

# Posting Orders to History

## About Posting

After you have shipped a job and printed an invoice for it, you no longer need the Order in your Orders list. It must be filed away to History so you can refer to it later when you need to, such as when the customer re-orders the same job. In Printer's Plan, the process of converting an Order to a History Job is called "Posting". Also posted during this process are:

- all the payments entered into Printer's Plan since the previous posting, and
- the Quick Sales (if you have the optional QuickSale tool) that have taken place since the previous posting.

In Printer's Plan, Accounts Receivable (A/R) and most of the Sales reports read the data directly from History Jobs; therefore, the pricing of an Order (subtotal, shipping and postage charges, sales tax, etc.) appears in the accounts receivable data and in most of the reports only after the Order has been posted.

## When to Post

In order to keep your accounts receivable and sales reports up-to-date, we recommend that you post to history daily. Some organizations though prefer to post every few days or even once a week.

You may post at any time during the day. Before you post, close Printer's Plan on all computers except for the one on which you are posting. Since closing Printer's Plan on some computers may cause interruption of the workflow in the shop, posting at the end or the beginning of the day may be more convenient.

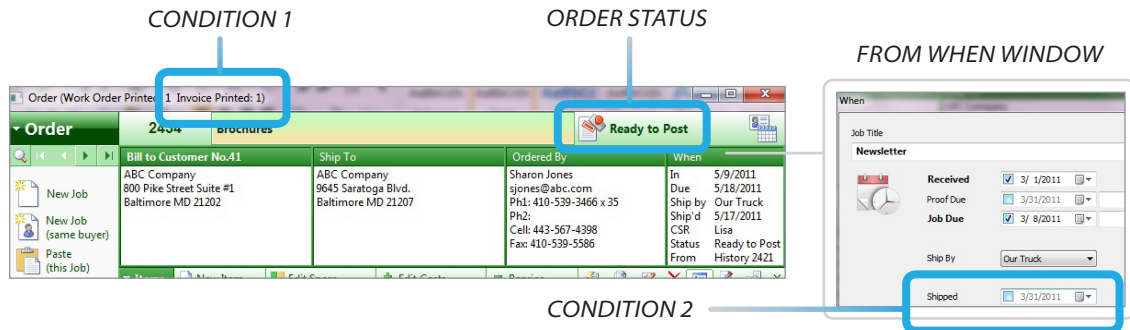
## When is an Order Ready to Post?

An Order is ready to post when the following conditions have occurred:

1. Its invoice has been printed at least once, and
2. It has been assigned a Shipped Date.

The following figure illustrates an example of an Order that has met the above conditions and is ready to post.

# Posting Orders to History



**NOTE:** The only way to take an Order out of the “Ready to Post” status is to remove the “Shipped” date. To do this, open the When window and click in the box in the **Shipped** field to remove the check mark.

## How to Post

**CAUTION:** Posting is not reversible; that is, after an Order is posted and it becomes a History Job, you cannot convert it back to its original Order properties. (To make revisions in History Jobs, please see “Correcting Invoices.”) Therefore, we strongly recommend that you verify the Orders before posting them and that you back up your database before you post. If you post an Order by mistake, restoring your backup is the only way to return to the pre-posting stage. (To perform a quick backup, go to Home | About | My Database.)

### Before posting:

Wait until after all the payments of the day have been entered into Printer’s Plan, then:

Back up your database.

### Posting process:

1. In the **Jobs** section, list the **Ready to Post** Orders.

# Posting Orders to History

List Manager << Orders / Ready to Post (17 listed)		JobNo	Customer	Title
<input type="radio"/> All		2434	ABC Company	Brochu
<input type="radio"/> In Progress		2431	Apex Realtors	Produ
<input type="radio"/> On Hold		2429	Ascot Inc.	Letterh
<input type="radio"/> Ready to Ship		2428	Allied Building Su...	Station
<input checked="" type="radio"/> Ready to Post		2426	Ascot Inc.	Applic
<input type="radio"/> Received Today		2418	Action Business Su	Busin

## Jobs Section

Verify the Orders to be posted. If an Order is not shipped yet but is accidentally marked Shipped, open the Order and remove the Shipped date.

- In **A/R**, open **Invoices Ready-to-Post**, and click **List**. The same **Ready to Post** Orders list you saw in the Jobs section appears on the right.
- To post all the Orders on the list, click **Post Now...**

A/R		New	Find	Open	Print	Email	Export	Favorites	Security	Post Now...
List Manager << Invoices Ready-to-Post / List (17 listed)										
<input checked="" type="radio"/> Invoices Ready-to-Post	JobNo	Remark	CusNo	Customer	First	Last	Subtotal	Discount	Shipping	Postdate
<input type="radio"/> Invoices Unpaid	2354		41	ABC Company	John	Smith	164.31	0.00	0.00	0.00
<input type="radio"/> Invoices Paid-in-Full	2359		32	Abel Laboratories	Mark	Sturm	61.25	0.00	0.00	0.00
<input type="radio"/> Payments Expected	2365		40	Ascot Inc.	Paul	Coven	1650.43	-82.52	0.00	0.00

## A/R Section

If the list includes Orders that you do not want to post yet, select (highlight) the Orders you want to post, and then click **Post Now...**

When you click **Post Now...**, the Post window appears, giving you an option to post only the highlighted Orders or all of them.

### Post

---

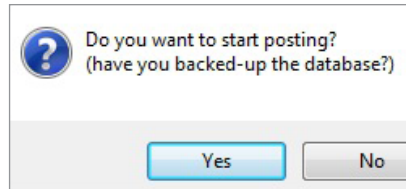
**Which orders do you want to post?**

All listed orders: 6

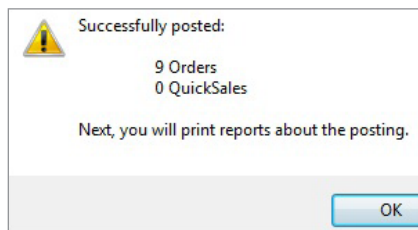
Highlighted orders only: 2

- Select the appropriate option, and click **OK** to post. A confirmation window appears.

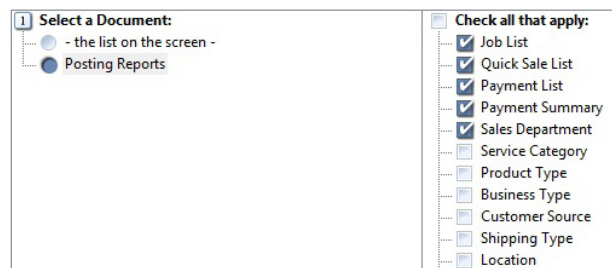
# Posting Orders to History



- If you haven't backed up yet, click **No** to cancel the posting, and then back up your database. Otherwise, click **Yes**. A second confirmation window appears.
- Click **Yes**. When the posting is finished, a message window appears, summarizing the posted items.



- Click **OK**. The Print window opens, listing all the Posting Reports that are available to print.



**Print Window For Posting Reports**

## Print Window For Posting Reports

Posting reports give information on the Orders, Payments, and QuickSale items (if you have the optional QuickSale tool) that were just posted.

- Check/un-check any reports that you do/do not want to print.
- Click **Print Now** or **Print to...** to print the reports.

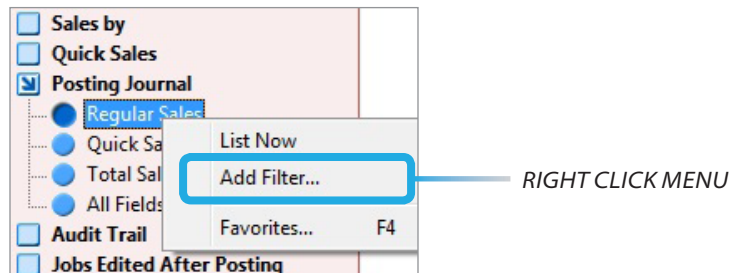
**NOTE:** To change the default selections of reports in this window, go to *Settings | Printing | Favorite Posting Reports*.

**NOTE:** If you accidentally close the Print window before you print the reports, don't worry. See the following paragraph.

## Re-printing the Posting Reports at a Later Time

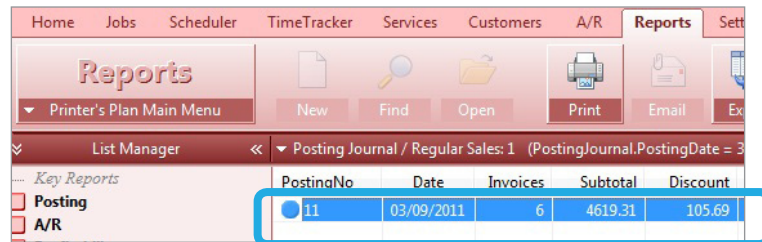
You can, at any time, re-print the Posting reports for a specific "posting" in the past.

1. Go to the Reports section.
2. Open **Posting Journal**.
3. Right-click on any one of the options (**Regular Sales**, **Total Sales**, or **All Fields**) and select **Add Filter...**



The Find window appears.

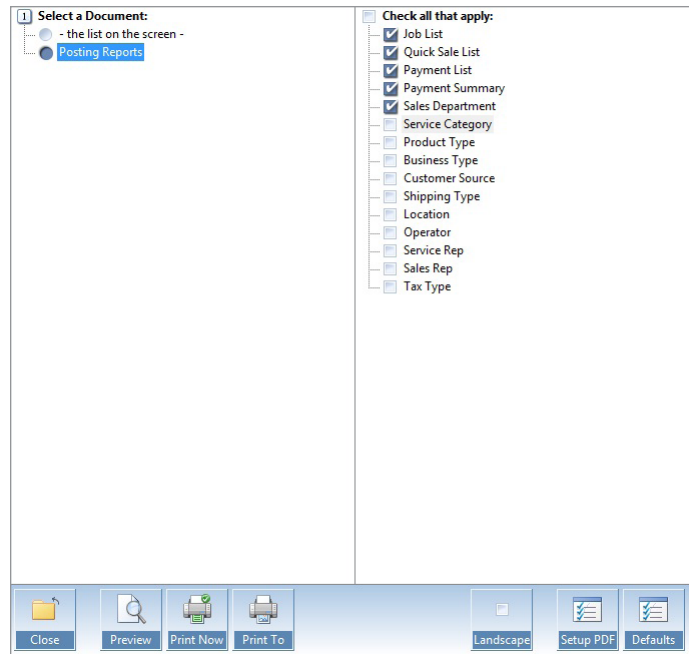
4. Define the date or the number of the "posting", and click **Find Now**. The "posting" is listed as a line item on the right.



THE REQUESTED "POSTING"

5. Select the item and click **Print**. The **Print** window appears.

# Posting Orders to History



6. Select **Posting Reports** to print the reports for the selected "posting".