# X.1 | Miscellaneous Functions in Services

In Printer's Plan, the Services section screen allows the user to perform maintenance functions on existing Services. Functions that can be performed from this screen include:

- Adjusting Service settings
- Excluding discontinued Services
- Changing the listing order of Services
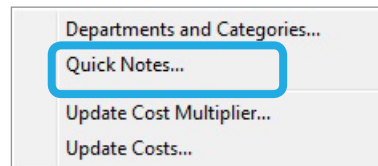- Moving Services from one Category to another
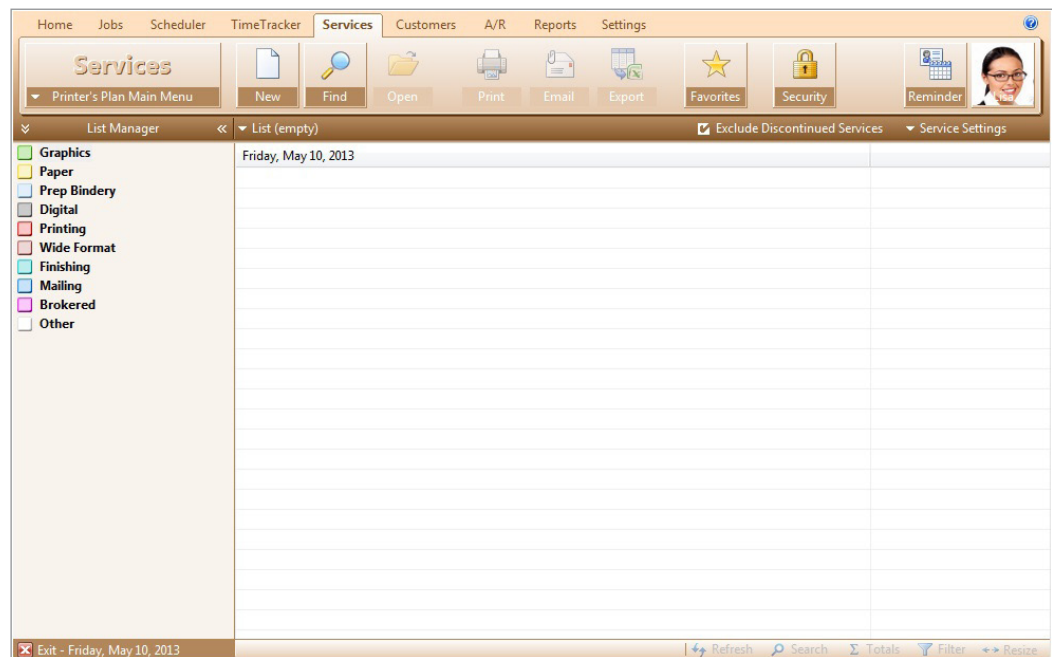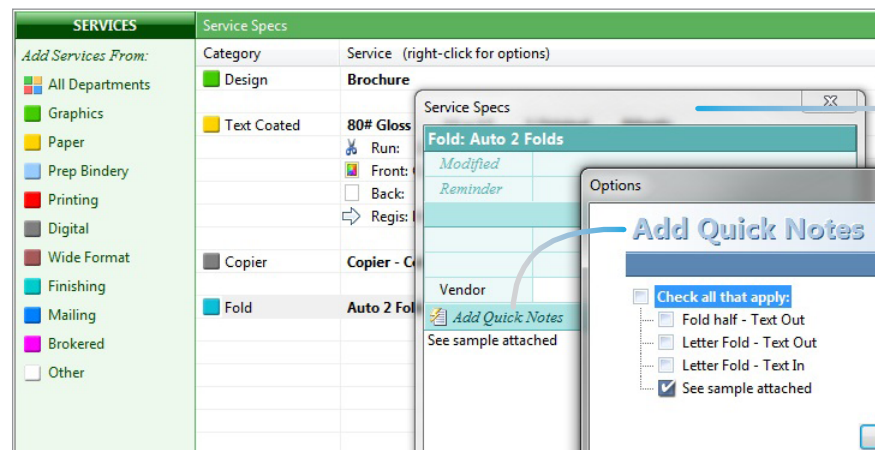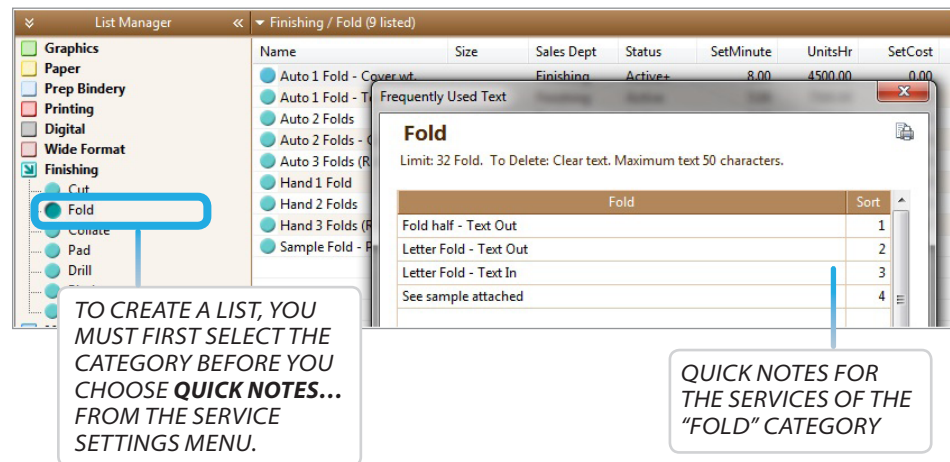

Adjusting Service Settings
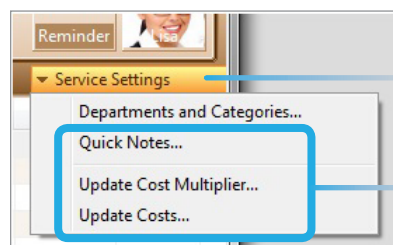
CLICK TO DISPLAY THE MENU.

THESE FUNCTIONS ARE AVAILABLE WHEN ONE OR MORE SERVICES OF A CATEGORY ARE LISTED ON THE SCREEN.

Service Settings > Quick Notes…

For the Services of each Service Category, you can create a list of brief notes (maximum 50 characters each), which you can assign to the Services in the Jobs section.

TO CREATE A LIST, YOU MUST FIRST SELECT THE CATEGORY BEFORE YOU CHOOSE **QUICK NOTES…** *FROM THE SERVICE SETTINGS MENU.*

QUICK NOTES FOR THE SERVICES OF THE "FOLD" CATEGORY

SERVICE SPECS WINDOW FOR THE AUTO 2 FOLD SERVICE

Jobs | Item Specs Window

Service Settings > **Update Cost Multiplier**

This function allows you to change the Cost Multiplier(s) of the selected Service(s).

*YOU MUST FIRST SELECT THE SERVICE(S) YOU WANT TO UPDATE BEFORE YOU CHOOSE **UPDATE COST MULTIPLIER...** FROM THE SERVICE SETTINGS MENU.*

*THE "MATERIAL COST MULTIPLIER" IS THE NUMBER IN THE **MULTIPLIER...** FIELD OF A SERVICE SETUP WINDOW.*

Service Settings > Update Costs…

This function allows you to change the costs (not prices) of selected Services by a percentage.

*YOU MUST FIRST SELECT THE SERVICE(S) BEFORE YOU CHOOSE **UPDATE COSTS…** FROM THE SERVICE SETTINGS MENU.*
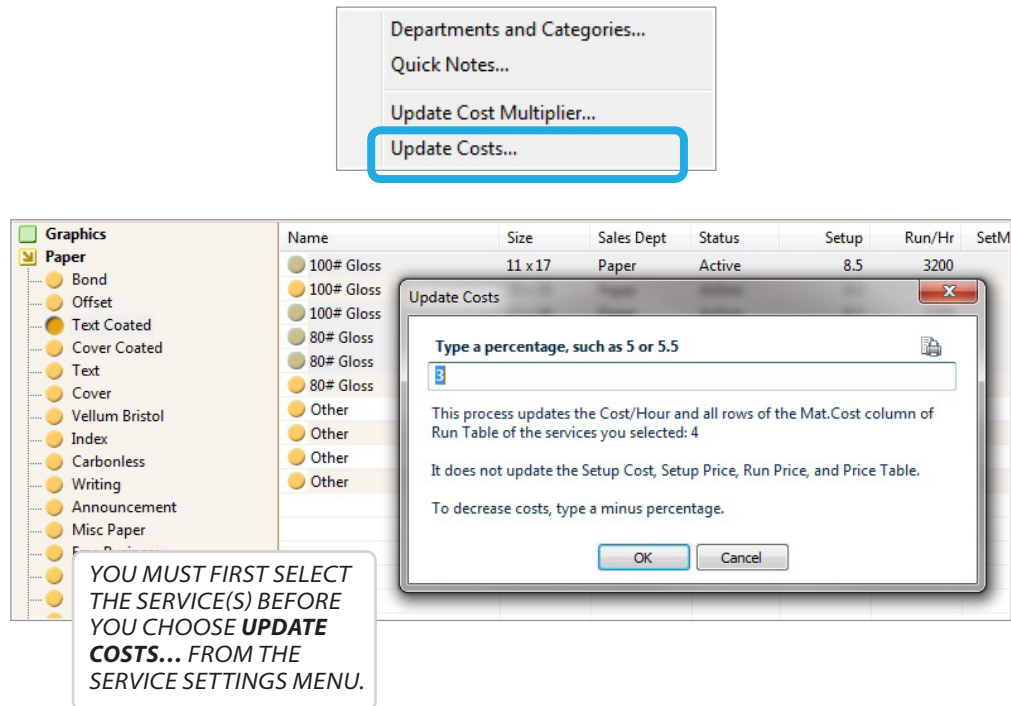
Excluding Discontinued Services

If you select the Exclude Discontinued Services option, any Service list you display in the Services section will include only the active Services in the selected Category.
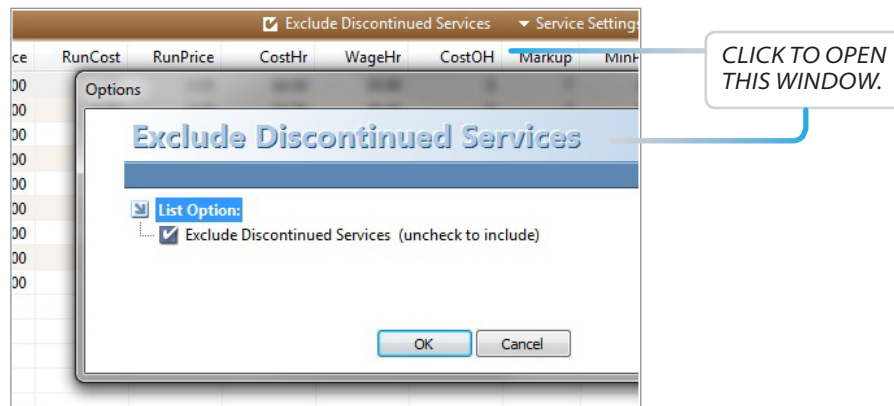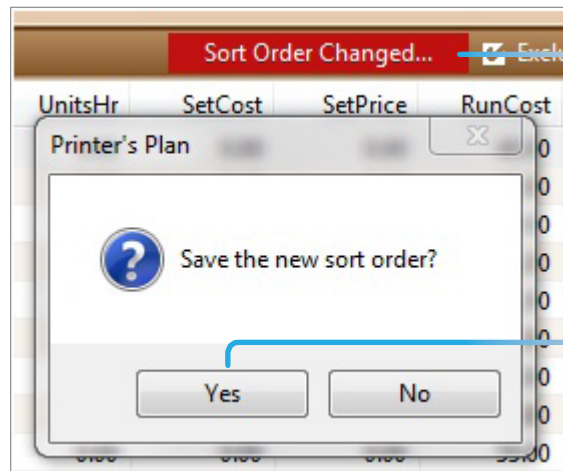

CLICK TO OPEN THIS WINDOW.

Changing the Listing Order of Services

① 1) CLICK THE SERVICE YOU WANT TO MOVE AND DRAG IT TO ITS NEW LOCATION ON THE LIST.

2) DO THIS FOR EACH SERVICE YOU WANT TO RELOCATE.

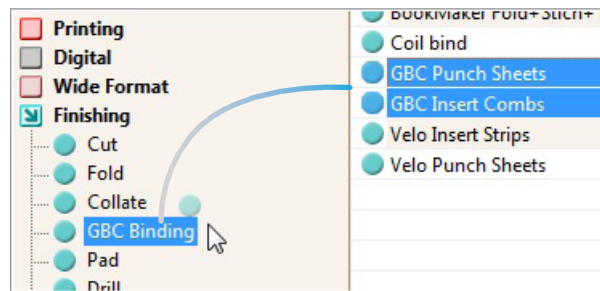② A RED BUTTON APPEARS ON THE TITLE BAR OF THE LIST. CLICK THIS BUTTON TO OPEN THE CONFIRMATION WINDOW.

③ CLICK YES TO ACCEPT THE NEW LISTING ORDER.

Moving Services from One Category to Another

This function is especially helpful if you decide to move some Services to a different existing Category or move them into a new Category of their own.

EXAMPLE 1:

To move Services from one existing Category to another:

1) *Highlight the Services to be moved.*

2) *Click and drag them to a different existing Category.*

EXAMPLE 2:

*To move Services from an existing Category to a new Category:*

1) *Create the new Category.*

2) *Highlight the Services to be moved.*

3) *Click and drag them to the new Category.*


IMPORTANT!

The destination Category type must match the Category type of the Services you are moving. Otherwise, Printer's Plan will not move the Services and will display a "not allowed" sign instead.
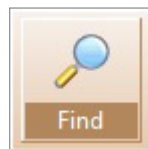

EXAMPLE:

Printer's Plan does not allow moving 20# White Bond paper (created in Category type "Paper") to the Design Category (created as Category type "Other").
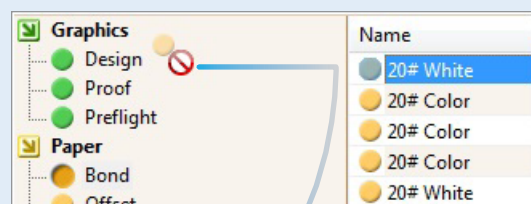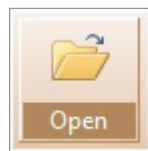
Buttons at the Top of the Services Section Screen
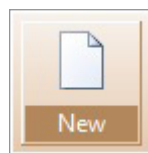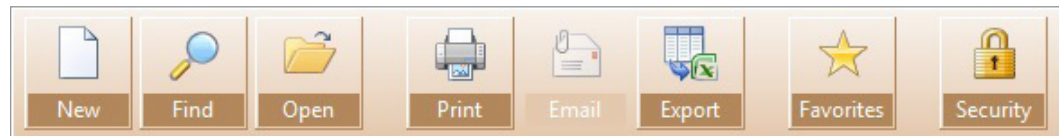
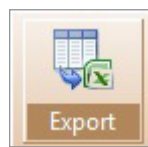*CLICK TO ADD A NEW SERVICE IN THE SELECTED CATEGORY.*

CLICK TO OPEN THE SETUP WINDOW OF THE SELECTED SERVICE.
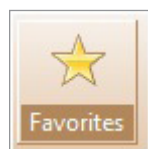
CLICK TO PRINT THE DISPLAYED LIST.

CLICK TO EXPORT EITHER SELECTED ROWS OR ALL ROWS OF THE DISPLAYED SERVICE LIST. (AVAILABLE ONLY TO USERS OF THE OPTIONAL EXPORT TOOL)

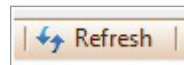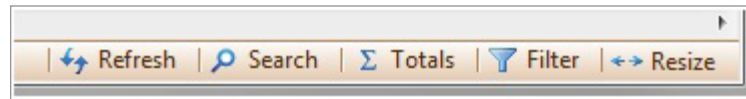*CLICK TO SELECT A REPORT THAT HAS BEEN SAVED TO FAVORITES.*

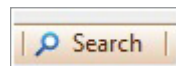*CLICK TO FIND A SERVICE OR A GROUP OF SERVICES.*

CLICK TO ENABLE/DISABLE SECURITY ON THIS COMPUTER.

Buttons at the Bottom of the Services Section Screen

Hot key: F5

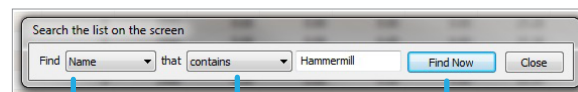*CLICK TO REFRESH THE SCREEN.*

Hot key: Ctrl+F3

① *CLICK TO OPEN THE SEARCH WINDOW.*

② *MAKE FILTER SELECTIONS.*

③ *WHEN YOU CLICK FIND NOW, PRINTER'S PLAN FINDS AND HIGHLIGHTS THE FIRST SERVICE THAT SATISFIES THE SEARCH CRITERIA. WHEN YOU CLICK FIND NOW AGAIN, THE SECOND SUCH SERVICE IS HIGHLIGHTED, AND SO ON, UNTIL THE SEARCHED ITEMS HAVE BEEN HIGHLIGHTED ONE-BY-ONE AND THE SEARCH STARTS AGAIN WITH THE FIRST SERVICE FOUND.*
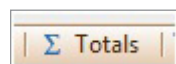
Hot key: Ctrl+T

CLICK TO VIEW THE COLUMN TOTALS OF THE DISPLAYED LIST.

Hot key: Ctrl+I

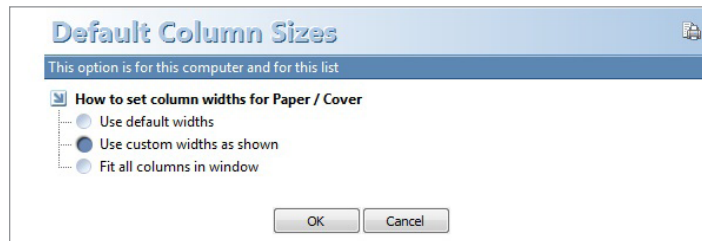*CLICK TO VIEW THE FILTER(S) PRINTER'S PLAN USED TO GENERATE THE CURRENTLY DISPLAYED LIST.*

(DON'T WORRY IF YOU DON'T UNDERSTAND THE INFORMATION IN THIS WINDOW. IT IS AVAILABLE FOR USERS WHO HAVE KNOWLEDGE OF DATABASE QUERY STATEMENTS AND FOR PRINTER'S PLAN TECHNICAL SUPPORT STAFF.)
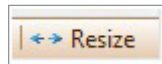
CLICK TO OPEN THE COLUMN SIZE OPTIONS WINDOW.

You can change the widths of columns and/or hide columns of a specific Service list view. You can then save the new view as the default for the same list.

Resize options are computer- and list-specific.

"Use custom widths as shown": Saves column widths as currently displayed. You can widen or narrow columns or hide the ones you think are unnecessary.

EXAMPLE:

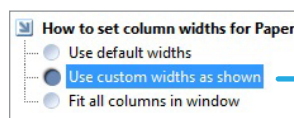*Cover Papers are listed. The Sales Dept and Status columns are hidden.*

Default view

COLUMNS TO BE HIDDEN

View after the columns are hidden (custom widths)

TO SAVE THE NEW VIEW (CUSTOM WIDTHS), CLICK RESIZE AND SELECT THIS OPTION.

To change the width of a column:

1. Place the mouse pointer on the line between two columns in the **column header**.

2. The pointer will change to a double-headed arrow.

3. Click with the left mouse button and drag the double-headed arrow to the right or left to change the width of the column on the left.

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"Fit all columns in window": Fits all the columns in one window for you to view, eliminating the need to scroll to the right. This view is saved for the currently displayed list.

"Use defaults widths": Resets lists saved with either of the two above options to the default view.

> *NOTE: Once a list has been reset to the default view, the previously saved view is lost.*

List Menu

The List Menu includes many of the commands previously explained in this section and their hotkeys.
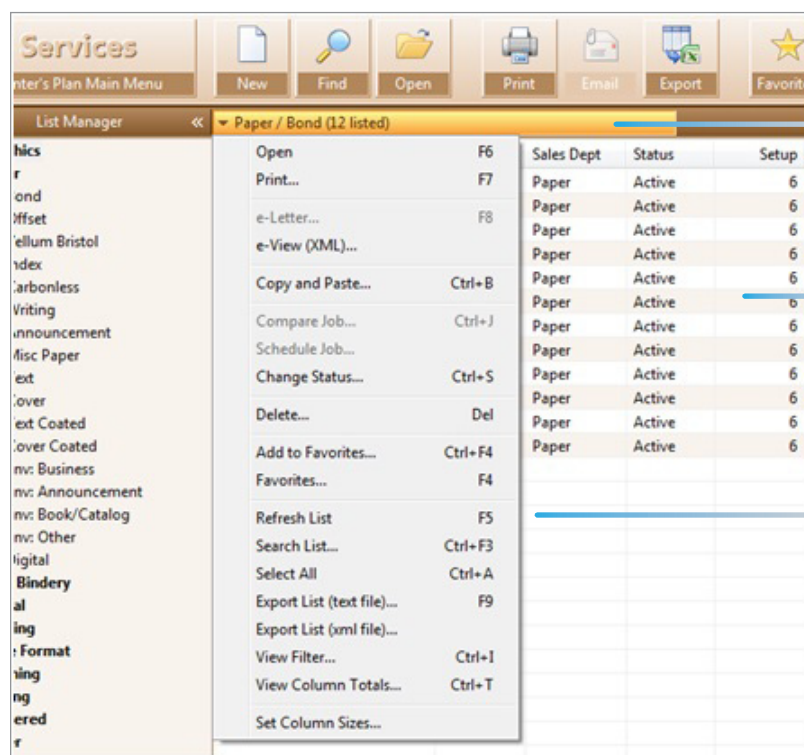
CLICK HERE

OR

RIGHT-CLICK ON THE LIST

TO DISPLAY THE LIST MENU.