X.1 | 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.

A further explanation of the example window follows.

General Properties

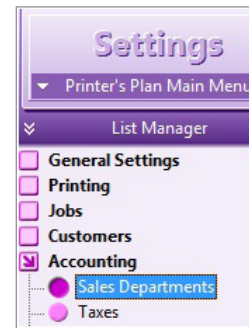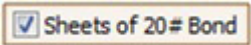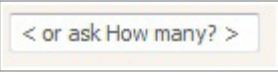| Field Name	Description
Service Name	The Service name is used in Jobs, Work Orders, and reports. Therefore, in this field, enter a name that describes this Service clearly. Limit: 50 characters
Invoice Name	The Invoice name is used when the option to print Services on Invoices and Quotes is selected. If no Invoice Name is assigned, then the Service Name will print on these forms. To exclude this Service from the list of Services printed on Invoices and Quotes, enter a tilde ("~") in this field. Invoice Name ~
Popup Reminder	When this field contains text, a reminder window, displaying the reminder, will pop up when this Service is assigned to an Item. *EXAMPLE: Reminder ("How?") for a Folding Service.* Popup Reminder How? **Jobs | Item Specs | Service Specs Window**
Default Note	The entry in this field will be automatically added to the **Note** field of this Service when the Service is assigned to an Item. Default Note See sample. **Jobs | Item Specs | Service Specs Window**
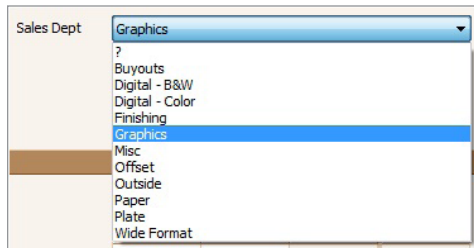
Sales Dept	You must assign a Sales Department to each Service for proper reporting. If you do not assign a Sales Department to a Service, the sales for the Service will be reported under Sales Department name "?". *(For more information on the Sales Departments table and how it relates to reports, see the "Settings" chapter.)*	The Sales Department list is set up in the Sales Departments table in Settings | Accounting | Sales Departments.

Pricing Properties

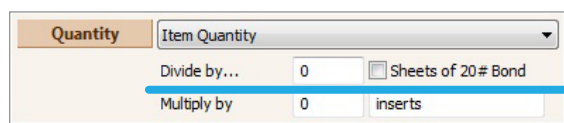| Field Name	Description
Quantity	A selection in this field is used to calculate the quantity of this Service in a Job. The calculated quantity (original quantity) may further be modified by the numbers assigned in the next three fields - **Divide by…**, **Multiply by**, and **Round-up to**. *(Please see the "Quantity Field" section in this chapter for a comprehensive explanation of the options in this field.)*
Divide by… and ☑ Sheets of 20# Bond	The original quantity is divided by the value in the **Divide By…** field. *(Please see the "Divide By Field" section in this chapter for a comprehensive explanation of this field.)*
Multiply by	The original quantity is multiplied by the value in this field. If the **Divide by…** field also has a value, the Original Quantity is both divided by and multiplied by these values, respectively. If the selection in the **Quantity** field is "---not used---", then the value in the **Multiply by** field becomes the Service quantity.

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.
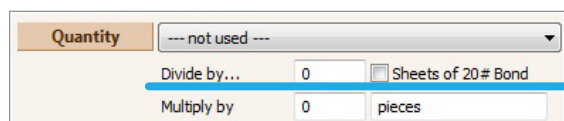
EXAMPLES of Using the Multiply by and < or ask How many?> fields
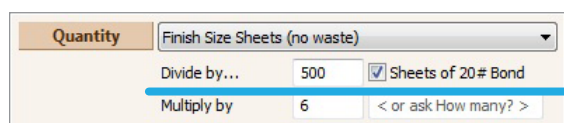
- **Service Name: Stuffing (a mailing service)**

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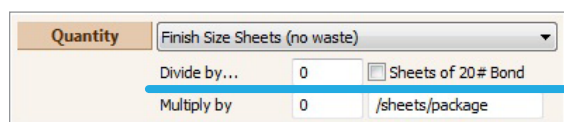
- **Service Name: Trim 3 sides of folded book**

  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.)
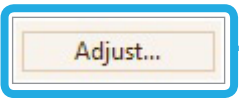
- **Service Name: Packages**

  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 <u>divide</u> 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.)*

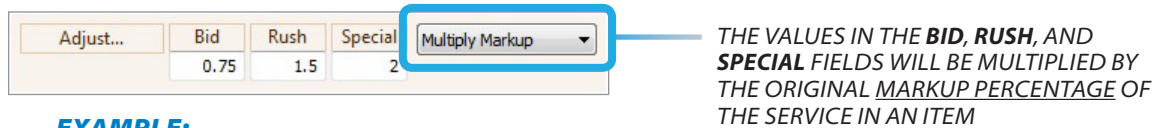|	
Waste…	A selection in this field is used to calculate the paper waste contributed to a job by this Service. If the Service does not contribute to Paper waste, select "---No Paper Waste---".
	(For more information about the Waste… field, see the "Paper Waste" section in this chapter.)
Cost	A selection 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.)

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

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 **Markup...** 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 **Setup Price** and **Run Price** columns of the Setup and Run Tables *(To learn about the Setup and Run Tables, see the "Setup and Run Tables" section in this chapter.)*
• Use Price Table	The price will be calculated from the value(s) entered in the Price Table that is assigned to the Service. *(To learn about the Price Table, see the "Price Table" section in this chapter.)*

Markup...	A value in this field tells Printer's Plan how to mark up the cost of a Service. *(To learn about the markup options, see the "Markup" section in this chapter.)*

Adjust...	Values in the three fields, **Bid**, **Rush**, and **Special**, allow you to adjust an Item price for different market conditions. For a brief explanation of the **Adjust...** field, click the field label.

Adjust...

You may adjust the price for different market conditions: Bid, Rush, and Special.

a) To reduce the price, enter a multiplier less than 1.0.
b) To increase the price, enter a multiplier greater than 1.0.

Then, select what to multiply: Markup or Price.

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.

Services | Service Setup Window

PULL-DOWN LIST OF THE **PRICE LEVEL** FIELD

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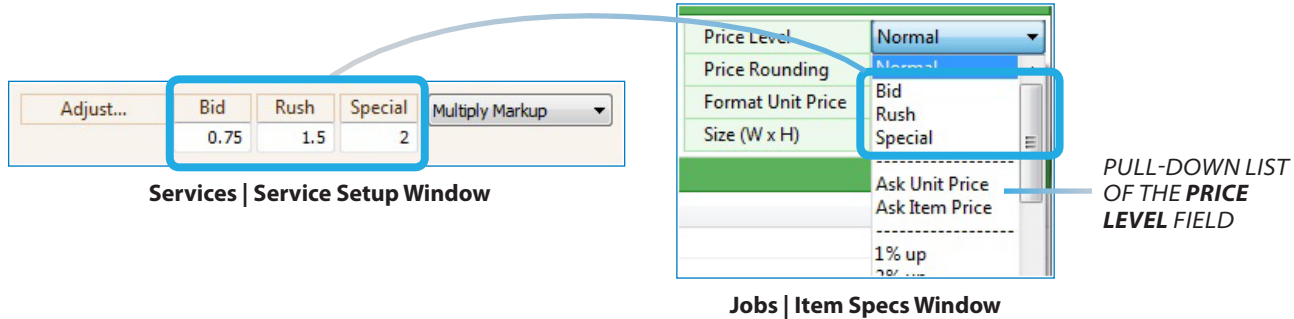
According to the selection in the **Price Level** field of an Item, Printer's Plan will use the value in the corresponding field of the Service setup window in the following ways:

THE VALUES IN THE **BID**, **RUSH**, AND **SPECIAL** FIELDS WILL BE MULTIPLIED BY THE ORIGINAL <u>MARKUP PERCENTAGE</u> OF THE SERVICE IN AN ITEM

EXAMPLE:

Service markup in the Item originally = 30%

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

THE VALUES IN THE **BID**, **RUSH**, AND **SPECIAL** FIELDS WILL BE MULTIPLIED BY THE <u>PRICE</u> OF THE SERVICE IN AN ITEM.
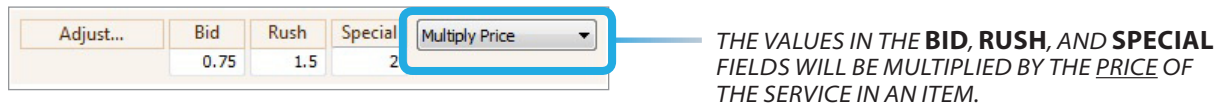
EXAMPLE:

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.

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.)

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

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:

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.

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.

7

Setup and Run Tables and Mat. Costs and Run Prices are Per Each	*(To learn how to use these tables, see the "Setup and Run Tables" section in this chapter.)*
Method between QtyBreaks Step	*(To learn about the methods for quantity breaks, see the "Step, Linear, and Sum Methods" section in this chapter.)*
Note	Click to add notes about this Service. *CLICK TO ADD DATE OR DATE AND TIME TO THE NOTE.* *DEFAULT CSR FOR THIS COMPUTER. CLICK TO ADD HIS/HER NAME TO THE NOTE.* *CLICK TO CLEAR ALL THE NOTES. IF YOU ACCIDENTALLY CLEAR THE NOTES, CLICK THE CANCEL BUTTON AT THE BOTTOM OF THIS WINDOW.* 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)".

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	

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

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

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

Other Properties

Auto-Add	< click to select >
Wage / Hour...	20.00

Field Name	Description
Default Vendor	*CLICK TO SELECT A VENDOR FROM THE PULL-DOWN LIST.* 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. 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. **Item specs window | Specs window of a Service other than Paper** **Item specs window | Specs window of a Paper** Vendor tables are set up in Settings | Vendors. **Paper Vendors** will show in the Vendor field of Papers (categories #100 – 199). **Buyout Vendors** will show in the Vendor field of Services of category #501. (In the Printer's Plan default database, this category is named "Buyout".) **Other Vendors** will show in the Vendor field of Services of categories other than what is listed above.
SKU	Stock-Keeping Unit
UPC	Universal Product Code
FSC	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...

ℹ️ 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.

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

🔲 Edit Specs	➕ Edit Costs	≡ Reprice
		Quantity
hures, 1 Original (1 side)		10,000

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	

e	Cancel	🔍 Item Direct Cost

Costs Window of an Item

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
Σ Item Price	2725.92	100.0

Item Direct Cost Window

Service Window – Top Section

(A) Service number is assigned by Printer's Plan for internal use.

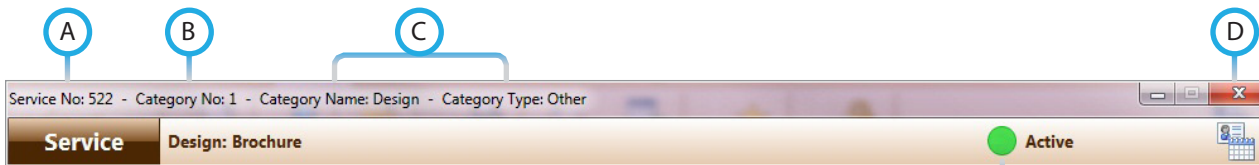You can search a Service by its number. (Use "Services.SerNo" from Advanced Find.)

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.

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.

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.

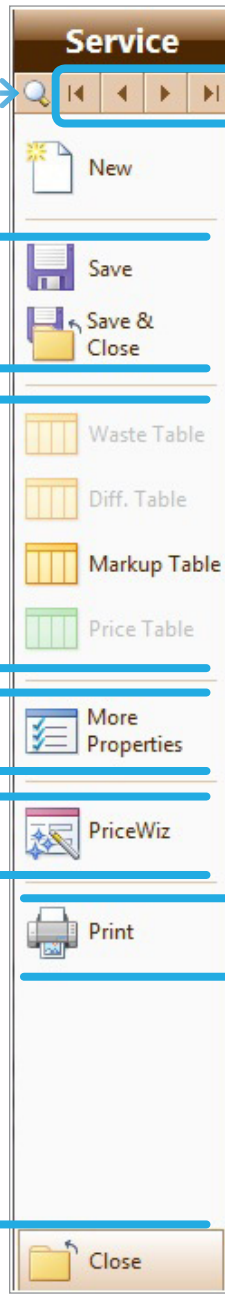Click to save or save and close the Service window.

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 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.

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