STANDARD OPERATING PROCEDURE

Sales Order Entry SOP

Document no.	SOP-SLS-005
Revision	1.0
Owner	Sales Operations Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To convert a closed deal into an accurate sales order and hand it off cleanly for fulfillment and billing, without delays or errors caused by incomplete information.

2. Scope

Applies to entering and processing sales orders once a deal is signed, through handoff to fulfillment and invoicing. Quote and proposal creation before signature is covered by a separate SOP.

Definitions

Sales order	The internal record created from a signed agreement that authorizes fulfillment and billing.
Credit hold	A status that pauses order processing until a customer's credit or payment terms are reviewed and approved.

3. Responsibilities

Sales Operations Analyst	Enters the sales order, validates it against the signed agreement, and routes it for approval.
Account Executive	Confirms order details with the customer and resolves any discrepancy flagged during validation.
Billing Specialist	Reviews credit status and generates the invoice once the order is approved.

RACI matrix

Activity	Sales Operations Analyst	Account Executive	Billing Specialist
Enter the order from the signed agreement	R/A	C	I
Validate order details for accuracy	R/A	C	-
Review credit status and terms	I	C	R/A
Resolve a flagged discrepancy	C	R/A	C
Hand off to fulfillment and generate the invoice	R	I	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Signed sales agreement or contract
- Order management or ERP system
- Customer credit check tool or report
- CRM opportunity record
- Invoicing system

5. Procedure

Step	Task	Owner	Done
5.1	**Receive the signed agreement** Receive the fully signed agreement and confirm it includes all required signatures and attachments before starting order entry.	Sales Operations Analyst	☐
5.2	**Enter the order in the system** Enter the customer, products, quantities, pricing, and contract term into the order management or ERP system exactly as stated in the signed agreement.	Sales Operations Analyst	☐
5.3	**Validate order details against the agreement** Compare every entered line item, price, and term against the signed agreement line by line before submitting the order for processing. **Checkpoint:** Every order line matches the signed agreement exactly before the order moves past validation.	Sales Operations Analyst	☐
5.4	**Check customer credit status** Check the customer's credit status and payment terms, especially for a new customer or one with a history of late payment, before releasing the order.	Billing Specialist	☐
5.5	**Apply a credit hold if needed** If the credit check raises a concern, place the order on credit hold and notify the account executive rather than releasing it for fulfillment. **Warning:** Never release an order for a customer on credit hold without documented approval from finance or the sales operations manager.	Billing Specialist	☐
5.6	**Resolve a flagged discrepancy** If validation finds a mismatch between the order and the agreement, contact the account executive to confirm the correct detail before making any change.	Account Executive	☐
5.7	**Get sign-off for a corrected order** Once a discrepancy is resolved, get the sales operations analyst to confirm and re-validate the corrected order before it proceeds.	Sales Operations Analyst	☐
5.8	**Update the CRM opportunity** Update the CRM opportunity to closed-won and link the sales order number, so the deal's downstream status is visible to the sales team.	Sales Operations Analyst	☐
5.9	**Hand off the order to fulfillment** Route the validated order to the fulfillment or provisioning team with any special instructions noted in the agreement, such as a custom start date.	Sales Operations Analyst	☐
5.10	**Generate the initial invoice** Generate the invoice according to the agreement's billing terms and schedule, and confirm the billing contact and method on file are correct.	Billing Specialist	☐

Step	Task	Owner	Done
5.11	**Confirm order status with the customer** Confirm with the customer that fulfillment or account setup is underway and that they've received the invoice, addressing any question about billing.	Account Executive	☐

6. Quality checks

- Every order matches the signed agreement line by line before fulfillment handoff.
- Customers on credit hold are never released without documented approval.
- CRM opportunities are updated to closed-won with a linked order number.
- Invoices reflect the exact billing terms stated in the signed agreement.

7. Records

- Signed sales agreements
- Order validation checklist
- Credit check results and hold approvals
- Generated invoices

8. KPIs

- Average time from signed agreement to order entry
- Order error or correction rate
- Percentage of orders released without a credit hold issue

9. Common mistakes

- Entering an order from a verbal understanding instead of the signed agreement.
- Releasing a flagged customer from credit hold without proper approval.
- Forgetting to update the CRM opportunity after the order is entered.
- Sending an invoice with billing terms that don't match the agreement.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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