

Standard Operating Procedure (SOP)

Order Verification and Documentation Check

This SOP defines the process for **order verification and documentation check**, ensuring accuracy and completeness of orders before processing. It includes verification of order details, validation of customer information, cross-checking invoicing and shipping documents, confirmation of product specifications, and authorization approval to prevent errors and discrepancies. The procedure aims to enhance order accuracy, streamline workflow, and maintain reliable records for auditing and customer satisfaction.

1. Purpose

To outline the standardized process for verifying orders and checking necessary documentation, ensuring all requirements are met prior to order processing.

2. Scope

This SOP applies to all staff members involved in order intake, processing, and documentation management within the organization.

3. Responsibilities

- **Order Entry Staff:** Initial verification of order details and documentation.
- **Sales/Account Manager:** Validate customer information and confirm product specifications.
- **Finance Department:** Cross-check invoicing documents and ensure billing accuracy.
- **Logistics/Shipping Team:** Verify shipping details and documentation.
- **Supervisor/Manager:** Final authorization and approval before processing.

4. Procedure

1. **Order Receipt:**
 - Receive order from customer via approved channels (email, portal, phone, etc.).
2. **Order Details Verification:**
 - Check order form/document for completeness and legibility.
 - Verify item numbers, quantities, pricing, discounts, and total amounts.
3. **Customer Information Validation:**
 - Confirm customer name, address, contact details, and account status.
4. **Documentation Check:**
 - Ensure required documents (purchase order, quotations, approvals) are attached.
 - Validate invoice and compare data against order form.
 - Review shipping documents and verify delivery address.
5. **Product Specification Confirmation:**
 - Check product codes, descriptions, and any special requirements against customer request.
6. **Authorization and Approval:**
 - Forward verified order to designated manager/supervisor for final approval.
7. **Record Keeping:**
 - File all order-related documentation in the appropriate system or archive for future reference and audit purposes.
8. **Order Processing:**
 - Release order for fulfilment upon successful verification and approval.

5. Documentation & Records

Document	Description	Retention Period	Owner
Order Form/Purchase Order	Original customer order details	3 Years	Sales Department
Invoice	Billing document for order	5 Years	Finance Department
Shipping Documents	Delivery notes, shipping labels, tracking info	3 Years	Logistics Team
Approval Records	Supervisor/manager sign-off or electronic approval	3 Years	Order Processing

6. Revision History

Version	Date	Description	Author
1.0	2024-06-01	Initial draft	Admin