

# PPAI Recommended Guidelines For Distributors

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Promotional Products Association International's (PPAI) purpose in publishing these recommendations is to promote efficiency, communication, and profitable supplier-distributor operations. Please consider routing or providing copies of these recommendations to sales managers, office managers, credit managers and the customer service department.

*These guidelines are not to be considered requirements or demands of any nature, but strictly as suggestions that your firm may wish to follow in the conduct of business in the promotional products industry. Voluntary compliance with these guidelines, however, will greatly facilitate industry transactions and business.*

## Catalogs and Samples

- Before presenting a new line, make sure the supplier's line is not restricted.
- Catalogs and samples may not be free. Please check with suppliers to determine their policies.
- A careful system of recording and dating all new catalogs and samples is extremely helpful. For samples, make sure to record which supplier provided them.
- Sales people should be as familiar as possible with all lines. It is very important to note that supplier names may differ from their product lines' names. One cannot be too familiar with a supplier's catalog, particularly the ordering policies. For example, note the policies with respect to under- and overruns.
- It's your responsibility to make sure you are selling from a current catalog.

## Credit

- The distributor should ask up front about the suppliers' credit policies and payment terms. Failure to do so may result in orders being delayed, rejected or sent COD. When credit is not established, include:
  - Credit references
  - Number of years in business
  - Dun & Bradstreet rating or UPIC (see UPIC Information on page 4)
  - Resale number
  - Federal ID number
  - Telephone numbers
  - Fax numbers
  - e-mail addresses
- Determine the payment amount and method of payment up front. Be alert to client's payment terms as well, so you don't get caught short for cash.

## Submitting Orders

- Purchase orders (POs) may be mailed, faxed, telephoned or sent electronically. Faxed or electronic submission is recommended. The purchase order is the distributor's legal contract to the supplier. All information should be included, such as product specifications and costs, color, imprint color, set up charges, imprint method, location and shipping method, etc. The distributor should state on the PO that "the purchase order lists all costs. If there are additional costs, call for authorization before proceeding with the order." Note on PO artwork delivery date and shipping method; example: e-mail, overnight delivery, etc.
- Highlight special instructions to the supplier on the PO, including variances from the supplier's stated policies, such as special requirements with respect to under- and overruns.
- The PO must be readable (typed is preferred).
- If the order is a co-op program and a co-op number has been assigned, make sure the number, co-op name, and words "CO-OP ORDERS" are on your PO. A co-op program is any online store, print catalog or program where the same items will be ordered multiple times.
- Ensure that both the product's style number and color of the products are stated on your PO. Check that the product you are ordering is available in the color you selected. If the product is a sized item include all sizes with quantities for each size.
- To avoid delays, check pricing against the current catalog and make sure any additional charges are on the PO. If you are using a supplier for the first time, ask the supplier to confirm pricing in writing.
- Include the name of the person placing the order on the PO in case the supplier needs to call for additional information. Respond to supplier inquiries promptly. Production time begins the date all information and final artwork (see Artwork below) is obtained by the supplier. Incomplete PO's requiring clarification, and delays in responding to suppliers questions, will push back delivery dates.
- **Telephone orders are not recommended.** If you place a telephone order, fax or mail the supplier a written copy with the words "CONFIRMING, DO NOT DUPLICATE" on the PO. Reference the person's name with whom you spoke, and the date and time you called in the order. Failure to do so could cause your order to be duplicated!
- Keep detailed notes for every conversation you have with a supplier. Note price quotes, inventory levels, production times, with whom you spoke, etc.
- Reorders must reference the last order submitted. Reference both the supplier's prior invoice number and your PO number. Include artwork, if available. Many suppliers retain artwork on file for a limited period of time after which you will have to submit new art and pay new set-up and/or art changes. **IMPORTANT:** On reorders, state, "Exact repeat. If the product has changed in any way, notify us before proceeding with the order."
- Request confirmation/acknowledgement of the order. Read and carefully check order acknowledgements for accuracy of quantity, pricing, imprint copy delivery date, shipping method, etc. When making changes or corrections, always reference the PO number and confirm in writing. When leaving phone messages for a supplier, be specific in your request (reference the order/quote) and when you need their response, so the supplier has the necessary information to respond promptly. *The single biggest source of miscommunications and misunderstandings is when verbal communications are not confirmed in writing.*

## Artwork and Imprinting

- Artwork should meet the requirements stated in the supplier's catalog for that product. Send art sized appropriately for a given product to reduce the risk of errors. If the catalog requires camera-ready art, and you submit something other than camera-ready art, expect additional charges and extended production time. When sending electronic files as art, check the supplier's catalog for acceptable formats. If not listed, be sure to call. Suppliers will not be responsible for delays due to non-compatible data. Check, if you are not sure of the policies. Following established sm@rt artwork guidelines ensures your orders will be processed quickly and accurately. Visit [smart-artwork.org](http://smart-artwork.org) to learn more.
- Include a print out of your artwork with your PO. When you send artwork always reference your PO number.
- When a product proof, paper proof, virtual proof or fax proof is required, be aware that production times are based on the date approved art work is received. Example: if proof production takes four (4) days and order production is 10 days, plan on at least 16 business (two days added for you to receive the proof and your customer to approve it) for the order to ship. If the proof is in error, additional time may be required.
- Check that the imprint method is available for the product. Carefully read the general information section in the supplier's catalog pertaining to the method of the imprint for possible limitations; for changes that could result; or for production delays that might be incurred as a result of using a specific imprinting process.
- All proofs should be approved by the client before advising the supplier of approval. Check proofs against the original artwork submitted to make sure that no changes were made during the transmittal process. (Fonts in particular need to be checked.)
- Imprint copy should be checked for accuracy and to ensure it complies with space limitations. Copy should be typed.
- Review catalog for imprint location options and indicate the location on your PO. When more than one imprint location is available, the supplier normally has a location they will use if you do not select a specific one. This may not be the location your customer wants and may result in additional costs to you.
- Imagine the color of your imprint against the color of the product. Is the result what you are looking for? Example: if you see a dark imprint color on a dark-colored product, the imprint may not be readable. If you are in doubt, call the supplier for their opinion.
- It is helpful to organize a file of client artwork and compile rules for the logos. The PPAI Bookstore has a booklet called *Trademark, Copyright and Related Issues in the Promotional Products Industry* as well as booklets and videos on the imprinting process. Contact The PPAI Bookstore at 972-258-3087 or go to [www.ppa.org/bookstore](http://www.ppa.org/bookstore) for more information.
- Sm@art Art. PPAI has developed guidelines for artwork standards and e-mail delivery of artwork. For more information, visit the PPAI sm@rt website at [www.ppa.org](http://www.ppa.org) and click on Associate Sites, or contact [smart@ppa.org](mailto:smart@ppa.org) or 972-252-0404.

## Delivery

- Check that the requested ship date is within catalog production times. If not, contact the supplier to confirm if rush production is available. Have the supplier provide rush service approval in writing. Use an actual date and avoid terms such as "ASAP." Many suppliers offer rush services on various products. For international shipments or unusual circumstances, check with the supplier.
- If the product is for a specific event date, make sure the words "deadline use date of: month/day/year" or "event date: month/day/year" appear on your PO. Indicate if you are willing to pay one- or two-day air shipping expenses to meet the deadline date. Ask suppliers to provide tracking numbers on shipments so you can track packages.
- When suppliers quote production times, they are referencing the number of days it will take to produce the order after all information and proof approvals have been received. *Allow additional time for delivery or shipping.*

- Check general information for house shipping carriers. Many terms are generic in nature. Therefore, be specific when requesting rush services. Many carriers' normal ground transportation includes truck freight (where product is heavy and this is the best method). If a specific carrier is required, use the words "SHIP VIA [CARRIER NAME] ONLY." The supplier may require your account number or ship COD to the destination. Suppliers generally have extended pick-up schedules with their normal transportation carriers. Changing from supplier's normal carriers could result in the loss of a production day.
- If you wish for the supplier to ship specifically via FedEx, state this and provide your FedEx account number on the PO. If you are enrolled in the PPAI/FedEx discount program (call PPAI for more information), this is especially important to receive the lower rates. FedEx offers free software packages and web-based tools that help you trace your shipments and manage your shipping activities. Go to [www.fedex.com](http://www.fedex.com) for more information.
- If it is necessary to ship on a COD basis to a client, indicate that information prominently on the PO as some suppliers may charge extra for COD shipments.
- Tracking shipments is a mutual responsibility of both suppliers and distributors. When it is necessary to track a shipment, a distributor should ask for the shipment method and the tracking number.
- If the client requires a copy of the freight bill, be sure to indicate that information on your PO.

## UPIC

The Universal Promotional Identification Code (UPIC) is the industry's comprehensive identification system upon which the UPIC Directory ([www.upic.org](http://www.upic.org)) is based. It is an electronic identifier that recognizes your business as a legitimate industry company and allows you to easily reference other industry companies. If you do not have your free UPIC identifier, apply for it today at [www.upic.org](http://www.upic.org).

## Dispute Resolution

In the event of a dispute involving a distributor and a supplier, and the two sides are at an impasse, PPAI provides the Dispute Advisory Service. For further information, contact the office of the president of PPAI.

## Volunteer Opportunities

There are numerous committees, task forces, regional associations, etc., in the industry that depend on volunteers from both supplier and distributor firms. One of the fastest ways to obtain exposure to potential future business is to volunteer and get involved. Contact PPAI for more information on volunteer opportunities.

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*For additional copies or information on PPAI membership contact:*

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