation	Order verification	2 years
Invoice	Order processing	7 years
Delivery Note	Order fulfillment	2 years

Customer Correspondence	Order lifecycle	2 years
Inventory Update Record	Post-verification	2 years

## 6. Compliance

- Adhere to all applicable company policies and relevant regulatory requirements regarding documentation and order management.
- Participate in scheduled audits and training sessions, as applicable.

## 7. Revision History

Version	Date	Description	Author
1.0	2024-06-15	Initial creation	Process Owner