

## **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.

🖉 Xebra Order Entry									
<u>File View Commands</u>	File View Commands Actions Enquiry Go Help								
Job: 1002	37			Special Commission					
Job Name: Chris	tmas Golf Dav			Be	n: JM	Jim McLaren			
Alternate Address	Eilo Attachm	anta			P-1	onn molearon.			
Allemale Address		ents	D: · · ·						
Status: Orde	er in Process	<u> </u>	Divisio	on:	<u>#9</u>				
Customer: ABC	<u>#</u>	ABCXXXXXXXXX				Production:	<u>#4</u>		
Billing Customer: ABC	<i>i</i> 4	QWRWQREQ				Created By: NC	N	aomi Coombs	
Ordered By: Nan	cy Bright			-	<b>#</b>	Order Date: 17-0	1-12	Created: 17-01-12	12:07 AM
Ship To: Nani	cv Bright			•	<b>#</b>	Due Dete: 17-0	2-12		
Bill To: Julie					<u></u>				
Oustamer DO #		_			Date	Completed:			
Customer PO #.			1			Invoice			
Cost Center:						Numbe	r:	_	
Job Type: Standard	Job		•	•		Date	e:		
Date Note		Add	1		Paid	d:			
				1					
			🗆 Spe	cial Inst	ructions				
   Itam	Description		Ouentitu		Ctotus		Fallou	Quete Number	
DS09	240 cm cotton	rich S/S nique note	uantity	E o	Status		rollow-up	208	17-01-12
SETUPITOTAL	Setun	icii 373 pique polo	1	IT				208	17-01-12
EMBTOT5000	Embroiderv to 50	)00 Stitches	110	Ea				208	17-01-12
FRTACC	Internal Freight A	ccrual	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 A	.ccrual	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 dependent 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).

🥥 Line Item				
File View Commands Acti	ons Help			
Job Number: 100237	Tracking:	•	Follow up:	Load Quote 208
Item: PS09	M 240gm	cotton rich S/	S pique polo	
	with co	ntrast raglan s	sleeves, piping and	
Product Cat. WBL	📕 GL Sales: 4000	#4		
Remarks:			Inventory item	Vew job for customer
Long description and inst	tructions		Total as freight	Exclude from sales
Ship to Contact:		- M	Print item on invoice	Cost only item
Sell To: ABC	ABCXXXXXXXXX	Buy Fro	m: SHINY MA V	Vinning Spirit
Quantity Ordered: 110	Ea		Quantity Ordered: 110	Ea
Quantity Shipped: 0			Quantity Shipped: 0	
Unit Price: 18.54	1 % <u>M</u> argin: 49.57	,	Unit Cost: 9.35	5
Cost Center:			Vendor Order Date:	🔤 🗆 Acknowledged
Reorder Date:	🔟 Ship	By:	Date Due: 17-02-	-12 🔲 Shipped:
🔽 Image	🗆 Royalty Code		Vendor Quote #:	
Artwork included	Alternate address		Vendor Job #:	
Repeat for vendor	Consecutive numbering		AP Sequence:	
File Attachments	Production definition			
e				

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.



Long Description And Instructions	X			
Long Description:				
Unisex cotton rich short sleeves pique polo with contrast raglan sleeves, piping and plackets				
Colour: Red/white/navy				
Sizes: 15 x Small, 32 x Medium, 39 x Large, 24 x XL	-			
, Vendor Instructions:				
Colour: Red/white/navy Sizes: 15x S 32 x M 39 x I	*			
24×XL	~			
, Warehouse Instructions:				
	^			
	~			
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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

	Alternate Address	of \$10 years with	
	Alternate address information		
at i	Contact: Nancy Bright	-	· #4
1	Company name:		Copy From
5	Address 1:		Customer
	Address 2:		⊻endor
	Address 3:		
	City:	State: Zi	p:
2	Carrier:	•	
	Inside delivery required		
	<u>O</u> K	<u>C</u> ancel	

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.



🥔 Line Item		
<u>File View Commands Action</u>	ıs <u>H</u> elp	
Job Number: 100237	Tracking:	Follow up: 31-01-12 Load Quote 208
ltem: PS09	Quote Requeste Customer Quote	d /S pique polo
	Art Production	sleeves, piping and
Product Cat.: WBL	GL Sales: Press Proof	
Remarks:	Complete	□ Inventory item
I one description and instru	ctions Reorder Due	Total as freight     Exclude from sales
Ship to Contect		Total as composition
Ship to Contact		
Sell To: ABC A	BCXXXXXXXXX	Buy From: SHINY Minning Spirit
Quantity Ordered: 110	Ea	Quantity Ordered: 110 Ea
Quantity Shipped: 0		Quantity Shipped: 0
Unit Price: 18.54	% <u>M</u> argin: 49.57	Unit Cost 9.35
Cost Center:		Vendor Order Date: 🔲 🗖 🗖 Acknowledged
Reorder Date:	Ship By:	Date Due: 03-02-12 Shipped:
🔽 🔽 Image 🛛 🖓	Royalty Code	Vendor Quote #:
C Artwork included	Alternate address	Vendor Job #:
🗌 🗆 Repeat for vendor 👘 🛛	Consecutive numbering	AP Sequence:
Specifications	Sales tax exception	A boquence.
File Attachments	Production definition	
Line item tracking description		

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 3<sup>rd</sup> 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 17<sup>th</sup> 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 15<sup>th</sup> 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.

🧭 Line Item			
<u>File View Commands A</u>	ctions <u>H</u> elp		
🇎 🗙 🗢 🛶 🐪			
Job Number: 100237	Tracking: Proof Approval	▼ Follow up: 02-02-12	Load Quote 208
Item: SETUP TOTAL	. 🦄 Setup		
Product Cat.	GL Sales: 4000		
Remarks:		Inventory item	New job for customer
Long description and in	astructions	Total as freight	Exclude from sales
Chin to Contact	ion de la	Total as composition	Proof required
Ship to Contact	_	Print item on invoice	Cost only item
Sell To: ABC	ABCXXXXXXXXXX	Buy From: TOTAL M Total Em	nbroidery
Quantity Ordered: 1	LT	Quantity Ordered: 1	LT
Quantity Shipped: 1		Quantity Shipped: 1	
Unit Price: 92	.31 % <u>M</u> argin: 35	Unit Cost 60.00	
Cost Center:		Vendor Order Date:	📰 🗖 Acknowledged
Reorder Date:	Ship By:	Date Due: 15-02-12	Shipped:
🗆 Image	🗆 Royalty Code	Vendor Quote #:	
Artwork included	Alternate address	Vendor Job #:	
Repeat for vendor	Consecutive numbering	AP Sequence:	
File Attachments	Sales tax exception Production definition		



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.

long Description And Instructions	X
Long Description:	
	~
	Ŧ
Vendor Instructions:	
Polos to be supplied by Shiny around 3rd of February 110 x PS09 Polo	^
Colour: Red/white/navy	
Sizes: 15 × 5, 32 × M, 39 × L, 24 × XL	
Embroider ABC logo (plot 123) @ 5000 stitches on front left chest	-
Warehouse Instructions:	
	*
	-
<u>O</u> K <u>C</u> ancel	

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 13<sup>th</sup> February to give them a call)

Dine Item		suggest 1 and	
<u>File View Commands Act</u>	ions <u>H</u> elp		
Job Number: 100237	Tracking: Due Complete	▼ Follow up: 13-02-12	Load Quote 208
∍ Item: EMBTOT5000	M Embroider	y to 5000 Stitches	
Product Cat.:	🐪 GL Sales: 4000 🧴	Ha l	_
Remarks:		Inventory item	New job for customer
Long description and ins	tructions	<ul> <li>I otal as freight</li> <li>Total as composition</li> </ul>	Exclude from sales
Ship to Contact		Print item on invoice	Cost only item
Sell To: ABC	ABCXXXXXXXXX	Buy From: TOTAL	Total Embroidery
Quantity Ordered: 110	Ea	Quantity Ordered: 110	Ea
Quantity Shipped: 0		Quantity Shipped: 0	
Unit Price: 0	% <u>M</u> argin: 0	Unit Cost: 2.35	5
Cost Center:		Vendor Order Date:	📶 🗔 Acknowledged
Reorder Date:	Ship By:	Date Due: 15-02-	12 🔲 Shipped:
🗌 🗖 Image	🗖 Royalty Code	Vendor Quote #:	
Artwork included	Alternate address	Vendor Job #:	
Repeat for vendor	Consecutive numbering	AP Sequence:	
File Attachments	Production definition	,	
Follow up date			
			Due Date: 130-04-09

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



		Bernier Date (00000 T Ventra Buste #
🥝 Line Item		
<u>File View</u> <u>Commands</u>	Actions Help	
🖹 🗙 🗲 🛛 New	Ctrl+E	
Job Nur Next	Ctrl+N cking: Due Compl	olete 💌 Follow up: 13-02-12 🗐 Load Quote 208
Item:	is Ctrl+P	roidery to 5000 Stitches
Delete		
Product Cat.:	GL Sales: 4000	A1
Bemarke:		□ Inventory item □ New job for customer
	al far also alfana a	🗖 Total as freight 👘 Exclude from sales
Long description an	dinstructions	🔤 🔲 Total as composition 👘 Proof required
Ship to Contact:		🔄 🙆 🔲 Print item on invoice 🛛 🔽 Cost only item
Sell To: ABC	ABCXXXXXXXXX	Buy From: TOTAL 🙀 Total Embroidery
Quantity Ordered:	110 Ea	Quantity Ordered: 110 Ea
Quantity Shipped:	0	Quantity Shipped: 0
Unit Price:	0 % <u>M</u> argin: 0	Unit Cost: 2.35
Cost Center:		Vendor Order Date: 🔲 🗖 Acknowledged
Reorder Date:	📰 Shi	nip By: 🗾 Date Due: 15-02-12 🗐 Shipped:
🗆 Image	🗖 Royalty Code	Vendor Quote #:
Artwork included	Alternate address	Vendor Job #:
Repeat for vendor	Consecutive numbering	AP Sequence:
File Attachments	Production definition	
Create a new line item		

#### Select Item Code from the options & click OK



Type in the item code

🥝 Item Data	
Item: ART	Ordering Instructions:
Description 1: ART - Art Production	]
Description 2:	
Remarks:	
Product Category:	
🗖 Total as freight	
Inventory item	
<u>Q</u> K <u>C</u> ancel	

#### Select the code & Click OK

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



-		-
-	🤣 Vendor/Scheduling Information	J
ł	Tracking: Art Production 🔹 Follow-up Date 20-01-12	
1	Vendor: 🗚 TY 🗾 🎽 Arty Johnson	
	Vendor Quote #.	
	Vendor Job #:	
4	Vendor Order Date:	
ł	Ship By Date:	
I	Request/Due Date: 20-01-12	
I	Shipped Date:	
I	Re-order Date:	
_	Vendor acknowledgement	
C	<u>QK</u> <u>Cancel</u>	

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

	Line Item Quantities	
ł	Disable automatic calculations Discount	Code: M Price:
ł	Sell Quantities	Buy Quantities
ł	Quantity Ordered: 1 ea	Quantity Ordered: 1
ł	Quantity Shipped:	Quantity Shipped:
-	Unit Price: 125.00	Unit Cost: 75.00
1	Percent Margin: 40	
I	Cost only item	
	<u>K</u>	Customer Item Enquiry

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.

🥔 Line Item	
<u>File View Commands Actions Help</u>	
Job Number: 1845 Tracking: Art Production	Follow up: 07-04-09
Item: ART MATA	ABC logo plot 123
Convert to E	EPS
Product Cat.: 🗚 👪 GL Sales: 4000 🛔	Ha.
Remarks:	Inventory item New job for customer
1	I otal as freight     Exclude from sales     Tatal as associate     Desclaration
Long description and instructions	I otal as composition     Proof required     Rint item on invoice     Cost only item
Sell To: ABC2 ABC Plumbing Company - PA	Buy From: ARTY Arty Johnson
Quantity Ordered: 1	Quantity Ordered: 1 It
Quantity Shipped: 0	Quantity Shipped: 0
Unit Price: 125.00 % Margin: 40	Unit Cost: 75.00
Date Due: 07-04-09 📰 Shipped: 00-00-00 📰	Vendor Order Date: 00:00:00 📰 🗔 Acknowledged
🗆 Image Reorder Date: 00-00-00	Vendor Quote #:
Artwork included Alternate address	Vendor Job #:
🗌 🗖 Repeat for vendor 👘 Consecutive numbering	AP Sequence:
Specifications Sales tax exception	Al objection]
File Attachments Production definition	
Hoyalty Code	
Product description line two	

To attach a file, click on File Attachments



File Attachments	
Add	Prospecting Attachments
File Attachments	
File Name	Size

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

		N I 100007 T I' And December of the
File Attach	ment	
File Name	e: 10197	6.pdf
Size	: 45084	
		Ogen <u>S</u> ave To Disk <u>D</u> elete
	Attach to	emails of the following document types:
ſ	Zip	Vendor Quote Request
Г	Zip	Customer Quote
ſ	Zip	Customer Acknowledgement
ſ	Zip	✓ Purchase Order
ſ	Zip	Invoice
ſ	Zip	Packing Slip
ſ	Zip	🗖 CSI Release
Г	Attac	h to E-Commerce order history
		OK <u>C</u> ancel

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 pint, you will receive this message. Click OK and close the displayed line item window. Our job appears along with our "schedule".

End of Line Items	ached the end of the line items for this job.
	ОК

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





-						3 . 1 . 2		
Xebra Order Entry				-				
<u>File View Commands</u>	<u>A</u> ctions Enqu <u>i</u> ry	<u>G</u> o <u>H</u> elp						
🖹 🗶 🙀 💊 🔿					×			
Job: 1002	37					ecial Commissio	on	
Job Name: Chris	tmas Golf Day			Re	p: JM Jim McLaren			
Alternate Address	🔲 File Attachm	ents						
Status: Orde	er in Process	•	Divisio	in:	<i>6</i> 4			
Customer: ABC	<i>#</i> 4	ABCXXXXXXXXXX			Production:	<b>#</b> 4		
Billing Customer: ABC	<b>#</b>	QWRWQREQ			Created By: N	 С N	aomi Coombs	
Ordered By: Nanr	cy Bright			-	M Order Date: 17	-01-12	Created: 17-01-12	12:07 AM
Ship To: Nan	cy Bright			•	M Due Date: 17	-02-12		
Bill To: Julie				•	M Date Completed:			
Customer PO #:					Invoice			
Cost Center:					Numb	er:		
Job Type: Standard	Job		•	-	Da	ite:		
Date Note					Pa	iid:		
			🗆 Spe	cial Inst	ructions			
Item	Description		Quantity	UOM	Status	Follow-up	Quote Number	Quote Date
	240gm cotton r	rich S/S pique polo	110	La	Due Complete	31-01-12	208	17-01-12
EMPTOTE000	Setup Embroidon do Ef	100 Stitchoo	110	LI Ea	Proor Approval Due Cemplete	13-02-12	200	17-01-12
FRTACC	Internal Freight A	coruel	1	LT	Due complete	13 02 12	208	17-01-12
HE238	100% Coolde (	Cotton Back Can	110	Ea			208	17-01-12
SETUP	Setun	ootton Duok oup	1	LT			208	17-01-12
			110	Ea			208	17-01-12
EMBC2	Embroiderv						000	
EMBC2 FRTACC	Embroidery Internal Freight A	ccrual	1	LT			208	17-01-12
EMBC2 FRTACC	Embroidery Internal Freight A Artwork for AB	ccrual C logo plot	1	LT	Art Production	20-01-12	208	17-01-12
EMBC2 FRTACC	Embroidery Internal Freight A Artwork for AB	ccrual C logo plot Add T	1 o Group	LT	Art Production	20-01-12	208	17-01-12
EMBC2 FRTACC ART	Embroidery Internal Freight A Artwork for AB	ccrual C logo plot Add T	1 o Group	LT	Art Production	20-01-12	208	17-01-12
EMBC2 FRTACC ART	Embroidery Internal Freight A Artwork for AB	ccrual C logo plot Add T	1 o Group		Art Production	20-01-12	208	17-01-12
EMBC2 FRTACC ART	Embroidery Internal Freight A Artwork for AB	ccrual	1 o Group		Art Production	20-01-12	208	17-01-12
EMBC2 FRTACC ART	Embroidery Internal Freight A Artwork for AB	Crual Clogo plot Add T Add T	0 Group		Art Production	20-01-12	208	17-01-12

Add Line Item To Grou	1p						
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



<u></u>	1 • 4 • 1 • 5 • 1 • 6 • 1 • 7 • 1 • 8 • 1 • 9 • 1 •	10 11	. 12	13 - 1 - 14 - 12 - 15 - 1 - 16 - 1 - 1	7				
Xebra Order Entry									
<u>File View Commands</u>	Actions Enquiry Go Help								
Job: 100237 🔽 Special Commission									
Job Name: Chris	stmas Golf Day		Re	ep: JM Jim McLaren					
Alternate Address	File Attachments			,					
Status: Orde	er in Process	Divisio	on:	<i>#</i>					
Customer: ABC	ABCXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX			Production:	<i>#</i> 4				
Billing Customer ABC	M OWBWOBEO			Created By N		i Ch-			
Ordered By: Nan	cy Bright		•		-	Created: 17-01-12	12:07 AM		
Bill To: Julia	Bit To Ver								
Customer DO #	·		-	Date Completed:					
Customer PO #:		_		Invoice	or				
Cost Center:			_	Nume	iei.	_			
Job Type: Standard	Job		<u>-</u>			_			
Date Note		A <u>d</u> d		Pa	aia: j				
		<b>—</b> 0	·						
		I Spe	cial inst	ructions					
			Luou	0					
Item DS09	240 gm cotton rich S/S pique pole	Uuantity 110	E o	Status Due Complete	Follow-up 31_01_12	208	Uuote Date		
SETUP TOTAL	Setun	1	IT	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		
EBTACC	Internal Ereight Accrual	1	IT	Duo compieto	10 02 12	208	17-01-12		
ART	Artwork for ABC logo plot 123	1	ea	Art Production	20-01-12	200	TTOTTE		
HE238	100% Coolde Cotton Back Cap	110	Ea			208	17-01-12		
SETUP	Setup	1	LT			208	17-01-12		
EMBC2	Embroiderv	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.

🎯 Xebra Order Entry									
File View Commands	Eile View Commands Actions Enquiry Go Help								
	Prepare Customer Quote	x l							
	Record Customer Order								
Job:  1002	Prenare Vendor Purchase Order	Special Commission							
Job Name: Chri	Customer Acknowledgement	Rep: JM Jim McLaren							
Alternate Address	Customer Acknowledgement								
Status: Ord	Print Packing Slip	Divicio	n:	<b>#</b>					
	Receive Vendor Invoice	Divisio	n.j						
Customer: ABC	Enter/Relieve Inventory			Production:	<u> </u>				
Billing Customer: ABC	Invoice Customer			Created By: N		laomi Coombs			
Ordered By: Nan	Print Shipping Label	Created: 17-01-12 12:07 AM							
Shin To: Nan	Print Misc. Job Document				7 00 10				
		<u> </u>		Due Date:	7-02-12				
	Bill I o: Julie Sales Tax Reversal I Date Completed:								
Customer PO #:	Credit Job			Invoice					
Cost Center:	Print Job Summary			Num	iber:				
Inh Type: Standard Inh									
oblinger Standard Job									
		A <u>d</u> d			unu.j				
		L Spe	cial Inst	ructions					
Item	Description	Quantity	UOM	Status	Follow-up	Quote Number	Quote Date		
PS09	240qm 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 EMPC2	Setup	110	LI			208	17-01-12		
	Internal Freight Accrual	110	La			200	17-01-12		
	Internal Freight Accidal					200	17-01-12		
	fear the second second second								
Prepare a purchase ord	er for the current job.								
							//		

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

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.



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Prepare Vendor Purchase	e Order	the state of the state				
File Commands Help						
1						
Vendor:	<u>•</u>				Shipping Information – Carrier:	
Production SHINY TOTAL	ən	-			🗌 Inside delivery re	equired
Urder To Contact:			<b>•</b>	<u>999</u>		
Remit To Contact:			•	<u>#</u>		
Existing purchase orders	for the sele	cted vendor on this job	0			
Select items for the nurch	aso ordor					
Item	Descriptio	n		Quantity	UOM Unit Cost E	Extension
Select a vendor for the pu	ırchase					1.

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	
Eile Commands Help	
Create Purchase Order	
Vendor: SHINY 💽 🏄 Winning Spirit	Shipping Information
P.O. Date: 19-01-12	Carrier:
Production Contact: Jim McLaren	Inside delivery required
Order To Contact.	A
Remit To Contact:	A
Existing purchase orders for the selected vendor on this job	
P.O. Number Date Item Description	
	19
Select items for the purchase order.	Quantity LIOM Linit 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.

Pantheon Systems	PO I CHI Ph ( Ph (	Box 5440 TTAWAY B/ 02 4389 860 02 4389 861	AY, NSW, 2261 10 11	PURC Number 100237	CHASE	Date 19-01-12 Page 1 of 1		
Your Quote Number See Below	Si 0	hip Date 3-02-12	Our Account Number	Contact Jim McLaren			Custom	er Order No.
TO: Vendor Info.: Phone Jii To 1 M	Winning Shiny F 195-197 FAIRFIE : 03 9499 rer To: m Brow tal Eml Smith S elbourn	g Spirit Pty Ltd 7 Grange Road ELD VIC 307: 9 2388 Fax: 03 9- 9 2388 Fax: 03 9- 70 m broidery St St VIC 3000	j 8 499 9868 Email: jmclare	en@pantheon.com.au	Deliver Via:			
Quantity	UM I	tem Des	cription		Unit Cost		GST	Extension
110	Ea F	PS09 240 with Sp Siz 15 32 39 24	)gm cotton rich S/S h contrast raglan sl ecial Instructions: C es: x S x S x M x L x XL	b pique polo eeves, piping and Colour: Red/white/nav	9.35 V		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					CONTRACTOR OF THE OWNER.		
File Edit Commands Insert Help							
▝▓▓ ▟▟Qॼ ↗ ▓▆▆≍ ᆃ→ ₥∠ॗॕॕॼॼ ▚							
	Pantheon Systems	PO Box 5440			PURCH		FR
	2000	CHITTAWAY BAY, NSW, 2261			Number	Date	
	1 horas and	Pb 02 4389 8600			100237	19-01-12	2
	Yeu	Ph 02 4389 8611			L	Pag	e 1 of 1
	Your Quote Number See Below	Ship Date 03-02-12	Our Account Number	Contact Jim McLaren		Custom	er Order No.
					Define 1 fee		
	то: у	Ninning Spirit Shiny Pty I td			Deliver via.		
	1	195-197 Grange Ro	ad				
	ŀ	-AIRFIELD VIC 3	078				
	Vendor Info.: Phone:	03 9499 2388 Fax: 03	9499 9868 Email: jmclar	en@pantheon.com.au			
	Deliv	er To:					
	Jin	n Brown tal Embroidery					
	1.5	Smith St					
	Me	elbourne VIC 300	)				
	Quantity U	JM Item D	escription		Unit Cost	GST	Extension
	110 E	Ea PS09 2	40am cotton rich S/	S nique nolo	9 35	0.94	1131 35
		Lu 1000 1	vith contrast raglan s	leeves, piping and	0.00	0.54	1101.00
		0	Special Instructions: ( Sizes:	Colour: Red/white/nav	у		
		1	5 x S				
		3	l2 x iVl 19 x L				
		2	4 x XL				



# 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.

🥝 Xebra Order Entry							
<u>File View Commands</u>	Actions Enquiry Go Help						
	Prepare Customer Quote			X			
	Record Customer Order						
Job: 1002	Prepare Vendor Purchase Order			l in ≥t	pecial Commissio	n	
Job Name: Chris	Customer Acknowledgement		Re	ep: JM Jim McLaren			
Alternate Address	Print Packing Slip						
Status: Orde	Receive Vendor Invoice	Divisio	in:	4			
Customer: ABC	Enter/Policy/a Inventory		,	Production:	14		
Billing Customer ABC	Inveice Customer			Created Bry N		: O h -	
Output Dia Non	Drive Customer					aomi Coomps Croatod: 17-01-12 "	12-07 AM
Ordered By: Nari	Print Shipping Laber	L	<u> </u>	Order Date: 17	7-01-12	Created. 17-01-12	12.07 AM
Ship To: Nan	Print Misc. Job Document		-	Due Date: 17	7-02-12 🔟		
Bill To: Julie	Sales Tax Reversal		•	🙆 Date Completed:			
Customer PO #:	Credit Job			_ Invoice			
Cost Center:	Print Job Summary			Numl	ber:		
Job Turor Rhandowd	1-h		7	Di	ate:		
Job Type, Standard		_		P	aid	_	
		Add					
		I Spe	ciai insi	ructions			
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
	Internal Freight Accrual	1	LI	Art Draduction	20.01.12	208	17-01-12
HE238	100% Coolde Cotton Back Can	110	Ea	Due Complete	13-02-12	208	17-01-12
SETUP	Setup	1	LT	Due complete		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

🕽 Xebra Reports	
File Go Help	
Outstanding Quotes	Reminders
Quote Conversions	Reorder Report
WIP Report	Order Comparison
Order Journal	Sales Comparison
Sales Journal	Income Comparison
Income Journal	Item Price List
Open Orders By Customer	Customer History
Open Orders By Vendor	Customer Sales by Fiscal Period
Orders By Customer Category	Customer Year to Year
Orders by Product Category	Customer New vs Total
Vendor Order Journal	Customer Fiscal Year to Year
Vendor Sales Journal	Line Item Tracking by Vendor
Order History	
Generate a reminders report.	

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

🤣 Reminders		
Date From:  31-01-12 To:  3 Sales Rep:	1-01-12	
Production: RED 🎽 The Re	d Team	
Past due invoice 10 to 15 days Past due invoice 30 to 35 days Cast due invoice 30 to 35 days	Sorting and Grouping <u>G</u> roup by sales rep. Group by customer.	
Past due invoice 60 days     Ino item tracking information     Scheduled to ship	<ul> <li>by job number</li> <li>by job due date</li> </ul>	C by line followup C by line scheduled ship date
Acknowledgement not received     Artwork not returned	C by job inv date C by job order date C by job completed date	by line order date     by line reorder date     by line reorder date     by line date shinned
Completed but not invoiced	C by payment due date	Keep jobs together.
Due for reorder	C Asce	ending
☐ Show Job <u>N</u> otes	C Des	cending
	<u>O</u> K <u>C</u> ancel	

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





#### b: Following up on the schedule

Having run the To Do list, the second most important job for the person following up production is to review EVERY time on that list and either finalise the line or update the follow up date and note a reason why it has changed. The benefit to all is that anyone can look at any job at any time and see what is happening on a job, if there is a delay, why there is a delay, when the goods were dispatched. This reduces dramatically the need to chase staff up to find out what they know and allows instant response to customer enquiries.

In our list above, we have 1 job to follow up, 100237. We need to follow up to make sure that the shirts will be ready to go to the embroiderer by the due date.

Locate the Xebra job by, from Order Entry, COMMANDS>FIND JOB and look for job 100237. Then I would double click on the line that required follow up. Once you have confirmed the delivery is on track, set the TRACKING to Complete and remove the follow up date

🥔 Line Item	
File View Commands Actions Help	
Job Number: 100237 Tracking: 🖸	ue Complete 🗾 Follow up: 🔲 Load Quote 208
Item: PS09	uote Requested ustomer Quote VS pique polo
Ar	rt Production sleeves, piping and
Product Cat.: WBL 📕 GL Sales: Pr	ress Proof ue Complete
Remarks:	omplete
Long description and instructions	eorder Due
Ship to Contact:	M     Print item on invoice     Cost only item
Sell To: ABC ABC	Buy From: SHINY Minning Spirit
Quantity Ordered: 110 Ea	Quantity Ordered: 110 Ea
Quantity Shipped: 0	Quantity Shipped:
Unit Price: 18.54 % <u>M</u> a	argin: 49.57 Unit Cost: 9.35
Cost Center:	Vendor Order Date: 19-01-12 📰 🗖 Acknowledged
Reorder Date:	Ship By: 🗾 Date Due: 03-02-12 🗐 Shipped: 🗐
🔽 Image 🗌 🗆 Royalty Code	Vendor Quote #:
Artwork included 🔽 Alternate addre	vendor Job #
Repeat for vendor Consecutive nu	mbering AP Sequence:
Specifications Sales tax excep	otion , start
File Attachments   Production defin	nition
Line item tracking description	

Then close the line item and make a note on the job by clicking ADD in the centre of the job screen to the right of the Notes. Add a note that Shiny have confirmed they are ready to ship the polos to Total Embroidery.

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File View Commands Actions Enquiry Go Help     Job: 100237 Image: Special Commission   Job: Job: 100237 Image: Special Commission   Job: Job: 100237 Image: Special Commission   Job: Image: Special Commission Job: Image: Special Commission   Job: Image: Special Commission Job: Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Commission Image: Special Commission Image: Special Commission   Image: Special Instructions Image: Special Instructions Image: Special Instruction
Image: Status: Image: Status:   Image: Christmas Golf Day Rep: JM   Image: Christmas Golf Day Image: Christmas Golf Day   Image: Christmas Golf Day <
Job: 100237   Job Name: Christmas Golf Day   Atternate Address File Attachments   Status: Order in Process   Oustomer: ABC   Billing Customer: ABC   Ordered By: Nancy Bright   Bill To: Julie   Customer PO #: Cost Center:   Job Type: Standard Job   Date Note   Image: Add   Image: Ship rol   Ship rol Ship rol   Status: Standard Job   Date Note   Image: Standard Job   Date Note   Imbroidery Special Instructions
Job Name: Christmas Golf Day   Alternate Address File Attachments   Status: Order in Process   Oustomer: ABC   ABC ABCXXXXXX   Production: RED   Billing Customer: ABC   ABC WRWOREQ   Ordered By: Nacy Bright   Ship To: Nancy Bright   Bill To: Julie   Customer PO #: Date   Customer PO #: Imvoice   Customer PO #: Imvoice   Job Type: Standard Job   Date Note   19-01-12 Shiny confirm ready to ship Polos to Total   Embroidery Special Instructions
Alternate Address File Attachments   Status: Order in Process   Customer: ABC   Billing Customer: ABC   Ordered By: Nacy Bright   Order By: Nacy Bright   Ship To: Nacy Bright   Bill To: Julie   Customer PO # Created I:   Customer PO # Invoice   Cost Center: Add   Job Type: Standard Job   Date Note   19-01-12 Ship vonfirm ready to ship Polos to Total   Embroidery Special Instructions
Status: Order in Process   Customer: ABC   ABC ABC   Billing Customer: ABC   Ordered By: Nacy Bright   Order Date: 17-01-12   Ship To: Nacy Bright   Bill To: Julie   Customer PO #: Date   Cost Center: Invoice   Job Type: Standard Job   Date Note   19-01-12 Shipy confirm ready to ship Polos to Total   Embroidery Special Instructions
Customer: ABC   Billing Customer: ABC   ABC ABCXXXXXX   Production: RED   ABC ABCXXXXXX   Ordered By: Nacy Bright   Ship To: Nacy Bright   Bill To: Julie   Customer PO # Date   Cost Center: Invoice   Job Type: Standard Job   Date Note   19-01-12 Ship y confirm ready to ship Polos to Total   Embroidery Special Instructions
Billing Customer: ABC ABC   Ordered By: Nancy Bright   Ship To: Nancy Bright   Bill To: Julie   Customer PO #: Date   Cost Center: Date   Job Type: Standard Job   Date Note   19-01-12 Ship Yoonfirm ready to ship Polos to Total   Embroidery Special Instructions
Ordered By: Nancy Bright       Image: Construction of the control of th
Ship To: Nancy Bright   Bill To: Julie   Customer PO #;   Cost Center;   Job Type: Standard Job   Date   Note   19-01-12   Ship Yconfirm ready to ship Polos to Total   Embroidery     Special Instructions   Order Date: [17-02-12] Date Completed:   Date:
Bill To: Julie 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
Customer PO #: Cost Center: Job Type: Standard Job Date Note 19-01-12 Shiny confirm ready to ship Polos to Total Embroidery  Date Special Instructions  Date Completed:
Cost Center: Job Type: Standard Job Date Note 19-01-12 Shiny confirm ready to ship Polos to Total Embroidery Special Instructions Embroidery Embroidery Final Special Instructions Final Special Instructi
Job Type: Standard Job  Date Note Date Date: Paid: Paid:
Job Type: Standard Job   Date   Date:   Paid: Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:   Paid:  Pai
Date     Note     Paid:       19-01-12     Shiny confirm ready to ship Polos to Total     Add     Paid:       Embroidery     Special Instructions
19-01-12     Shiny confirm ready to ship Polos to Total       Embroidery
Special Instructions
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.

