Process orders for customers in logistics operations

Overview

This standard is about processing orders for customers in logistics operations. It involves identifying customers' order requirements and problems with the order. It also involves processing the information which must be passed on to customers.

This standard is relevant to all operatives at every level in logistics operations. Operatives could, for example, be working in warehousing and storage, transport, or freight forwarding.

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Performance criteria

You must be able to:

1. obtain relevant information on the **customer requirements** for ordering goods in logistics operations
2. provide **customers** with **delivery information**
3. pass on orders and invoicing information to relevant **colleagues**
4. respond to enquiries about the progress of the order
5. inform **customers** if their orders cannot be delivered within the time originally agreed
6. identify and respond to **problems with processing orders**
7. store **customers'** details securely and maintain confidentiality in accordance with organisational and legal requirements
8. record work undertaken according to organisational procedures
9. comply with organisational procedures and relevant **legal, safety and operating requirements** relating to processing orders for customers

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Knowledge and understanding

You need to know and understand:

1. how to obtain information on the **customer requirements** for ordering goods in logistics operations
2. the range of **customers** you process orders for
3. the relevant stock control and ordering systems used by your organisation
4. the relevant information required by the **colleagues** who will fulfil the orders
5. the length of time it takes to fulfil orders for different goods provided by your organisation, and what to do if this timeframe cannot be achieved
6. the information required by the **colleagues** who will issue the invoice
7. how to store **customers**' personal and financial details securely, how to maintain confidentiality and the requirements of data protection legislation
8. the **special requirements** related to orders
9. the roles and responsibilities of **colleagues** in logistics operations
10. the information and recording systems used by the organisation and the requirements for maintaining records
11. the organisational procedures and relevant **legal, safety and operating requirements** relating to processing orders for customers

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Glossary

Colleagues: permanent, temporary, agency staff, external, line manager, supervisor, customer/clients

Customers: internal, external

Customer requirements: delivery time, address, name, contact number

Delivery information: delivery time, progress

Legal, safety and operating requirements: safety regulations, codes of practice, load restrictions, working time regulations, transport regulations

Problems with processing orders: payments, stock quantities, damaged stock

Special requirements: delivery locations, times, addresses

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