

SOP Template: Order Handover to Fulfillment or Production

This SOP details the **order handover to fulfillment or production** process, including order verification, documentation review, communication protocols between departments, scheduling, resource allocation, and quality checks. The goal is to ensure a seamless transition of orders from sales to production or fulfillment teams, minimizing errors, delays, and ensuring timely delivery to customers.

1. Scope

This SOP applies to all new customer orders requiring transfer from the sales department to fulfillment or production teams.

2. Responsibilities

Role	Responsibility
Sales Team	Order accuracy, initial documentation, communication with customer, handover initiation
Order Management/Coordinator	Order verification, documentation review, scheduling, information relay
Fulfillment/Production Team	Resource allocation, workflow scheduling, order processing and quality checks
Quality Assurance	Pre-production/final checks, compliance verification, issue reporting

3. Procedure

- Order Verification**
 - Confirm all required order details (item, quantity, specs, customer info, delivery date, address).
 - Ensure order is approved and payment/credit terms are met.
- Documentation Review**
 - Collect all necessary documents: order form, PO, artwork, specs, customer notes, shipping instructions.
 - Log documents in the order management system.
- Communication Protocol**
 - Initiate formal handover via email or approved platform, including all order details and attachments.
 - Notify fulfillment/production lead and confirm receipt.
- Scheduling and Prioritization**
 - Add order to production/fulfillment schedule.
 - Identify and escalate any urgent or priority orders.
- Resource Allocation**
 - Confirm required materials, inventory, and staffing are available or on order.
 - Assign team members and workstations as needed.
- Quality Checks**
 - Review order for completeness and accuracy before production/fulfillment starts.
 - Conduct in-process and final QC as per company standards.
- Order Processing**
 - Begin production or packaging/shipping as per the order workflow.
- Status Update & Issue Handling**
 - Update order management system at each stage.
 - Immediately communicate any issues or discrepancies to the concerned departments.
- Completion & Handover**
 - Close the order in the system once fulfilled/produced.
 - Notify sales/customer service for delivery or dispatch confirmation.

4. Documentation & Records

- All order records and communications must be stored in the designated order management system.
- Retain documents as per company policy.

5. Review & Continuous Improvement

- Review handover process quarterly for improvement opportunities.
- Document lessons learned and update SOP as needed.

Approved by: _____ Date: _____