

# Chapter 4

## The Order-Taking Process

*This section will focus on the elements of taking and processing orders. It will combine all of the functions you have learned thus far.*

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## **Section 4.1 – The Order Taking Process**

It's imperative that you collect all the data necessary to run an order. The customer has a picture in their head of what they want and your challenge is to get that information transferred over to a work order form for processing. There are a lot of details and it's easy to overlook some of them.

### **4.1.1 Key Elements Of An Order**

When taking a customer's order, you need to know the following things as a minimum:

- The customer contact information.
- The style, size and color of each garment.
- The location of the embroidery.
- The size of the embroidery.
- The colors of the embroidery.
- For Lettering – font, size, style, height, color
- Correct spelling! Write it out in block letters and have the customer approve it.

### **4.1.2 Limiting The Options And Choices You Offer To Customers**

Initially, it would seem that you should offer your customers anything and everything in order to get the sale. But in reality this is incorrect. The possibilities of Embroidery Design Creation and Layout are so vast, that the typical person can quickly be overwhelmed. In addition, the more choices that you offer, the longer it takes to write-up the order, which isn't a profitable use of your time. As a general rule, never let the customer see the computer screen.

Think of yourself as a consultant. Guide the customers through the process by leading them through the many options without confusing them.

#### **Example – Embroidery Fonts**

**Wrong** – *“We offer 50 different fonts from which you can choose. Which one do you like the best.”* You will now be forced to show them every font and probably set up samples using the majority of the fonts.

**Right** – *“Our best selling fonts are (list a maximum of 10), but I think this one would look best.”* You gave the customer a limited choice, then steered them to one ideal choice.

#### **Example – Lettering Properties**

**Wrong** – *“We can make your letters arced, straight, bridged, slanted, shadowed, stretched, compacted, mirrored...what would you like?”* Once again, you will be forced into demonstrating many different options.

**Right** – *“I suggest that we arc your letters for this application.”* You are providing a quick simple recommendation for the job. Most of the time, the customer will respond to your suggestion.

## **Section 4.2 – Working With An Order Form**

On the next two pages, you will see a sample Work-Order Form. This may not be the form that you choose to use in your shop, but it does illustrate what information needs to be collected. To keep things simple, it's suggested that you use a different Order Form for each different item a customer orders.

### **4.2.1 Customer Contact Information**

Use this section to obtain contact information about the customer. Email is very useful, since it allows you to send them a proof of the design for approval. Beware of PO Boxes; be sure to get a physical address whenever possible.

### **4.2.2 Garment Information**

Collect information about what kind of garment is being sewn on. In most cases, the customer is ordering the garment from you, thus you will need all of the details for placing an order with a distributor. In addition, this information will help you identify which garment the Work Order applies to. If the customer supplies the garment you still need to gather as much information as possible for reference.

### **4.2.3 Stock Design Information**

If a stock design is being used as part of the design, clearly indicate the design name and number, as well as its source. Document the size, stitch count and thread colors. If the customer wants to change some of the colors in the design, be sure to note it.

### **4.2.4 Lettering Information**

Most orders have no more than 2 lines of text. Write down the text in clear block letters, as well as the font, estimated letter height and thread color. It is rare that letters will be in any format other than straight or arced. Circle the appropriate format. Also note whether the letters should be all upper case or a combination of upper and lower case. If other layouts of lettering are needed, make notes. You can always write more information on the back of the sheet.

### **4.2.5 Layout Sketch**

If necessary, make a simple sketch to show how the lettering should be laid out in combination with the stock design. In the case of a custom digitizing situation, attach artwork and create a sketch with notes on the back of the page.

### **4.2.6 Customer Approval**

Upon completion of the information gathering, review in detail with the customer and have them sign the form

### **4.2.7 Programmer Use**

After the Work Order is setup, the programmer should indicate design name, what disk it was stored on, the disk file name, hoop size, backing, topping and needle size.

**CUSTOMER ORDER FORM**  
(Use one form per each different item.)

Customer Name: \_\_\_\_\_ Order Date: \_\_\_\_\_ Pickup Date: \_\_\_\_\_

**CUSTOMER CONTACT INFORMATION**

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

**GARMENT INFORMATION**

Description: \_\_\_\_\_ Source: \_\_\_\_\_  
Brand: \_\_\_\_\_ Style: \_\_\_\_\_ Color: \_\_\_\_\_ Size: \_\_\_\_\_ Qty: \_\_\_\_\_

**STOCK DESIGN INFORMATION**

Design Name: \_\_\_\_\_ Design Number: \_\_\_\_\_  
Source: \_\_\_\_\_ Height: \_\_\_\_\_ Width: \_\_\_\_\_ Stitches: \_\_\_\_\_

1	6	11	16	21	26
2	7	12	17	22	27
3	8	13	18	23	28
4	9	14	19	24	29
5	10	15	20	25	30

NOTES: \_\_\_\_\_  
\_\_\_\_\_

**LETTERING INFORMATION**

Line #1: \_\_\_\_\_  
Font: \_\_\_\_\_ Height: \_\_\_\_\_ Thread Color: \_\_\_\_\_  
Style: ARC or STRAIGHT ALL CAPS or Upper/Lower

Line #2: \_\_\_\_\_  
Font: \_\_\_\_\_ Height: \_\_\_\_\_ Thread Color: \_\_\_\_\_  
Style: ARC or STRAIGHT ALL CAPS or Upper/Lower

NOTES: \_\_\_\_\_  
\_\_\_\_\_

**LAYOUT SKETCH**

**CUSTOMER APPROVAL**

I agree that the spelling, font, design, colors and placement are correct.  
Name: \_\_\_\_\_ Date: \_\_\_\_\_  
Order Taken By: \_\_\_\_\_

**PROGRAMMER USE ONLY**

Finished Design Saved As: \_\_\_\_\_  
Finished Design Saved To Disk: \_\_\_\_\_  
Hoop Size: \_\_\_\_\_ Backing: \_\_\_\_\_  
Topping: \_\_\_\_\_ Needle: \_\_\_\_\_

## **Section 4.3 – Developing Embroidery Recipes**

In Chapter 3, you learned about design recipes, which allowed you to set software properties such as density, underlay and pull compensation. Embroidery recipes refer to such variables as threads, backings, toppings, needles and machine speed.

Each design that you create will have the opportunity to be used on a variety of garment types and situations. From a Production standpoint, you will need to adjust and record any variations that are needed for specific situations. This information is invaluable when dealing with repeat customers. More often than not, a customer will request that you “do it the same way as last time.” Thus, you must be able to reconstruct the previous order in every detail.

If you have the Pulse Librarian system you can record all of the variables as they apply to a specific design, electronically, which is the best solution. However, it is possible to create and save recipes on paper. Some shops use this method, and save the recipes in a file folder for the customer and/or design. Regardless of the method you use, you must be specific about the details.

### **4.3.1 Thread Colors**

This is perhaps the most crucial issue. Thread colors may have to be changed depending upon the color of the garment. For example, a Soccer Team logo might be composed of a white and black soccer ball with red letters. These colors would probably be acceptable on a royal blue shirt, but not a red shirt. Thus, a new “thread color recipe” would have to be created for the red shirt. In addition, always be sure to list the Thread Manufacturer and Thread Number. Simply using the descriptive word “red” is not enough.

### **4.3.1 Backings**

Different fabrics require different backings. Always record the type of backing as well as how many layers are used for each situation.

### **4.3.2 Toppings**

Though toppings can improve the quality of sewing when dealing with textured fabrics, they also can be difficult to work with. Thus, the desire is not to use a topping unless absolutely necessary. Make careful notes about which application actually requires it.

### **4.3.3 Needles**

The 75/11 ballpoint needle is the most commonly used needle in the industry and works well for most applications. However, there will be situations where a different needle is required. Once again, be sure to capture this information.

### **4.3.4 Machine Speed**

There are situations where the design quality is improved by using a slower machine speed. Be sure to record the speed and situation.

## **Section 4.4 – Processing An Order**

It's now time to test your Embroidery skills by bringing together all of the elements of a Work Order, from paper to finished product. The following exercise will require a combination of everything that you have learned since the beginning of class. It will test your ability to understand all of the processes without a step-by-step guide, just like you will encounter everyday in your own shop.

There are sample work orders on the following pages. Your Instructor will assign one of them to you. The details of the job are included, but it's up to you to create the design and sew it. Your Instructor will be available to help you with questions, but you are responsible for completing the task.

Good Luck!

Job #1	Short Sleeve T-Shirt - Owl
Job #2	Unconstructed 6 Panel Cap – Soccer Mom
Job #3	6 Panel Baseball Cap – Dawgs
Job #4	Golf Towel – Grand Masters Tournament

### **One Final Embroidery Opportunity For You**

Upon successful completion of your assigned Job, you will have the opportunity for one final task. Create a design for your company using lettering, a stock design or a combination of both. There are no restrictions other than it fits within a 15cm hoop. After you are satisfied with your creation, sew it on a canvas tote bag. This will be yours to keep as a memento of your Embroidery Success Training.