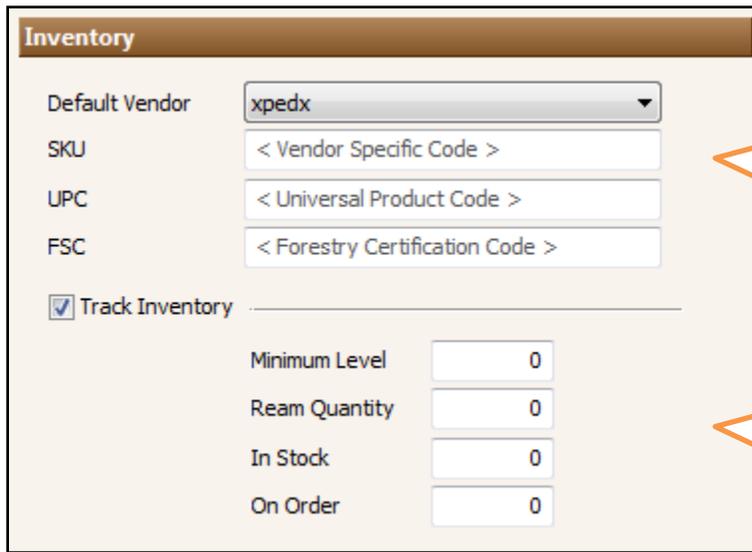


Inventory Tool

This optional tool is designed to help you track and manage stock and other selected Services.

Inventory properties of a Service:



The screenshot shows the 'Inventory' setup window with the following fields and values:

Default Vendor	xpedx
SKU	< Vendor Specific Code >
UPC	< Universal Product Code >
FSC	< Forestry Certification Code >
<input checked="" type="checkbox"/> Track Inventory	
Minimum Level	0
Ream Quantity	0
In Stock	0
On Order	0

To open this window, click:

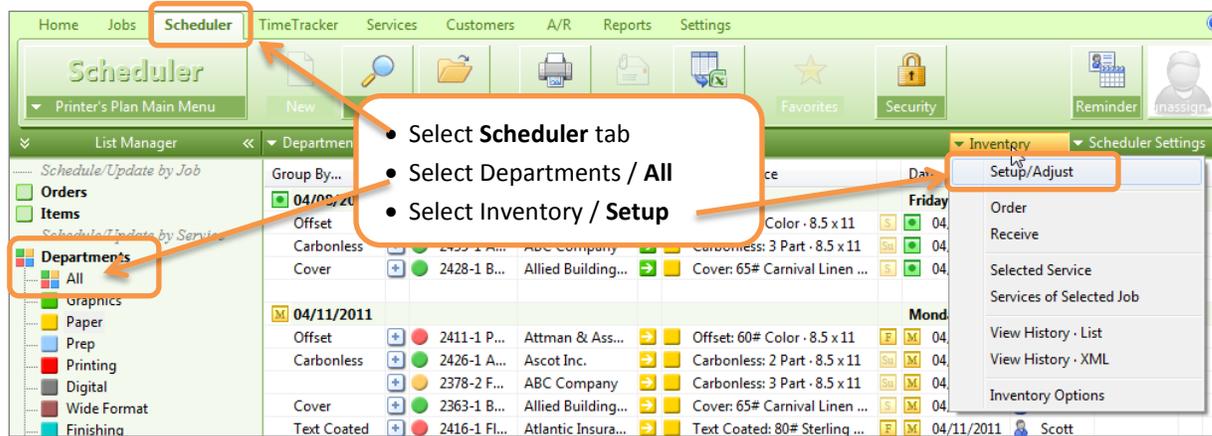
in the Service Setup window.

You can assign the Inventory Properties easily in the Inventory Setup window. See Page 3 for

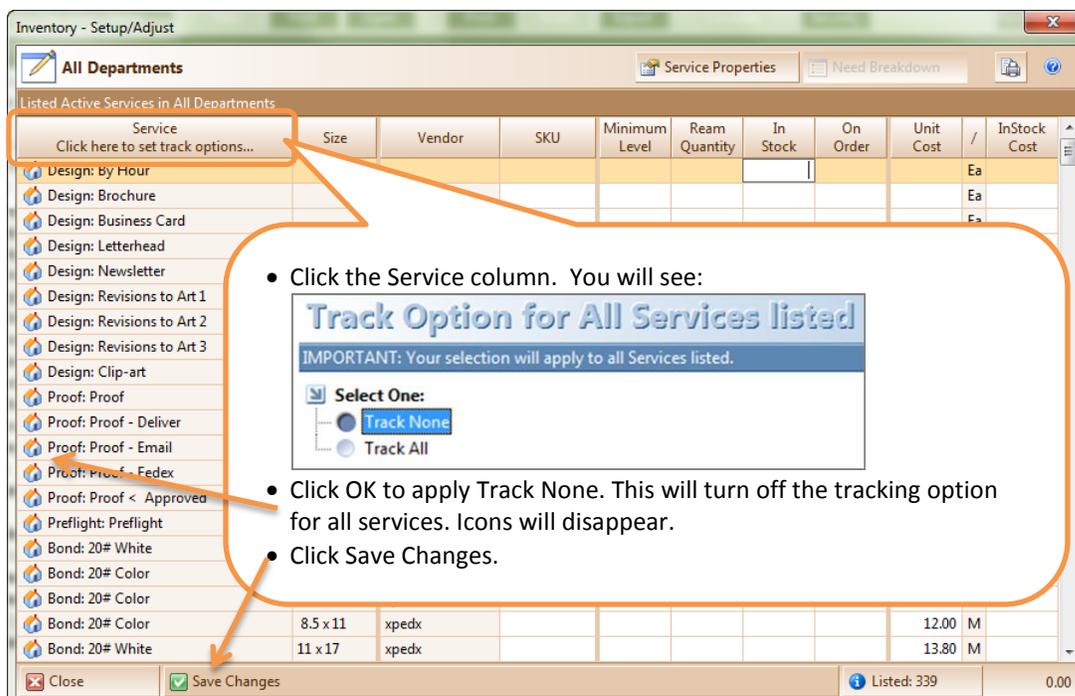
Getting Ready

STEP 1: Turn Off the Tracking Option of All Services:

The easiest method is to turn off the tracking option of all Services and then selecting the ones you want to track.



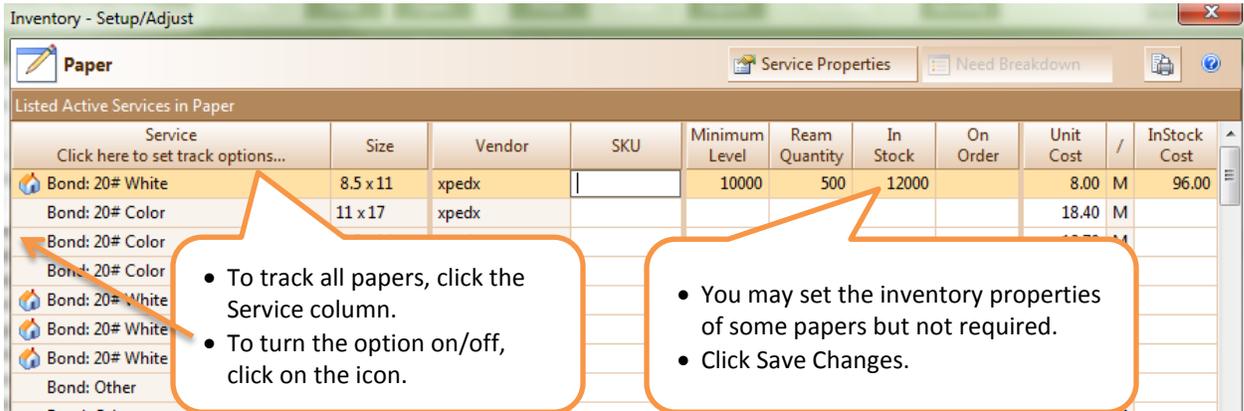
This will open the Inventory Setup/Adjust window and list all Active (not discontinued) Services:



Now, the tracking option is off for all Services. Next, you will select the ones you want to track.

STEP 2: Turn -On the Tracking Option of the Services you want to track:

In the scheduler window, select **Paper** from Departments and then select Setup from the Inventory menu.



In this window you will set and/or adjust the **Inventory Properties** of papers. The **Setup** list includes all **active** (not discontinued) papers. *See **Options** to set the "Sort Services by Vendor" option.*

Inventory Properties

You may edit the following properties in this window or in "More Properties" window of a Service:

- **SKU:** Vendor Specific Code.
- **Minimum Level:** Minimum quantity you would like to have in-stock.
- **Ream Quantity:** Number of sheets of paper per ream. Printer's Plan will round-up the "Order" quantity to this.
- **In-Stock:** Current quantity you have.
- **On-Order:** Current quantity you have ordered but not received yet.
- **Unit Cost:** This value is read from the Run Table/First Row/Material Cost Column of Service.

The following properties are calculated:

- **Item:** Number of times a specific paper is assigned to jobs and not marked as "Done".
- **Need:** Number of sheets of paper needed (not marked as "Done") by jobs.
- **In-Stock Cost** = Unit Cost x Quantity-In-Stock. In other windows, this column becomes "Extended Cost" and its value is calculated based on Quantity Ordered or Received.

Tip: You may start using/testing this tool without setting up Inventory Properties.

Ordering Inventory

In this window you will specify what and how many to order.

To open this window in the **Scheduler** section:

- a) Select **Departments / Paper** from the List Manager, then select **Order** from the **Inventory** menu.
- b) Or, right-click on a Service Quantity field and select **Selected Job** or **Selected Service** from the popup menu.

To open this window in the **Jobs** section:

- c) In the Job window, click **Inventory** button.
- d) In the Specs window, right-click on a Service and select **Check Service Inventory** from the popup menu.

The **Order Inventory** list includes the papers that are **To-Do** and Priority field is not marked as **On-Order** or **In-Stock**. See **Options** to set the "In Order Inventory window, include Services of" option.

The screenshot shows the 'Inventory' window with a table of items. Callouts provide the following information:

- Need Breakdown:** 2 Items need 562 sheets of this paper. To see Items, double-click the cell or click "Need Breakdown" button.
- Order Quantity:** You may change the Order Quantity. Type 0 not to order or uncheck the box.
- Unit and Extended Cost:** You may change the Unit and Extended Cost.

On Order	Item	Need	Order	Unit Cost	Extended Cost
2		562	562	8.70 M	4.88
1		5515	5515	13.80 M	76.10
3		10990		11.60 M	
1		31200		21.00 M	
1		2172	3172	23.00 M	72.95
2		656	656	31.00 M	20.33
1		595		55.00 M	32.72
1			5555	60.00 M	333.30

After you click OK, Printer's Plan will:

1. Update the **On-Order** property of paper based on the quantity you ordered.
2. Update **Inventory History** by adding a record for each paper ordered.
3. Update the **Priority** field of Job Services as **On-Order** or **To-Order** or **In-Stock**.

The screenshot shows the 'Inventory History' table with callouts for the Priority Column and status indicators:

- Priority Column:** A green circle indicates 'In-Stock', a red circle indicates 'To-Order', and a yellow circle indicates 'On-Order'.

Category: Service	Date	Operator	Tag	P
Wednesday				
Offset: 60# Color · 8.5 x 11	Th	01/05/2011	unas...	●
Thursday				
Offset: 60# Color · 8.5 x 11	W Th	01/06/2011	unas...	●
Carbonless: 2 Part · 8.5 x 11	S Th	01/06/2011	Scott	●
Cover: 65# Carnival Linen ...	Th Th	01/06/2011	Scott	●
Cover: 65# Carnival Linen ...	S Th	01/06/2011	Scott	●

Receiving Inventory

In this window you will specify what and how many you received.

To open this window:

- Select **Departments / Paper** from the List Manager, then select **Receive** from the **Inventory** menu.

The **Receive Inventory** list includes the papers you ordered. Priority field is marked as **On-Order**.

Category	Name	Size	Vendor	SKU	Minimum Level	Ream Quantity	In Stock	On Order	Item	Need	Received	Unit Cost	Extended Cost
Writing: 24#	Classic Linen	8.5 x 11	Russell				10000	1330	2	11330	1330	34.00	45.22
Env: Business: 24#	Window White	#10	Chesapeake					2136	2	6		17.00	M
Env: Book/Catalog: 24#	Catalog	9 x 12	Atlantic							10593	10593	44.50	M
												516.60	

After you click OK, Printer's Plan will:

1. Update the **In-Stock** and **On-Order** properties of paper based on the actual quantity you received.
2. Update **Inventory History** by adding a record for each paper received.
3. Update the **Priority** field of Job Services as **On-Order** or **To-Order** or **In-Stock**.

Consuming Inventory

When you mark a paper as **Done**, Printer's Plan will open this window for you confirm the actual stock quantity used. *See **Options** to set the "Open Quantity Used window" option.*

Field	Value	Notes
In-Stock Was	5,200	
Less Quantity Used	1200	70 less than estimated 1,270
In-Stock Now	4,000	

After you click OK, Printer's Plan will:

1. Update the **In-Stock** property of paper based on the **Quantity Used**.
2. If you change the **Quantity Used**, update the **Actual Material Quantity** and **Cost of Job**.
3. Mark the paper as **done**. The **Priority** field remains unchanged.

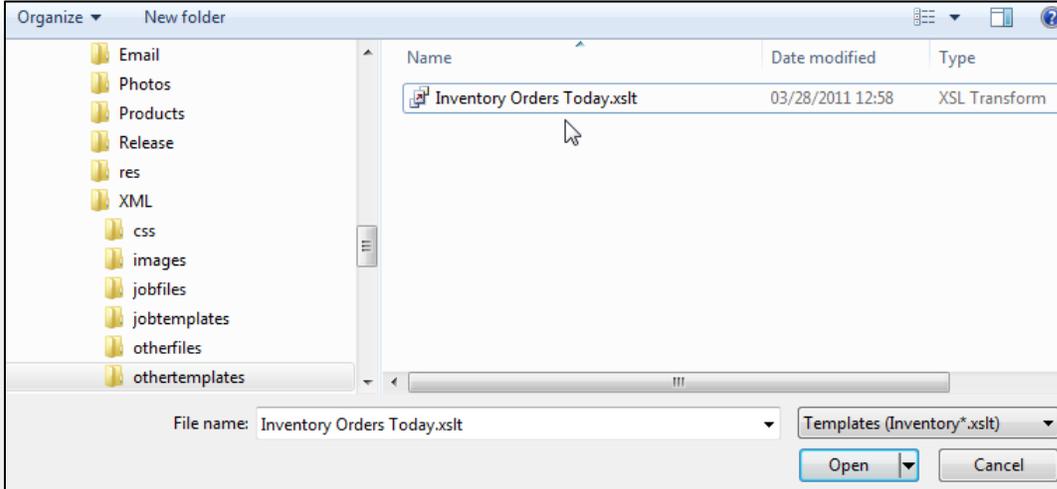
History - List

Select this from the Inventory menu to view the history of what you ordered and received.

Vendor	ActionDate	Action	Service	Size	SKU	Quantity	Cost
Kelly	01/05/2011	- Received	Offset: 60# Color	8.5 x 11		-10990	127.48
Kelly	01/05/2011	Ordered	Offset: 60# Color	8.5 x 11		10990	127.48
xpedx	01/05/2011	- Received	Bond: 20# White	8.5 x 14		-562	4.88
xpedx	01/05/2011	Ordered	Bond: 20# White	8.5 x 14		562	4.88

History - XML

Select this from the Inventory menu to view the history using your own query and template. You need the optional XML tool of Printer's Plan to use this feature.



Options

In this window you will set Inventory Tool options, which apply to all computers.

The screenshot shows the 'Inventory Options' dialog box with the following sections and options:

- Which Services do you want to list in the 'Order Inventory' window?**
 - Only the Services of Orders-In-Progress (uncheck to list Services of All Orders)
 - Only the Services of Items-In-Production (uncheck to list Services of All Items)
 - (reserved)
- After checking a Service as Done:**
 - Open Quantity Used window to confirm/edit Quantity Used
 - If Quantity Used is edited, update Actual Quantity and Cost of the Job
- Other Options:**
 - Sort Services by Vendor (uncheck to sort by Service Category)
 - Save Unit Cost, if edited. IMPORTANT: This option effects pricing. Uncheck if not sure.
 - Allow ordering/editing inventory from the Job window (uncheck to preview)

Callouts provide additional information:

- Important:** If checked, this option will change the Cost of Jobs (price will not change).
- Important:** If checked, this option will change the default Unit Cost of Services.

Buttons: OK, Cancel