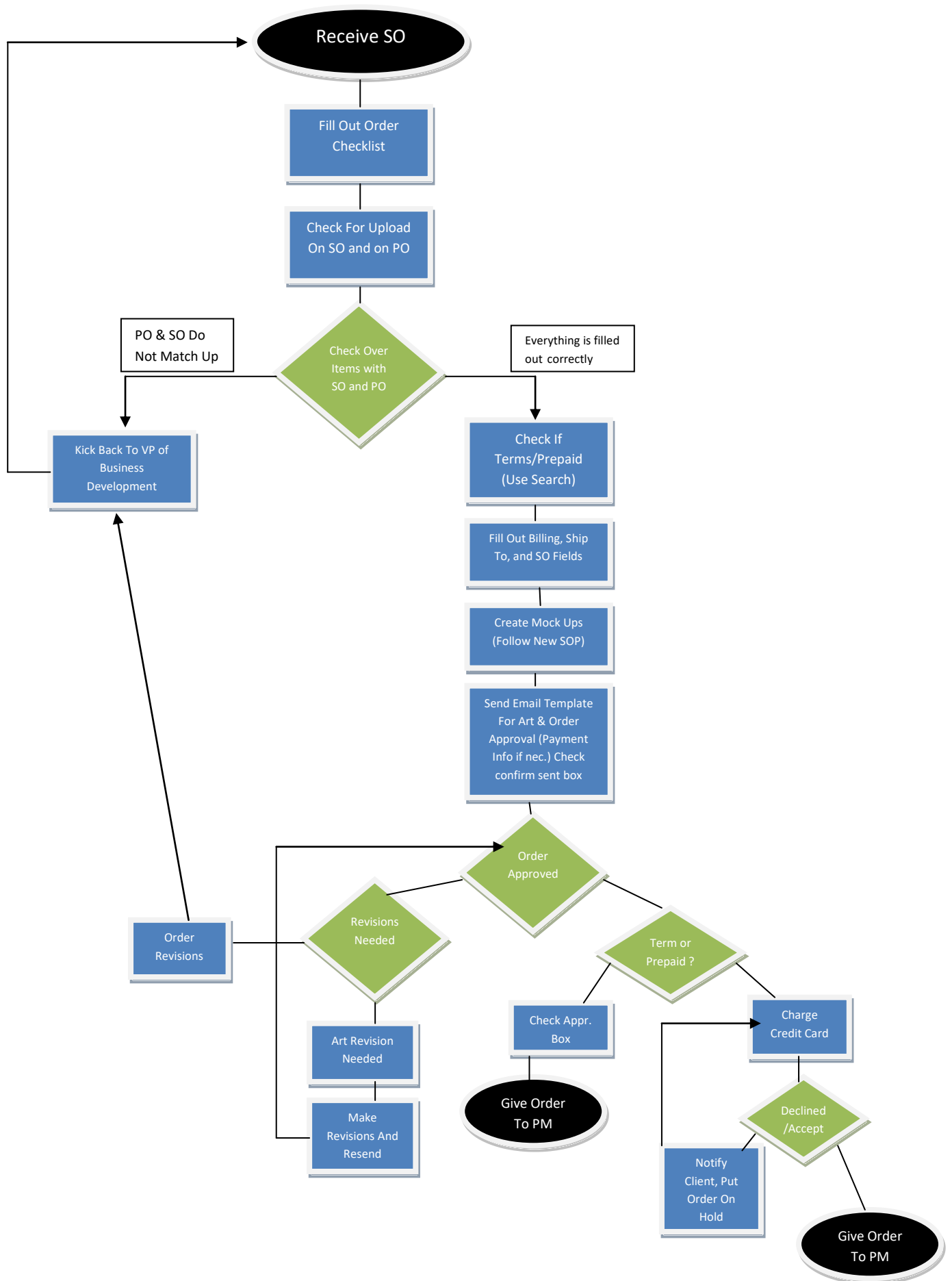


# ACSOP-Flow Chart



## ACSOP-1

### Fill Out Order Checklist

This will be automated soon, but for now I need the following filled out:

1. SO# copied down from the SO# in Netsuite.
2. 2. Company
3. 3. Sales Rep
4. In hands date

## ACSOP-2

### Check For Upload

The first thing we need to check is if the PO says we have an upload, and does it match up with the SO that the BDM filled out.

If the PO and the SO do not match, kick the order back to the manager.

## ACSOP-3

### Check Over Details Of The Order

Step 1: Check The Item Ordered (is it the correct item, correct color, capacity)

Step 2: Check The Qty. Ordered (Does the SO qty match the PO from client)

Step 3: Check The Imprint: (Number of sides, type of imprint)

Step 4: Check The Pricing: (Make sure the pricing in the SO matches the pricing on the PO)

Step 5: Check The Shipping Amount: (Make Sure BDM put a shipping amount on the order)

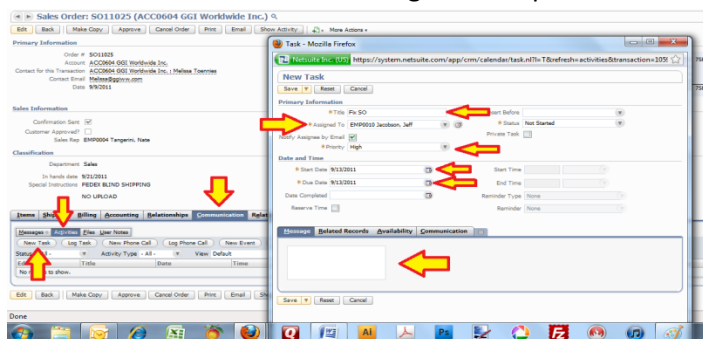
Step 6: Check for packaging and accessories. (Follow same check for items, color...etc)

Step 7: Check Memo, and Special Instructions for notes from the BDM.

Step 8: Check In Hands Date (Does it match from SO to PO)

Step 9: Check “Files” section to make sure all art files, po copy files, and upload files are saved in their proper spot.

- If the SO has discrepancies between it and the PO the client submitted, DO NOT FIX IT.
- Just start a task to the Sales Manager and explain the issue in the task.



- Then place the paper copy on the Sales Manager's desk.

## ACSOP-4

### Check If The Client is Terms or Prepaid

Step 1: Run the search “Adnan-Customers With Net 30 Terms Search” to see if the client is on terms or not.

Step 2: In the Billing section on the SO please mark either prepaid or Net 30 terms depending on what the client has qualified for.

Step 3: Go to the Company page > Click Edit > Click the Financial Tab > Click the Term Drop Down Box and choose either Net 30 or Prepaid.

Step 4: From SO, click edit, go to billing tab> drop down box and choose prepaid or Net 30

## ACSOP-5

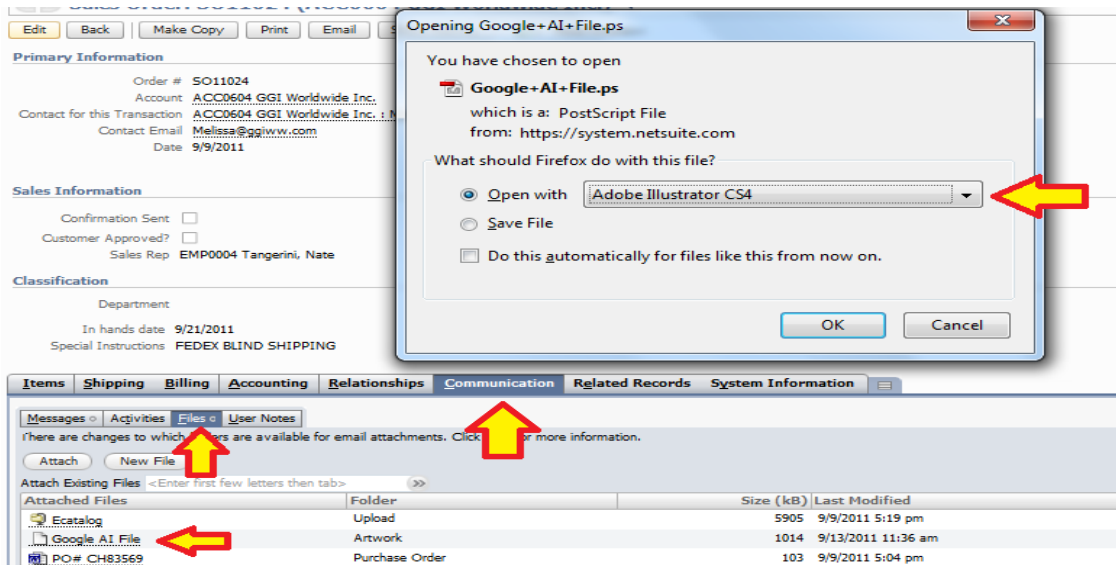
### Fill Out Billing, Ship To, and SO fields

Step 1: Fill Out Billing AND SO Fields (Hit New if there is not a current company address, otherwise choose the company and the bill to should auto-populate.)

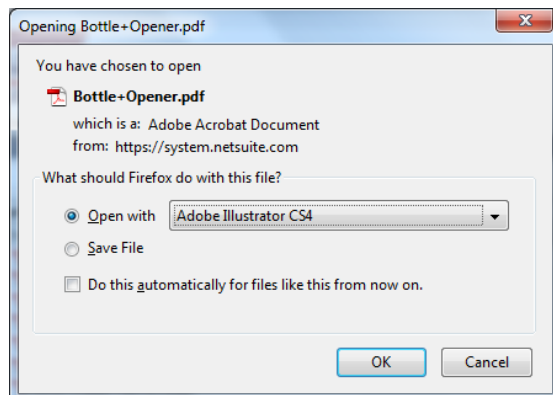
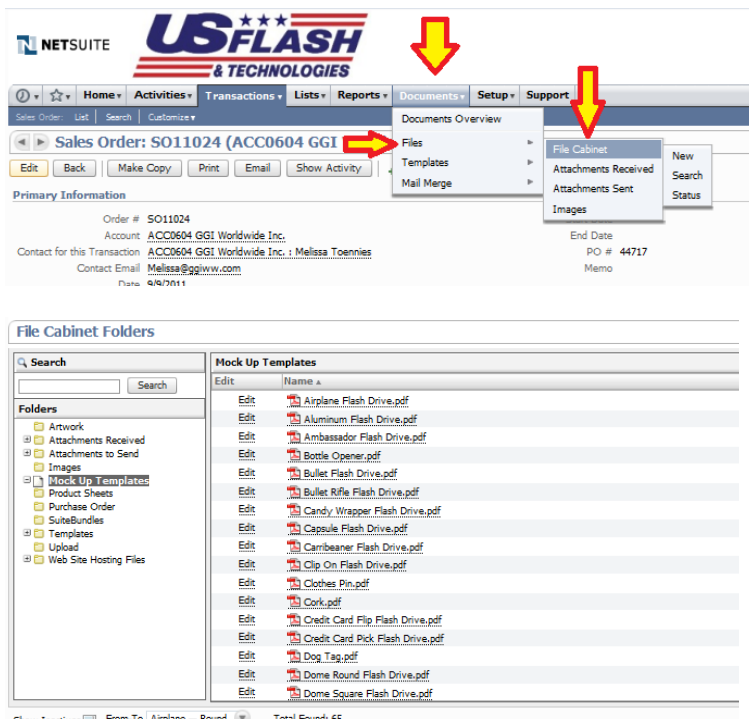
## ACSOP-6

### Create Art and Order Confirmations (Upload too if available)

Step 1: Go to > Communications > Files and select the artwork file > Open With > Adobe Illustrator



Step 2: Go to Documents > Files > File Cabinet > Mock Up Templates > Choose appropriate item template > Open With Adobe Illustrator



Step 3: Save Adobe Illustrator Mock Up File as PDF in "New Artwork Files" folder on desk top. Name the file with the SO# first followed by Art Confirmation (i.e. SO11111-Art Confirm).

Step 4: (If applicable)- send upload screenshot in files folder under the SO in Netsuite.

(Download file-open file-save screenshot as word doc-save in file cabinet in Netsuite and attach in email)

Step 4: Send Order and Art Confirmation Out using Email templates

Step 5: Hit Edit > Check Confirm Sent Box > Hit Save

Primary Information

\* Custom Form: USF Sales Order

Order #: SO11024

\* Account: ACC0604 GGI Worldwide Inc.

Contact for this Transaction: ACC0604 GGI Wo...lissa Toennies

Contact Email: Melissa@ggiww.com

\* Date: 9/9/2011

Sales Information

Confirmation Sent: ☐

Customer Approved?: ☐ (highlighted with a red arrow)

Sales Rep: EMP0004 Tangerini, Nate

Classification

Department:

Step 6: Follow Up (Follow Up Plan will be developed for this section)

#### ACSOP-7

##### Revisions Needed

Step 1: Order Revisions – Send Task To Sales Manager and have them deal with order revisions.

Step 2: Artwork Revisions

- Go To Emails and pull up Art Confirmation Sent > Open With Adobe Illustrator
- Make requested changes and save to “New Artwork Folder” on desk top
- Sent out artwork confirmation again

#### ACSOP-8

##### Approval For Term Clients

Check to see if we have all approvals – Artwork and Order and Upload Screenshot (if applicable)

Approvals must be emailed in- we cannot have a verbal – legal purposes.

Check “Customer Approved Box”

Click approve button

Save Final Proof in the SO file cabinet, Name file SO# and final proof (i.e. SO11111-Final Proof)

Deliver paper copy to Project Manager

#### ACSOP-9

##### Approval For Prepaid Clients

Check to see if we have all approvals – Artwork and Order and Upload Screenshot (if applicable)

Approvals must be emailed in – we cannot accept verbal – legal purposes

Check for payment info –

Enter and run credit card info under Billing Tab.

Save Final approved artwork in file cabinet, Name file SO# and final proof (i.e. SO11111-Final Proof)

If payment approved- Check “Customer Approved” box and submit paper copy to Project Manager

If payment declined- Notify Client with template email, place order back in waiting for payment folder.

NOTE: For Hybrid payment methods- mark the payment method in billing, and notify Project Manger in the notes.

Click Approve tab

SO#: &lt;NLTRANID&gt;

PO#: \_\_\_\_\_

## Sales Order Checklist

| Date sent                                      | Date Approved                                 | Action                                                                                                  | Comments |
|------------------------------------------------|-----------------------------------------------|---------------------------------------------------------------------------------------------------------|----------|
| /                                              | /                                             | Order Confirm                                                                                           |          |
| /                                              | /                                             | Art Confirm                                                                                             |          |
| Yes                                            | No                                            | Upload                                                                                                  |          |
| /                                              | /                                             | Upload screenshot                                                                                       |          |
| Card Accepted:<br>Yes <input type="checkbox"/> | Card Accepted:<br>No <input type="checkbox"/> | Credit Card <input type="checkbox"/> Check Sent <input type="checkbox"/> Terms <input type="checkbox"/> |          |

### For Production Manager Only

| Date | Action                           | Comments          |
|------|----------------------------------|-------------------|
|      | Order sent to vendor             |                   |
|      | PI received from vendor          |                   |
|      | PO billed                        |                   |
|      | SO billed (Credit Card or Check) |                   |
|      | SO shipped                       | FedEx Tracking #: |
|      | SO billed (Terms)                |                   |
|      | Tracking and invoice sent        |                   |

**Additional comments:**

|                              |
|------------------------------|
| Vendor:                      |
| Company: NLENTITYID          |
| Sales Rep: <NLSALESREP>      |
| In-hands date: <NLCUSTBODY1> |
| Ship date:                   |