



CARATA LTD

Purchase Coordinator Training Manual

Professional Operations Guide for DQC Department

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Purchase Coordinator (PC) – Roles, Responsibilities & Performance Standards

1. Role Overview

- The Purchase Coordinator is responsible for sourcing and purchasing customer orders.
Explanation: The PC ensures that all items requested by the customer are located, purchased, and ready for delivery within the expected time.
- Ensuring accuracy and quality of items.
Explanation: The PC must confirm that the items purchased match exactly what the customer ordered, including the correct product, quantity, size, brand, and condition where applicable.
- Preparing orders for fast handover to the deliverer.
Explanation: Once purchasing is complete, the PC should organize and package the items properly so the deliverer can collect them immediately without unnecessary waiting.
- **Goal:** Ensure zero delays and 100% order accuracy.
Explanation: The PC should work toward completing every purchase on time while ensuring that customers receive exactly what they requested.
- **Rule:** Every shilling must be accounted for.
Explanation: Every amount received, spent, refunded, or remaining must be properly recorded. No money should be lost, unexplained, or used for purposes unrelated to the order.

2. Core Responsibilities

- **Order Processing:** Confirm product name, quantity, and price.
Explanation: Before purchasing, the PC must carefully review the order details to understand exactly what needs to be bought and the expected price.
- **Purchasing:** Buy exact items from correct vendors.
Explanation: The PC should purchase the correct products from the

appropriate or approved vendors while considering availability, price, and quality.

- **Quality Check:** Verify condition, quantity, and receipts.
Explanation: Before handing over the order, the PC must check that the items are in good condition, the quantity is correct, and the purchase is supported by the necessary receipt or proof of purchase.
- **Order Preparation:** Package properly and notify deliverer immediately.
Explanation: Items should be organized and secured appropriately to prevent damage or loss. Once the order is ready, the deliverer should be informed immediately.

3. Standard Workflow

- Receive order
Explanation: The PC receives the order and begins reviewing the customer's requirements.
- Confirm details
Explanation: Check the product names, quantities, prices, instructions, and any special customer requests.
- Purchase items quickly
Explanation: Begin purchasing without unnecessary waiting to prevent delays in the delivery process.
- Double-check accuracy
Explanation: Compare the purchased items against the original order before proceeding to handover.
- Package items
Explanation: Arrange and secure the items appropriately so they are ready for transportation.
- Notify deliverer
Explanation: Inform the deliverer immediately that the order is ready for collection.
- Handover without delay
Explanation: Ensure the order is handed over promptly, together with any necessary information, receipts, or instructions.

4. Communication Guidelines

- Update deliverer on progress
Explanation: Keep the deliverer informed about the status of the order, especially when there are delays, unavailable items, or other challenges.
- Notify when order is ready
Explanation: The deliverer should be informed immediately when the order has been completely purchased, checked, and packaged.
- Communicate clearly and professionally
Explanation: Information should be accurate, easy to understand, respectful, and provided at the right time.
- Handle customer interaction politely if required
Explanation: When the PC needs to communicate directly with a customer, they should remain polite, helpful, and professional.
- in cases where you are required to help with
- the delivery.
Explanation: If the PC is required to assist with delivery, they should cooperate with the deliverer and follow the required delivery procedures to ensure the order reaches the customer successfully.

5. Cash Handling & Accountability

- Track all money received and spent
Explanation: The PC must record all money received for purchasing and every amount spent. The remaining balance should always be clear and verifiable.
- Keep all receipts
Explanation: Receipts provide proof of purchases and help confirm that the customer's money was used correctly.
- Submit daily financial records
Explanation: All required financial information should be submitted accurately and on time at the end of the working day or according to company procedures.

6. What NOT to Do

- Do not delay purchases
Explanation: Avoid unnecessary waiting before purchasing items because delays at the purchasing stage can affect the entire delivery process.
- Do not guess items
Explanation: If an item is unclear, unavailable, or different from what was requested, the PC should confirm the correct information instead of making assumptions.
- Do not misuse funds
Explanation: Money provided for customer purchases must only be used for the intended order and must be fully accounted for.
- Do not skip quality checks
Explanation: Every order should be checked before handover to prevent wrong, damaged, missing, or poor-quality items from reaching the customer.

7. Performance Standards (KPIs)

- Speed of purchase
Explanation: Measures how quickly the PC completes the purchasing process after receiving an order.
- Order accuracy
Explanation: Measures how consistently the PC purchases the correct items, quantities, and required specifications.
- Communication efficiency
Explanation: Measures how clearly and quickly the PC communicates with the deliverer, customer, vendors, and relevant team members.
- Financial accountability
Explanation: Measures how accurately the PC manages, records, and accounts for all customer purchase funds.

8. Best Practices

- Build relationships with vendors
Explanation: Good relationships with reliable vendors can make it easier

to locate products, negotiate where appropriate, and complete purchases efficiently.

- Know product locations

Explanation: Understanding where different products and vendors are located helps the PC reduce purchasing time.

- Balance speed with accuracy

Explanation: The PC should work quickly without sacrificing the correctness or quality of the order.

- Prepare before deliverer arrival

Explanation: The order should be fully checked, organized, and ready before the deliverer arrives whenever possible. This minimizes waiting time.

9. Example

- Order: Milk, Bread, Eggs

Explanation: The PC receives an order requiring these three items and checks the exact quantities, specifications, and any customer instructions.

- Purchase correctly

Explanation: The PC purchases the requested milk, bread, and eggs from the appropriate vendor.

- Check quality

Explanation: The PC confirms that the items are fresh, undamaged, and in the correct quantities.

- Package quickly

Explanation: The items are organized and packed appropriately for transportation.

- Notify deliverer

Explanation: The deliverer is informed immediately that the order is ready.

- **Result:** Fast and efficient delivery

Explanation: Because the PC completed the purchasing process accurately and quickly, the deliverer can proceed without unnecessary waiting or corrections.

10. Final Principle

- **Speed + Accuracy = Success**

A PC must be fast enough to prevent delays while remaining accurate enough to prevent mistakes. Both are necessary for successful order fulfillment.

- A great Purchase Coordinator saves time, reduces errors, and increases revenue.
- Efficient purchasing reduces waiting time, prevents costly mistakes, improves customer satisfaction, supports deliverer performance, and contributes to the overall success of the business.

• Performance Evaluation Table

Metric	Description	
Speed	Time taken to complete the purchase	Measures how efficiently the PC completes the purchasing process without causing unnecessary delays.
Accuracy	Correctness of the items	Measures whether the PC purchases exactly what the customer ordered, including the correct items and quantities.
Communication	Correctness of the items	Measures how clearly and promptly the PC communicates order progress, challenges, and readiness.
Accountability	Proper money handling	Measures whether all customer funds are properly received, spent, recorded, and supported by receipts.