



Guide to the Production Process

Steps

- 1: Overview**
- 2: Setting up the Production Process**
- 3: Producing Purchase Orders and Customer Confirmations**
- 4: Tracking Production**
 - a: Reminders Report – your “To Do” list**
 - b: Following up on the schedule**

1: Overview

Before you work through this process, you should be familiar with the Customer Quote Process (see Guide to the Xebra Advantage Quote Process).

As you will learn as you become experienced with Xebra, production can be effected in many ways. However this guide is the recommended general procedure for Promotional Products Items and any Process Jobs but can be used for any items. The advantage of this procedure is the use of the “Tracking” to provide a daily “to do” follow up list allowing anyone to respond to customer enquiries instantly.

NOTE: It depends on your internal procedure and if you have a “production/ sales support” team as to who does what and at what stage a job may be handed over to the “team”.

In the Guide to the Xebra Advantage Quote Process, we finished at the stage of a quote being turned into a job (see 3.2: in that process)

NOTE: It depends on your internal procedure - if you have a production department that takes over from here or some other procedure - what other detail the rep needs to complete at this stage. Before the job actually proceeds the decoration quantity and pricing for that quantity needs to be set, the colour, sizing or other VENDOR INSTRUCTIONS entered in the relevant line items and perhaps artwork attached – this is covered in the Production Procedure guide.

Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea			208	17-01-12
SETUP TOTAL	Setup	1	LT			208	17-01-12
EMBTOT5000	Embroidery to 5000 Stitches	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
HE238	100% Coolde Cotton Back Cap	110	Ea			208	17-01-12
SETUP	Setup	1	LT			208	17-01-12
EMBC2	Embroidery	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12

If you have a production/sales support team that takes over from here or some other procedure - what other detail the rep needs to complete at this stage. Before the job actually proceeds the decoration quantity and pricing for that quantity needs to be set, the colour, sizing or other VENDOR INSTRUCTIONS entered in the relevant line items and perhaps artwork attached.

This guide will continue from this point and whether the sales person continues with the process or it is handed to a support person/team is dependant on your internal structure.

Please acquaint yourself with the terms MLI and RLI.

MLI (Main Line Item) is the finished item that is being quoted/ordered (the embroidered Polo or the Pad printed pen)

RLI (Related Line Item) are the sub items related to the MLI – the processes required (embroidery, art, setup, pad printing, internal freight accrual etc) – to produce the finished item.

We do suggest that if there is a Production/Sales Support person/team, the “hand over” is accompanied by the Job Summary or you may wish to print the Job Summary as a job ticket. It contains the detail of all the items and the suppliers being used, the customer and delivery address, the customers order date and purchase order to you and, the date the job is required plus expected cost and sell pricing. The Job Summary is available under ACTIONS>JOB SUMMARY.

2: Setting up the Production Process.

Now we prepare the production tracking. In this order, we are ordering the polos from Shiny, getting Total Embroidery to embroider the logo on the front chest but we need Arty Johnson to create a new logo file for us in the correct format first and get that approved.

We may want Shiny to send the items directly to Total Embroidery rather than to us and us to them. We also need to give the Suppliers instructions on things like colours, sizes, decoration type and placement. We also want to add in reminders so we get a daily “to do” list to follow up.

To do this, we simply double click on the MLI (the PS09 line), enter what is required on that line and SCROLL through the other line items using the Aqua coloured right facing arrow editing or adding instructions to each line where required.

In our example, we double click the PS09 line and to add supplier instructions, we click on LONG DESCRIPTION (middle left of screen).

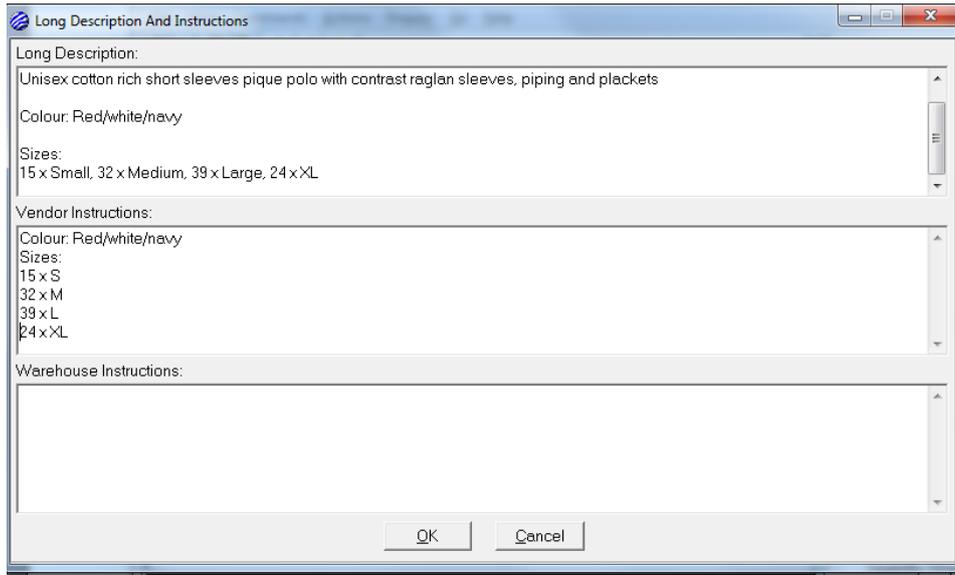
The screenshot shows the 'Line Item' window with the following details:

- Job Number: 100237
- Tracking: [Dropdown]
- Follow up: [Calendar]
- Load Quote: 208
- Item: PS09
- Description: 240gm cotton rich S/S pique polo with contrast raglan sleeves, piping and
- Product Cat: WBL
- GL Sales: 4000
- Remarks: [Text Field]
- Long description and instructions:
- Inventory item:
- Total as freight:
- Total as composition:
- Print item on invoice:
- New job for customer:
- Exclude from sales:
- Proof required:
- Cost only item:
- Ship to Contact: [Dropdown]
- Ship to: ABC
- Buy From: SHINY
- Quantity Ordered: 110
- Quantity Shipped: 0
- Unit Price: 18.54
- Unit Cost: 9.35
- Date Due: 17-02-12
- Image:
- Artwork included:
- Repeat for vendor:
- Specifications:
- File Attachments:
- Royalty Code:
- Alternate address:
- Consecutive numbering:
- Sales tax exception:
- Production definition:

Anything that appears in the Long Description section of this window will appear on Customer documents (Quotes or Order Confirmations). Anything that appears in Vendor Instructions will appear on Supplier documents (Purchase Orders). Warehouse Instructions will appear on Packing Slips. Our customer wants 110 Red PS09 – 15 small, 32 medium, 39 Large and 24 XL. In the quote we gave all the colour and size options. We will firstly edit the Long Description so the Order confirmation will go back to the customer with their selected colours and sizes.

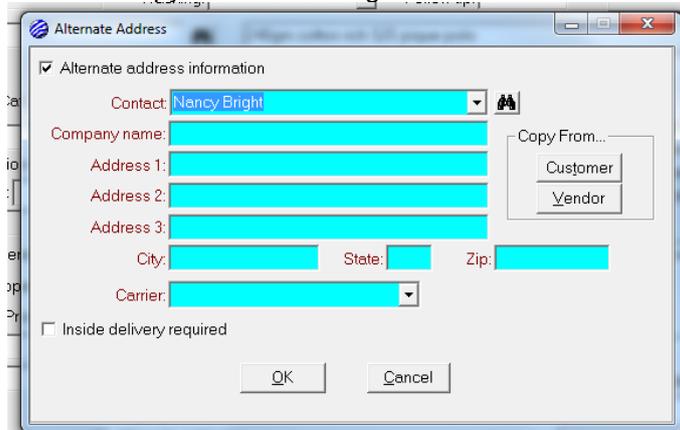
Then enter the relevant details into the Vendor Instructions. You can copy/paste from the Long Description if you wish but remember the supplier doesn't need to know that it is 240gm 40/60 cotton rich etc – they supplied that information with their product description and only need to know the colour/size information.



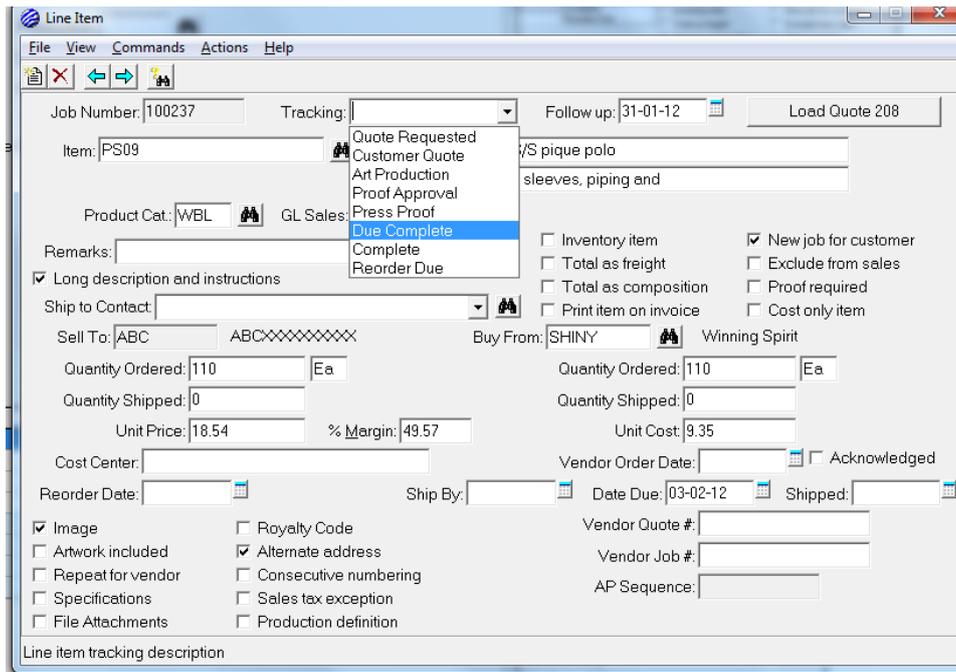


Click OK to get back to the MLI. Now we tell Shiny when we want them to have their part of this job completed and where we want them to deliver this item to.

Just under the UNIT COST field (lower right) enter or select the date you require this supplier to have this item completed by. In our example we need to deliver the job by 17 February so we want Shiny to have despatched the PS09 by 3rd February. We also want Shiny to send the PS09 directly to our decorator, Total Embroidery. Click on **Alternate Address** (lower centre), select the TOTAL EMBROIDERY details straight from our Supplier masterfile by clicking on "Vendor" in the "Copy From" on the right. Click OK



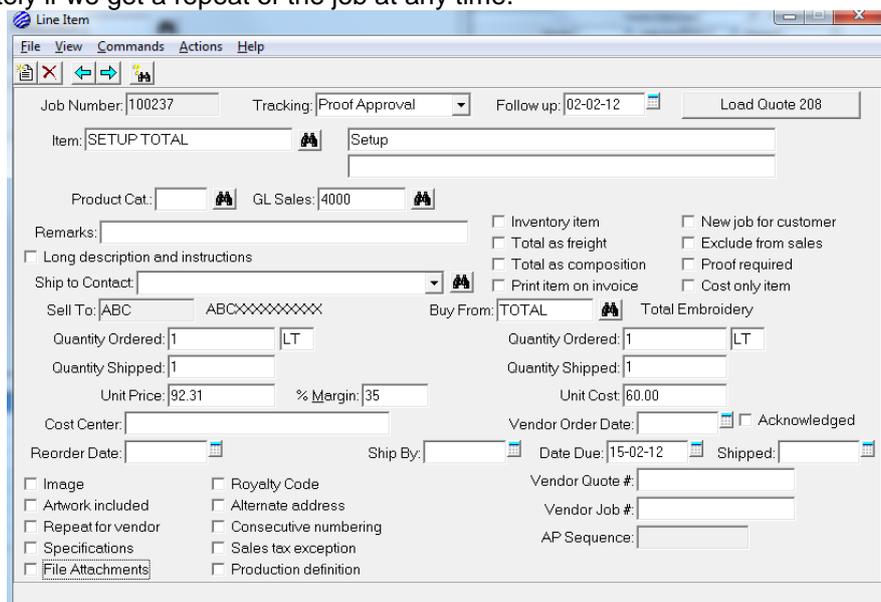
Now we want to set ourselves a reminder for our "to do" list. You can select a reason for the reminder from the drop down list (centre top) or you can type in your own reason. Set yourself a date you want the follow up to appear in your "to do" list.



That line is scheduled so now click on the right facing aqua arrow in the icon bar to proceed to the next line in the job – in this case the Setup line for Total Embroidery. In this job, we are getting an artwork file created by Arty Johnson and will need a proof approval for the setup by 3rd February. Total Embroidery have 2 RLI – the setup and the actual embroidery. The Date Due should be the same date on both lines unless you want the system to produce a separate Purchase Order for each of the 2 lines

Note: the system allows you to enter different Date Dues for the same supplier in case you need some items immediately and others at a later date. If they are produced on the same Purchase Order, the Purchase order will create a separate page for each due date.

As the customer in this example wants the polos for the 17th February and we want to check them first, we will tell Total Embroidery that we want them to have despatched the embroidered garments to us by the 15th February. Note that there is a field on the bottom left called FILE ATTACHMENT. When the final artwork file is available, click this and attach the file so it is available to be sent with the Purchase Order if required but also available immediately if we get a repeat of the job at any time.



Use the Aqua right facing arrow to scroll to the next RLI – the embroidery. Click on LONG DESCRIPTION so we can let Total Embroidery know the decoration requirements.

Click OK. Now enter the Date Due (same as Setup line so goes as 1 Purchase Order) and a follow up date (we will set it so we get a reminder on the 13th February to give them a call)

Now we need to add the Art production line. Select Commands / New to add a new Line Item.

Select Item Code from the options & click OK

Type in the item code

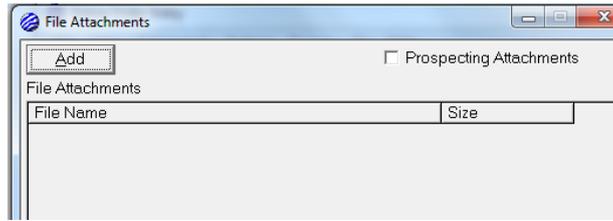
Select the code & Click OK

Complete the Vendor Information required such as Tracking, Followup Date, Due Date (Supplier Due Date) Click OK

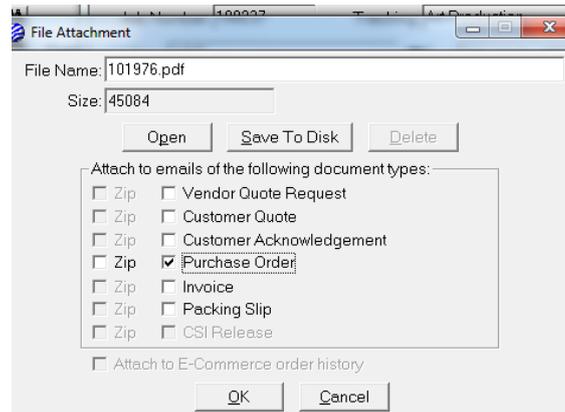
Now complete the Qty & pricing information. We have pre-loaded Arty's pricing, so just by entering the Sell Qty as 1 & TABBING through the remaining fields, the pricing auto fills. You can over-ride any of these pre-loaded prices if you wish. Click OK

In this example we have an ABC logo file but need it converted to an EPS. We can use the FILE ATTACHMENT facility to send the file we have and modify the description lines to explain what we want (or if there are a lot of instructions, go into Vendor Instructions in LONG DESCRIPTION). We need this done by tomorrow (Date Due) and we are setting a follow up of tomorrow with a reason of Art Production.

To attach a file, click on File Attachments

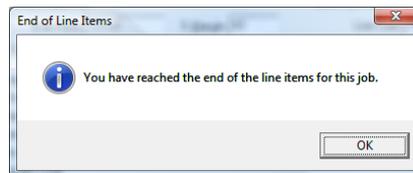


You can add a file from anywhere on your computer, or use a file already saved in the Customer's Prospecting file.



At this point you can tell the system to attach the file to any emailed documents you send out. In this case, we have selected Purchase Order, so the file will automatically attach to the Purchase Order we send to Arty. Click OK & Close the Attachment window.

If we arrow right at this point, you will receive this message. Click OK and close the displayed line item window. Our job appears along with our "schedule".



We want to attach the Artwork RLI to the PS09 MLI. To do this, just right click on the Artwork Line Item & select Add to Group, Select PS09 from the list

Xebra Order Entry

File View Commands Actions Enquiry Go Help

Job: 100237 Special Commission

Job Name: Christmas Golf Day Rep: JM Jim McLaren

Alternate Address File Attachments

Status: Order in Process Division:

Customer: ABC ABCXXXXXXXXX Production:

Billing Customer: ABC QWRWQREQ Created By: NC Naomi Coombs

Ordered By: Nancy Bright Order Date: 17-01-12 Created: 17-01-12 12:07 AM

Ship To: Nancy Bright Due Date: 17-02-12

Bill To: Julie Date Completed:

Customer PO #: Invoice

Cost Center: Number:

Job Type: Standard Job Date:

Date Note Add Paid:

Special Instructions

Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea	Due Complete	31-01-12	208	17-01-12
SETUP TOTAL	Setup	1	LT	Proof Approval	02-02-12	208	17-01-12
EMBTOT5000	Embroidery to 5000 Stitches	110	Ea	Due Complete	13-02-12	208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
HE238	100% Coolde Cotton Back Cap	110	Ea			208	17-01-12
SETUP	Setup	1	LT			208	17-01-12
EMBC2	Embroidery	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
ART	Artwork for ABC logo plot			Art Production	20-01-12		

Add To Group

Add Line Item To Group

Select the master item of the group to add ART - Artwork for ABC logo plot 123

Item	Description	Quantity
PS09	240gm cotton rich S/S pique polo	110
HE238	100% Coolde Cotton Back Cap	110

Double click on the MLI to return to the Order Entry Screen

Xebra Order Entry

File View Commands Actions Enquiry Go Help

Job: 100237 Special Commission

Job Name: Christmas Golf Day Rep: JM Jim McLaren

Alternate Address File Attachments

Status: Order in Process Division:

Customer: ABC ABCXXXXXXXXX Production:

Billing Customer: ABC QWRWQREQ Created By: NC Naomi Coombs

Ordered By: Nancy Bright Order Date: 17-01-12 Created: 17-01-12 12:07 AM

Ship To: Nancy Bright Due Date: 17-02-12

Bill To: Julie Date Completed:

Customer PO #:

Cost Center:

Job Type: Standard Job

Date Note

Special Instructions

Invoice
Number:
Date:
Paid:

Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea	Due Complete	31-01-12	208	17-01-12
SETUP TOTAL	Setup	1	LT	Proof Approval	02-02-12	208	17-01-12
EMBTOT5000	Embroidery to 5000 Stitches	110	Ea	Due Complete	13-02-12	208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
ART	Artwork for ABC logo plot 123	1	ea	Art Production	20-01-12		
HE238	100% Coolde Cotton Back Cap	110	Ea			208	17-01-12
SETUP	Setup	1	LT			208	17-01-12
EMBC2	Embroidery	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12

Line item list

You can now repeat this process for any other line items.

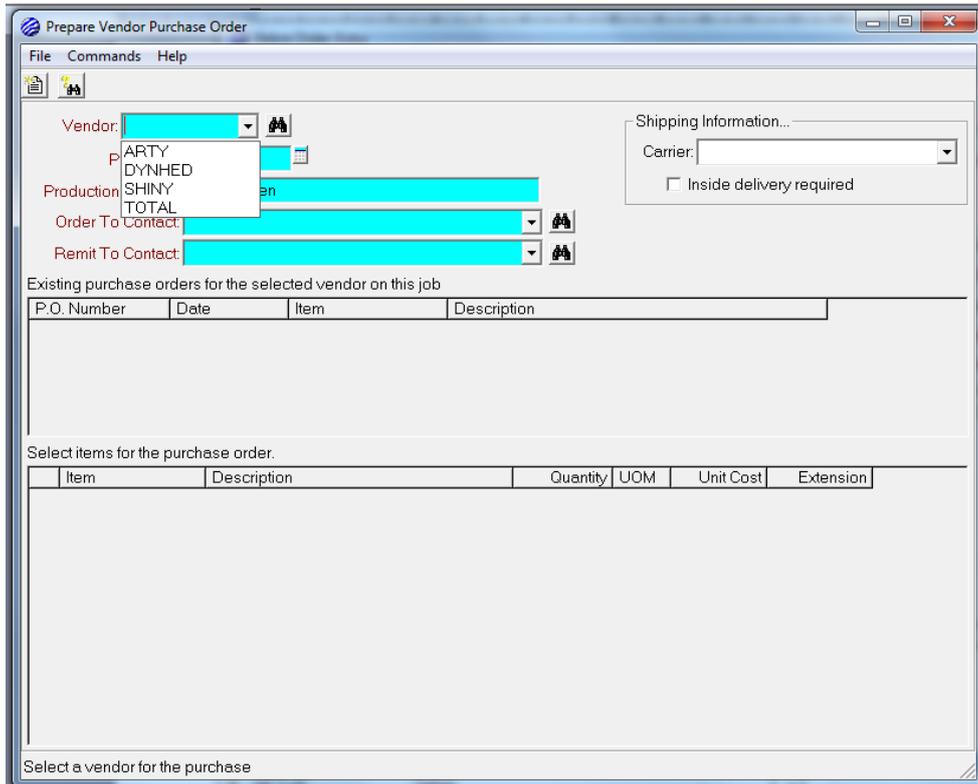
3: Producing Purchase Orders and Customer Confirmations

Having set up the production schedule, we can now create our Purchase orders (PO) for all the suppliers and send the customer an Order Confirmation if required.

At the job screen in Order Entry, click ACTIONS>PREPARE VENDOR PURCHASE ORDER

Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea	Due Complete	31-01-12	208	17-01-12
	SETUP TOTAL	1	LT	Proof Approval	02-02-12	208	17-01-12
	EMBTOT5000	110	Ea	Due Complete	13-02-12	208	17-01-12
	FRTACC					208	17-01-12
	ART	1	ea	Art Production	20-01-12		
	ART	1	ea	Art Production	20-01-12		
HE238	100% Coolde Cotton Back Cap	110	Ea	Due Complete	13-02-12	208	17-01-12
	SETUP	1	LT			208	17-01-12
	EMBC2	110	Ea			208	17-01-12
	FRTACC	1	LT			208	17-01-12

If there is only one Supplier on the job, the Supplier code will automatically populate in the Vendor field. In our example, we have 4 suppliers. If you click the downward facing arrow to the right of the Vendor field, the suppliers we are using in this particular job will appear. We will produce the Shiny PO first by clicking on the SHINY code from the drop down list and hitting the TAB key.



The items being supplied by Shiny appear in the lower portion of the screen and the PO date and the person you want to be the contact for this item (defaults to Sales Rep but you can replace that). If you want to specify a particular transport company/courier, enter that (or if you have entered your transport companies into the Shipping Instructions of Control Files you can select from your drop down list).

Note: If there is an item selected in the lower half that you don't want to appear on the PO (eg internal freight accrual) simply double click on it to de-select it.

Now click COMANDS>CREATE PURCHASE ORDER.

Prepare Vendor Purchase Order

File Commands Help

Create Purchase Order

Vendor: SHINY Winning Spirit

P.O. Date: 19-01-12

Production Contact: Jim McLaren

Order To Contact:

Remit To Contact:

Shipping Information...
Carrier:
 Inside delivery required

Existing purchase orders for the selected vendor on this job

P.O. Number	Date	Item	Description

Select items for the purchase order.

Item	Description	Quantity	UOM	Unit Cost	Extension
X PS09	240gm cotton rich S/S pique polo	110	Ea	9.35	1028.50
FRTACC	Internal Freight Accrual	1	LT	30.00	30.00

Make the vendor purchase order.

Remember we specified in the scheduling that we wanted Shiny to send direct to our Embroiderer – have a look at the Deliver to address below – of course the layout of this form is dictated by you.

 PO Box 5440
CHITTAWAY BAY, NSW, 2261
Ph 02 4389 8600
Ph 02 4389 8611

PURCHASE ORDER

Number 100237	Date 19-01-12
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Page 1 of 1

Your Quote Number See Below	Ship Date 03-02-12	Our Account Number	Contact Jim McLaren	Customer Order No.
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TO: Winning Spirit
Shiny Pty Ltd
195-197 Grange Road
FAIRFIELD VIC 3078

Deliver Via:

Vendor Info.: Phone: 03 9499 2388 Fax: 03 9499 9868 Email: jmclaren@pantheon.com.au

Deliver To:
Jim Brown
Total Embroidery
1 Smith St
Melbourne VIC 3000

Quantity	UM	Item	Description	Unit Cost	GST	Extension
110	Ea	PS09	240gm cotton rich S/S pique polo with contrast raglan sleeves, piping and Special Instructions: Colour: Red/white/navy Sizes: 15 x S 32 x M 39 x L 24 x XL	9.35	0.94	1131.35

At this stage, you do get the opportunity of adding special instructions to this PO by using the OPTIONS at the top. We do not recommend this unless it is a note to the supplier that you do not want recorded on the job - "can you help us out on this one please Peter as the customer has a nearly impossible deadline" sort of thing. All Special instructions should be entered in Vendor Instructions on their line item.

Click FILE>SAVE to get a final preview and select the e-mail icon if you would like to e-mail to your supplier. Repeat this process for all Vendors Purchase Orders.

Xebra Print Preview
File Edit Commands Insert Help



**PO Box 5440
CHITTAWAY BAY, NSW, 2261**
Ph 02 4389 8600
Ph 02 4389 8611

PURCHASE ORDER	
Number	Date
100237	19-01-12

Page 1 of 1

Your Quote Number See Below	Ship Date 03-02-12	Our Account Number	Contact Jim McLaren	Customer Order No.
--------------------------------	-----------------------	--------------------	------------------------	--------------------

TO: Winning Spirit
Shiny Pty Ltd
195-197 Grange Road
FAIRFIELD VIC 3078

Deliver Via:

Vendor Info.: Phone: 03 9499 2388 Fax: 03 9499 9868 Email: jimclaren@pantheon.com.au

Deliver To:				
Jim Brown				
Total Embroidery				
1 Smith St				
Melbourne VIC 3000				

Quantity	UM	Item	Description	Unit Cost	GST	Extension
110	Ea	PS09	240gm cotton rich S/S pique polo with contrast raglan sleeves, piping and Special Instructions: Colour: Red/white/navy Sizes: 15 x S 32 x M 39 x L 24 x XL	9.35	0.94	1131.35

Your job is now in production. If you would like to send your customer an Order Confirmation, click **ACTIONS>CUSTOMER ACKNOWLEDGEMENT**. The layout is of course up to you.

The screenshot shows the Xebra Order Entry application. The 'Actions' menu is open, highlighting 'Customer Acknowledgement'. The main window displays the following details:

- Job: 1002
- Job Name: Chris
- Rep: JM Jim McLaren
- Production: [blank]
- Created By: NC Naomi Coombs
- Order Date: 17-01-12
- Due Date: 17-02-12
- Date Completed: [blank]
- Invoice Number: [blank]
- Invoice Date: [blank]
- Invoice Paid: [blank]

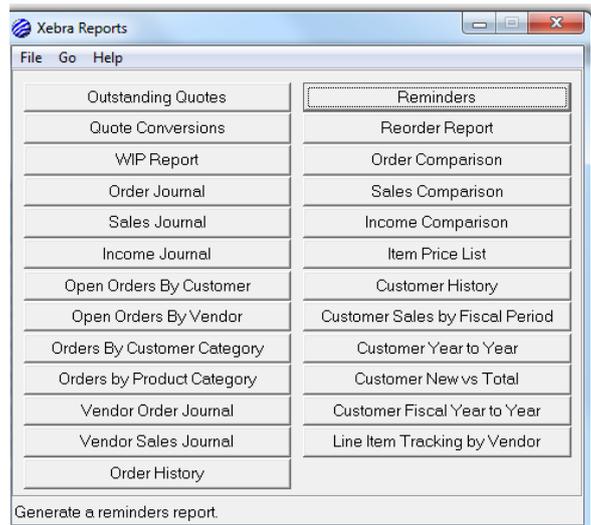
Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea	Due Complete	31-01-12	208	17-01-12
SETUP TOTAL	Setup	1	LT	Proof Approval	02-02-12	208	17-01-12
EMBTOT5000	Embroidery to 5000 Stitches	110	Ea	Due Complete	13-02-12	208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
ART	Artwork for ABC logo plot 123	1	ea	Art Production	20-01-12		
HE238	100% Coolde Cotton Back Cap	110	Ea	Due Complete	13-02-12	208	17-01-12
SETUP	Setup	1	LT			208	17-01-12
EMBC2	Embroidery	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12

4: Tracking Production

Having set up your production schedule, it is extremely important to keep it updated. It is like your CRM programs and diaries. They are great tools but if you don't use them religiously, they become unreliable.

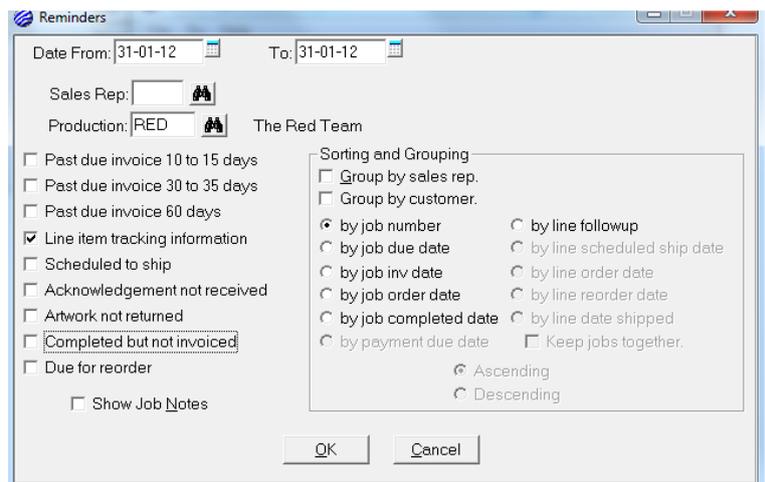
The first task EVERY DAY for a person looking after the production process is to run your "To Do" list

a: Reminders Report – your "To Do" list



From the Order Entry screen, click GO>REPORTS>REMINDERS. Enter the date range for your to do list – typically from T (today) to T (today) but if it is a Monday, it is always wise to cover Saturday and Sunday as well just in case a reminder has inadvertently been set for the weekend. We are running this just for jobs relating to the Red Production team.

Untick everything except Line item tracking information and click OK



The resultant report will give you a list of all components of jobs that you need to be following up providing you with the job number, the line within that job and the reason along with the contact details of the supplier you are following up

Xebra Order Entry

File View Commands Actions Enquiry Go Help

Job: 100237 Special Commission

Job Name: Christmas Golf Day Rep: JM Jim McLaren

Alternate Address File Attachments

Status: Order in Process Division:

Customer: ABC ABCXXXXXXXXX Production: RED The Red Team

Billing Customer: ABC QWRWQREQ Created By: NC Naomi Coombs

Ordered By: Nancy Bright Order Date: 17-01-12 Created: 17-01-12 12:07 AM

Ship To: Nancy Bright Due Date: 17-02-12

Bill To: Julie Date Completed:

Customer PO #:

Cost Center:

Job Type: Standard Job

Date **Note**

19-01-12 Shiny confirm ready to ship Polos to Total Embroidery

Special Instructions

Invoice Number:
Date:
Paid:

Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
PS09	240gm cotton rich S/S pique polo	110	Ea	Complete		208	17-01-12
SETUP TOTAL	Setup	1	LT	Proof Approval	02-02-12	208	17-01-12
EMBTOT5000	Embroidery to 5000 Stitches	110	Ea	Due Complete	13-02-12	208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12
ART	Artwork for ABC logo plot 123	1	ea	Art Production	20-01-12		
HE238	100% Coolde Cotton Back Cap	110	Ea	Due Complete	13-02-12	208	17-01-12
SETUP	Setup	1	LT			208	17-01-12
EMBC2	Embroidery	110	Ea			208	17-01-12
FRTACC	Internal Freight Accrual	1	LT			208	17-01-12

When all lines are complete, your job is complete.

Some companies will Receive the Vendor invoices before Invoicing the customer. Others will invoice and process the suppliers invoices later. Xebra can handle both methods and these options are outlined in the A Guide to Day to Day Accounting Process.