

# Catalog Order Cycle v2.0

# Catalog Order Cycle v2.0 (Improved)

This page documents the improved workflow for catalog-based orders.

It addresses key issues with **cashflow, production prioritization, QC, and shipment accuracy**.

Use this as the **official SOP** for all catalog orders.

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## Overview

1. Customer browses catalog (book or online) or showroom.
  2. Sales rep prepares quotation.
  3. Pro Forma Invoice issued (with estimated shipping).
  4. Customer pays deposit (min. 30%, smaller % only for long-trusted customers).
  5. Order list created → sent to Purchasing & Production Head.
  6. Production starts (prioritized by matrix).
  7. Internal QC + optional Customer QC.
  8. Packing in wooden crates.
  9. Final Commercial Invoice issued.
  10. Balance payment (before stuffing, or after vessel departure for trusted customers).
  11. Container stuffing & shipment.
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## Sales & Quotation

- **Catalog:** Static (annual/seasonal). Website catalog under development.
- **Custom Orders:** Tracked separately under *Custom Order System*.
- **Quotation:** Prepared by Sales Rep.
- **Shipping Cost:**

- FCL → **FOB pricing**.
  - LCL → **per CBM using calculator tool** (not rough guess).
  - Use the CBM Calculator App for all quotes.
  - **Extra Items (filler at stuffing):**
    - Offered from **ready-stock only**.
    - Priced at **smaller or no discount** (improves margin).
    - Added to **Final Invoice**, not Pro Forma.
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## Order List & Production

- **Order List:**
    - Tied to specific customer.
    - Lists only **made-to-order items** (ready-stock excluded).
    - Shared with:
      - **Purchasing** → raw materials & outsourced supplier items.
      - **Production Head** → in-house manufacturing & tracking.
  - **Production Priority Matrix** (replaces first-come-first-serve):
    1. Long lead-time items → start early if deposit covers raw material.
    2. High-margin items → prioritized for profitability.
    3. Easy/ready items → handled later, closer to stuffing.
  - **Production Tracking:**
    - Per-item milestone status: *Started* → *In Supplier* → *Finishing* → *Done*.
    - Tool: Google Sheet or AppSheet (no more pen & paper).
    - Completion estimate recorded **per item**, not just per order list.
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## Quality Control

- **Internal QC:**
    - Formal **QC Checklist** per product type (cracks, finish, stability).
    - Must be completed before customer QC.
  - **Customer QC:**
    - Optional. Only some customers send inspectors.
    - Sales must send **progress updates (bi-weekly or monthly)** with photos & % complete.
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## Packing & Shipping

- **Packing:**
    - Use **3-4 standard crate sizes** for most products.
    - Build adhoc crates only for oversized/odd items.
  - **Documents:**
    - Standard doc list available.
    - Sales confirms customer-specific requirements.
    - Shipping department acquires all docs.
  - **Invoices:**
    - *Pro Forma Invoice* → deposit & initial confirmation.
    - *Final Commercial Invoice* → includes filler items + actual freight.
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## Payment Terms

- **Deposit:**
    - Minimum 30%.
    - Smaller % possible for long-trusted customers.
    - Deposits are allocated **only for raw material purchases** (to secure cashflow).
  - **Balance Payment:**
    - Default: before stuffing.
    - Exception: for trusted customers, after vessel departure (still before BL release).
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## Roles & Responsibilities

- **Sales Rep**
    - Prepare quotation, confirm shipping method, update customer regularly.
  - **Purchasing**
    - Order raw materials & supplier items.
    - Must follow Purchasing SOP (backup person assigned).
  - **Production Head**
    - Track per-item status & estimated completion.
    - Report bottlenecks early.
  - **QC Staff**
    - Complete internal QC checklist.
  - **Packing Team**
    - Use standard crates when possible.
  - **Shipping Dept**
    - Prepare shipment docs & coordinate container stuffing.
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