

# Order-to-Dispatch Standard Operating Procedure

A step-by-step guide to managing every order from capture to customer delivery — powered by VasyERP.

## About This SOP

This Standard Operating Procedure defines the end-to-end process your team must follow each time a customer order is received — from the moment it enters any sales channel through to successful dispatch and customer confirmation. Following this SOP consistently eliminates errors, prevents stock discrepancies, and ensures every customer receives their order on time.

TARGET ORDER ACCURACY	MAX PICK & PACK TIME	DISPATCH LEAD TIME	CUSTOMER NOTIFICATION
<b>99.5%</b>	<b>2 HRS</b>	<b>Same Day</b>	<b>Automated</b>

<b>Scope</b>	All inbound sales orders across every channel — POS, e-commerce, wholesale, and telephone.
<b>Applies To</b>	Sales team, warehouse staff, dispatch coordinators, and finance/invoicing team.
<b>Effective Date</b>	Upon implementation of VasyERP Order Management Module.
<b>Review Cycle</b>	Quarterly, or after any significant process change.

## Process Flow Overview

Every order passes through seven defined stages. Each stage has clear responsibilities, system actions in VasyERP, and escalation rules. No stage may be skipped.

<b>01</b>	<b>ORDER CAPTURE</b>	Order enters VasyERP from any channel
<b>02</b>	<b>INVENTORY CHECK</b>	System verifies stock & allocates units
<b>03</b>	<b>ORDER CONFIRMATION</b>	Customer & sales team are notified
<b>04</b>	<b>PICK &amp; PACK</b>	Warehouse fulfils the pick list
<b>05</b>	<b>QUALITY CHECK</b>	Accuracy verified before sealing
<b>06</b>	<b>DOCUMENTATION</b>	Invoice, delivery note & labels generated
<b>07</b>	<b>DISPATCH</b>	Shipment scheduled, tracking activated

**■ VasyERP Tip:**

*VasyERP automatically moves each order through stages 1–3 without manual intervention. Stages 4–7 require warehouse and dispatch confirmation to maintain audit trails.*

## Detailed Step-by-Step Procedure

### 1 ORDER CAPTURE ACROSS ALL CHANNELS

- All orders (POS, website, phone, wholesale) feed directly into VasyERP
- Each order is assigned a unique Order ID by the system
- Channel source, customer details, and line items are recorded automatically
- Sales team receives real-time notification for phone/manual orders
- Duplicate order check runs automatically — flag any duplicates immediately

### 2 INVENTORY AVAILABILITY CHECK & STOCK ALLOCATION

- VasyERP checks live stock levels against the ordered SKUs
- Stock is allocated from the nearest / most appropriate warehouse
- If stock is insufficient: system blocks the order and alerts the sales team
- Sales team must contact the customer within 2 hours for out-of-stock items
- Restock notification sent to procurement if stock falls below re-order level

### 3 ORDER CONFIRMATION & CUSTOMER NOTIFICATION

- Automated confirmation email/SMS dispatched to the customer via VasyERP
- Internal sales order document generated and stored in the system
- Customer-facing estimated delivery date populated from carrier integration
- Sales team reviews order summary for accuracy before releasing to warehouse
- Any amendments must be made at this stage — not after pick list generation

#### 4 PICKING: WAREHOUSE FULFILMENT

- VasyERP generates and assigns pick lists to warehouse staff
- Pick lists are organised by warehouse zone for maximum efficiency
- Staff scan each item barcode on pick to confirm against the system
- Discrepancies (damaged / missing stock) escalated to warehouse supervisor
- Picked items staged in designated packing area by Order ID

#### 5 PACKING & QUALITY CHECK

- Packer verifies line items against the digital pick list in VasyERP
- Each item is checked for damage, correct variant (size/colour/spec)
- Packing materials chosen per product type (fragile, standard, bulk)
- Packed box weighed and dimensions captured for accurate shipping cost
- QC pass confirmed in VasyERP — order moves to Documentation stage

#### 6 DOCUMENTATION: INVOICE, DELIVERY NOTE & LABELS

- VasyERP auto-generates SARS-compliant VAT invoice with all order data
- Delivery note printed and included inside the package
- Shipping label generated via carrier integration — affixed to outer packaging
- All documents stored against the Order ID for future retrieval
- Finance team notified; payment status updated in the system

#### 7 DISPATCH & SHIPMENT TRACKING ACTIVATION

- Order handed to courier / dispatch driver; handover confirmed in VasyERP
- Tracking number linked to the order — customer notified automatically
- Real-time shipping status visible to customer service and the customer
- Proof of delivery (POD) scanned and attached in VasyERP once delivered
- Order marked 'Fulfilled' — triggers post-delivery satisfaction workflow

## Escalation Matrix & Exception Handling

Scenario	Who Handles It	Response Time	Action in VasyERP
Out-of-stock after order placed	Sales Team Lead	Within 2 hours	Flag order, contact customer, raise restock PO
Incorrect item picked	Warehouse Supervisor	Immediately	Cancel pick, re-assign, log discrepancy note
QC fail / damaged item	QC Lead + Sales Team	Within 1 hour	Hold order, log defect, arrange replacement
Carrier collection failure	Dispatch Coordinator	Same day	Rebook with alternate carrier, update tracking
Invoice VAT discrepancy	Finance Team	Within 4 hours	Void invoice, regenerate, reattach to order
Customer requests amendment	Sales Team	Before dispatch	Edit order in VasyERP if pre-pick; else returns flow

## KPIs to Track in VasyERP Reports

KPI	Target	VasyERP Report
Order Accuracy Rate	≥ 99.5%	Order Fulfilment Report
Order-to-Dispatch Time	≤ Same Day	Order Lifecycle Report
Stock-Out Rate	< 2%	Inventory Availability Report
Invoice Error Rate	0%	Finance / Invoice Audit Report
On-Time Delivery Rate	≥ 95%	Shipping & Carrier Report
Returns Due to Packing Error	< 0.5%	Returns & Defect Report

**Ready to automate your Order-to-Dispatch workflow?**

Book a free 30-minute demo and see VasyERP in action with your own order scenarios.  
[vasyerp.co.za](https://vasyerp.co.za)