Standard Operating Procedure (SOP): Order Entry and Documentation Process

1. Purpose

This SOP details the **order entry and documentation process**, covering steps such as order receipt, data validation, order input into the system, verification procedures, document generation, and record maintenance. The objective is to ensure accurate, timely, and efficient order processing to enhance customer satisfaction and support seamless business operations.

2. Scope

This procedure applies to all employees involved in receiving, validating, entering, documenting, and maintaining records for customer orders.

3. Responsibilities

- **Sales/Order Entry Staff:** Responsible for accurate data entry and verification.
- **Supervisors/Managers:** Oversight of compliance and authorization of special/exception orders.
- **Document Control:** Ensure proper filing and retrieval of order documents.

4. Procedure

1. **Order Receipt**
    - Orders are received via email, phone, customer portal, or in person.
    - Document the date and time of receipt.
    - Acknowledge receipt to the customer.
2. **Data Validation**
    - Review order for completeness (customer details, product/service description, quantities, pricing, delivery requirements).
    - Contact customer for clarification if needed.
    - Check for duplicate orders.
3. **Order Input into System**
    - Log in to the Order Management System (OMS).
    - Enter validated order details into the system accurately.
    - Assign a unique order number/reference code.
4. **Verification Procedures**
    - Review order entry for accuracy versus received documents.
    - Cross-check with inventory/stock levels where applicable.
    - Obtain required approvals for exceptions or special terms.
5. **Document Generation**
    - Generate order confirmation and related documents (invoice, delivery note, etc.).
    - Send order confirmation to the customer and internal departments.
6. **Record Maintenance**
    - File and store all order documents (physical or digital) using appropriate naming conventions.
    - Ensure records are protected, organized, and accessible for audits and future reference.
    - Follow the company's data retention and security policies.

5. Documentation/Forms Used

- Order Entry Form/Template
- Order Confirmation Template
- Invoice Template
- Delivery/Shipping Documents
- Customer Communication Log

6. Record Retention

All order-related records must be retained for a minimum of **X years** as per company policy and legal regulations.

7. References

- Order Management System User Manual
- Data Protection Policy
- Audit and Compliance Guidelines

8. Revision History

Version	Date	Description	Author
1.0	YYYY-MM-DD	Initial release	Name