



PRINTER'S PLAN

# POWER TOOLS



## Shipments

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Overview

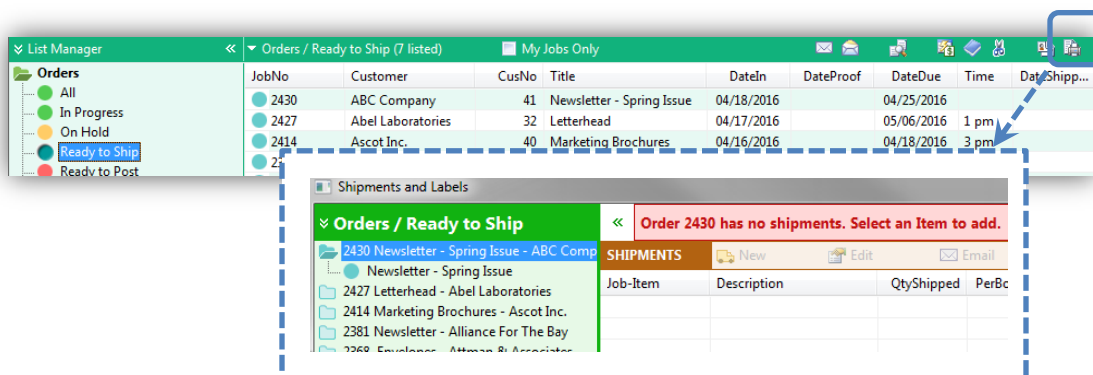
- ✓ Add multiple shipments to each Item of an Order
  - Data for each shipment includes:
    - Shipment Quantity
    - Shipment Weight
    - Number of Boxes
    - Ship to Address
    - Tracking Number
    - Date Shipped
    - Date Received
    - Shipping Method
    - Shipping Charge and
    - Notes about the shipment
- ✓ Email to the customer to inform her/him of shipment
- ✓ Review the details of previous shipments
- ✓ Print labels to affix on shipment boxes
- ✓ Print other forms for jobs, such as Re-order forms, Purchase Orders, Packing Slips, and Delivery Tickets for individual Items of Orders

## Opening the Shipments Tool

The Shipments tool can be opened in two ways:

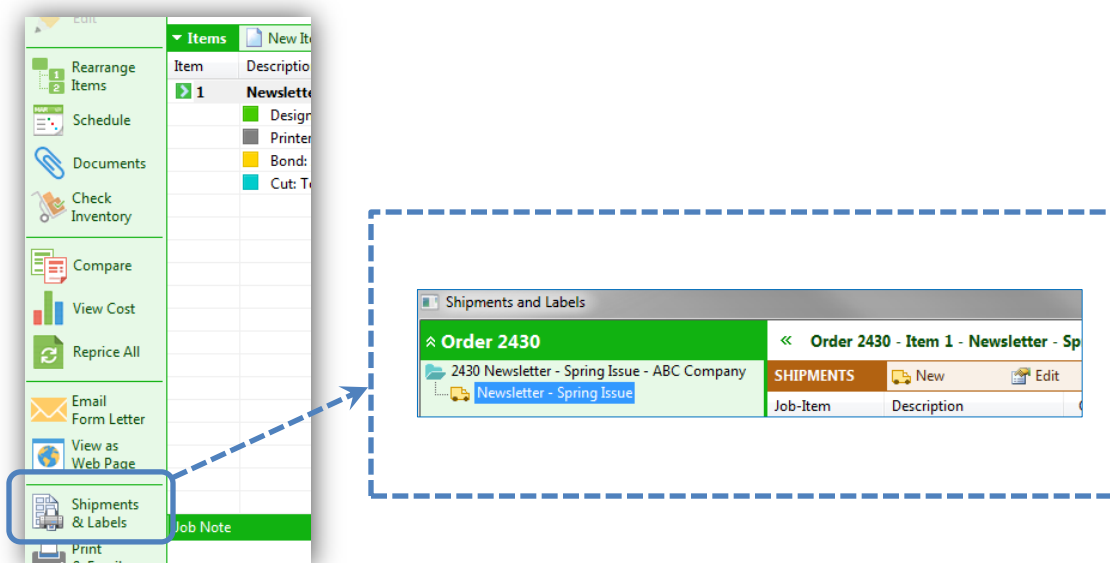
### A. Open from the Jobs section for a group of jobs:

1. List a group of orders, such as "Ready to Ship" orders.
2. Select the orders you want to work with.  
To work with all the orders on the list, you may leave them unselected.
3. Click the **Shipments** button. The Shipments window includes the selected orders (or all the listed orders if only one or none is selected).



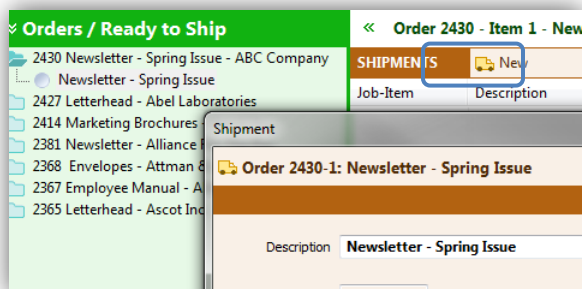
### Open from the Job window for a single job:

1. Open an Order.
2. Click the **Shipments** button. The Shipments window includes only the order you have opened.



## Adding a Shipment

1. In the Shipments tool, expand an Order and select the Item you want to ship. The "Shipment" window for the Item opens. (If it does not open, click **New**.)



2. Enter the information about the shipment.

Enter the quantity of this shipment and the quantity per box.

Enter the total weight of this shipment.

Enter the tracking number.

Click to select another ship to address or to add a new address.

Click to connect to USPS, UPS, and FedEx websites to obtain rates.

Click to add dated notes about this shipment. These notes are displayed only in this Shipment window.

Enter the shipping charge for this shipment. It will be saved to the Shipping field of the Totals window of the order. The charges for the consequent shipments will also be added. The final shipping charge will be a cumulative sum.

Today's date is automatically assigned as the shipped date. You may change it. Enter the date when the customer receives the shipment as additional information.

### Order 2430-1: Newsletter - Spring Issue

Description: **Newsletter - Spring Issue**

Item Quantity:

Shipped Earlier:

This Shipment:  Total Weight:  Pounds  Ounces

Quantity / Box:  Weight / Box: 18 lbs 0 oz

Number of Boxes:

Ship To... ABC Company  
9645 Saratoga Blvd.  
Baltimore MD 21207

Tracking Number:

Shipped: ☒ 4/18/2016

Received: ☐ 4/18/2016 by customer

Shipped By: UPS

Lookup Rates: USPS UPS FEDEX

This Shipment \$:  ☒ Add to Job (Current \$0.00)

Note... 4/18/2016: UPS picked up at 4:30.

## Printer's Plan POWER TOOL | Shipments

- Click **OK** to save the shipment.  
Click **OK + Add to Print Queue** to save the shipment and to add it to the Labels list for printing labels. The Shipment window closes.
- If you would like to send an email to the customer to inform her/him of the shipment, click **Email** as shown below. Other actions you can take in this window are also shown below.

Click to add a shipment for the selected Item, and then follow steps 1 through 3 above.

Click to edit the selected shipment.

Click to delete the selected shipment.

Click to send an email to the customer to inform her/him of the shipment. (See the information box below to learn how to send an email and how to modify and create an email template.)

A truck icon indicates the existence of one or more previous shipment(s). Click the Item description to view the previous shipment(s) for this Item or to add another shipment to the Item.

**Orders / Ready to Ship**

- 2430 Newsletter - Spring Issue - ABC Company
  - Newsletter - Spring Issue
- 2427 Letterhead - Abel Laboratories
  - Letterhead
- 2414 Marketing Brochures - Ascot Inc.
  - Marketing Brochures
- 2381 Newsletter - Alliance For The Bay
- 2368 Envelopes - Attman & Associates
- 2367 Employee Manual - Alliance For The Bay
- 2365 Letterhead - Ascot Inc.

**Order 2430**

**SHIPMENTS** New Edit Email Delete

Job-Item	Description	QtyShipped	PerBox	Boxes	Weight	Shipped To	By	Tracking
2430-1	Newsletter - Spring Issue	1.00	1200	1	18 lbs 0 oz	Baltimore MD 21207	UPS	1Z56T25U03856

**LABELS** Add Selected Shipments Remove

Job-Item	Description	QtyShipped	PerBox	Boxes	Weight	Shipped To	By	Tracking
2414-1	Marketing Brochures	5000	2000	3		Baltimore MD 21234	Our Truck	
2427-1	Letterhead	3000	3000	1		Baltimore MD 21239	Our Truck	

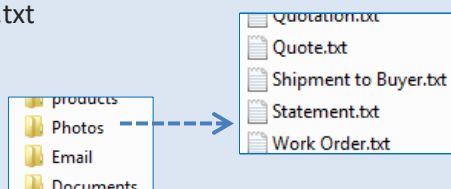
Close Print Labels Data Source: C:\Printer's Plan\

### Sending Emails

When you click the **Email** button, a list of email templates appears. Select one, and click **Open**. Printer's Plan opens a new email window from your default Email program. The body of the email is populated with the message from the template and with data from the job. Click **Send** to send the email.

### Creating/Modifying Email Templates

The email templates are stored in the Email folder which typically resides in the Printer's Plan directory on your server. The templates are text files with file extensions as .txt. For a template to be available in the Shipments tool, its file name must start with "Shipment". Example: Shipment to Buyer.txt



To create a new email template or to modify an existing template, please see the EmailHelp.txt file in the same Email folder. You can open this file in MS Word or any text editor.

## Shipping Labels

### Creating Shipping Labels

Printer's Plan shipping labels are created in Microsoft Word, using the MS Word templates. Therefore, the computer that will print labels must have MS Word installed on it.

Printer's Plan installation includes several label templates already created for your use. These templates are installed in the Printer's Plan directory on your server where your database (PlanData.mdb) is located. The file extension of these templates is .dot. The file names start with "Ship".

*Example: Shipping Label 6-UP.dot*

You may use these templates as they are or modify them. (See "How to Modify Label Templates" at the end of this document.

For a label to be created from a template, Printer's Plan first creates a data source file and names it *Shipping Label.txt*. Then, Printer's Plan opens Microsoft Word, which in turn merges the data source with the template. The result is the label document which is ready to be printed.

The templates that come with Printer's Plan are created to find the data source (the Shipping Label.txt file) at the following address:

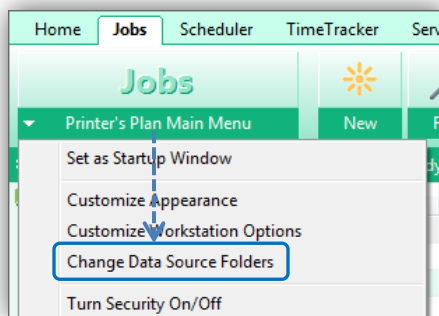
C://Printer's Plan

Thus, your Printer's Plan must be set to save the data source file (ShippingLabel.txt) in the same location. (See "Preparing to Print Shipping Labels" below for instructions.)

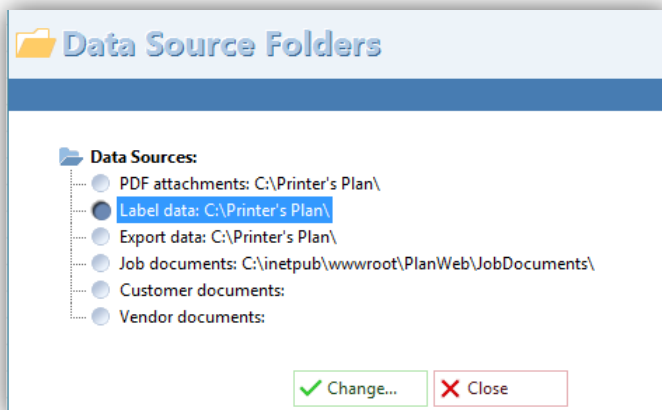
### Preparing to Print the Labels

In preparation, do the following:

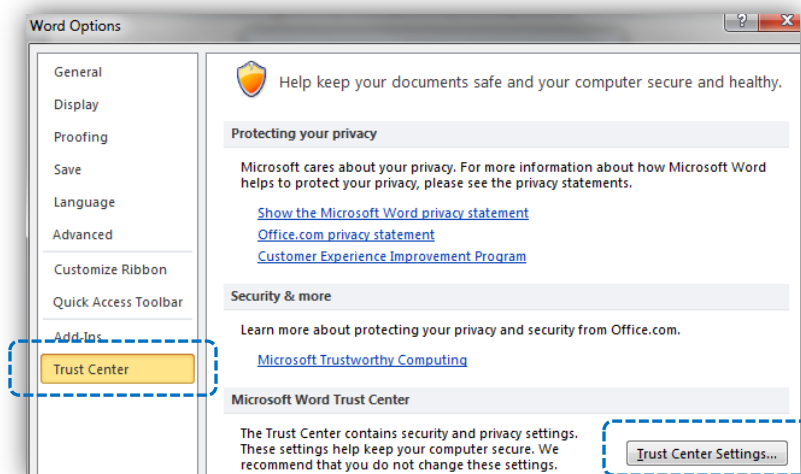
1. Confirm that Printer's Plan and the labels templates agree on the data source location. (The following steps assume the templates look for the data source at C://Printer's Plan.)
  - 1) Click **Printer's Plan Main Menu** and select **Change Data Source Folders**.



The "Label data" line should read as follows. If not, click **Change** to assign the correct address.



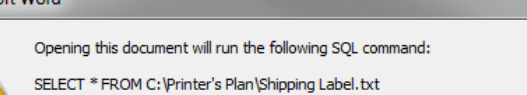
2. Enable macros in MS Word. To do so:
  - 1) Open MS Word.
  - 2) From the File menu, select **Options**.
  - 3) In the Options window, click **Trust Center** and then **Trust Center Settings...**



- 4) In the next window, select **Macro Settings** and then **Enable all macros...**

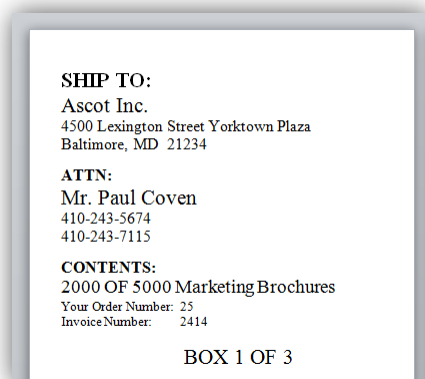
Location where the data source (the ShippingLabel.txt file) will be created. Click to change it.

- Label templates are typically in the Printer's Plan directory on your server where your PlanData.mdb file is located.
- Template file names start with "ship".

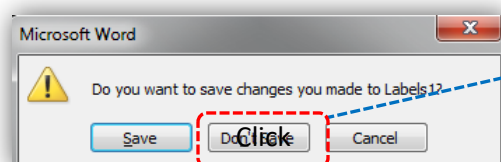
- 
- The screenshot shows a Microsoft Word window with a title bar that says "Microsoft Word". Inside the window, there is a yellow warning triangle icon. To the right of the icon, the text reads: "Opening this document will run the following SQL command: SELECT \* FROM C:\Printer's Plan\Shipping Label.txt". Below this, it says: "Data from your database will be placed in the document. Do you want to continue?". There are three buttons: "Show Help >>", "Yes", and "No". The "No" button is highlighted with a blue border. At the bottom, there is a link that says "Was this information helpful?".
- Microsoft Word
- Opening this document will run the following SQL command:
- SELECT \* FROM C:\Printer's Plan\Shipping Label.txt**
- Data from your database will be placed in the document. Do you want to continue?
- Show Help >>
- Yes No Help
- [Was this information helpful?](#)



- Click Yes. MS Word will place the shipment data in the template and open the label document as a MS Word document file.



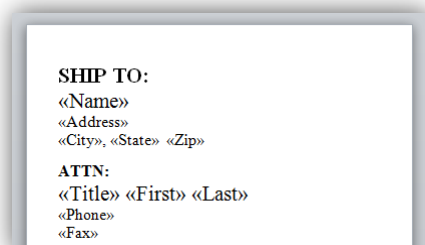
- Print the label(s).
- When printing ends, close the document. The following message appears.



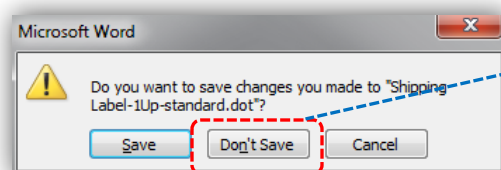
Click **Don't Save**.

*If you click yes, the data will permanently be saved to the template, thus ruining the template.*

- The label document closes and the template itself appears.



- Select **Don't Save** again.



Click **Don't Save**.

*If you click yes, the data will permanently be saved to the template, thus ruining the template.*

**Important:** Keep a back-up copy of your shipping templates. You will need them if your templates become bad due to various reasons.