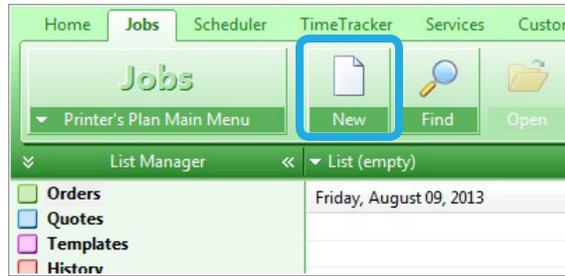


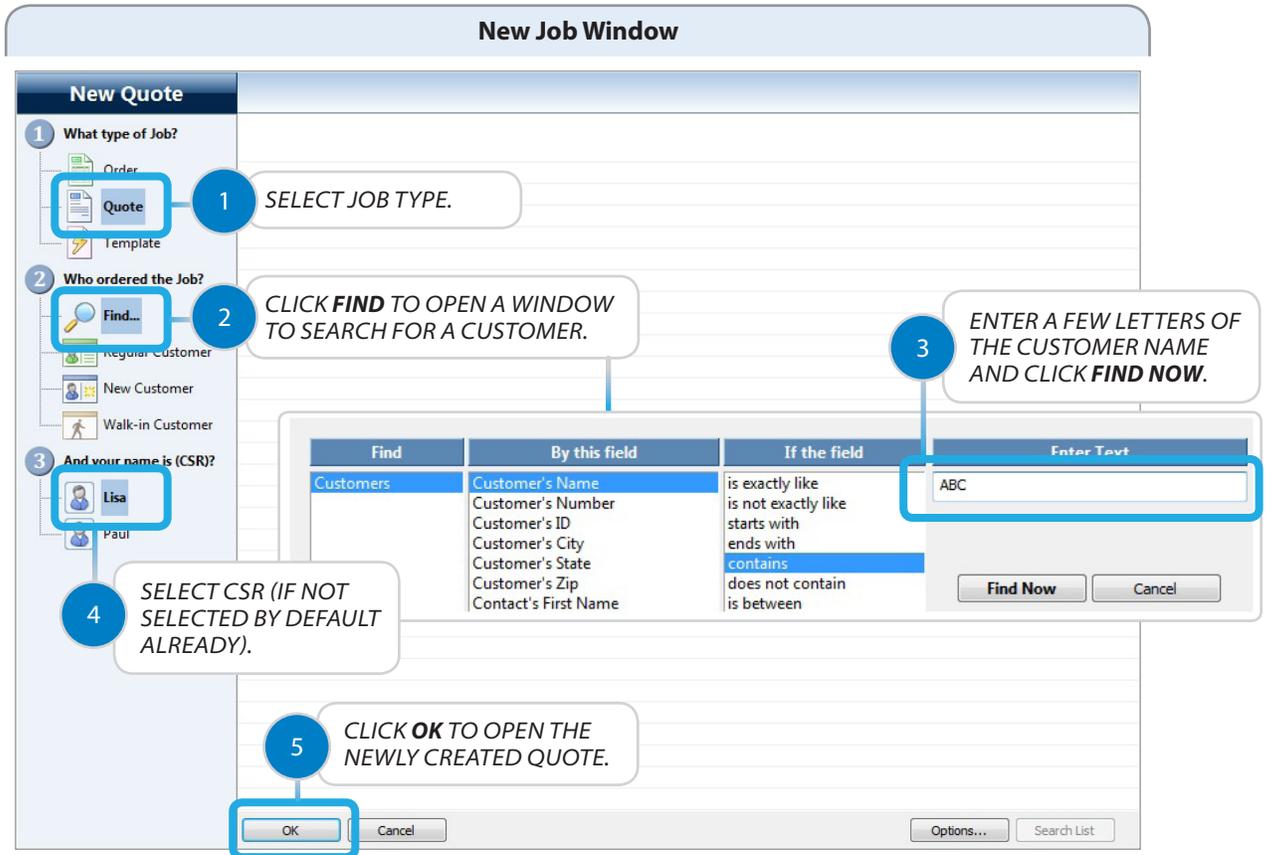
# Creating a New Quote

**NOTE:** The options and prices shown in the images in this section might vary due to your setup preferences in Printer's Plan.

**Step 1:** Click **New** to open the New Quote window.



**Step 2:** In the New Job window:



# Creating a New Quote

**Step 3:** In the newly created Quote:

**Newly Created Quote**

|  |  |   |   |
|--|--|---|---|
| <b>Quote</b> 508 <span style="float: right; color: red;">Hot</span>                      |  |   |   |
| <b>Bill to Customer No.32</b><br>ABC Company<br>220 Lexington Ave.<br>Baltimore MD 21201 | <b>Ship To</b><br>James Hudson 410-323-2309<br>ABC Company<br>9645 Saratoga Blvd<br>Baltimore MD 21210 | <b>Ordered By</b><br>Gail Brooks<br>gailb@abcco.com<br>Ph1: 410-323-7340<br>Ph2:<br>Cell: 443-545-8765<br>Fax: 410-323-8790 | <b>When</b><br>In 5/10/2013<br>Due<br>Ship by Our Truck<br>Ship'd<br>CSR Lisa<br>Status Hot<br>From Scratch |

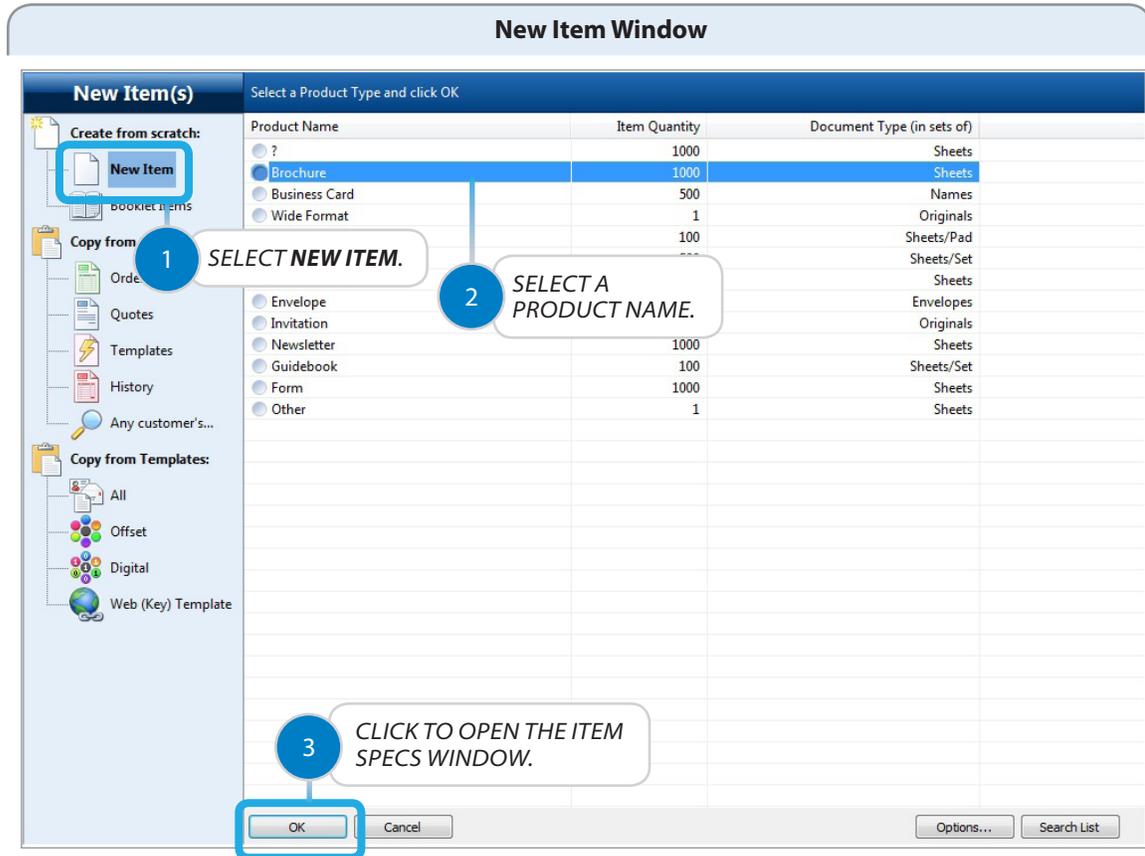
| Item   | Description | Quantity | Time | Price/Hr | Unit Price | Price | ± | L | E* | S |
|--|-------------|----------|------|----------|------------|-------|---|---|----|---|
| <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: 0 auto;"> <p><b>Options</b></p> <p><i>What would you like to do next?</i></p> <p>Printer's Plan will help you walk-through the checked items.</p> <p><input checked="" type="checkbox"/> <b>Check the data you want to complete:</b></p> <p><input checked="" type="checkbox"/> Item Specs</p> <p style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <div style="border: 1px solid #ccc; border-radius: 15px; padding: 5px; width: fit-content; margin: 10px auto; text-align: center;"> <p><i>CLICK TO OPEN THE NEW ITEM WINDOW.</i></p> </div> |             |          |      |          |            |       |   |   |    |   |

| Job Note | Memo to Customer | Job Totals |      | NOT PRICED |             |
|----------|------------------|------------|------|------------|-------------|
|          |                  | Subtotal   | ?    | Total      | ?           |
|          |                  | Discount   | 0.00 | Paid       | 0.00        |
|          |                  | Shipping   | 0.00 | Balance    | 0.00        |
|          |                  | Postage    | 0.00 |            |             |
|          |                  | Taxable    | 0.00 |            |             |
|          |                  | Tax        | 0.00 |            | Net 30 Days |

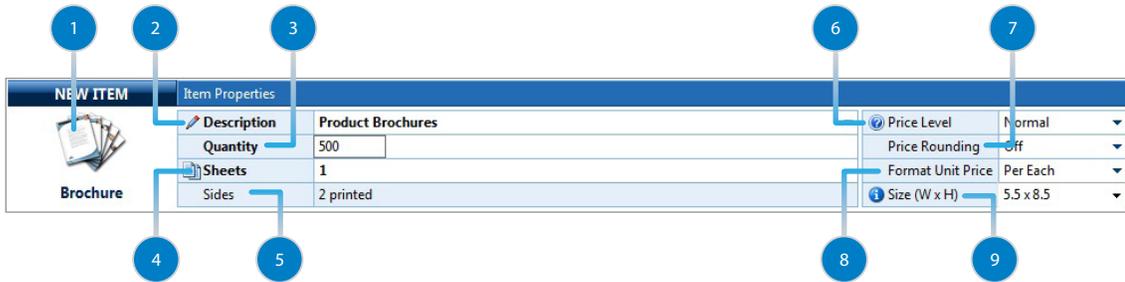
## Creating a New Quote

**Step 4:** In the New Item window:



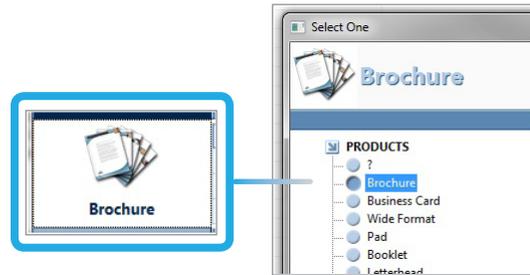


## Item Specs Window – Top Section

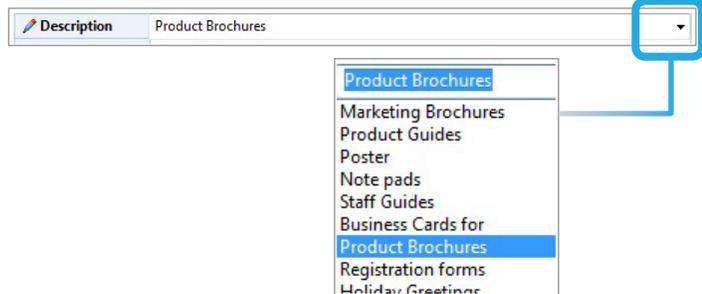


1 The **Product Type** name selected in the previous window appears here. To change the Product Type, click to display the list again.

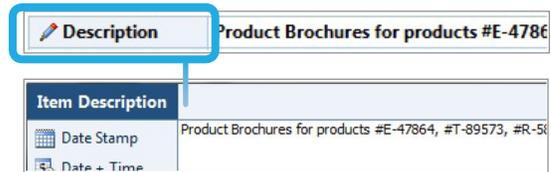
*Product Types are set up in Settings | Jobs | Product Types. To learn how to attach images to Product Types, see “Photos” in the “Settings” chapter.*



2 Enter the **Item Description**, or click the arrow to select from the frequently-used Item Descriptions list. (*This list is set up in Settings | User Defined Properties | Job/Item Titles.*)



The Description field is not limited in size. To enter longer text and to view it later, click **Description** to open the Item Description window.



3

Enter the finished quantity to be delivered to the customer in the **Quantity** field. In jobs where the final product has more than one sheet per set, the Quantity is the final quantity of sets to be delivered to the customer.

Quantity

500

To quote prices for multiple quantities, click **Quantity** to open the Quantity Breaks window. Enter up to ten quantities in increasing order, separated by spaces. The first quantity must be greater than the original quantity.

Quantity

Quantity Breaks

Type up to 10 quantities, separated by a space:

800 1000 1200

Enter quantities in increasing order. The first quantity must be greater than 500. These quantities will be saved in the 'Note' field.

OK Cancel

**IMPORTANT:**

*Multiple-quantity prices are calculated from the default setup values of Services. Multiple-quantity prices may be different from the expected prices under the following conditions:*

- a) A Service in the Item is set up such that Printer's Plan asks for the quantity, cost, or price of the Service as you create the Item, and/or*
- b) You have manually modified the cost or price of the Item in the Edit Costs window.*

4

Enter the number of **Sheets** per set.

Click **Sheets** to make an alternative selection.

- a) Select **Originals, Sheets, Envelopes, Names, Originals/Set, Sheets/Set** or **blank** according to your preference. For calculations and pricing, the program behaves the same way regardless of your selection.
- b) Select **Sheets/Pad** if this Item is a padding job. Then, enter the number of sheets per pad in this field and the number of pads in the **Quantity** field. Printer's Plan will assume one original and multiply the number in the Quantity field by the number of sheets per pad to arrive at the total number of finished sheets. The quote/invoice will display the number of pads and the number of sheets per pad.
- c) Select **Tabs/Pad** if this Item is a tab job. Printer's Plan will behave in the same way as explained in (b) above.

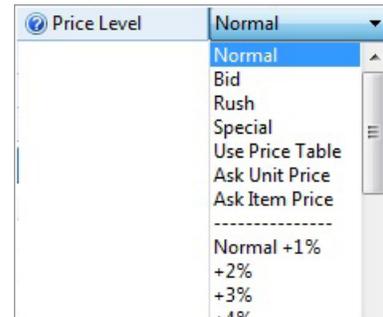
5

The **Sides** field is for information only. After the job specifications are added, this field displays the number of printed and blank pages per set as shown in the second figure.

After job specifications are added:

6

To select a **Price Level** different from what is displayed, click the arrow to display the drop-down list. The default selection in this field is the Price Level that is assigned to the customer.



#### Price Level feature:

**Bid, Rush, and Special:** Markup percentages or the prices of the Services in the Item will be multiplied by the numbers assigned in the **Adjust...** fields of the Service setup window.

*(For a comprehensive explanation of Bid, Rush, and Special, see "Service Setup – Common Fields" in the "Services" chapter.)*

|           |      |      |         |                 |
|-----------|------|------|---------|-----------------|
| Adjust... | Bid  | Rush | Special | Multiply Markup |
|           | 0.75 | 1.5  | 2       |                 |

**Use Price Table:** Select to assign a predefined Price Table to the Item. The appropriate price from the Price Table will override the default Item price. *(For a comprehensive explanation of the Price Table, see "Item Price Table" in this chapter.)*

**Ask Unit Price, Ask Item Price:** Use these options if you want to override the default price that Printer's Plan calculates for the Item.

**Ask Unit Price:** Printer's Plan displays the following window, asking for a Unit Price for the Item. It then multiplies the Unit Price by the Item Quantity to arrive at the Item Price.

**Ask Item Price:** Printer's Plan displays the following window, asking for the Item price.

**1% up, 2% up, etc.:** Printer's Plan increases the Item default price by the indicated percentage.

**-1% down, -2% down, etc.:** Printer's Plan decreases the Item default price by the indicated percentage.

# Creating a New Quote

7

Click to turn the **Rounding** feature on or off for this Item. The default selection in an Item is the one assigned to the customer.

*(To learn about Price Rounding and to set up the table, go to Settings | Jobs | How to Round Item Price.)*

8

Click to format the **Unit Price** for this Item (Per Each or Per 1000). A blank selection defaults to Per Each.

*(To set the default selection, go to Settings | Jobs | Job Options.)*

9

Enter the final **Document Size**. Optional in some cases, mandatory in others. See the following:

- If, in this Item, you are using a Service which is set up such that Item Width, Height, Perimeter, or Area is selected in the **Quantity** field (typically Wide Format Services), the quantity (area or length) for that Service is calculated from the dimensions entered here.
- With the exception of the above, the size in this field is not used in price calculations. You may choose to leave this field blank. If you do enter a size, it will print on work orders, invoices and quotes. Some valuable uses are to describe the finished book size or folded document size.

**CLICK SIZE (W X H) TO OPEN A DIALOG BOX THAT EXPLAINS THE FUNCTION OF THIS FIELD.**

**NOTE:**

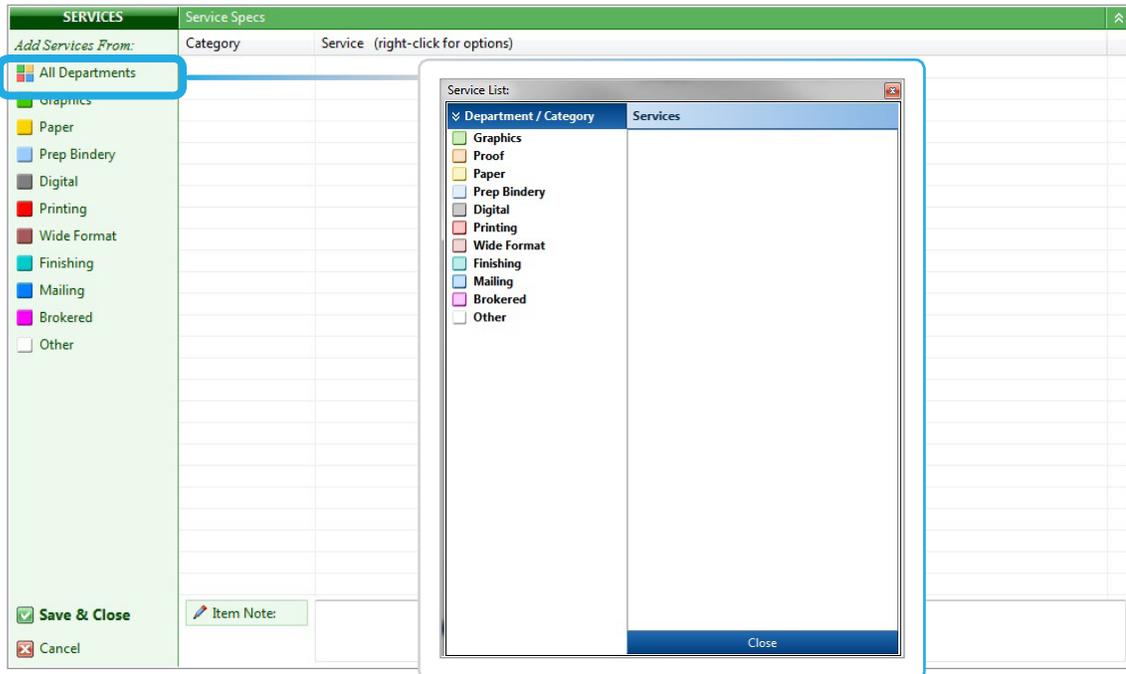
*Document Size and Finish Size are not linked; i.e., changing one does not affect the other.*

*Enter the size as Width x Length.*

*(The pull-down list of sizes is set up in Settings | Frequently Used Text | Paper Finish Sizes.)*

### Item Specs Window – Bottom section: Adding Services to an Item

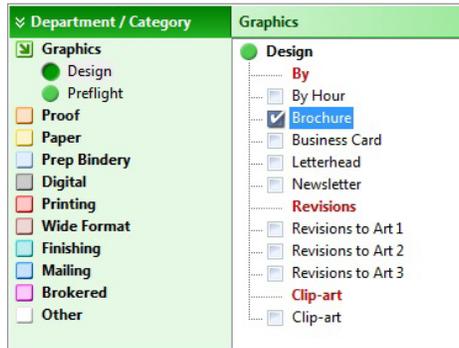
1. Click **All Departments** to open the Service List window which includes a list of the Service Departments created in the Services section.



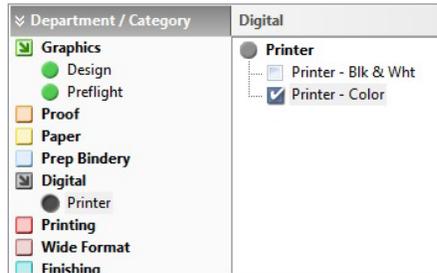
2. Click a Department to expand its Categories.
3. Click a Category to list its Services.
4. Check mark a Service to add it to the Item.  
You can add multiple Services from one Category. Exception: You can add only one printer (Offset or Digital) to an Item.

*(See the following pages for steps 2, 3, and 4 above.)*

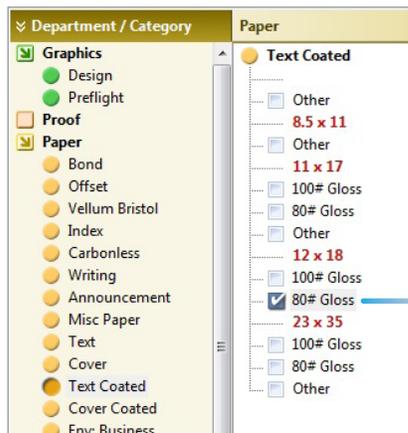
# Creating a New Quote



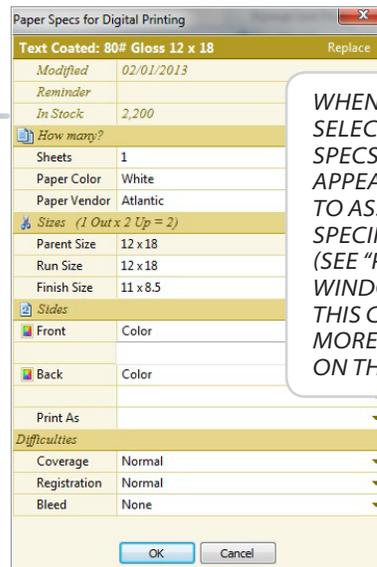
1 OPEN **GRAPHICS**, CLICK **DESIGN**, AND CHECK MARK A DESIGN SERVICE.



2 OPEN **DIGITAL**, CLICK **PRINTER**, AND CHECK MARK A PRINTER.

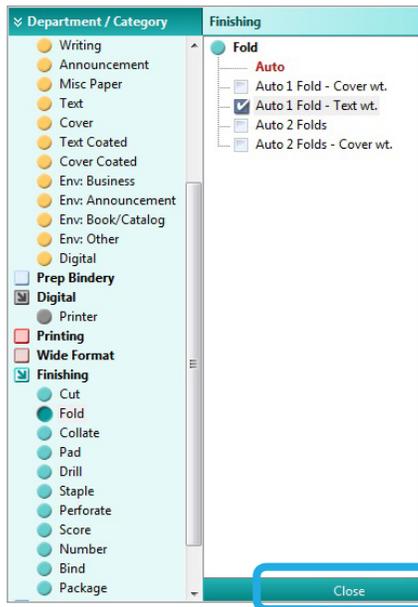


3 OPEN **PAPER**, CLICK **TEXT COATED**, AND CHECK MARK A PAPER.

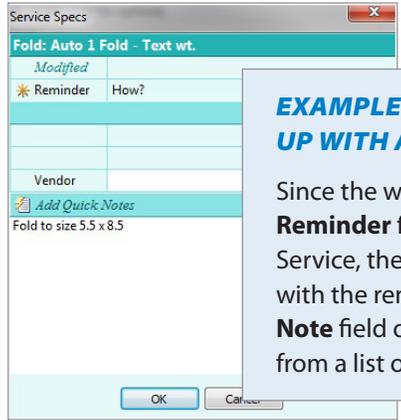


WHEN A PAPER IS SELECTED, THE PAPER SPECS WINDOW APPEARS FOR YOU TO ASSIGN PAPER SPECIFICATIONS. (SEE "PAPER SPECS WINDOW" LATER IN THIS CHAPTER FOR MORE INFORMATION ON THIS WINDOW.)

# Creating a New Quote



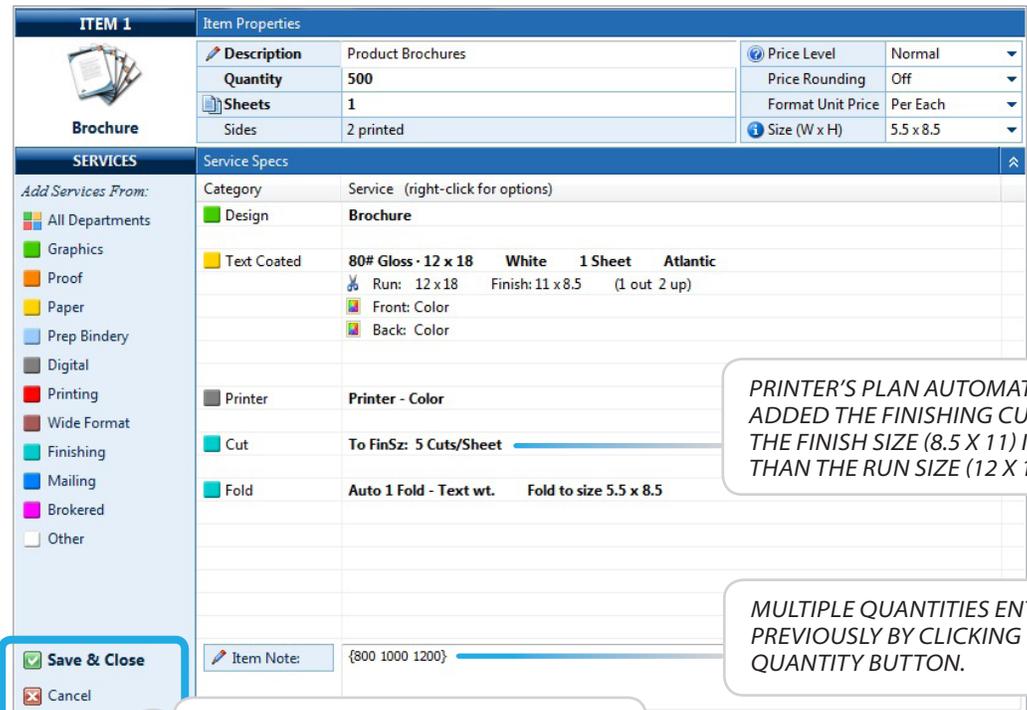
4 OPEN **FINISHING**, CLICK **FOLD**, AND CHECK MARK A FOLDING SERVICE.



**EXAMPLE OF A SERVICE THAT IS SET UP WITH A POPUP REMINDER:**  
 Since the word "How?" is assigned to the **Reminder** field of the setup window of this Service, the Service Specs window pops up with the reminder. Enter the notes in the **Note** field or click **Add Quick Notes** to select from a list of predefined notes.

5 CLICK TO CLOSE THE SERVICE LIST WINDOW.

Now the Specs page looks like the following:



PRINTER'S PLAN AUTOMATICALLY ADDED THE FINISHING CUT BECAUSE THE FINISH SIZE (8.5 X 11) IS SMALLER THAN THE RUN SIZE (12 X 18).

MULTIPLE QUANTITIES ENTERED PREVIOUSLY BY CLICKING THE QUANTITY BUTTON.

6 CLICK **SAVE & CLOSE** TO SAVE THE ITEM. CLICK **CANCEL** TO CANCEL THE ITEM.

# Creating a New Quote

The newly created Quote looks like the following:

**Quote 508 Product Brochures Hot**

Bill to Customer No.41: ABC Company, 800 Pike Street, Baltimore MD 21202  
 Ship To: ABC Company, 9645 Saratoga Blvd., Baltimore MD 21207  
 Ordered By: Michelle Greene, mgreene@abc.com, Ph1: 410-539-3466 x 35, Ph2: 443-567-4398, Fax: 410-539-5586  
 When: In 10/25/2013, Due, Ship by Our Truck, Ship'd, CSR Lisa, Status Hot, From Scratch

| Item | Description  | Quantity | Time | Price/Hr | Unit Price | Price  | ± | L | E* | S |
|------|--|----------|------|----------|------------|--------|---|---|----|---|
| 1    | Product Brochures 1 Sheet (2 sides) 5.5 x 8.5<br>(800 1000 1200)                   | 500      |      |          | 0.9790/Ea  | 489.54 |   |   |    |   |
|      | Design: Brochure   | 2        | 1:40 | 65.00    | 54.1700/Ea | 108.34 |   |   |    |   |
|      | Text Coated: 80# Gloss · 12 x 18 · 1 out 2 up White · Color / Color · Atlantic ... | 250      |      |          | 100.8000/M | 25.20  |   |   |    |   |
|      | Printer: Printer - Color   | 500      | 0:14 |          | 0.6800/Ea  | 340.00 |   |   |    |   |
|      | Cut: To FinSz 5 Cuts/Sheet   | 5        | 0:07 | 60.00    | 1.4000/Ea  | 7.00   |   |   |    |   |
|      | Fold: Auto 1 Fold - Text wt. · Fold to size 5.5 x 8.5                              | 500      | 0:09 | 60.00    | 0.0180/Ea  | 9.00   |   |   |    |   |

Job Totals: Subtotal 489.54, Discount 0.00, Shipping 0.00, Postage 0.00, Taxable 489.54, Tax 29.38  
 Balance Due: Total 518.92, Paid 0.00, Balance 518.92, Net 30 Days

CLICK TO PRINT/EMAIL A QUOTE FOR/TO THE CUSTOMER.  
 (SEE "PRINTING/EMAILING DOCUMENTS" TO LEARN ABOUT THE PRINT WINDOW.)