Procedure: Order Processing and Review

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# Purpose

This procedure describes a system, provides instructions and assigns responsibilities for processing and reviewing customer orders at [Company].

# Scope

The scope of this procedure includes taking and processing customer orders and making amendments to existing orders.

# Responsibilities

Amend this section to reflect company structure.

The Production Manager, Operations Manager, Dispatch Officer and Sales Manager are responsible for carrying out order processing and review as noted in the following sections.

# Procedure

Amend the details of this procedure to reflect working practices.

## Quotations

Prior to placing an order, a customer may ask for a formal quotation. If a quotation is required the Sales Manager prepares a quote and details the price (using the pricing calculator) and availability (i.e. are the goods in stock and back order list). If the goods are not available, then a lead-time for delivery of the goods is provided. The lead-time must be obtained by consultation with either the Production/Operations Manager as applicable/appropriate.

Customers are provided with a quote within five working days of receipt.

## Receiving orders

Orders are received via email, facsimile, post or telephone. Customer order requirements are recorded onto a customer order Form FP702-1: Customer Order Form.

## Determining product and order requirements

When recording orders, the Sales Manager confirms the following requirements:

* the customer name, address and delivery details
* any special instructions (including any requirements for product conformity records, inspection and test reports, certificates of analysis, etc.)
* reference number of the product being ordered and its description
* the quantity required
* the pack size
* delivery date
* any special product marking or labelling
* any special packaging or shipping requirements, including transport and storage conditions.

The completed order is reviewed to identify any additional requirements, whether stated or not, that would apply and which are not listed above.

## Order review

After product and order requirements are determined, they are reviewed to verify that:

* reference numbers are valid and match the product description and pack size
* product descriptions are complete and the type of product(s) required is unambiguous
* any additional requirements for special marking, labelling, packaging or shipping are identified and can be met
* shipping and billing addresses are complete and valid
* terms of payment and credit status are acceptable
* the price and terms of delivery are correct.

In the event of insufficient information, discrepancies or other ambiguities, the customer is contacted for clarification. All corrections and additions made on the order are initialled by the person making the changes.

If the resulting corrections or order are difficult to understand (i.e. illegible, information obscure, small writing, etc.), the whole order must be transcribed onto a new order form that is stapled to and kept with the original order.

## Verification of availability

Before accepting an order:

* a check is made to ensure that the product is in stock or will be available within the timeframe required by the customer, and
* the product can be delivered as per the customer’s requirements.

A copy of the purchase order is made and forwarded to the dispatch officer and the original is filed in the order awaiting dispatch file.

## Order changes and amendments

Changes to an order and/or an amendment received from customers are sent to the Sales Manager. When a change is received:

* the original order is retrieved
* the change is reviewed for completeness and clarity and the customer is contacted if more information if needed
* the current status of the original order is determined
* the feasibility of the requested change and the impact on cost and delivery is assessed
* if acceptable, the change is confirmed and all relevant documentation is amended
* the changes are communicated to all affected personnel/departments.

A record is kept of the results of the order review.

Customers are to be notified by the Sales Manager as soon as possible when a delivery is delayed. At this time, customers will be given a new lead-time.

Appendices

Amend as required or delete.

Definitions

Amend as required or delete.

| Term | Definition |
| --- | --- |
|  | Insert terms/abbreviations and definitions for those used within the procedure. Do not include any terms or abbreviations not used within the procedure. |
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Document Information

| Revision History | | | |
| --- | --- | --- | --- |
| Revision | Modified by | Change Control No. | Description of Change |
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Complete the above fields for each revision of this document. Ensure that there is sufficient description of changes so that the change history of this document can be followed. Additional columns can be added to include document/change tracking numbers generated by your company’s systems if required (eg. change control).

| Associated forms and procedures | |
| --- | --- |
| Doc. No. | Document Title |
| FP702-1 | Customer Order Form |

List all controlled procedural documents referenced in this document (for example, policies, procedures, forms, lists, work/operator instructions

| Associated records | |
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List all other referenced records in this document. For example, regulatory documents, in-house controlled documents (such as batch record forms, reports, methods, protocols), compliance standards etc.

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