

PMSOP-1

Check SO vs. Customer PO

Need to compare the Sales Order that was received and approved to the Purchase order the client submitted to make sure that everything is good to submit to our factory to produce.

Step 1: Make sure that the In Hands Date, Items, Capacities, Colors, Imprints, Upload, Ship To address on shipping tab all match and then scan the artwork confirmation to make sure that everything matches up. (Check Memo and Special Instructions)

Required Fields- Make sure all are filled in.

Home Activities Transactions Lists Reports Documents Setup Support

Sales Order: SO11109 (ACC0469 DOUBLE 13 MARKETING) Status: Pending Billing

Edit Back Make Copy Bill Close Order Print Email Show Activity More Actions

Primary Information

Order # SO11109
 Account ACC0469 DOUBLE 13 MARKETING
 Contact for this Transaction ACC0469 DOUBLE 13 MARKETING : Noah Kivett
 Contact Email nkivett@double13.com
 Date 9/19/2011

Start Date
 End Date PO # 5661
 Memo

Subtotal 9,640.00
 Discount
 Shipping Cost
 Handling Cost
 Total 9,640.00

Sales Information

Confirmation Sent ☒
 Customer Approved? ☒
 Sales Rep EMP0004 Tangerini, Nate

Opportunity Opportunity # OPT12824
 Sales Effective Date 9/19/2011
 Created From Quote # EST12820

Lead Source Partner
 Ready To Send Out ☒

Classification

Department Sales
 In hands date 9/30/2011
 Special Instructions FEDEX BLIND INTERNATIONAL SHIPMENT
 NO UPLOAD

Class Promotional
 SO Tracking Number
 Date Order Shipped


Upload On Order No

*Item	Fulfilled	Invoiced	Quantity	Description	Price Level	Rate	Amount	Options
Swivel			100	Front Side: Logo Back Side: Blank	Custom	4.56	456.00	Item Color: Yellow- 3945C Capacity: 1 GB Imprint Sides: 1 Side Front Imprint Type: Silk Screen Imprint# of Colors: 2
Swivel			100	Front Side: Logo Back Side: Website	Custom	7.56	756.00	Item Color: Red- 485 Capacity: 2 GB Imprint Sides: 2 Sides Imprint Type: Full Color
Swivel			100	Front Side: Logo Back Side: Blank PMS Housing Match (286)	Custom	4.23	423.00	Capacity: 128 MB Imprint Sides: 1 Side Front Imprint Type: Laser Engrave
PMS Color Match Housing			100	PMS Housing Match (286)	Custom	0.15	15.00	Item Color: Custom Custom: Both Drive and Swing Arm Are 286
Full Color Process Imprint			100	Monkey.jpg	Custom	0.25	25.00	Custom: Monkey.jpg
Full Color Process Set Up Fee			1	1 Sided Full Color Imprint	Custom	40.00	40.00	
Upload			300	Same Upload Goes On All Drives Ordered	Custom	0.00	0.00	Custom: Upload Should Be Under 100 MB
Auto Run Upload			300	Autorun website www.usflash.net	Custom	0.15	45.00	
Non-Delete Upload			300	Upload to be partitioned to where it cannot be deleted	Custom	0.15	45.00	
Accessories			300	Attach Key Rings To Drive	Custom	0.25	75.00	Item Color: Black Accessories: Key Ring Claw
Packaging			300		Custom	1.35	405.00	Packaging: Magnetic Plastic
Custom Mold			100	Cactus- See "Cactus" file for clarification	Custom	5.56	556.00	Item Color: Custom Capacity: 4 GB
Custom Mold			1	Mold Charge	Custom	150.00	150.00	
Shipping			1	FEDEX 2DAY DIRECT DROPSHIP OUR FACTORY	Custom	165.00	165.00	

PMSOP-2

Create & Email Out PO to Vendor

Step 1: Hit the drop ship icon once- Fill in PO Fields, Change Shipping Description, Change Price to 0

Items Shipping Billing Accounting Relationships Communication Related Records System Information												
Discount Rate		Enable Item Line Shipping <input type="checkbox"/> Promotion Code										
Item	Fulfilled	Invoiced	Quantity	Description	Price Level	Rate	Amount	Options	Drop Ship	Spec.	Cost Estimate Type	Est. Unit Cost
Professional		0	1000	RUBBERIZED CASING - MATTE BLACK FRONT LOGO: WQI FOD BACK: BLANK IMPRINT COLORS: RED PMS 485 / GREEN348 / WHITE	Custom	9.64	9,640.00	Item Color: Black Capacity: 8 GB Imprint Sides: 1 Side Front Imprint Type: Silk Screen Imprint# of Colors: 3			Purchase Order Rate	0.00
Shipping		0	1	FEDEX 2DAY DIRECT DROPSHIP FROM MANUFACTURER	Custom	0.00	0.00				Purchase Order Rate	0.00

View below for PO required fields

Purchase Order: PO10988 (VEN0002 Oriphe)

Edit Back Mark Shipped Bill Close More Actions

Primary Information

Vendor # VEN0002 Oriphe Supervisor Approval ☒ Created From Sales Order #S011060 Total 0.00

Are items shipped to customer? ☐ Receive By Date 9/20/2011

Contact for this Transaction VEN0002 Oriphe : Fong PO # PO10988

Contact Email fong@oriphe.com Memo

Employee EMP0012 Whitcup, Wendy

Classification

Department Operations Class Promotional

Special Instructions 2 NO UPLOAD In hands date 9/30/2011

SHIP BLIND PO# Tracking Number

Item	Vendor Name	Received	Billed	Quantity	Description	Rate	Amount	Options	Department	Class	Customer	Billable	Closed
Silicone Wristband Thick		0	100	1	COLOR IMPRINT: PMS 116 IMPRINT on clasp and on band	0.00	0.00	Item Color: Reflex Blue Capacity: 4 GB Imprint Sides: 2 Sides Imprint Type: Silk Screen Imprint# of Colors: 1	Sales	Promotional	ACC3855 Keystone Recognition		
Shipping		0	1	1	SHIP BLIND	0.00	0.00		Sales	Promotional	ACC3855 Keystone Recognition		

Step 2: Email Order over to the vendor (Use New Order To Vendor Template) (add any specific notes i.e. real sample photo required before full production, upload is on ftp site)

Email Message - Mozilla Firefox

Netsuite Inc. (US) <https://system.netsuite.com/app/crm/common/crmmessage.nl?transaction=10636&entity=128&d=T&>

New Email Message

Merge & Send Reset Preview Cancel

For more information on how replies to this email message can be received and saved, click [here](#).

Recipients Message Attachments


Template New Order to Vendor

Subject U.S. Flash & Technologies: Purchase Order <NLTRANID> - 1

Field Type Transaction Insert Field

Message **Formatted Text** (HTML Source Code)

Font Size Color

B I U 

Here is a new order.

**Please ship BLIND-PAPERLESS

Please confirm logo and in-hands date. Please send P1.

Thank you.

Merge & Send Reset Preview Cancel

Step 3: Attach Artwork files and PO to the order.

New Email Message

Merge & Send Reset Preview Cancel

For more information on how replies to this email message can be received and saved, click [here](#).

Recipients Message Attachments

Zip attachments ☐

Attach Document Template

☒ Include Transaction ☒ Type **Inline - Below**

There are changes to which folders are available for email attachments. Click [here](#) for more information. Attachments can be up to 5 MB in size

Remove All

Attach File	Folder	Size (kB)	Last Modified	File Type
<Type then tab>				

Add Insert Remove Cancel List New Open Edit

Merge & Send Reset Preview Cancel

Choose Attach File

- All -

so11113 Search

Attach File	Type
<input checked="" type="checkbox"/> SO11113	Purchase Order
<input checked="" type="checkbox"/> SO11113 2 of 2	Artwork
<input checked="" type="checkbox"/> SO11113-DOCS EMERGENCY MEDICINE	Artwork
<input checked="" type="checkbox"/> SO11113-DOCS EMERGENCY MEDICINE LOGO	Artwork
<input checked="" type="checkbox"/> SO11113-DOCS WHO CARE LOGO	Artwork

File Type

- Attach Upload files in zip form if applicable or post to vendor FTP

PMSOP-3

Receive PI Back

Issue with the order: (in hands date, printing, fedex acct# not working...etc.)

Step 1: Task BDM with Issue and directions on what the options are and to call the client and get it taken care of. Give a deadline to complete the task.

Step 2: Get Task back from BDM on how to proceed.

Step 3A: Issue cannot be resolved cancel order and refund money.

Step 3B: Issue can be resolved, notify vendor on the option chosen by the client, and proceed to PMSOP-4.

No Issue With Vendor Order- Move to PMSOP-4

PMSOP-4

Check PI & Enter Data IN PO & Bill PO

Step 1: check the PI and make sure that the shipping and pricing is in line with what it should be. Provided by Gabe.

Step 2: Click edit in the PO and enter the pricing and shipping amounts in the PO.

Step 3: Click save and then click the Bill button.

Step 4: Fill out the correct fields for the Bill and click save. Record Reference No. as PO#

The date due will always be a Tuesday or Friday. If you are billing the PO on Friday-Monday it will be due the next Tuesday. If you are billing the PO Tuesday-Thursday the bill will be due the next Friday. Click Save

PMSOP-5

Bill Prepaid SO

Step 1: Click the Sales Order that corresponds with the PO

Step 2: If the Sales Order is a prepaid status, it is time to bill the PO. C

Step 3: Click Bill, change tax code to non-taxable on each line item.

Step 4: Click Okay on the next order, it will create a cash sale.

PMSOP-6

Send Email Client About Order

If client is pre-paid

Step 1: From cash sale form choose the email template – “Your Order Is In Process” template (has ETA)

Step 2: Attach Cash Sale as PDF to the document and send.

If client is terms

Step 1: From SO form choose the email template – “Your order Is In Process” Template (has ETA)

*If waiting for upload, mention in the email.

PMSOP-7

Follow Up On Tracking

Follow Up On Every Order two days before the order is supposed to ship.

-Send Email Template (Order Status)? To Vendor? Request QC Reports? Use Template

PMSOP-8

Order Has An Issue

Step 1: Find out what options are available

Step 2: Start a Task- Detail out the issue, and the options available, and assign to BDM.

Step 3: Receive Task Back From BDM

Step: 4 Notify the vendor with which option to proceed with.

PMSOP-9

Receive & Enter Tracking

Step 1: Check emails for either Fed Ex tracking numbers or emails from vendors with tracking numbers

Step 2: Enter the tracking numbers in the PO and the SO.

Step 3: (If Applicable) Bill the Term Clients and create their invoice. (Change Tax Codes on invoice)

PMSOP-10

Email Out Shipment Details

Step 1: (Term Clients) From Invoice, send out email template "Your Order Has Shipped" email, and attach the Invoice

Step 2: (Pre-paid Clients) From SO send out email template "Your Order Has Shipped" email. (Includes Tracking #)