

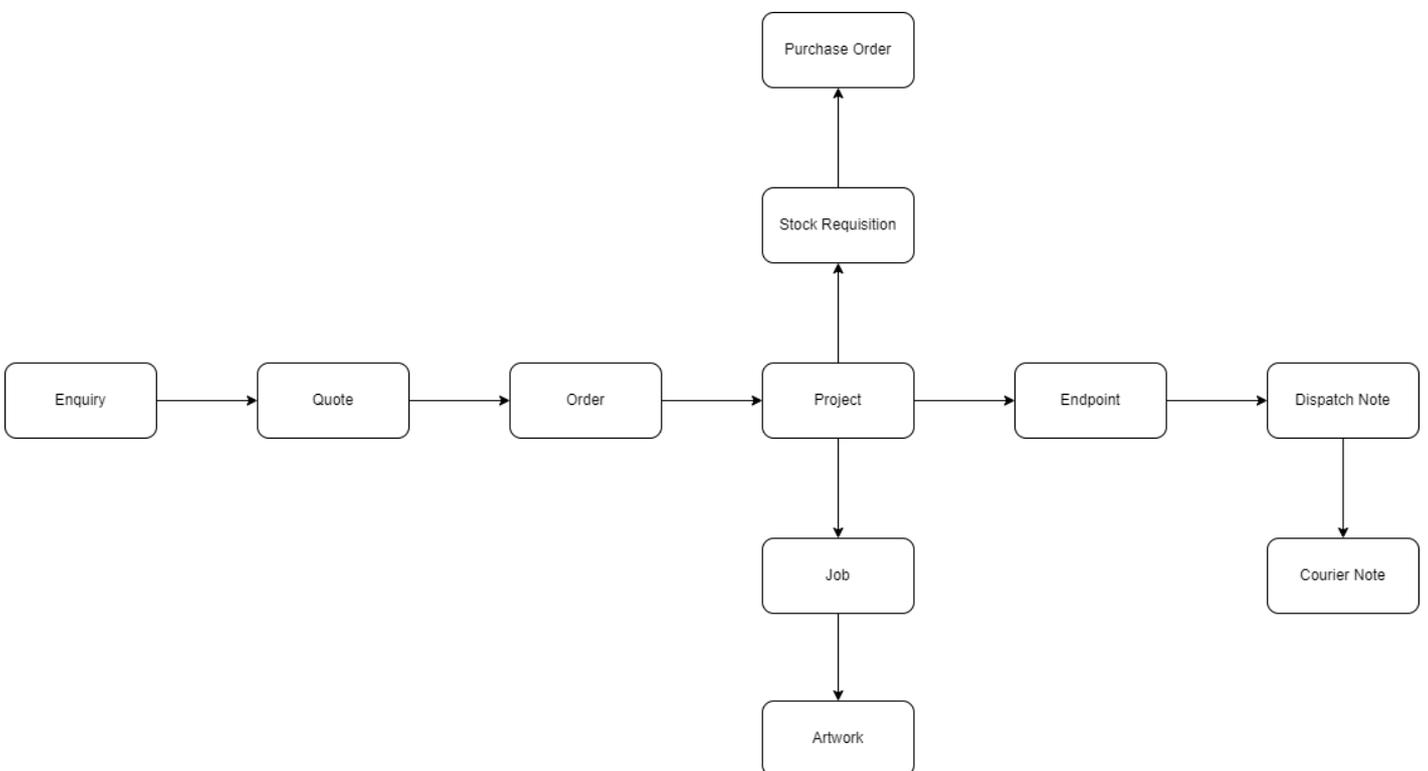
# 8.1 Operation Planning & Control

## Overview

In planning product realization, the Company will determine the following, as appropriate :-

1. quality plans in the form of Job Bags will be issued for every job detailing all aspects of the process;
2. ensure that all activities associated with Process Control are planned and carried out in such a way under controlled conditions;
3. documents and records of such processes will be kept for a period of two years;
4. show the current inspection and test status of all goods within the Company.

## Operational Component Workflow



## Definitions

# Enquiry

An enquiry is an initial enquiry received by a customer, this is not a required step in the process flow but may be the first point of communication with a customer.

- This is represented as a ticket within the helpdesk system.
- Enquiries have a unique tracking number known as a **Ticket Number**

## Enquiry Contexts

Enquiries can be classified into the following contexts...

- Sales Enquiry
- Order Progress Enquiry
- Artwork Enquiry
- Complaint

## Enquiry Statuses

Enquiries can either be open, awaiting customer response or closed.

# Quote

A quote represents the customers requirements in context of our offerings.

- Quotes have a unique tracking number generated by the system

## Quote Statuses

Quotes can have the following statuses

- Draft
- Sent
- Opened
- Active
- Active Sale
- Dead

# Order

An order represents a confirmation of a quote or parts of a quotation or an order from a web source in which the customer has generated their own quote and then order. As such this can represent the start of customer communication.

# Project

A project represents a group of one or more Operational Instruction Sets known as Jobs and one or more Endpoints.

## **Project Statuses**

A project can have one of the following statuses

- Awaiting Operations Acceptance
- Active
- Awaiting Endpoint Completion
- Awaiting Invoice
- Complete
- Cancelled

## **Stock Requisition**

A Stock Requisition is required when a none stocked item is required for completion of a project

## **Purchase Order**

A purchase order represents a stock/service order from a supplier

### **Purchase Order's can have the following statuses...**

- Draft
- Requisition
- Awaiting Supplier Confirmation
- Awaiting Delivery
- Awaiting Invoice
- Complete

## **Job**

A Job is a production Instruction Set. It lists the processes, their representative instructions and the order in which they should be completed.

### **A Job has the following statuses:**

- Active Process....
- Active
- Inactive
- Complete

## **Artwork**

An artwork represents a unique piece of artwork in the system it has the following variables

- Width
- Height
- Quantity
- Unique Fingerprint (generated by creating a unique hash of the document file, prevents collisions)

## Endpoint

An endpoint represents the final stage of a Project, a Project can have many endpoints.

### **Endpoints can be of two types...**

- Pick up
- Delivery

## Dispatch Note

Represents a dispatch note which can either be a pick up note or a delivery note.

## Courier Note

Delivery note type must have a Courier Note, this represents our Dispatch Note within a first or third party courier network.

# Examples

## Example Digital Project Bag

Redo Project
Invoice
Change Status
Project Sheet
Elements
Artwork
Make Survey Request

### Project Info

**Project Type:** Sale  
**Project Status:** Complete  
**Department:** Graphic Warehouse  
**Project Folder:** [\192.168.0.10\root\PROJECTS\QUO941868\\_COPY](#)  
**Invoice ID:** QUO:941868  
**Order:** QUO:941868  
**Title:** 113472  
**Start Date:** 2022-12-23 09:24:08  
**Due Date:** 2023-01-04 00:00:00  
**Completed Date:** 2023-01-04 14:57:00  
**Project Owner:** Frances McCorry  
**Project Value:** £290.44  
**Purchase Order Reference:**   
**Invoice Id:**

### Invoices

SAGE REF	TOTAL	START DATE	INVOICED DATE	OPTIONS
QUO:941868	£290.44	2023-01-04 17:23:45	2023-01-04 00:00:00	<input type="button" value="Delete"/> <input type="button" value="View Invoice"/>

### Project Items

REF	NAME	PROCESS	STATUS	OPTIONS
<input type="checkbox"/> QUO:941868/01	Rigid Board Printing - Direct to Board - Fluted Board (Correx) - 4mm - Single Sided	N/A	Complete	<input type="button" value="View Processes"/>

### Endpoints

TYPE	STATUS	LAST UPDATED	OPTIONS
Delivery	Complete	<b>Courier:</b> DX Couriers Next Day <b>Service Type:</b> Next Day <b>Tracking Number:</b> L6904094  <b>FAO:</b> Steve Robinson <b>Company:</b> Lindum site office <b>Address:</b> John Coupland Hospital <b>Address 2:</b> Morton Suite <b>Address 3:</b> Ropery Road <b>City:</b> Gainsborough <b>Region:</b> <b>Postcode:</b> DN21 2TS <b>Country:</b> United Kingdom & NI <b>Phone:</b> 07741 097090 <b>Email:</b> sales@lindensigns.org	2023-01-04 14:57:00 <input type="button" value="View Details"/>

## Example Job Sheet

**QUO:941868/01**     **SD:** 23/12/2022     **Client:** Linden Signs  
**DD:** 04/01/2023     **Title:** 113472

<b>Contact:</b> Gemma Moore <b>Phone:</b> 01773741500 <b>Email:</b> sales@lindensigns.org	<b>Order Form Received: Pay Before Dispatch</b> <input type="checkbox"/> <b>Customer Type:</b> <b>Payment Method:</b> <input type="checkbox"/> CC <input type="checkbox"/> Account <input type="checkbox"/> Cheque <input type="checkbox"/> BACS <input type="checkbox"/> Other <input type="checkbox"/> <b>Project Value:</b> £290.44 <b>Updates:</b> <input type="checkbox"/> Survey Done? <input type="checkbox"/> Artwork Done? <input type="checkbox"/>
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**Stock List**

Stock	Predicted	O/I	Used	Signature
Fluted Board - 4mm - 1.22m x 2.44m	9 Sheets			
General Ink For Catalogue	25.65 SQMs			

**Job Description**

**Title:** Rigid Board Printing - Direct to Board - Fluted Board (Correx) - 4mm - Single Sided

<b>mp:</b>	400.00mm x 300.00mm x 8
<b>mp:</b>	600.00mm x 450.00mm x 30
<b>mp:</b>	600.00mm x 800.00mm x 4
<b>mp:</b>	400.00mm x 250.00mm x 20
<b>mp:</b>	300.00mm x 100.00mm x 6
<b>mp:</b>	200.00mm x 300.00mm x 4
<b>mp:</b>	400.00mm x 200.00mm x 4
<b>mp:</b>	2400.00mm x 1220.00mm x 4

**Printing**

<b>Substrate:</b> Fluted Board - 4mm <b>Preferred Printer:</b> <b>Double Sided:</b> <b>Reversed:</b> <b>White Ink:</b> <b>Notes:</b>	<b>Checked By</b>  <b>Date/Time</b>
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**Digital Cutting**

<b>Substrate:</b> <b>Notes:</b>	<b>Checked By</b>  <b>Date/Time</b>
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**Packing**

<b>Notes:</b> <ul style="list-style-type: none"> <li>- Quality check</li> <li>- Photo</li> <li>- Pack for delivery</li> </ul>	<b>Checked By</b>  <b>Date/Time</b>
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**Notes**

<div style="border: 1px solid #ccc; width: 100%; height: 100%; background-color: #f0f0f0;"></div>	<b>Checked By</b>  <b>Date/Time</b>
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# Example Ticket/Enquiry

MP

## Betting Jobs

Ticket# 53226928 - created 13 hours ago

Price for a dibond sign 38cm x 15cm

With Thanks  
Callum Brown

[Please Click here to view our Product Catalogue Flip Book](#) [Visit our Website](#)  
T: 01355 264 077



See more

set to internal    reply    forward    split

13 hours ago

# Example Quote (Backend)

Edit Quote
PDF Preview
Status Update
Send Email
Duplicate
Download Proofs

**Quote Info**

Quote Status: Active Quote

Title: Betting Jobs Ticket# 53226928

Quote Folder: [\\192.168.0.10-root\QUOTES\94808? COPY](#)

Likeliness Level: %

Start Date: 2023-05-02 16:40:24

Last Edited: 2023-05-02 16:42:32

Predicted Conversion:

Department: Graphic Warehouse

Sales Person: Patrick Spencer

Quote View: [Open](#)

Cart View: [Open](#)

**Totals**

SubTotal: £23.84

Delivery: £ 0.00

Delivery Discounts: £ 0.00

VAT: £4.77

Total (Incl. VAT): £28.61

Cost: £6.65

Margin: 72.11%

Gross Profit: £ 17.19

**Quote Items**

CODE	TITLE	SIZE DESCRIPTOR	WIDTH	HEIGHT	QUANTITY	PPI	TOTAL	COSTS	PROFIT	MARGIN
<input checked="" type="checkbox"/> DTB-HOARDING	Rigid Board Printing - Direct to Board - ACM Panel (Aluminium Composite / Dibond / Diabond) - Hoarding (White) - Single Sided - Custom Size				1		£23.84	£6.65	£17.19	72.11%

**Quote Notes**

Below are the quotes relevant notes

NOTE	BY	WHEN
Scenario: Manual Quote Cycle - Logic Failure - Is the quote value greater than £500?		2023-05-02 17:11:01
[Contact,25737] viewed quote on Graphic Warehouse - Wide Format Trade Print		2023-05-02 16:42:29
[Contact,25737] viewed quote on Graphic Warehouse - Wide Format Trade Print		2023-05-02 16:42:28
Status changed from **Temp Quote** to **(Active Quote)**	Patrick Spencer	2023-05-02 16:40:35
Quote created	Patrick Spencer	2023-05-02 16:40:24

**Quote Emails**

Below are the quotes relevant emails

TO	SUBJECT	START DATE/TIME	STATUS	OPTIONS
eastkilbride@minutemanpress.com,	Quote #947318 - Betting Jobs Ticket# 53226928	2023-05-02 16:41:40	Sent @ 2023-05-02 16:41:44	<a href="#">Edit</a>

## Example Quote (Frontend)

You are a Matic Track Administrator

[Home](#) | [Current User: Callum Brown](#) | [My Dashboard](#) | [My Account](#) | [Saved Carts](#) | [Log Out](#)

[BLOG](#) | [CART](#)

ROLL UPS | BANNERS | RIGID BOARDS | POSTERS | EXHIBITION | FLAGS | POINT OF SALE | VINYL & STICKERS | WALL GRAPHICS | WINDOW GRAPHICS | ACCESSORIES | PHOTO ART | SIGNAGE

Your Quotes & Carts > Viewing Quote #947318

# YOUR QUOTE #947318

BETTING JOBS TICKET# 53226928

QUOTE PREPARED PERSONALLY FOR MINUTEMAN PRESS - EAST KILBRIDE

**Patrick**

Hi Callum, Thanks for giving me the opportunity to quote! I've priced up your requirements below.

Comparing us against someone else? We'd hate to lose out so give me a call on my direct line [0330\\_380\\_0172](tel:03303800172) to discuss anything (I'm on chat below as well!).

TOTAL: £23.84

£28.61 incl. VAT

PLACE ORDER

REQUEST A CALL BACK

0330 380 0172

NEW FABRIC BROCHURE

Download Me!

ON A TIME LIMIT?

PHONE ME!

0330 380 0172

DON'T FORGET THE ESSENTIALS!

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Marketing Materials - Marketing Packs - Full

No Image Found

Cable Ties - Black - 4.5mm x 300mm - 50

No Image Found

Bungee Rope (Black) - 100m

No Image Found

Cable Ties - Black - 3.5mm x 140mm - 100

Revision #5  
Created 25 April 2023 11:15:46 by Admin

Updated 3 May 2023 10:38:42 by Admin