Customer Service Representative

Purpose and Scope

The purpose of this work instruction is to provide information on the duties that occurs in the customer service department. This work instruction applies to customer service assistance to customers as well as internal employees.

Responsibilities

Customer Service Representative (CSR)

Expedite Late Purchase Orders

- Go into the computer and check the customer's order by entering sales order number, customer purchase-order number, customer account number or material item code.
- If the order is late from a supplier, notify the purchasing department of the delay. The purchasing agent will then expedite the purchase order with the vendor to find out the status of delivery.
- The purchasing agent tells the customer service representative the status of the purchase order.
- The customer service representative phone fax or email the customer with the information regarding the status of the customer purchase order.

Fax or Email Documents

Upon request, the customer service representative may send the following documents to the customers via fax or email:

Quotes, test reports, manufacturer certifications, product literature, invoice copies, packing
Slip copies, drawings, specifications, etc.

The documents may be requested by the customers or an inside or outside sales person. Make sure you have the necessary information needed before faxing or emailing such as:

- Correct Customer Name and Spelling
- Correct Fax Number or Email Address
- Correct Documents

Confirming Purchase Orders

Customers routinely place verbal orders and then send a purchase order document afterwards. These are confirming orders, as opposed to an original purchase orders.

To check the confirming purchase orders that arrive by email, fax, or postal mail you will:

Email/Fax –

- Go into the computer system and enter the document release number assigned by the system. If unknown, <F3> will give you lookup assistance.

- Check the confirming document against the information in the system if there are any mistakes made then the CSR notifies the ISR about the error(s) so that they can contact the customer regarding the corrections. .

Postal Mail -

- Purchase Orders are open and stamped by the Receptionist.
- The Receptionist then places the purchase orders into the Customer Service Supervisor's mail box.
- The Customer Service Supervisor gathers the purchase orders and checks them against the system, by entering the Customer name and locating the customer's purchase order number. If the purchase order is completed a "C" (complete) is placed in the right hand corner, Customer Acct # (left hand corner) and the release number (Sales order #) at the top of the document. If the order is open an "O"(open) is placed in the upper-right corner instead of the "C".

We also receive purchase orders through dedicated websites such as Exostar, EDI, and OASIS. These websites are located on the Customer Service Supervisor's computer only and they are accessed by I.D. # and password. These are original orders. Once the purchase orders are printed they are given to the Inside Sales Rep. that handles that customer, enter into the system, reviewed, acknowledge, logged, and scan into the system.

The acknowledgement of the purchase order is send back to the customer through the same website the purchase order was received.

The following things to look for when verifying the confirming documents are:

- Customer Name and Spelling
- Customer Bill and Ship to Address
- Customer Purchase Order Number
- Correct Quantity, Color, Size, UOM & Price
- Customer Part Number & Drawing
- Ship Via
- Manufacturer Certs and Test Reports if required by Customer
- Customer Quality Clauses
- Special Instructions
- Customer Due Date
- Sales Tax Status
- Contact Person/Phone Number
- Email Address (if any)

Once the documents are confirmed, the designated CSR logs and scans the documents into the computer system. The CSR then places the documents in the purchase order tray located upstairs on the file cabinet for the document control clerk for filing or archiving (boxing for storage) as appropriate.

4. Pulling Sales Orders from File Cabinet:

With the addition of the document imaging system, the only time you remove sales orders from the file cabinet is if you need to identity the signature of a shipped order or verify a tracking number. UPS shipments automatically update the order processing system with the correct tracking numbers.

5. Customer Service Calls:

Customer service calls include the following things:

- Status of order(s)
- Increase or decrease of quantity
- Change of due date
- Change of color or size
- Change of ship to address
- Change of ship via
- Change or add the purchase order number/reference
- Cancellation of order(s)
- Traceability of tracking number
- RMA # for returned material

Customers sometime calls for the following request:

- Copy of Invoices
- Packing Slips/Certs
- Test Reports
- Manufacturing Certs

All changes need to be approved by the inside sales representative.

Procedure References

DISTRIBUTION PLANNING & PROCESS CONTROL QSP-09A
PRODUCTION PLANNING AND PROCESS CONTROL QSP-09B

Release Notes

- Revision B references the document imaging system.
- The document format was changed for readability.