

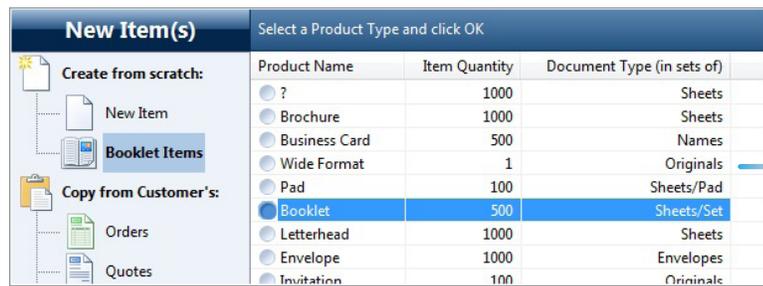
# How to Enter Various Job Types

## Entering a Booklet Job

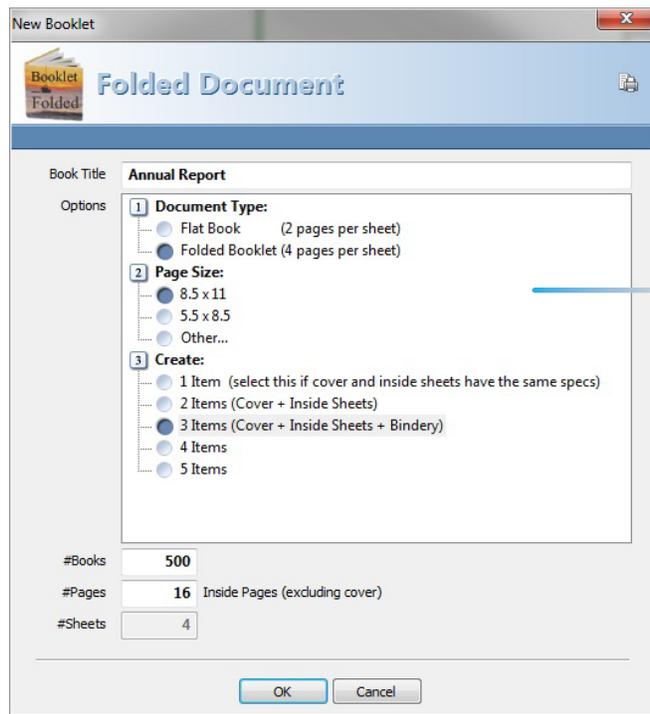
**NOTE:** The options and the prices shown in the images in this section may vary due to your setup preferences in Printer's Plan.

To demonstrate entering a booklet job, a book with the following specifications will be used as an example:

- Number of books: 500
- Folded and saddle-stitched
- Final trim size: 8.5 x 11
- Cover on 80# Cover Coated, inside pages on 80# Text Coated paper
- Number of inside pages: 16



1 IN THE NEW ITEM(S) WINDOW, SELECT **BOOKLET ITEMS** AND THEN **BOOKLET** FROM THE PRODUCT TYPES LIST.  
CLICK **OK**.

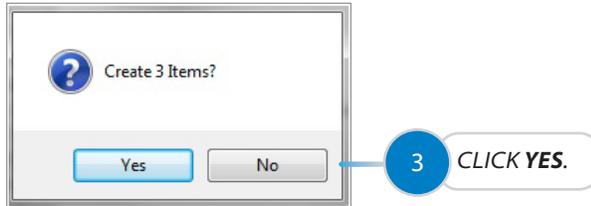


The New Booklet window appears.

2 MAKE THE REQUESTED SELECTIONS AND ENTER THE REQUESTED DATA. CLICK **OK**.  
PAGE SIZE=FOLDED AND TRIMMED BOOKLET SIZE

# How to Enter Various Job Types

A dialog box appears, stating Printer's Plan will create three Items, one each for the Cover, Inside Pages, and Bindery.



First, the Specs window for Item 1 (Cover) appears. Printer's Plan automatically assigns the following data: Description, Sheets/Set, Size (folded booklet size), and Paper Finish Size. *(Note: Paper finish size is the flat finish size before folding.)*

**Item Properties**

|             |                       |                   |          |
|-------------|-----------------------|-------------------|----------|
| Description | Annual Report   Cover | Price Level       | Normal   |
| Quantity    | 1                     | Price Rounding    | On       |
| Sheets/Set  | 1 printed + 1 blank   | Format Unit Price | Per Each |
| Sides       |                       | Size (W x H)      | 8.5 x 11 |

**Service Specs**

| Category     | Service (right-click for options)  |
|--------------|--|
| Cover Coated | 80# Gloss 23 x 35 Chesapeake Papers<br>Run: 11.5 x 17.5 Finish: 11 x 17 (4 out 1 up)<br>Front: 4 Colors<br>Back: |
| Bindery      | Cut To RunSize: 3 Cuts/Sheet   |
| Large Press  | 4 Color Press Wash: 4 Mix: 0   |
| Cut          | To FinSize: 4 Cuts/Sheet   |

**Item Note:** {600 700 800}

**Callout 3:** CLICK YES.

**Callout 4:** SELECT PER EACH TO SHOW PER BOOKLET PRICE ON THE QUOTE. (IN THE FOLLOWING ITEMS, YOU DO NOT NEED TO MAKE A SELECTION IN THIS FIELD.)

**Callout 5:** ADD SPECIFICATIONS FOR THE COVER OF THE BOOKLET.

**Callout 6:** CLICK TO SAVE THE SPECS AND CLOSE THE WINDOW FOR ITEM 1.

**IMPORTANT:** All Items must have the same quantity if you choose to display multiple-quantity prices on a Quote.

# How to Enter Various Job Types

Next, the Specs window for Item 2 (Inside Sheets) appears. Printer's Plan automatically assigns the following data:

Description, Sheets/Set (flat sheets), Size (folded booklet size), and Paper Finish Size.

The screenshot shows the 'NEW ITEM' window with the following data:

| Item Properties |                                  | Price Level       |          |
|-----------------|----------------------------------|-------------------|----------|
| Description     | Annual Report   Inside Pages: 16 | Price Level       | Normal   |
| Quantity        | 1                                | Price Rounding    | On       |
| Sheets/Set      | 4                                | Format Unit Price | Per Foot |
| Sides           | 8 printed                        | Size (W x H)      | 8.5 x 11 |

| Service Specs |  |
|---------------|--|
| Category      | Service (right-click for options)                |
| Text Coated   | 80# Gloss 11 x 17 4 Sheets/Set Chesapeake Papers |
|               | Run: 11 x 17 Finish: 11 x 17 (1 out 1 up)        |
|               | Front: Black                                     |
|               | Back: Black                                      |
| Printer       | Printer - Blk & Wht                              |

**7** ADD SPECIFICATIONS FOR THE INSIDE PAGES OF THE BOOKLET.

**8** CLICK TO SAVE THE SPECS AND CLOSE THE WINDOW FOR ITEM 2.

Entering multiple quantities for this Item is not required.

# How to Enter Various Job Types

Then, the Specs window for Item 3 (Bindery) appears. Printer's Plan automatically assigns the following data:

Description, Sheets/Set, and Size (folded booklet size). *(Note: Number of Sheets/Set in the Bindery Item = Number of Inside Sheets + Number of Cover Sheets)*

The screenshot shows the 'NEW ITEM' dialog box with the following details:

- Item Properties:**
  - Description: Annual Report | Bindery
  - Quantity: 100
  - Sheets/Set: 5
  - Sides: (empty)
  - Price Level: Normal
  - Price Rounding: On
  - Format Unit Price: Per Each
  - Size (W x H): 8.5 x 11
- SERVICES:**
  - Category: Bind
  - Service: BookMaker Fold+Stich+Trim

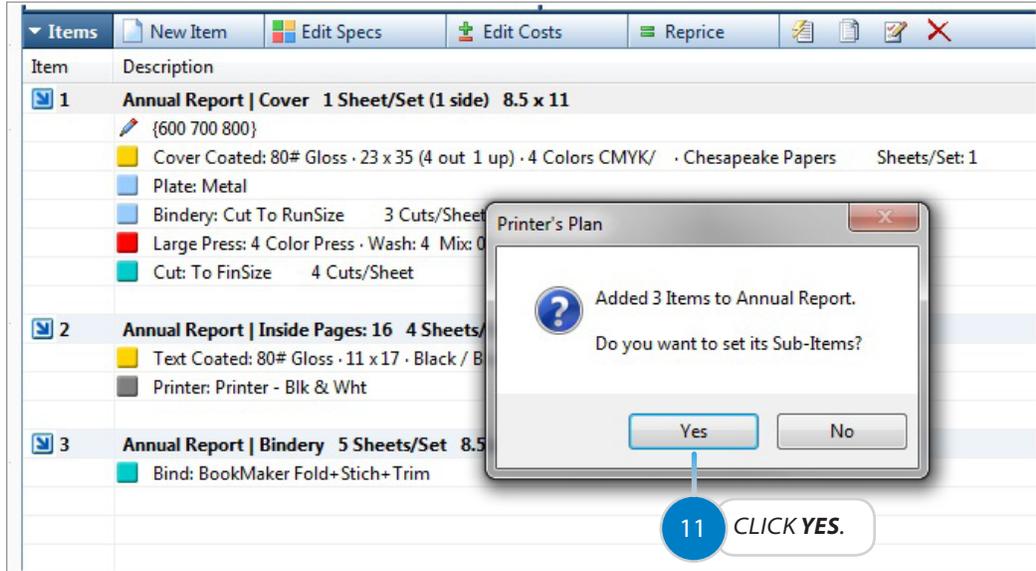
Callout 9: ADD SPECIFICATIONS FOR THE BINDERY. (Points to the Service Specs table)

Callout 10: CLICK TO SAVE THE SPECS AND CLOSE THE WINDOW FOR ITEM 3. (Points to the Save & Close button)

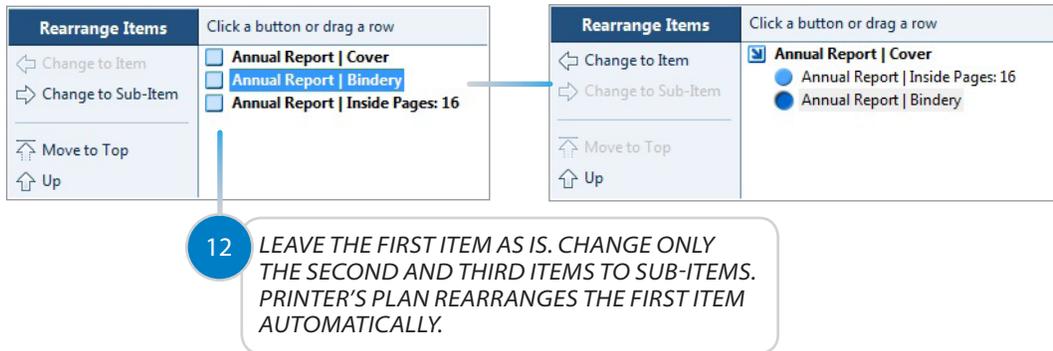
Note: Entering multiple quantities in this Item is not required.

# How to Enter Various Job Types

The Quote window appears with the three Items listed. A dialog box asks if you want to set the Items as Sub-Items.



The Rearrange Items window appears.



# How to Enter Various Job Types

The Quote window displays the booklet job with Sub-Items and prices.

Booklet name Price of 500 books

| Item                 | Description   | Quantity | Time | Price/Hr | Unit Price | Price    |
|----------------------|---|----------|------|----------|------------|----------|
| <b>Annual Report</b> |   |          |      |          |            |          |
| 1.1                  | Annual Report   Cover 1 Sheet/Set (1 side) 8.5 x 11<br>(600 700 800)                | 500      |      |          | 1.5425/Ea  | 1,187.44 |
|                      | Cover Coated: 80# Gloss - 23 x 35 (4 out 1 up) - 4 Colors CMYK/ - Chesapeake Papers | 165      |      |          | 716.7878/M | 118.27   |
|                      | Plate: Metal  | 4        |      |          | 22.0000/Ea | 88.00    |
|                      | Bindery: Cut To RunSize 3 Cuts/Sheet  | 3        | 0:04 | 60.00    | 1.3333/Ea  | 4.00     |
|                      | Large Press: 4 Color Press - Wash: 4 Mix: 0   | 660      | 2:12 | 250.00   | 0.8333/Ea  | 550.00   |
|                      | Cut: To FinSize 4 Cuts/Sheet  | 8        | 0:11 | 60.00    | 1.3750/Ea  | 11.00    |
| 1.2                  | Annual Report   Inside Pages: 16 4 Sheets/Set (8 sides) 8.5 x 11                    | 500      |      |          | 0.6423/Ea  | 321.17   |
|                      | Text Coated: 80# Gloss - 11 x 17 - Black / Black - Chesapeake Papers                | 2,025    |      |          | 86.4000/M  | 174.90   |
|                      | Printer: Printer - Blk & Wht  | 4,050    | 1:15 |          | 0.0361/Ea  | 146.21   |
| 1.3                  | Annual Report   Bindery 5 Sheets/Set 8.5 x 11                                       | 500      |      |          | 0.1900/Ea  | 95.00    |
|                      | Bind: BookMaker Fold+Stich+Trim   | 500      | 1:35 | 60.00    | 0.1900/Ea  | 95.00    |

13 **CLICK TO OPEN THE PRINT WINDOW.**

Sub-Item prices

14 **IN THE PRINT WINDOW, SELECT THE QUOTE OPTIONS. THEN, CLICK PRINT OR EMAIL PDF.**

**1 Select a Document:**

- For In-House:
  - Estimate Detail
  - For Customer:
    - Quotation (Default)
    - Quotation (All Services)
    - Quotation (No Subtotal)
    - Quotation (Custom)
    - Quotation (Booklet)
    - Quotation (Letter Style)

**2 Check Document Options:**

- Document Style (select one):**
  - Standard (job totals at bottom)
  - Classic (job totals in price column)
  - Letter Style
- Document Info (check all that apply):**
  - Column Headers and Lines
  - Company Logo
  - Company Name
  - Company Address
  - Company Phone and Fax
  - Ship To Address
  - Ship By + Due Date & Time
  - Received by \_\_\_\_\_ Date \_\_\_\_\_
- Specs (select):**
  - Job Title
  - + Item Description
  - + Item Description + Paper
  - + Item Description + All Services
  - + Item Description + All Services & Prices
- Prices (check all that apply):**
  - Item Unit Price
  - Item Price
  - Job Totals (Subtotal + Disc + Tax...)
- Other Options (check all that apply):**
  - Item Notes
  - Service Notes
  - Prices for more quantities
  - Job Memo
  - Sub-Items
  - #Originals (or #Sheets) after Item Description
  - No Attention

Select one of these three depending on your preference.

You must select both of these if you want to show unit prices.

# How to Enter Various Job Types

The printed Quote will look similar to the following, depending on the print options you select. If you prefer not show the job specifications on the Quote, select the “Item Description” option instead of “Item Description + All Services” in the Print window.

| Quantity | Unit Price | Price    |
|----------|------------|----------|
| 500      | 2.3748/Ea  | 1,187.44 |
| 600      | 2.1538/Ea  | 1,292.32 |
| 700      | 1.9935/Ea  | 1,395.47 |
| 800      | 1.8726/Ea  | 1,498.15 |

Cover 8.5 x 11  
 Cover Coated: 80# Gloss 11 x 17  
 Front: 4 Colors CMYK

Inside Pages: 16 8.5 x 11  
 Text Coated: 80# Gloss 11 x 17  
 Front: Black  
 Back: Black

Bindery 8.5 x 11  
 Book binding

Jobs section | Quote Printout of a Booklet Job

## NOTES:

- *Item Descriptions:*

| Description | Annual Report   Cover            |
|-------------|----------------------------------|
| Description | Annual Report   Inside Pages: 16 |

The pipe character, (|), enables Printer’s Plan to properly display the book contents when you print the Quote/Invoice with Item specifications. (See figure: Quote Printout of a Booklet Job)

Note the pipe character must appear immediately after the book name and must be preceded and followed by single spaces.

The “Booklet Items” feature described in this section automatically assigns the Item descriptions and adds the pipe characters.

- *The Booklet job described above also can be entered manually by selecting **New Item** in the New Item(s) window and creating an Item for each of the Cover, Inside Pages, and Bindery. Be sure to follow the formats described for the Item Descriptions, Sheets/Set, book size, and paper finish size. After creating all the Items, click the **Rearrange** button on the Job window and set the sub-Items.*