

Order Entry & Tracking Checklist

Follow these procedures to save time and money!

What is Needed From The Customer

- A signature on your order acknowledging all charges including artwork, proof and shipping estimates
- A signed purchase order if their company requires it. **Many companies will not issue payment without a valid purchase order.**
- On charge account orders - an authorized signature to use the account
- A deadline use date or event date

(Note: Check on the inventory and the ability to meet the ship date with the supplier before finalizing the order)

- Credit references and banking information
- Billing and shipping addresses
- An **acknowledgment of the terms and conditions for payment (Net 30 etc.)**
- **Prepayment on orders where credit history has not been established.**

- Red Flags

Customers without credit history: Get prepayment or credit card authorization.

What to Send to the Supplier

- Purchase Order #
- Previous Purchase Order #
- Order Date
- Ship Date: Shipping Method (Ground, Overnight, Truck, etc.)
- **Absolute deadline date (Circle this)**
- Item
- Description, Product Number
- Quantity
- Proof requested, paper, email, product
- Total Cost
- Overrun – Under-run tolerance (Example: no more than 5 % overruns accepted, **or no overruns accepted**)
- Ask for one overrun to be sent directly to you
- **Payment method: Set up terms with the supplier before you send in an order**
- **Have the supplier sign and fax back to you that all pricing is correct.**

- Red Flags

Shipping Charges: Verify these with the supplier. Items such as coffee mugs and cube note pads can be quite costly to ship. You need to be aware of this and inform your customer about this ahead of time.

Proof Approval- I never sell a new order without getting a paper, email or product proof ahead of time. The customer must sign the proof before the order is produced.

Art Information Needed

Type of imprint method: digital, silk screen, pad printing, etching, engraving, debossing, embossing, embroidery, foil stamp, etc. Check with the manufacturer to make sure the product is compatible with the imprint and the art supplied.

- Specify imprint location: Center, left, right, etc.
- Specify size of imprint: Maximum imprint area or smaller
- For artwork supplied with a disk or emailed, print out a hard copy and fax to the supplier
- PMS Color Match Information: On some products color matching will not be guaranteed
- Proof requested: **Highly recommended on all orders**
- Type of proof: Paper, email, actual product proof
- Additional art charges
- Special instructions

-Red Flags: Art and proof charges: These can be costly. Verify these charges ahead of time.

How to Track an Order

- Call within 24 hours after you send an order
- Call at least once a week after you have placed the order
- Confirm everything
- Call the day before the order ships to make sure it is on schedule
- Keep notes including **names, dates and time of conversation**

What to Do the Day the Order Ships

- Get tracking number information.
- **Email or fax a copy to the tracking number to the customer**
- **Get a faxed invoice from the supplier**

What to Do the Day the Order Arrives

- Call and thank the customer for the order
- Make sure the customer is pleased and everything has arrived as ordered

Smart Invoicing Procedures

- Invoice the customer as soon as you have verification the order has arrived
- Date your invoice the ship date of the order
- Include the customer purchase order number, if applicable
- Mail as soon as possible

Send A Handwritten Thank You Note