STANDARD OPERATING PROCEDURE

QUICKBASE PROCESS

Creating, Managing and Closing Out Workorders

Purpose:

This SOP describes the procedures and responsibilities required to properly create, workflow manage, and close out Quickbase work orders.

Responsibilities:

All CNRSW Marketing Team Members are responsible to ensure that all requirements outlined in this document are met, and this SOP is intended to provide guidance for the process.

Creating New Work Orders

Under the Work Orders tab, select "New Work Order".

- Enter Project/Event Title (Keep this short. No need to add descriptive terms like RUSH, HOT, ETC).
- Enter Cost Center (0 in most cases)
- Enter Work Order Type
  - New Work Order
  - Reprint (when no changes are needed)
  - Reprint with Changes (when text changes are needed only)
- Account Rep: Select the appropriate rep assigned to base
- Status: Mark New Work Order "In Progress"
- Base: Select appropriate base
- Department: Select appropriate Department
- Program: Select appropriate Program
- Facility: Not needed, though you can further narrow down who the work order belongs to.

<u>Customer Section</u>

- Customer: This is the requesting client, who the artwork will be sent to.
- Additional Contact information: As needed
- Quote: No
- Quote Details: Not needed

Publicity Information

- Event Date/Start Time/End Time: Enter as relevant
- Event Project Information: General information highlighting the project
- Additional Information: As needed
- Sign-up Deadline: As needed
- Info Phone: As needed
- Attachment: This is where a client should upload copy. This is not the final copy for the designer.

Attachments

- Attachment: Attached your copy and any relevant images here. This is the finalized copy that the designer will utilize. This should be clean, precise copy.

Products

- Select "Order Products Here"
- Product Type: Use pulldown to find appropriate project
- Quantity: Add QTY amount
- Product Cost: 0 (in most cases)
- Phase: Select "Assigned"
- Graphic Artist: Select Graphic Artist who will be working on project.
- All other fields are as needed and not required
- Select Save and Close.
- Repeat process to add additional formats

Managing Existing Work Orders

Search for the work order number you are looking for using the magnifying glass icon/upper right, or… under the HOME tab, select the pulldown key under "Most Recent Phase" and group A-Z. This will list all of your work orders by current phase so you can quickly see a running list of where you stand (Assigned, Proofing, Approved, Complete, etc.)

Click on the pencil icon next to the work order product you are working with (ctrl/click opens it in a new tab for your convenience). This opens up the work order for phasing purposes.

Under Phase, change the phase to the current status. The designer should be phasing from Assigned to Design and then to Proofing Marketing. The rep should be moving all other phases from that point to the Finished phase.

Select Save and Close.
Note: This needs to be done for each product in the work order. It's very important that this step is carried out by all involved to ensure accurate data is displayed for analytical purposes.

Closing Out Existing Work Orders

Search for the work order number you are looking for using the magnifying glass icon/upper right, or… under the HOME tab, select the pulldown key under "Most Recent Phase" and group A-Z. This will list all of your work orders by current phase so you can quickly see a running list of where you stand (Assigned, Proofing, Approved, Complete, etc.)

Click the work order number (not the pencil but the number itself) to open the work order.

Scroll down to products at the bottom of the work order and Ctrl/Click the pencil next to each product. This will open each product in its own tab.

Each product needs to be marked/phased as Finished (using the Phase menu). Otherwise, Quickbase will prevent you from properly closing out a finalized work order. Phase each item as Finished.

Under product cost, type 0 (We do not currently charge clients for any design functions). Click Save and Close (do this for each product)

Scroll down to the bottom of the work order under Invoices. Click “Add Invoice”. Check the box “Invoiced” and then select the Save and Close bottom. If you do not see this checkbox, then one of your products has not been phased over to Finished, and is preventing this function.

Go back to the primary work order file, which should still be open. Under Account Rep Time Worked, ad your time. Ensure that the graphic designer has done so as well. Under Status, you can now mark the work orders as completed. Do so, and select the Save and Close button.

This concludes the Work Order Quickbase process.