SOP: Order Confirmation and Customer Notification

This SOP details the process of **order confirmation and customer notification**, ensuring timely acknowledgment of customer orders, verification of order details, and clear communication regarding order status. It covers procedures for confirming order receipt, updating customers on processing stages, handling modifications or cancellations, and delivering purchase confirmations through appropriate channels, aiming to enhance customer satisfaction and operational efficiency.

1. Purpose

To establish a standardized process for confirming customer orders, verifying order details, notifying customers at key steps, and handling order modifications or cancellations.

2. Scope

This SOP applies to all employees responsible for processing customer orders and communicating order status across all sales and service channels.

3. Responsibilities

- **Order Processing Team:** Verify order details, update order status, and notify customers.
- **Customer Service Team:** Address customer queries, requests for modifications or cancellations, and ensure customer satisfaction.
- **IT/Systems Team:** Maintain order management systems and ensure reliable communication channels.

4. Procedure

1. **Order Receipt**
   - Receive customer order via order management system, website, or other approved channels.
   - Check for completeness and accuracy (customer details, products, quantities, payment information).
2. **Order Confirmation**
   - Within 1 business hour of order receipt, send an automated or manual order confirmation to the customer. The confirmation must include:
     - Order number/reference
     - Date and time of order
     - Summary of ordered products/services
     - Billing and shipping addresses
     - Estimated delivery/fulfillment date
     - Contact information for customer inquiries
3. **Order Verification and Processing**
   - Verify payment and stock availability.
   - Update order status in the system (e.g., Processing, Shipped, Delivered).
   - If issues arise (e.g., payment errors, out-of-stock), notify the customer promptly with next steps.
4. **Customer Notification during Processing**
   - Notify the customer at major milestones (e.g., order dispatched, exception, delivery confirmation) via their preferred channel (E-mail, SMS, App notification).
5. **Order Modification or Cancellation Requests**
   - Receive and process modification or cancellation requests in accordance with company policy.
   - Confirm receipt of request to the customer within 1 business hour.
   - Notify the customer of the outcome and next steps (e.g., refund processing) within 24 hours.
6. **Final Confirmation and Record Keeping**
   - Send purchase completion confirmation and any relevant documentation (receipt, invoice, warranty, etc.).
   - Maintain a record of all communications and actions taken for at least 12 months.

5. Communication Templates

Stage	Channel	Template Summary

Order Confirmation	Email/SMS	"Thank you for your order #[Order Number]. We have received your order and will update you on its progress. Products: [List Items] Shipping to: [Address] Estimated Delivery: [Date]"
Order Dispatched	Email/SMS	"Your order #[Order Number] has been dispatched and is on its way! Track your order: [Tracking Link]"
Order Modification/Cancellation	Email/Call	"We have received your request to [modify/cancel] order #[Order Number]. [Details of modification/cancellation and next steps.]"
Order Completion	Email	"Your order #[Order Number] is complete. Thank you for shopping with us! Your invoice/receipt is attached."
Issue Notification	Email/Call	"There is an issue with your order #[Order Number]: [Issue Details]. Please contact us for assistance."

6. Records and Documentation

- Order confirmations and related communications must be archived in the order management system.
- Modification or cancellation approvals should be documented for audit and customer support purposes.
- All communications must be retained per the company's data retention policy (minimum 12 months).

7. Review and Continuous Improvement

- This SOP will be reviewed annually or after any process change.
- Feedback from customers and staff should be used to refine notification templates and response times.
- Regularly update the procedure to reflect changes in technology or business needs.

8. References

- Order Management Policy
- Customer Service Policy
- Data Protection and Retention Policy