

# Service Setup - Common Fields

This section explains the Service setup properties that are common to Services of all Category types. As an example, the setup window of a Folding service (Category "Other") is used. The properties unique to Services of other Categories and other variations of setup are explained later in this chapter.

Service No: 180 - Category No: 402 - Category Name: Fold - Category Type: Other

**Service** **Fold: Auto 1 Fold - Text wt.** Active

**General Properties**

Service Name: Auto 1 Fold - Text wt. Sales Dept: Finishing

Invoice Name: Fold

Popup Reminder: How?

Default Note:

**Pricing Properties**

Quantity: Finish Size Sheets (no waste)

Divide by...: 0 ☐ Sheets of 20# Bond

Multiply by: 0 < or ask How many? >

Round-up to: 0

Waste...: Additional Paper Waste

Setup (#Sheets): 10

+ % of Fin. Qty: 5

**Cost**: Time Cost only

Cost / Hour \$: 48.00

**Price**: Cost + Markup

Markup...: % or #

8

Adjust...: Bid Rush Special Multiply Markup

0.75 1.5 2

Minimum Price: 0.00 Modified...: 5/16/2012

**Setup Table**

Per	Minutes	Mat. Cost	Setup Price
Lot (1)	5.00		

**Run Table**

QtyBreak	Units/Hour	Mat. Cost	Run Price
1	7500.00		

Mat. Costs and Run Prices are: Per Each

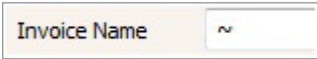

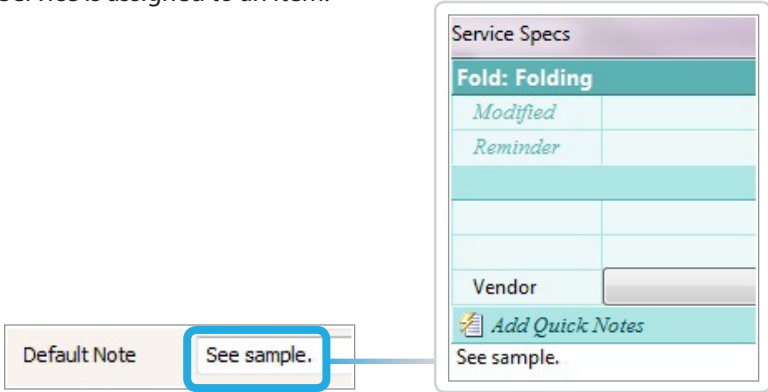
Method between QtyBreaks: Step

**Note**

More Service Properties...

A further explanation of the example window follows.

## General Properties

Field Name	Description
<b>Service Name</b>	The Service name is used in Jobs, Work Orders, and reports. Therefore, in this field, enter a name that describes this Service clearly. Limit: 50 characters
<b>Invoice Name</b>	<p>The Invoice name is used when the option to print Services on Invoices and Quotes is selected. If no Invoice Name is assigned, then the Service Name will print on these forms.</p> <p>To exclude this Service from the list of Services printed on Invoices and Quotes, enter a tilde ("~") in this field.</p> 
<b>Popup Reminder</b>	<p>When this field contains text, a reminder window, displaying the reminder, will pop up when this Service is assigned to an Item.</p> <p><b>EXAMPLE:</b> Reminder ("How?") for a Folding Service.</p>  <p style="text-align: center;"><b>Jobs   Item Specs   Service Specs Window</b></p>
<b>Default Note</b>	<p>The entry in this field will be automatically added to the <b>Note</b> field of this Service when the Service is assigned to an Item.</p>  <p style="text-align: center;"><b>Jobs   Item Specs   Service Specs Window</b></p>

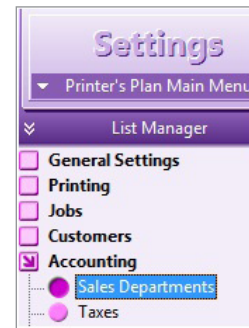
**Sales Dept**

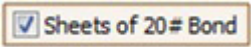
A screenshot of a dropdown menu titled 'Sales Dept'. The menu is open, showing a list of options. 'Graphics' is selected and highlighted in blue. Other visible options include '?', 'Buyouts', 'Digital - B&W', 'Digital - Color', 'Finishing', 'Graphics' (repeated), 'Misc', 'Offset', 'Outside', 'Paper', 'Plate', and 'Wide Format'.

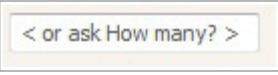
You must assign a Sales Department to each Service for proper reporting. If you do not assign a Sales Department to a Service, the sales for the Service will be reported under Sales Department name "?".

*(For more information on the Sales Departments table and how it relates to reports, see the "Settings" chapter.)*

The Sales Department list is set up in the Sales Departments table in Settings | Accounting | Sales Departments.

**Pricing Properties**

Field Name	Description
<b>Quantity</b>	<p>A selection in this field is used to calculate the quantity of this Service in a Job.</p> <p>The calculated quantity (original quantity) may further be modified by the numbers assigned in the next three fields - <b>Divide by...</b>, <b>Multiply by</b>, and <b>Round-up to</b>.</p> <p><i>(Please see the "Quantity Field" section in this chapter for a comprehensive explanation of the options in this field.)</i></p>
<b>Divide by...</b> and 	<p>The original quantity is divided by the value in the <b>Divide By...</b> field.</p> <p><i>(Please see the "Divide By Field" section in this chapter for a comprehensive explanation of this field.)</i></p>
<b>Multiply by</b>	<p>The original quantity is multiplied by the value in this field.</p> <p>If the <b>Divide by...</b> field also has a value, the Original Quantity is both divided by and multiplied by these values, respectively.</p> <p>If the selection in the <b>Quantity</b> field is "---not used---", then the value in the <b>Multiply by</b> field becomes the Service quantity.</p>

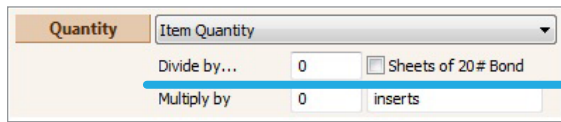


< or ask How many? >

If the “multiply by” value of this Service varies by job, then leave the **Multiply by** field blank. In the next field, override the phrase “< or ask How many? >” and enter a word that will finish the question starting with “How many...?”, such as *pieces*. Then, Printer’s Plan will ask “How many pieces?” when you assign this Service to an Item.

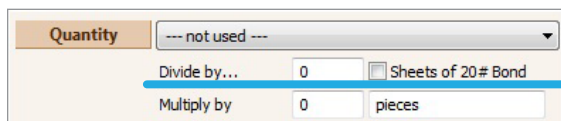
### EXAMPLES of Using the Multiply by and < or ask How many? > fields

- Service Name: Stuffing (a mailing service)**



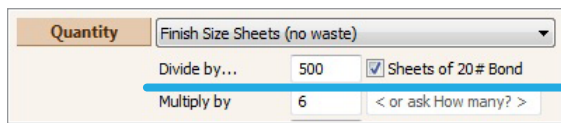
When this Service is assigned to an Item, Printer’s Plan will ask “How many inserts?”. Then, it will multiply the answer by the Item quantity to arrive at the total number of inserts.

- Service Name: Clip Art**



When this Service is assigned to an Item, Printer’s Plan will ask “How many pieces?”. The answer will be the Service quantity because the Quantity field selection is “---not used---”.

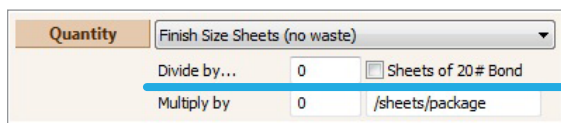
- Service Name: Trim 3 sides of folded book**



**Note:** (6 = 3 sides x 2)

Printer’s Plan will divide the Finish size sheets by the calculated lift size (500 if 20# Bond) and then multiply the result by 6. (The Number of trim sides (3) is multiplied by 2 because the quantity of sheets to trim is doubled when the sheets are folded.)

- Service Name: Packages**



When this Service is assigned to an Item, Printer’s Plan will ask for the number of sheets per package (message displayed will read: “How many /sheets/ package?”). Then, it will divide the number of finish size sheets by the answer to arrive at the total number of packages. (For more information about this setup, see the “Divide By” section in this chapter.)

### Waste...

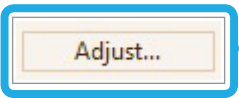
A selection in this field is used to calculate the paper waste contributed to a job by this Service. If the Service does not contribute to Paper waste, select “---No Paper Waste---”.

(For more information about the Waste... field, see the “Paper Waste” section in this chapter.)

### Cost

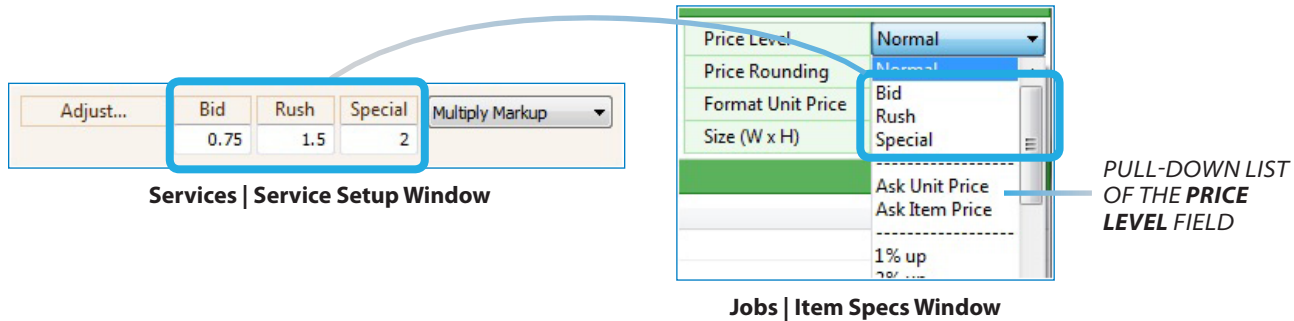
A selection in this field is used to calculate the cost of a Service.

(To learn about how to use this field, see the “Pricing Properties > Cost Field” section in this chapter.)

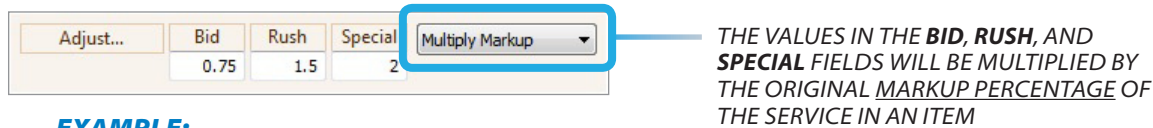
<b>Price</b>	<p>A selection in this field is used to calculate the price of a Service.</p> <table border="1"> <thead> <tr> <th data-bbox="427 474 756 504">Selection In the "Price" field</th><th data-bbox="834 474 1141 504">What the Selection Means</th></tr> </thead> <tbody> <tr> <td data-bbox="427 527 756 556">• ---No Price---</td><td data-bbox="834 527 1419 625">The cost will be calculated, but the price will be zero. In the Job, the price will be displayed as "No Charge" (or as ".01" in some views).</td></tr> <tr> <td data-bbox="427 646 756 676">• Cost + Markup</td><td data-bbox="834 646 1419 758">The price will be calculated by marking up the cost according to the selection in the <b>Markup...</b> field. If the Markup value is zero, then Cost = Price.</td></tr> <tr> <td data-bbox="427 779 756 846">• Use Price Column of Setup and Run Tables</td><td data-bbox="834 779 1419 961">The price will be calculated from the value(s) entered in the <b>Setup Price</b> and <b>Run Price</b> columns of the Setup and Run Tables <i>(To learn about the Setup and Run Tables, see the "Setup and Run Tables" section in this chapter.)</i></td></tr> <tr> <td data-bbox="427 982 756 1012">• Use Price Table</td><td data-bbox="834 982 1419 1129">The price will be calculated from the value(s) entered in the Price Table that is assigned to the Service. <i>(To learn about the Price Table, see the "Price Table" section in this chapter.)</i></td></tr> </tbody> </table>	Selection In the "Price" field	What the Selection Means	• ---No Price---	The cost will be calculated, but the price will be zero. In the Job, the price will be displayed as "No Charge" (or as ".01" in some views).	• Cost + Markup	The price will be calculated by marking up the cost according to the selection in the <b>Markup...</b> field. If the Markup value is zero, then Cost = Price.	• Use Price Column of Setup and Run Tables	The price will be calculated from the value(s) entered in the <b>Setup Price</b> and <b>Run Price</b> columns of the Setup and Run Tables <i>(To learn about the Setup and Run Tables, see the "Setup and Run Tables" section in this chapter.)</i>	• Use Price Table	The price will be calculated from the value(s) entered in the Price Table that is assigned to the Service. <i>(To learn about the Price Table, see the "Price Table" section in this chapter.)</i>
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<b>Markup...</b>	<p>A value in this field tells Printer's Plan how to mark up the cost of a Service.</p> <p><i>(To learn about the markup options, see the "Markup" section in this chapter.)</i></p>										
<b>Adjust...</b>	<p>Values in the three fields, <b>Bid</b>, <b>Rush</b>, and <b>Special</b>, allow you to adjust an Item price for different market conditions.</p> <p>For a brief explanation of the <b>Adjust...</b> field, click the field label.</p> <div data-bbox="435 1486 1308 1719">  <div data-bbox="721 1486 1308 1719"> <p><b>i</b> You may adjust the price for different market conditions: Bid, Rush, and Special.</p> <p>a) To reduce the price, enter a multiplier less than 1.0. b) To increase the price, enter a multiplier greater than 1.0.</p> <p>Then, select what to multiply: Markup or Price.</p> </div> </div>										

**Here is a more detailed explanation:**

The three fields correspond to three selections in the pull-down list of the **Price Level** field of an Item.



According to the selection in the **Price Level** field of an Item, Printer's Plan will use the value in the corresponding field of the Service setup window in the following ways:

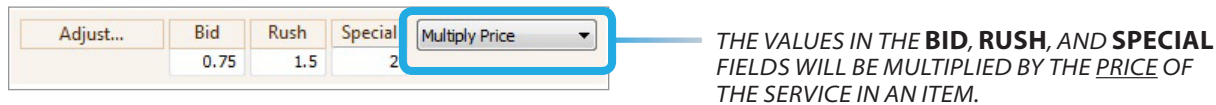


**EXAMPLE:**

Price Level Bid

Service markup in the Item originally = 30%

Final calculated Service markup = 30 x 0.75 (from the Bid field) = 22.50%



**EXAMPLE:**

Price Level Rush

Service price in the Item originally = \$85.50

Final calculated Service price = 85.50 x 1.5 (from the "Rush" field) = \$128.25

**Minimum Price**

If the calculated price of this Service in an Item is less than the price entered in this field (minimum price), the calculated price will be replaced by the minimum price.

**Modified...**  
and

When you make a modification to a pricing property of a Service, such its unit cost, assign the date of your modification.

☒ 5/24/2012

**NOTE:**

The date in this field will appear in the Specs window of this Service in an Item as in the following two figures. (This feature may be especially helpful with papers when you want to know how recently you changed the cost of the paper.)

Paper Specs for Digital Printing	
Cover Coated: 10pt C2S 23 x 35	
Modified	05/24/2012
Reminder	
In Stock	3,000
How many?	

**Jobs | Item Specs Window | Specs Window of Paper Used in the Item**

Service Specs	
Printer: Copier - Color	
Modified	05/24/2012
Reminder	

**Jobs | Item Specs Window | Specs Window of Copier Used in the Item**

If you click the **Modified...** field name after you assign the date, the following window opens:

Last Modified

Add this to Service Note

05/24/2012: Modified cost

Click OK if your changes affect the pricing of this Service. Clicking OK will set Last Modified Date = Today and add the note above to the Service Note.

Click Cancel not to change the Date and Service Note.

OK

Cancel

THE DEFAULT NOTE IS "MODIFIED COST". YOU CAN OVERWRITE IT WITH ANOTHER DESCRIPTION OF THE MODIFICATION.

If you click **OK**, the note will be added to the **Note** field of the Service setup window.

Note

05/24/2012: Modified cost

More Service Properties...

To assign another date next time, click the **Modified...** button and click **OK** again. This way, in the **Note** field, you will have a record of the dates of all the changes.

Note

05/24/2012: Modified cost  
6/4/2011: Modified cost  
11/17/2010: Modified cost

<p><b>Setup and Run Tables</b> and</p> <p>Mat.Costs and Run Prices are</p> <p>Per Each ▼</p>	<p>(To learn how to use these tables, see the "Setup and Run Tables" section in this chapter.)</p>				
<p>Method between QtyBreaks</p> <p>Step ▼</p>	<p>(To learn about the methods for quantity breaks, see the "Step, Linear, and Sum Methods" section in this chapter.)</p>				
<p><b>Note</b></p>	<p>Click to add notes about this Service.</p> <div data-bbox="422 924 682 1134"> <p>CLICK TO ADD DATE OR DATE AND TIME TO THE NOTE.</p> <p>DEFAULT CSR FOR THIS COMPUTER. CLICK TO ADD HIS/HER NAME TO THE NOTE.</p> </div> <div data-bbox="714 882 1388 1165"> <table border="1"> <thead> <tr> <th>Note</th><th>Auto 1 Fold - Text wt.</th></tr> </thead> <tbody> <tr> <td> <div> <div>Date Stamp</div> <div>Date + Time</div> <div>Lisa</div> <div>Clear Note</div> </div> </td><td> <p>5/25/2012: - Lisa - This paper will be available only from Atlantic Paper Company after July 1, 2012.</p> <p>05/24/2012: Modified cost</p> <p>6/4/2011: Modified cost</p> <p>11/17/2010: Modified cost</p> </td></tr> </tbody> </table> </div> <p>CLICK TO CLEAR ALL THE NOTES. IF YOU ACCIDENTALLY CLEAR THE NOTES, CLICK THE <b>CANCEL</b> BUTTON AT THE BOTTOM OF THIS WINDOW.</p> <p>If you want the oldest note to show at the top and the newer notes added to the bottom, go to Settings   Jobs   Job Options and assign "No" to the option "In the Notes window, add the new date and text at the top (last note first)".</p>	Note	Auto 1 Fold - Text wt.	<div> <div>Date Stamp</div> <div>Date + Time</div> <div>Lisa</div> <div>Clear Note</div> </div>	<p>5/25/2012: - Lisa - This paper will be available only from Atlantic Paper Company after July 1, 2012.</p> <p>05/24/2012: Modified cost</p> <p>6/4/2011: Modified cost</p> <p>11/17/2010: Modified cost</p>
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## More Service Properties

Modified... 5/25/2012

More Service Properties...

Price Table

More Properties

PriceWiz

CLICK EITHER BUTTON TO OPEN THE "MORE SERVICE PROPERTIES" WINDOW.

More Service Properties

**Scheduler (optional tool)**

Service Center: Design

Default Operator: Anna

Default Tag:

**Vendor**

Default Vendor:

SKU: < Vendor Specific Code >

UPC: < Universal Product Code >

FSC: < Forestry Certification Code >

**Inventory (optional tool)**

☐ Track

Minimum Level: 0

Ream Quantity: 0

In Stock: 0

On Order: 0

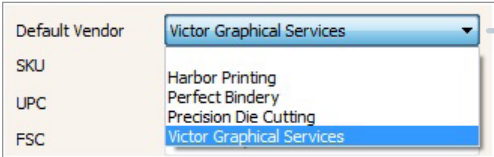
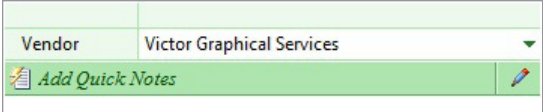
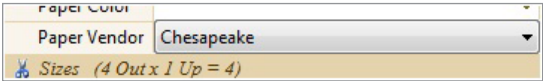
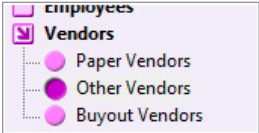
**Other Properties**

Auto-Add: < click to select >

Wage / Hour...: 20.00

SEE "SCHEDULER" IN "POWER TOOLS" FOR AN EXPLANATION OF THE FIELDS UNDER SCHEDULER.

SEE "INVENTORY" IN "POWER TOOLS" FOR AN EXPLANATION OF THE FIELDS UNDER INVENTORY.

Field Name	Description
<b>Default Vendor</b>	<div data-bbox="428 533 919 688">  </div> <p>CLICK TO SELECT A VENDOR FROM THE PULL-DOWN LIST.</p> <p>In an Item, the default vendor name will display on the specs window of this Service and will be added to the Service name as a note. It will also print on the work order with the Service name.</p> <p>The assigned vendor of this Service can be changed for a specific Item. The default vendor, however, can be changed only in the “More Service Properties” window.</p> <div data-bbox="667 926 1206 1037">  </div> <p><b>Item specs window   Specs window of a Service other than Paper</b></p> <div data-bbox="667 1121 1206 1201">  </div> <p><b>Item specs window   Specs window of a Paper</b></p> <p>Vendor tables are set up in Settings   Vendors.</p> <div data-bbox="428 1331 685 1463">  </div> <p><b>Paper Vendors</b> will show in the Vendor field of Papers (categories #100 – 199).</p> <p><b>Buyout Vendors</b> will show in the Vendor field of Services of category #501. (In the Printer’s Plan default database, this category is named “Buyout”).</p> <p><b>Other Vendors</b> will show in the Vendor field of Services of categories other than what is listed above.</p>
<b>SKU</b>	Stock-Keeping Unit
<b>UPC</b>	Universal Product Code
<b>FSC</b>	Forest Stewardship Council Chain-of-Custody certification

These codes will be used:

- As search fields in searching Services and Items that contain specific Services
- In Paper Needs reports
- In Inventory

### Auto-Add

Click to select a Service that will also be added to an Item when this Service is added.

#### EXAMPLE:

"Proof-Email" is selected in the **Auto-Add** field of a design Service named "Brochure".

The "Proof-Email" Service is automatically added to the Item when the "Brochure" Service is selected in the Item.

Other Properties

Auto-Add: Proof: Proof - Email

Wage / Hour: 30.00

Service Specs	
Category	Service (right-click for c
Design	Brochure
Proof	Proof - Email
Text Coated	80# Sterling Ultra Matt

### Wage/Hour...

Click the field name to open the following window with a brief explanation of this field.

Wage / Hour...



Wage/Hr is what you pay to the operator including benefits. It is a direct cost and used in calculating the out of pocket cost of this service.

IMPORTANT: Wage/Hr is NOT used in calculating cost and price.

Edit Specs Edit Costs Reprice

Quantity: 10.000

Wage / Hour: 30.00

Jobs | Job Window

MATERIAL					TIME	
Unit Cost	Per	Actual Quantity	Charge Quantity	Mat'l Cost	Service Cost	±
	Ea	1	1		43.34	
17.6000	Ea	4	4	70.40	70.40	
264.0030	M	2608	2608	688.52	688.52	
	Ea	54	54		56.80	
	Ea	10430	10430		1364.00	
				758.92	2223.06	
				758.92	2223.06	

Costs Window of an Item

The calculated out-of-pocket cost of this Service in an Item is displayed in the "Direct Cost" window from the "Costs" window.

TIME COST = SUM OF TIME COSTS OF ALL SERVICES THAT ARE SET UP AS "TIME COST ONLY" AND "TIME COST + MATERIAL COST"

TIME COST OF ONE SERVICE = WAGE/HR \* CALCULATED TIME TO PRODUCE THE SERVICE

#### Item Direct Cost

Direct Time Cost = Actual Time x Wage/Hour of Service

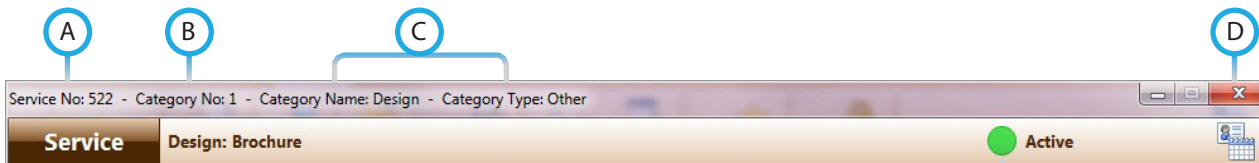
Direct Mat'l Cost = Mat'l Cost / Overhead Multiplier of S

Description	Direct Cost	% of Price
+ Time Cost	213.25	7.7
+ Material Cost	637.75	23.3
= Total Cost	851.00	31.1
Item Price	2725.02	100.0

Item Direct Cost Window

### Service Window – Top Section

- A** Service number is assigned by Printer's Plan for internal use.  
You can search a Service by its number. (Use "Services.SerNo" from Advanced Find.)  
Services numbered 174, 175, and 193 (named "Cut To RunSz", "Cut To FinSz", and "NCR padding", respectively, in the default Printer's Plan database) have special properties which are explained when these services are discussed later in this guide.
- B** Category numbers are assigned by Printer's Plan for internal use.  
You can search a Service by its Category number. (Use "Services.CatNo" from Advanced Find.)
- C** Category Name and Type are assigned in the Service Departments and Categories table. (See the "Service Departments and Categories" section in this chapter.)
- D** Reminder tool button. (See "Reminder" in "Power Tools".)



- E** Click to select a Service status. The following window appears.



Department / Category	Finishing
<b>Finishing</b> <input type="radio"/> Cut <input type="radio"/> Fold <input type="radio"/> Score <input type="radio"/> Perforate <input type="radio"/> Collate <input type="radio"/> Drill <input type="radio"/> Number <input type="radio"/> Staple <input type="radio"/> Pad <input checked="" type="radio"/> Bind <input type="radio"/> Package	<input checked="" type="radio"/> Bind <b>BookMaker</b> <input type="checkbox"/> BookMaker Fold+Stich <input type="checkbox"/> BookMaker Fold+Stich+Trim <b>Coil</b> <input type="checkbox"/> Coil bind <b>GBC</b> <input type="checkbox"/> GBC Insert Combs <input type="checkbox"/> GBC Punch Sheets <b>Perfect</b> <input type="checkbox"/> Perfect Bind <b>Velo</b> <input type="checkbox"/> Velo Insert Strips <input type="checkbox"/> Velo Punch Sheets

The default status is "Active".

A "Discontinued (hidden for new jobs)" Service will not appear in lists when you add Services to Items in the Jobs section.

The "Active + Group Header" status is used to group a long list of Services in one Category. Grouping helps the user locate a Service easily. Assign this status to only one of the Services in the group. Printer's Plan uses the first word of the Service name as the group header and displays it in red. Then, all the services whose names start with that word are displayed under the header. (See the following example.)

#### Example for using the "Active + Group Header" status

In the example on the left, only one of the two GBC Services has the "Active + Group Header" status. Both are listed under the header "GBC".

## Left Pane

Click to open the Find window, where you can search another Service in the same Category. Printer's Plan finds the Service, closes the current window, and opens the window of the Service found.

Click to save or save and close the Service window.

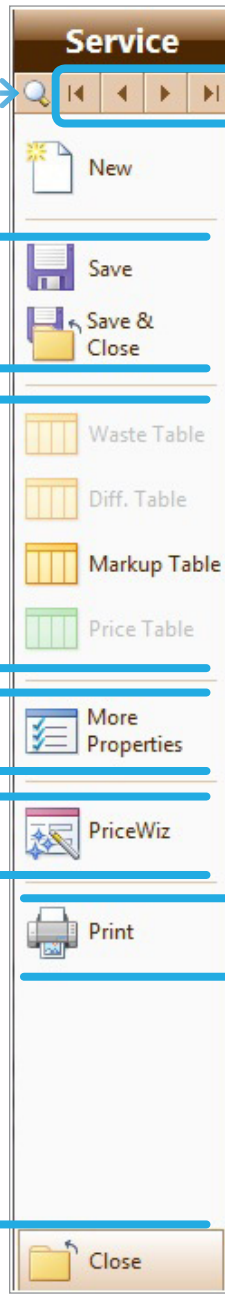
According to the Category of a Service, one or more of these buttons will be enabled.

*(To learn about Waste, Difficulty, Markup, and Price tables, see the sections under their corresponding names in this chapter.)*





Click to open the "More Service Properties" window of this Service.

Click to open the "PriceWiz" window.  
*(To learn about PriceWiz, see the section under the same name in this chapter.)*

Click to close the Service window. The changes will not be saved. (To save the changes, click the **Save & Close** button.)



If you have a list of Services in the main window and open one of the Services on the list, you can browse up and down the list using these buttons without closing the Service window.

-  Click to open the first Service on the list.
-  Click to open the previously listed Service.
-  Click to open the next listed Service.
-  Click to open the last Service on the list.

Click to print this Service window.