

 Precision Swiss Products, Inc.	Document # Revision SOP-1.0-003 1 Effective Date 10/11/23
Document Title Backlog Review	Document Type Standard Operating Procedure

1. Purpose:

To identify orders that are at risk of being delayed due to but not limited to material delays, tooling delays, manufacturing resources.

2. Scope:

The process includes going over the backlog reports, reviewing orders, and informing any customers if there needs to be a new delivery date.

3. Terms, Acronyms and Definitions:

- a. Backlog: List of open customer orders
- b. ERP: Enterprise Resource Planning
- c. PSP: Precision Swiss Products
- d. Champion: Person responsible for making sure the action items are completed for their department

4. References:

- a. ERP System

5. Responsibilities and Authority:

- a. **Purchasing Team** - Responsible for notifying scheduling of delays on any material, tooling, and hardware. Also notify scheduling of any changes to lead times.
- b. **Department Leads/Programmers** - Responsible for notifying scheduling of any delays that prevent the job from starting on time per the schedule start date. Also responsible for notifying scheduling if any issues arise that cause delays on the job.
- c. **Scheduling** - Responsible for replanning delayed jobs and provide customer service new re-commit dates to provide to customer.
- d. **Customer Service** - Responsible for notifying customer of delays on their orders and provide new re-commit dates. Also responsible for requesting revised Purchase orders if re-commit dates are approved. Customer Service also responsible for notifying scheduling of any customer requests to pull in or push out. Review if due dates on the

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ERP system are accurate per PSP acknowledgement. Act as backup to pulling Backlog Report.

- e. **Director of Manufacturing** - Responsible for ensuring jobs are running per schedule and expectations.
- f. **Finance** – Responsible for pulling the Backlog report from the ERP.

6. Inputs:

- a. Backlog Summary report from the ERP is utilized to identify delayed jobs.

7. Process Steps:

- a. Finance or Customer Service will pull the Backlog report from the ERP every Monday, export it to Excel and save it on the P: Drive Backlog Review folder and save with current date.
- b. The Scheduling Team will review orders that are due over the next three weeks and identify possible delays, then assign action items and champions.
- c. If an order is identified as delayed and we are not able to provide a re-commit date within 2 days, it must be escalated to management and an emergency meeting needs to be held with all departments involved to establish a new re-commit date.
- d. The Scheduling Team will add notes to the spreadsheet and dashboard and update CSRs to notify customer on new re-commit date.

8. Outputs:

- a. re-commit date communicated to customer.

9. Flow Chart:



Revision History			
Revision	Description of Change	Approver	Effective Date
1	Initial release. Update from old QMS document # SOP-8.1-004. No change to content, no retraining necessary for current employees.	Daniela Kozar	10/11/23

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