

# Service Departments & Categories

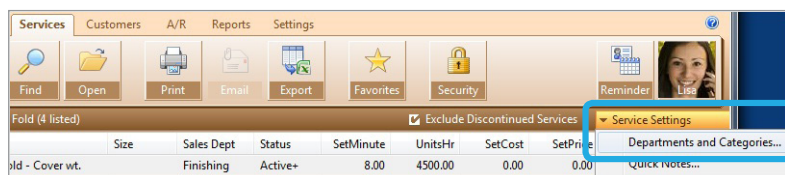
It makes sense to organize the Services in groups because, as you assign a Service to a job, looking up a Service in a relevant group is easier than searching for it in a list of hundreds, sometimes thousands, of Services. Departments and Categories in Printer's Plan help you with this organization. In addition, Services inherit their characteristics from the Categories in which they are created.

In Printer's Plan, you can create up to twelve Departments, such as Graphics, Paper, and Finishing. Within each Department, you can create up to one hundred Categories, such as Design and Proof in the Graphics Department, Bond and Coated Text in the Paper Department, and Fold and Cut in the Finishing Department. It is within a Category only, that you can set up a Service. You may set up as many Services as you wish in each Category. Following is a sample organization of Services:

Department	Category	Service
Graphics	Design	Business Card Design
		Design by Hour
		Revisions to Graphics
Paper	Bond	20# White 8.5 x 11
		20# Color 11 x 17
	Cover	60#
		80#
Finishing	Fold	Right-angle
		Half

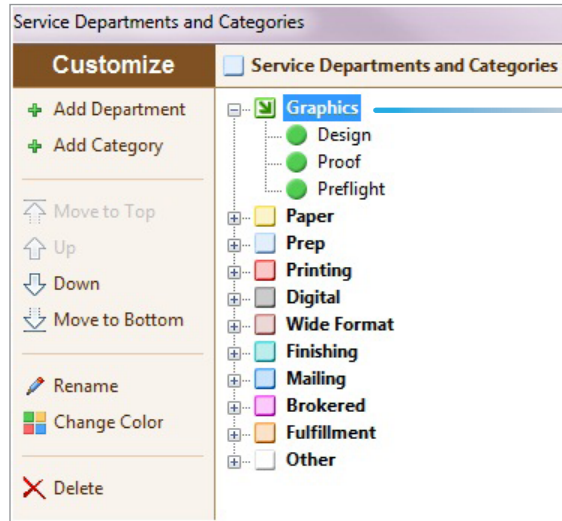
## Creating and Organizing Service Departments and Categories

In the Services section, click **Service Settings** and select **Departments and Categories...**





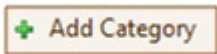

# Service Department & Categories

The "Service Departments and Categories" window appears.

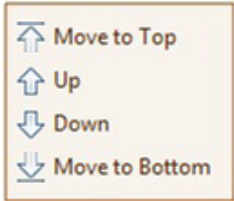

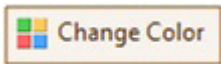




CLICK THE (+) SIGN NEXT TO A DEPARTMENT TO VIEW ITS CATEGORIES.

## Functions of the "Service Departments and Categories" window:

Description	Function
	<p>Click to add a new Service Department and then enter the name of the Department.  <i>(Keep the name brief to save space on screens and reports where it is used to complement the Service name.)</i></p> <p>Limit: 12 Departments</p> 
	<p>1. Highlight the Department to which you want to add a Category and click <b>+Add Category</b>. The New Category window appears.</p> 

# Service Department & Categories

	<p>2. Select the Category type. (See <i>Category Types</i> in this section.)</p> <p>3. Enter the Category name. (Keep the name brief to save space on screens and reports where it is used to complement the Service name.)</p> <p>Limit: 100 Categories per Department.</p>
	<p>Use these buttons to change the list order of Departments and Categories. (First click the Department or Category, then click a button.)</p> <p><b>NOTE:</b> To move a Category from one Department to another: Click and drag the Category name to the desired Department.</p>
	<p>Click after you select the Department or Category that you want to rename.</p>
	<p>Used only with Departments.</p> <p>Click this button after you select the Department. The color options are fixed.</p>
	<p>Click after you select the Department or Category that you want to delete.</p> <p><b>NOTE:</b> Deleting a Department will delete all of its Categories, too.</p> <p>A Category that has Services cannot be deleted. To delete a Category, you must empty it first by deleting its Services or moving them into another Category.</p>
	<p>Click to expand all Departments.</p>

### Consider the following as you create Departments and Categories:

Departments and Categories, their names, and their listing orders may become important in certain areas of Printer's Plan, such as the following:

- Work Orders: Department and Category names are printed with each Service.
- As Services are added to an Item of an Order/Quote, they are listed and then printed on the work orders in the same order as that of their Categories and Departments. Production will be more efficient and error-free if the listing order matches the production order.

# Service Department & Categories

**NOTE:** The listing order of the Services in an Item can be modified; however, this requires several extra clicks.

(See the “Jobs” chapter for more information.)

- Basic Schedule: Services appear under the Departments to which they belong.
- Scheduler tool:
  - Services are listed under their Categories and Departments.
  - Item (job) locations match the Service Departments.
  - As Items automatically move from location to location, the movement follows the same order as that of the Departments.

(See the Scheduler guide for more information.)

- JobTracker: Locations are the Service Departments.

(See the JobTracker guide for more information.)

**NOTE:** Initially, do not be too concerned about setting up the Departments and Categories. Later as you use Printer’s Plan, you can rename, delete, or relocate Departments and Categories and move your Services from one Category to another at any time. The setup of Services, including their costs and prices, will not be affected.

## Category Types

Nine Category types are available in Printer’s Plan.

### New Category

You can add up to 100 Categories to each Department.

**What type of a Category do you want to add?**

- Paper
- Offset Press
- Digital Printer
- Carbonless
- Envelope
- Plate
- Proof
- Quick Sale
- Other

**Service Category Types**

# Service Department & Categories

Printer's Plan allows only one of the following Category types: Carbonless, Envelope, Plate, Proof, and Quick Sale. If one is already created, the New Category window will not include that type as an option. Therefore, your New Category window may look like the following because the Categories mentioned are already added in the original Printer's Plan database you have received:

**New Category**

You can add up to 100 Categories to each Department.

What type of a Category do you want to add?

- Paper
- Offset Press
- Digital Printer
- Other

## NOTE:

- The original database you have received from Printer's Plan includes four Envelope categories as an exception. If you delete them, however, you will be able to create only one Envelope category.
- All of the four original Envelope categories have identical properties.

## After Departments and Categories are Created

Now you are ready to add (set up) Services. To add a Service, select the appropriate Category and then click "New" to open a Service setup window.

Home Jobs Scheduler TimeTracker **Services** Customers A

**Services**

Printer's Plan Main Menu

New

2 CLICK THE "NEW" BUTTON.

List Manager << Finishing / Fold (4 listed)

- Graphics
- Paper
- Prep
- Printing
- Digital
- Wide Format
- Finishing
  - Cut
  - Fold**
  - Collate
  - Part

Name	Size
Auto 1 Fold - Cover wt.	
Auto 1 Fold - Text wt.	
Auto 2 Folds	
Auto 2 Folds - Cover wt.	

1 SELECT THE CATEGORY.

SEE THE FOLLOWING PAGES TO LEARN TO SET UP VARIOUS TYPES OF SERVICES.