SOP: Order Tracking, Follow-up, and Status Updates

This SOP establishes the process for **order tracking, follow-up, and status updates**, ensuring timely monitoring of order progress from placement to delivery. It includes procedures for regular communication with suppliers and customers, updating the order status in the system, addressing delays or issues promptly, and providing accurate and consistent status information to all stakeholders to enhance customer satisfaction and operational efficiency.

1. Purpose

To define the standardized procedure for tracking orders, performing follow-ups, and communicating status updates to all relevant parties from order placement until delivery completion.

2. Scope

This SOP applies to all employees involved in order management, tracking, customer service, and supplier communications.

3. Responsibilities

- **Order Management Team:** Monitor order progress, follow up on outstanding orders, update order status in system.
- **Customer Service Team:** Provide updates to customers; address queries and escalate issues as needed.
- **Suppliers/Vendors:** Communicate status of orders and notify of any potential delays.
- **Management:** Review order tracking metrics and handle escalations.

4. Procedure

1. **Order Entry & Acknowledgment**
    - Verify accuracy of order details upon receipt.
    - Input order into the designated order management system.
    - Send order confirmation to the customer and relevant stakeholders.
2. **Order Tracking**
    - Track the progress of orders daily using the order management system.
    - Update order statuses (e.g., Processing, Shipped, Delivered, Delayed) promptly as circumstances change.
    - Contact suppliers for order status if orders are approaching due dates and updates are not received.
3. **Follow-up Procedures**
    - Initiate follow-ups for pending orders that exceed expected timelines.
    - Escalate issues or delays to management as per escalation matrix.
    - Log all follow-up communications in the order records.
4. **Status Updates to Stakeholders**
    - Communicate order status to customers at key milestones or upon request (order confirmation, shipment, expected delivery).
    - Notify stakeholders immediately of any delays or issues, providing an updated estimated delivery date and cause of delay.
    - Document all status updates in the system for audit purposes.
5. **Order Completion & Closeout**
    - Confirm receipt of goods/services with customer.
    - Update order status to 'Completed' upon delivery confirmation.
    - Close out the order in the order management system.
6. **Exception Handling**
    - Identify and address order discrepancies, delays, or issues promptly.
    - Escalate unresolved issues via the escalation procedure.

5. Communication Channels

- Email
- Order Management Software Notifications
- Phone Calls for time-sensitive or urgent issues
- Customer/Supplier Portals

6. Documentation & Records

- Maintain all order-related communications and status updates in the order management system.
- Retain records in accordance with company record retention policies.

7. Key Metrics & Review

Metric	Description
Order On-time Delivery Rate	Percentage of orders delivered by promised date
Customer Update Response Time	Average time to respond to customer order status queries
Issue Resolution Time	Average time taken to resolve order-related issues

8. Revision History

Date	Version	Description	Author
2024-06-28	1.0	Initial release	Procurement Team