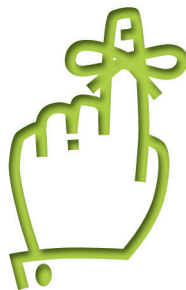




PRINTER'S PLAN

POWER TOOLS



Reminder

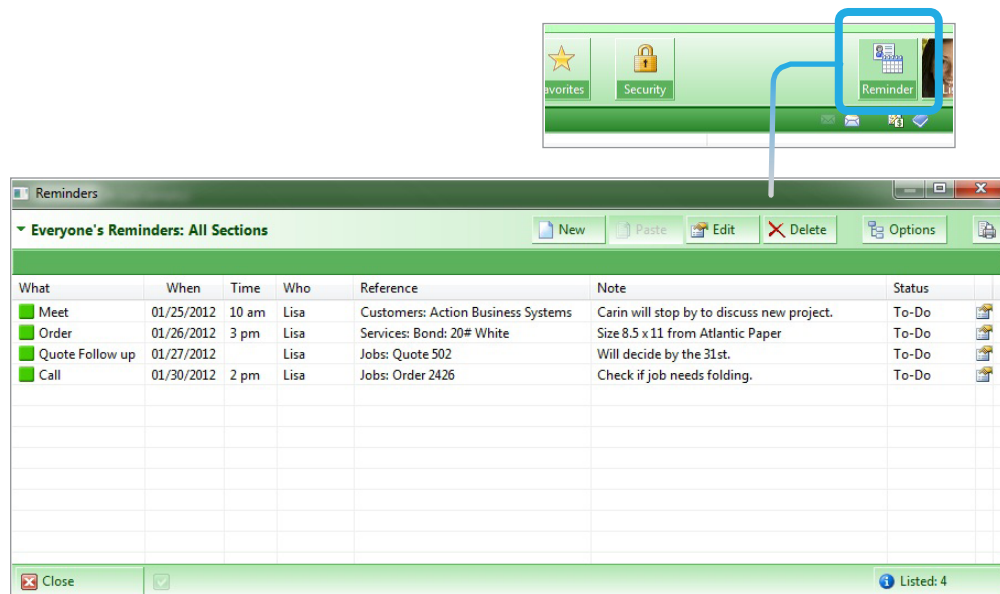
POWER TOOL | Reminder

The Reminder tool is designed to remind you of actions to be taken and events that will occur. These actions and events may include:

- Following up quotes,
- Ordering certain items, such as toner for a copier and a part for the folder,
- Calling a customer about a specific job in the shop,
- Meeting with a customer,
- Checking with a vendor about the status of a die-cutting job you have sent out.

The Reminder tool is available in all sections of Printer's Plan.

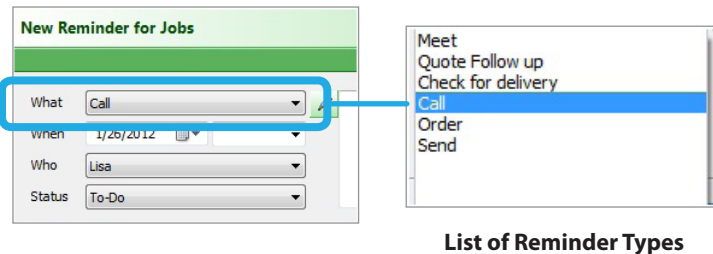
Click the **Reminder** button on the upper-right corner of the Printer's Plan screen to enter a new reminder and to view the existing ones.



Reminders Window

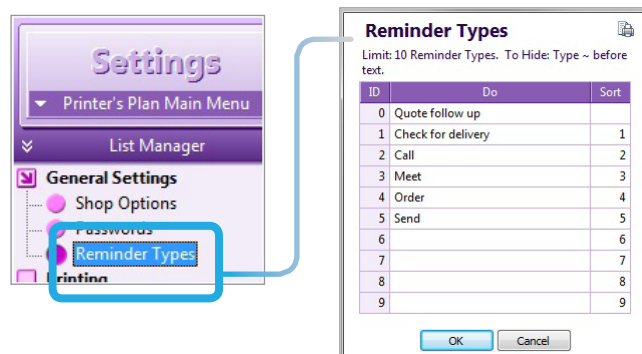
Fields of the Reminder Window

What field: Click to select the type of the reminder.

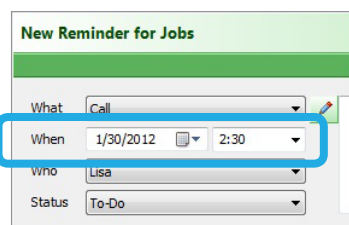


List of Reminder Types

You can customize the Reminder Types list in *Settings | General Settings | Reminder Types*.



When fields: Click the first field to select the date of the action about which the reminder is set. In the second field, click the arrow to select the time from the list or enter the time manually. The list of times cannot be modified.



Who field: Click to select the person, for whom the reminder is scheduled, from the customer service reps list.

POWER TOOL | Reminder

New Reminder for Jobs

What: Call

When: 1/30/2012 2:30

Who: Lisa

Status: To-Do

unassigned
Lisa
Paul
Brad
Anna
Tom

NOTE: If the reminder is not scheduled for anyone specific, select “unassigned”.

You can modify the Customer Service Reps list in *Settings | Employees | Service Reps*.
You may also add salespeople or other staff members to this list.

Settings

Printer's Plan Main Menu

List Manager

- General Settings
- Printing
- Jobs
- Customers
- Accounting
- Employees
- Operators
- Service Reps
- Sales Reps
- Vendors

Service Reps

Limit: 100 Service Reps. To Hide: Type ~ before text.

No	Name	Sort
101	Lisa	101
102	Paul	102
103	Brad	103
104	Anna	104
105	Tom	105

Status field: Select “To Do” when the reminder is active. Select “Done” when the action is completed.

Note field: Enter notes about the reminder.

ENTER THE NOTE IN THIS BOX.

TO ENTER A LONGER NOTE OR VIEW AN EXISTING ONE, TO ASSIGN A DATE AND TIME TO A NOTE, OR TO CLEAR THE NOTE, CLICK THE “PEN” ICON. THE NOTE WINDOW OPENS.

Note

To-Do

Check if job needs folding.

Date Stamp

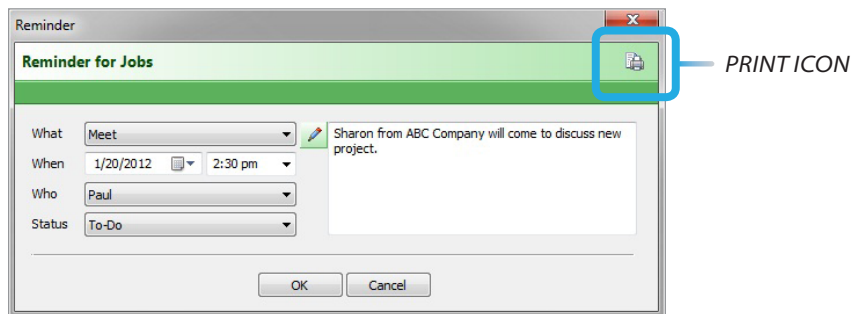
Date + Time

Clear Note

Reminder Note Window

POWER TOOL | Reminder

Print icon: Click to print the Reminder window.



Reminder Window

Reminders Window

Once a reminder is added, it can be viewed from the Reminders window.

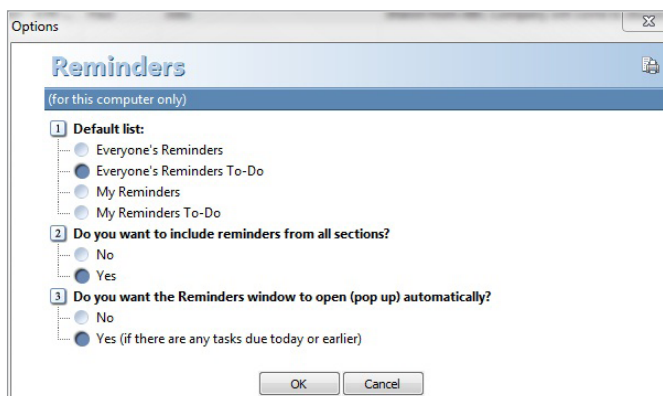
The following fields are available in the Reminders window.

A screenshot of the 'Reminders' window. The window has a title bar and a green header area. Below the header is a toolbar with buttons: 'New', 'Paste', 'Edit', 'Delete', 'Options', and a print icon. Below the toolbar is a table with columns: 'What', 'When', 'Time', 'Who', 'Reference', 'Note', and 'Status'. The first row of the table contains the following data: 'Meet', '01/20/2012', '2:30 ...', 'Paul', 'Jobs', 'Sharon from ABC Company will come to discuss new...', and 'To-Do'. There are several callouts with lines pointing to different parts of the window:

- A callout pointing to the 'New' button: 'CLICK TO ENTER A NEW REMINDER.'
- A callout pointing to the 'Edit' button: 'CLICK TO EDIT A HIGHLIGHTED REMINDER.'
- A callout pointing to the 'Delete' button: 'CLICK TO DELETE A HIGHLIGHTED REMINDER.'
- A callout pointing to the 'Options' button: 'CLICK TO PRINT THIS WINDOW AS SHOWN.'
- A callout pointing to the 'Print' icon: 'CLICK TO PRINT THIS WINDOW AS SHOWN.'
- A callout pointing to the 'Everyone's Reminders To-Do: All Sections' header: 'CLICK TO SELECT WHICH REMINDERS TO DISPLAY. "MY REMINDERS" ARE THE REMINDERS ENTERED FOR THE DEFAULT CSR ASSIGNED TO THIS COMPUTER.'
- A callout pointing to the 'Options' button: 'CLICK TO SET THE DEFAULT OPTIONS FOR THE REMINDERS WINDOW. (SEE THE NEXT PAGE FOR THESE OPTIONS.) THE OPTIONS ARE COMPUTER-SPECIFIC.'
- A callout pointing to the 'Status' column: 'LEFT-CLICK ONCE TO OPEN THE REMINDER.'
- A callout pointing to the table area: 'RIGHT-CLICK ANYWHERE IN THE WINDOW TO DISPLAY THIS MENU.'

POWER TOOL | Reminder

Options List



Reminders Window | Options Window

Default list:

When you open Reminder, the reminders will be listed according to the option selected on this list. To view them in another way at any time, click the button on the upper-left.



Do you want to include reminders from all sections?

If you select “No”, then, in each section of Printer’s Plan, you will see only the reminders entered in that section.

Do you want the Reminders window to open (pop up) automatically?

If you select “Yes”, then, each time you open Printer’s Plan, the Reminders window will also open automatically if there are reminders for today or earlier.

“Done” Reminders

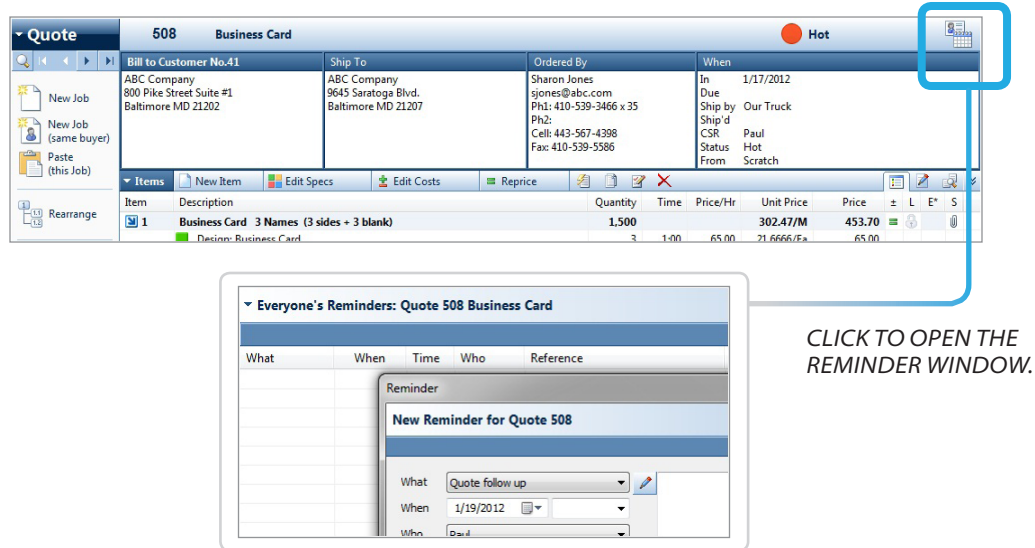
If you have chosen to include the “Done” reminders in the Reminders window, they will show in grey as below:

▼ My Reminders: All Sections							
New Paste Edit Delete Options							
What	When	Time	Who	Reference	Note	Status	
Order	01/26/2012	3 pm	Lisa	Services: Bond: 20# White	Size 8.5 x 11 from Atlantic Paper	To-Do	
Quote Follow...	01/27/2012		Lisa	Jobs: Quote 502	Will decide by the 31st.	Done	
Call	01/30/2012	2 pm	Lisa	Jobs: Order 2426	Check if job needs folding.	Done	

POWER TOOL | Reminder

Reminders for Quotes and Orders

You can enter a reminder for a Quote or an Order in its Job window.

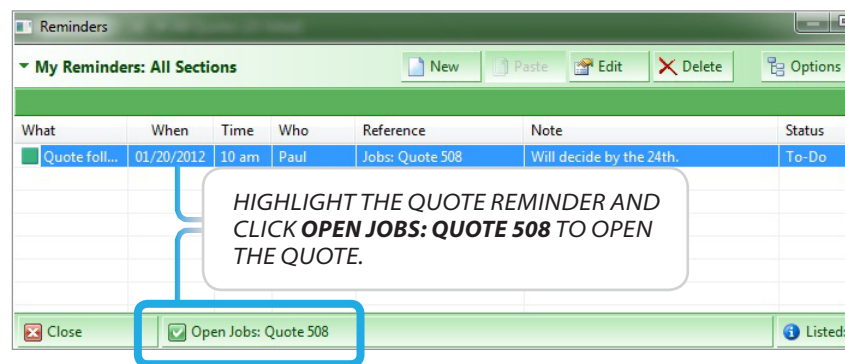


The screenshot shows the 'Quote 508 Business Card' window. A blue box highlights the reminder icon in the top right corner. A callout box shows the 'New Reminder for Quote 508' dialog with the following fields:

What	When	Time	Who	Reference
Quote follow up	1/19/2012		Paul	

CLICK TO OPEN THE REMINDER WINDOW.

Then, you will be able to easily open this Quote or Order directly from the Reminders window and follow up by phone or email.



The screenshot shows the 'Reminders' window with the following table:

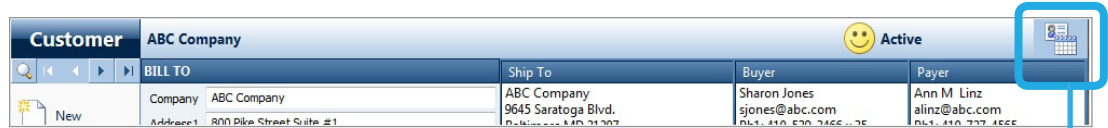
What	When	Time	Who	Reference	Note	Status
Quote follow up	01/20/2012	10 am	Paul	Jobs: Quote 508	Will decide by the 24th.	To-Do

HIGHLIGHT THE QUOTE REMINDER AND CLICK **OPEN JOBS: QUOTE 508** TO OPEN THE QUOTE.

Reminders for Customers and Services

You can also enter a reminder for a specific customer or a service from within the customer and service windows respectively.

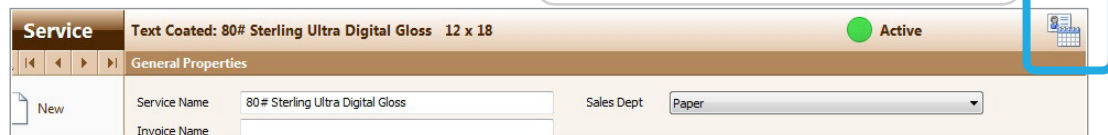
POWER TOOL | Reminder



Customer		ABC Company		Active	
Search	Navigation	BILL TO		Ship To	Buyer
New		Company	ABC Company	ABC Company	Sharon Jones
		Address1	800 Pike Street Suite #1	9645 Saratoga Blvd.	sjones@abc.com
					Ann M. Linz
					alinz@abc.com

Customers | Customer (ABC Company) window

OPEN THE CUSTOMER OR THE SERVICE WINDOW AND CLICK THE REMINDER BUTTON TO ENTER A REMINDER



Service		Text Coated: 80# Sterling Ultra Digital Gloss 12 x 18		Active	
General Properties					
New		Service Name	80# Sterling Ultra Digital Gloss	Sales Dept	Paper
		Invoice Name			

Services | Service (Paper: Text Coated) window

Then, the Reminders window will appear as below:

Reminders						
Everyone's Reminders: All Sections						
<div> New Paste Edit Delete Options </div>						
What	When	Time	Who	Reference	Note	Status
Call	01/19/2012		Paul	Services: Text Coated: 80# Sterling Ultra Digital Gloss	Contact xpedx and Kelly to check prices.	To
Meet	01/20/2012	9 am	Paul	Customers: ABC Company	Sharon will come to discuss new project.	To