

forwarder will handle all of the logistics involved in taking a product from a producer's factory to a buyer's receiving dock. An export house can actually assume all of the functions performed by an export sales office in larger firms, taking orders, processing them, arranging for shipments and invoicing the buyer.

## **KEEPING RECORDS**

There are a variety of internal documents such as work orders, planning schedules, packing notes and marking instructions designed to enable each sub-unit within the company to carry out its specific task. Many of these are copies of the original order modified with additional information designed to enable each part of the company to carry out its function. Each should include a section that allows a report to be made of any setbacks that might occur though forms should be as simple and standardized as possible. The point is not to add to internal paperwork, but to keep an accurate track of an order's progress.

The overall monitoring of the progress of the order may be the responsibility of the export sales department or of the shipping department. Whoever is responsible will keep in touch with the production and warehouse staff as all of the elements in the schedule unfold. It is important to remember to schedule enough time for assembling all of the documents and completing the paperwork involved.

The records used to track an order's progress can be filed in the sequence in which tasks are carried out, or according to the types of activities that need to be performed. Whatever approach is chosen, a separate file should be opened for each order and that file should be monitored daily until the order is completed. The file should contain all correspondence and documentation relating to the order from the initial inquiry right through to the costing information assembled after the final payment has been met. Such files are invaluable when it comes time to preparing future quotations and they will help firms to avoid repeating mistakes.

## **TRACKING AND MONITORING**

Orders must be tracked and monitored at every step of the process until they are delivered to the customer. This is a customer service responsibility. The necessary information has to be provided in the order system so tracking can be managed in a timely and effective manner. Order monitoring steps might include:

- ordered entered;
- credit approved;
- order picked by warehouse complete as ordered;