






Operation/Task:	Acceptance of customer orders and managing external (customer supplied) documents.			Equipment:	N/A
Owner:	Client Services Manager	Date Prepared:	6/1/2015	Department Responsibilities:	
		Revision History:	See last page		

ALERTS (see below): Critical Step  Quality Check  Tip  Team Safety 

Purpose: This SOP/work instruction documents procedures for order acceptance.

Step #	Alerts	Step Description - "What to Do"	"How to Do it"	"Why to Do it"
1		Customer Order Acceptance: Order acceptance may be received in the form of a customer purchase order, signed letter of quotation, fax confirmation, letter, e-mail, or verbally. In any case, upon receipt of the order, the Account Executive and/or Customer Service Account Specialist (CSR) accepts responsibility for the order.	<ul style="list-style-type: none"> Account Executive and/or CSR should fill out the Job Jacket/RFE (158-1030) or Lettershop/DP Estimate Jacket (Mail 048/EST002) and sign to verify order acceptance. Coordinate delivery dates to ensure that they can be met with Scheduling and/or Production Managers. Establish a schedule to meet the required due date with Scheduling and/or Production Managers. 	To confirm order, price and timeline with customer.

2	◆ <input checked="" type="checkbox"/>	Review External (Customer Supplied) Documentation and Determine Order Type (New Sale or Exact Rerun).	<ul style="list-style-type: none"> Review all samples, electronic files and specification sheets provided by the customer. <i>All client provided samples, electronic files and specification sheets must be submitted to the Customer Service Account Specialist upon order acceptance, to ensure appropriate specifications are communicated to production.</i> If the order is a new sale, compare the actual job materials received to the estimate verifying the job is ready to enter into production. If job specs have changed since the estimate was done, either send the job back to estimating or proceed with job entry. If there is no estimate, have estimate created and proceed with job entry. If the order is a re-run, and no estimate was required, use prior job ticket as foundation for job entry. 	Reviewing customer supplied documents allows us to also compare them to the estimate to ensure the job is accurately priced. If anything has changed with the order it gives the Account Executive and/or Customer Service Account Specialist the opportunity to revisit the job with the customer and update the quote/estimate before it enters production.
3	◆	Control Documents: After initial review the Customer Service Account Specialist (CSR) is responsible for controlling the customer supplied documents.	<ul style="list-style-type: none"> Maintain an electronic or paper library of supplied documents. Manage distribution of controlled copies of reference documents, including revisions. When revisions are made to these documents, the CSR ensures updates to all controlled copies of documents are completed and also updates references to these documents in ENPOINTE requests for estimates and job tickets. 	To determine customer requirements for inquiries, order processing, manufacturing or invoicing.

Notes:

Please see standalone SOP for handling Change Orders and PHI/SPII work.

AA or Author Alterations are chargeable alterations to the job requested by the customer.

Rework Alterations are non-chargeable alterations to the customer and are to be entered into the CI Rework System on the ENPOINTE intranet for tracking.

Definitions:

Revision History	Description of Changes	Requested by	Date
Rev 1	Revised SOP to new format	Julie Robinson	6/1/15
Rev 2	Added Revision History table	Julie Robinson	8/1/16
Rev 3	Updated to current SOP format: gray header bar; branding changes: font size/type, changed GLS references to ENPOINTE; changed Project Manager references to Account Specialist. Changed Owner to Client Services Manager.	Liz Nourse	4/19/21

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Rev. Date 4/20