

Settings

Important Information About the Tables Discussed in This Chapter

- Most tables discussed in this chapter, such as the Employees | Service Reps table, include a column named “No” that displays the ID numbers of the records in the table. Printer’s Plan assigns an ID number to each record and uses this number to locate the record throughout the software. Printer’s Plan does not allow the user to edit the ID numbers.

EXAMPLE:

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

No	Name	Sort
102	Paul	1
103	Justin	2
104	Caitlin	3
101	~Lisa	4

Employees | Service Reps Table

- Use “Sort” numbers to adjust the order of the records displayed to the user within Printer’s Plan.
- In a table that uses the “No” column, do not delete a record if an existing Job, customer or Service is using it. Instead, type ~ in front of the description of the record, like #101 ~Lisa in the above example. (To find out if a record in a table is in use, you can search Jobs, customers, and Services by the ID number of that record. See “Find and Advanced Find” in the “Jobs” chapter.)
- Information about a table’s properties is included at the top of each table.
- The tables discussed in the “Frequently Used Text” section of this chapter do not include the “No” column. The beginning of that section details the distinct properties of those tables.

General Settings

General Settings > Shop Options

General Settings

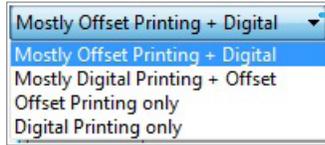
- Shop Options
- Passwords
- Reminder Types

Shop Options

Printing Method	Mostly Offset Printing + Digital
Saturday is a Workday	Yes
Sunday is a Workday	No

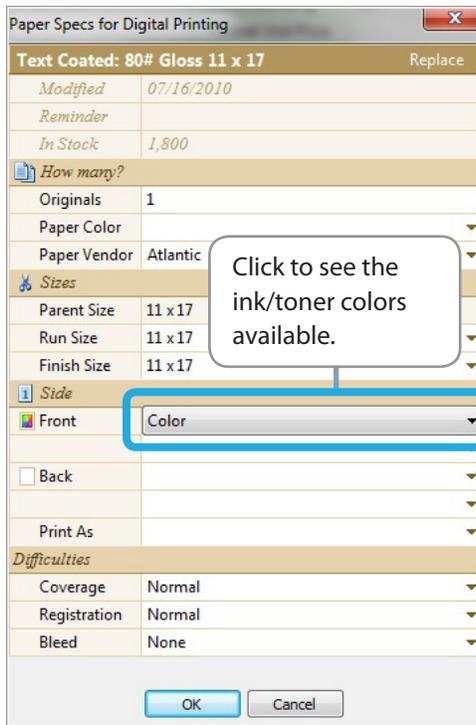
OK Cancel

General Settings > Shop Options > Printing Method



Click to select the method that best describes your business.

The option you select determines the ink/toner colors that are initially available to you in the Paper Specs window during job entry if you add a Paper to the Item Specs before adding a Printer.



Click to see the ink/toner colors available.

Printing Method Selected:

- Digital Printing Only
- Mostly Digital Printing + Offset

“Black” and “Color” are available for selection.

Printing Method Selected:

- Offset Printing Only
- Mostly Offset Printing + Digital

All the ink color combinations for offset printing are available.

Jobs | Item Specs | Paper Specs

NOTE: If you add to the Item Specs, first the Paper and then the Printer, then the color options in the Paper Specs are refreshed to suit the Printer you added. Printer’s Plan asks you to confirm the changes.

TIP: If your default selection is “Offset...” or “Mostly Offset...” and you are adding an Item for a digital job, then select the digital printer first on the Specs page. Similarly, add the offset press first if you are adding an offset Item and your shop option is “Digital...” or “Mostly Digital...”

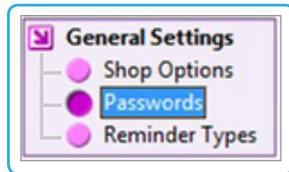
General Settings > Shop Options > Saturday/Sunday is a Workday

Saturday is a Workday	Yes	▼
Sunday is a Workday	No	▼

Select "No" for the weekend day when your business is closed so that:

- Printer's Plan will alert you if the due date that you assign to a Job is a non-workday.
- If you have the optional Scheduler tool, the Auto-Schedule feature will not assign tasks to non-workdays.

General Settings > Passwords



In this window, you can set up a hierarchal password system to password-protect certain tasks in Printer's Plan. The left side of the window allows you to assign passwords for up to five privilege levels. The right side of the window allows you to assign the password level required for the various tasks listed.

Passwords

Top level password is required to open this window. Do not assign it to tasks. Do not leave blank passwords between top and last level used. Maximum 20 characters.

Level	Description	Password	ID	Tasks and Required Password Levels	Level
1	Top Level (Master Password)	RavensRule52	9	Goto Home Section	
2		Bmore1	10	Goto Jobs	
3		EAPoe	11	Goto Services	2
4		oldbay	12	Goto Customers	3
5	Low Level	charmcity	13	Goto A/R	3
			14	Goto Reports	2
			15	Goto Settings	
			16	Goto Scheduler	
			17	Goto TimeTracker	
			18		
			19		
			20		
			21	Add/Edit Orders	5
			22	Add/Edit Quotes	5
			23	Add/Edit Templates	4
			24	Add History Jobs	3
			25	Add/Edit KeyOrders	
			26	Add/Edit KeyQuotes	
			27		
			28	Add job if customer is Past Due/Over Credit	3
			29		
			30		

1 Assign passwords here.

TIPS:

- Passwords are CaSe-seNSITive.
- You may use alphabetical and numeric characters, as well as punctuation marks and mathematical symbols.
- Assign a password to a level only if all levels above it have passwords. For example, do not assign passwords to Levels 4 and 5 if Level 3 has no password.

We strongly recommend that you password-protect Job History (Task IDs #24 and #34).

2 Assign password protection to various tasks here.

We recommend that you do not assign Level 1 to any tasks, but that you use Level 2 as the highest level for tasks. (See the following note box marked **IMPORTANT**.)

Password-protected tasks require the password for the level you assign to them or the password for any higher level. For example, a task to which you assign Level 3 can be accessed with the password for Level 3, as well as those for Levels 2 and 1, but it cannot be accessed with the passwords for Levels 4 and 5.

Scroll down for more tasks.

IMPORTANT!

The Level 1 password is the Top Level password. It is the only password that:

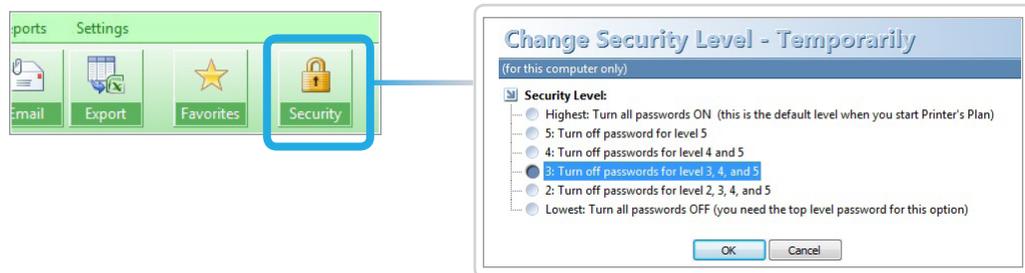
- Allows access to all tasks that you password-protect with any level of password.
- Allows access to the Passwords window.
- Allows you to delete your practice data (Home | About | My Database | Delete my practice data).
- Allows you to customize Workstation options (Any section | Printer's Plan Main Menu | Customize Workstation Options).

Since Level 1 is such a powerful level, we recommend that you do not assign this level to any of the tasks listed in the window. Instead, let Level 2 be the highest level for tasks.

If you forget the Level 1 password, you cannot look it up yourself. You will need to send us your database, and we will look it up for you. For this service, we require a written copy of the request signed by the owner of your business.

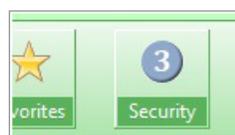
Security on a specific computer:

In Printer's Plan, Security refers to the level of password protection. Click the **Security** button to open the following window.



In the Change Security Level window, you can select the option to turn off password protection at a specific Level (on this computer only). Modifying the Security Level can allow you to navigate Printer's Plan more freely.

When you select a specific level of security, the level number displays on the **Security** button.



To enable full password protection again, click the **Security** button and select the first option, "Highest: Turn all passwords ON". Otherwise, the specified level of password protection will remain in effect until Printer's Plan is restarted.

General Settings > Reminder Types

(used only with the optional Reminder tool)

General Settings

- Shop Options
- Passwords
- Reminder Types**

Reminder Types

Limit: 10 Reminder Types. To Hide: Type ~ before text.

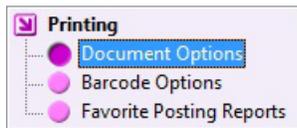
ID	Do	Sort
0	Call	
1	Meet	1
2	Quote Follow up	2
3	Order	3
4	Check for delivery	4
5	Send	5
6	Other	6
7		7
8		8
9		9

OK Cancel

Set up this table only if you have the optional Reminder tool. *(Please see "Reminder" in "Power Tools" to learn about this table.)*

Printing

Printing > Document Options



In the Document Options window, you can set the properties and the default print options for all the printable documents in Printer's Plan.

Select a document.

Assign properties to the document selected on the left.

See the next page for an explanation of this section.

Set printing options for the document selected in the left pane. You can temporarily modify these options when you print the document.

Document Properties Explained

Set Document Properties

A Document Title: **B** Description (not printed)
Invoice Default

C Default Note or Memo / Letter to Customer:
 Thank you for the order.

D Footer Note or Message:
 Pay from this invoice.

E Left Top
 0.25 0.9 (document margins in inches)

Select Document Font... Size
 Arial 90

Select Default Printer... Clear Default Copies
 HP LaserJet R1005 2

Select Back Color... Select Text Color...
 Color of Document Columns

Save & Close Save Close

This section on next page...

- A. The Title prints on the document.

Test-print the document with the new title to verify that the text fits in the space provided on the document.

- B. The Description does not print on the document. It is used only on the Print window for a quick description of the specific document to the user.

FOR EXAMPLE: Four Invoice documents are available, each with its own printing options. One can be set for printing only the Item Description, another for printing the Item Description with all the services, another for printing booklet invoices with sub-items, and another for printing invoices in the Letter Style format. See the following:

<p>For Customer:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Invoice (Default) <input type="radio"/> Order Receipt <input type="radio"/> Delivery Ticket <input type="radio"/> Invoice (All Services) 	<p>Specs (select):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Job Title <input checked="" type="checkbox"/> + Item Description <input type="checkbox"/> + Item Description + Paper
<ul style="list-style-type: none"> <input type="radio"/> Invoice (Default) <input type="radio"/> Order Receipt <input type="radio"/> Delivery Ticket <input checked="" type="radio"/> Invoice (All Services) <input type="radio"/> Invoice (Booklet) 	<p>Specs (select):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Job Title <input type="checkbox"/> + Item Description <input type="checkbox"/> + Item Description + Paper <input checked="" type="checkbox"/> + Item Description + All Services

- C. This note prints above the first Item description or the title on "Standard" and "Letter" style Quotes/Invoices. It prints closer to the bottom of the document on "Classic" styles.

- D. This message prints at the bottom of the document.

- E. The print margins of a document may vary slightly from printer to printer. You can adjust them here for your printer.

F Select Document Font... Size
Arial 90

G Select Default Printer... Clear Default Copies
HP LaserJet P1005 2

H Select Back Color... Select Text Color...
Color of Document Columns

I Save & Close Save Close

F. Click this button to change the font style and font size used on the document. Be sure not to choose a too-wide style or a too-big size such that the amount of text will not fit in the available space. The layout of each document is fixed and will not adjust for the area that the text needs.

G. Click this button to assign a default printer for the document.

The default number of copies is assigned in the properties window of the printer.

Printer's Plan prints to the default tray of the printer. You cannot assign another tray by default to a document.

(TIP: If you want to set up to print two or more documents to different trays of the same printer, set up the same printer multiple times, each with a different default tray.)

To be able to accomplish the printer functions above, your computer must have management permissions for the selected printer.

H. If you are not using preprinted forms, use these buttons to change the background and text colors of the columns on the document.

(If you are using preprinted forms, you must uncheck the "Column Headers and Lines" option.

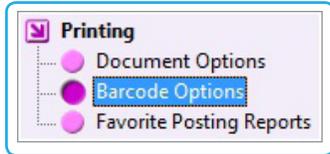
Document Info (check all that apply):
 Column Headers and Lines

Then, Printer's Plan ignores the colors selected here.)

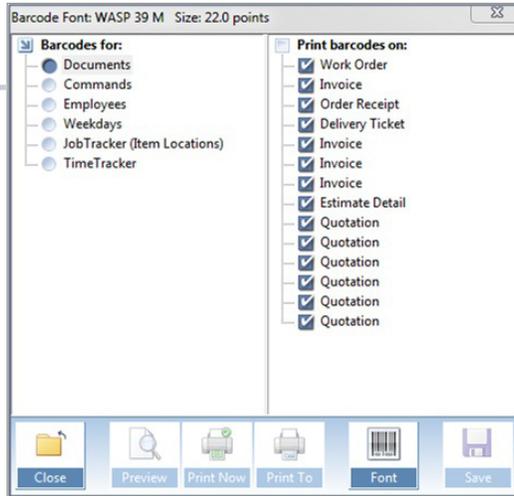
I. Be sure to click **Save** or **Save & Close** to save your changes. To cancel the changes, click **Close**.

Printing > Barcode Options

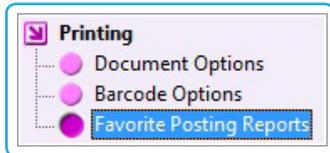
(used only with the optional BarcodeSupport tool)



Set up Barcode options only if you have the optional BarcodeSupport tool.
 (Please see "BarcodeSupport" in "Power Tools" to learn about these options.)

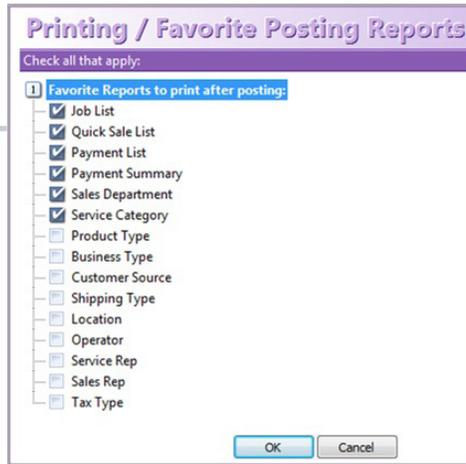


Printing > Favorite Posting Reports



Posting in Printer's Plan is a process where shipped and invoiced Orders are converted into History Jobs. After the posting process is completed, Printer's Plan allows you to print reports for the jobs posted.

In this table, you can select the reports you want to print after each posting so they can be printed with one click.



To learn more about Posting and Posting Reports, see the "Closing the Day" chapter.

Jobs

Jobs > Job Options

Explanation of Job Options

Option

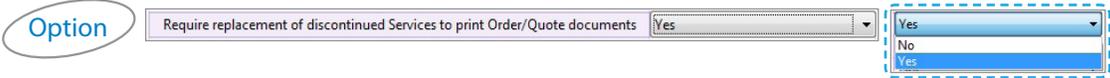
Assign a default format in which to display the Item Unit Price on the Job window.

The "blank" selection defaults to "Per Each".

JOBS WINDOW						
Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
1	Product Brochures 1 Sheet (2 sides)	2,500			267.84/M	669.59

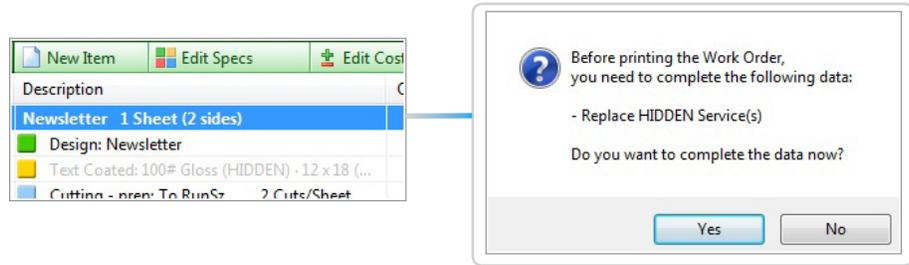
NOTE: The Unit Price format can be changed for a specific Item on the Item Specs page.

If selection is "Per Each"



Selection “Yes”:

If a Service used in a Job has been discontinued (hidden), Printer’s Plan does not allow you to print or email a document for the Job until you replace the Service with an active one.



Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
1	Product Brochures 1 Original (2 sides)	2,500			173.50/M	433.75
	Text Coated: 80# Gloss - 12 x 18 (1 out 2 up) - ...	1,250			100.8000/M	126.00
	Copier: Copier - Blk & Wht	2,500	0:47		0.0381/Ea	95.25
	Cut: To FinSz 5 Cuts/Sheet	15	0:20	60.00	1.3333/Ea	20.00
	Outside: Embossing	2,500			0.0770/Ea	192.50

“Use Service Property”: Service Unit Price will be displayed according to the selection in the Service setup (property) window (Per M or Per Each). The selection “Total” will default to “Per Each”.

(In the examples shown: Paper is \$100.80/M parent size sheets, Embossing is \$0.077/Each finish size sheet, and Cutting is \$1.3333/Each lift.)

“Per Each (in 4 decimals)”: All Service Unit Prices will be displayed as “Per Each”.

“Per M (in 2 decimals)”: All Service Unit Prices will be displayed as “Per M”.

EMBOSSING SERVICE

Run Table			
QtyBreak	Units/Hour	Mat.Cost	Run Price
1000		50.00	
2000		90.00	
2500		110.00	

Mat.Costs and Run Prices are
Total

CUTTING SERVICE

Run Table			
QtyBreak	Units/Hour	Mat.Cost	Run Price
1	46.00		

Mat.Costs and Run Prices are
Per Each

PAPER SERVICE

Run Table			
QtyBreak	Units/Hour	Mat.Cost	Run Price
1	46.00		

Mat.Costs and Run Prices are
Per Each

Option Set the New Quote Status as

Click to assign a different status to a Quote on the Job window.

Assigning statuses to Quotes helps you follow up your Quotes efficiently and in a timely manner.

Option Change the Quote Status to 'Won' after converting it to an Order

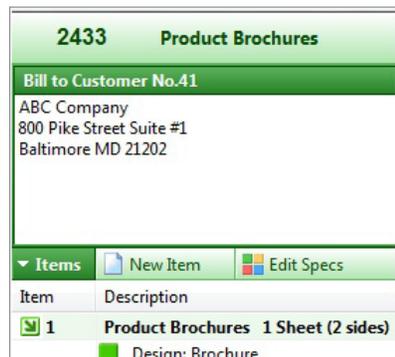
Selection "Yes":

Printer's Plan automatically changes the status of a Quote to Won after you convert the Quote to an Order.

Option When entering a new Job, set the Job Title to Item 1 description

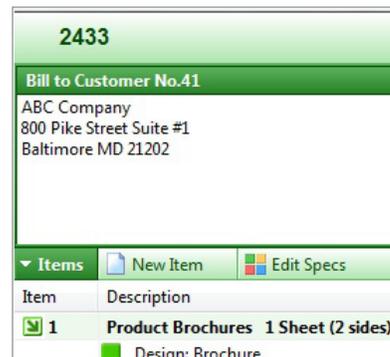
Selection "Yes":

The Description of the first Item is automatically copied to the Job Title field.



Selection "NO":

The Job Title field is left blank. You will need to enter the Job Title manually.

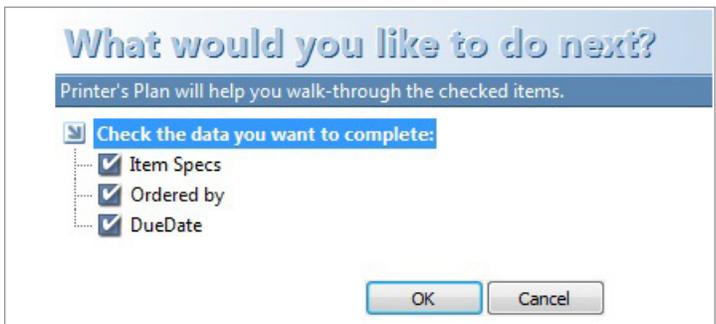


Option



Selection “Ask me what to do next”:

When you create a new Order or a Quote, or whenever you open a Job that is missing required data, Printer’s Plan asks which of the required data you want to enter (as shown below). Printer’s Plan then opens the appropriate windows for data entry. (See “Settings | Jobs | Data to Require” for more information about required data for Jobs.)



Option

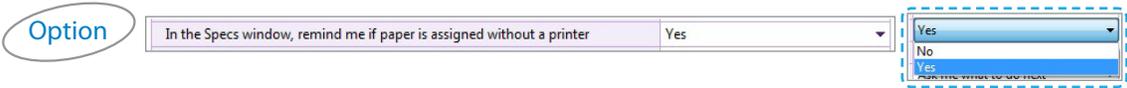


Selection “Yes”:

Job Note for Work Order/Estimate Detail	
Date Stamp	2/28/2013 02:23:32 PM: Customer wants at least 500 to be delivered asap. Rest can wait until next week.
Date + Time	2/28/2013 11:08:14 AM: Paper too difficult to feed. Perforator wasted too many sheets. Printing the job again. Will not meet the due date. Called customer.
Lisa	2/25/2013: Call customer as soon as the job is ready.

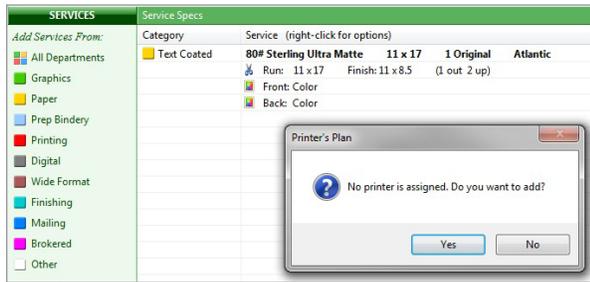
Selection “No”:

Job Note for Work Order/Estimate Detail	
Date Stamp	2/25/2013: Call customer as soon as the job is ready.
Date + Time	2/28/2013 11:08:14 AM: Paper too difficult to feed. Perforator wasted too many sheets. Printing the job again. Will not meet the due date. Called customer.
Lisa	2/28/2013 02:23:32 PM: Customer wants at least 500 to be delivered asap. Rest can wait until next week.



Selection “Yes”:

As you create an Item, if you forget to add a printer after adding a paper, Printer’s Plan reminds you to add a printer. If you click Yes, the Specs window remains open. If you click No, the Specs window closes and the Item is priced without a printer.



Selection “Open it in View/Edit mode”:

The Default Customer Service Representative (CSR) of the computer has full permissions to view and edit a Job written by another CSR.



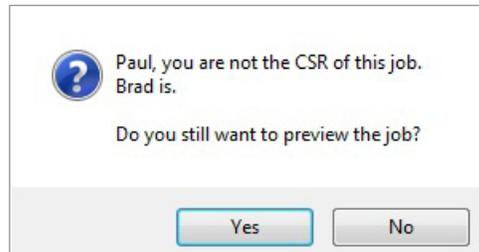
Selection “Open it in Preview mode (no editing)”:

The Default CSR can open and preview a Job written by another CSR, but cannot edit it.



Selection “Ask”:

For example, Printer’s Plan reminds the Default CSR (Paul) that he is not the CSR of the Job. The program allows Paul to preview the Job, but does not allow him to edit it.



Option After entering a deposit, add a payment note to the Memo field Yes

Selection "Yes":

Job Note	Memo to Customer	Job Totals	Total	Balance Due
	Payment \$50.00 Check 02/28/2013	Subtotal 110.71	Paid 116.25	-50.00
		Discount 0.00	Balance 66.25	
		Shipping 0.00		
		Postage 0.00		
		Taxable 110.71		
		Tax 5.54		
				Net 30 Days

Deposit payment towards an Order.

Option After printing/emailing invoice/quote, add date printed to job note Yes

Selection "Yes":

Job Note	Memo to Customer
02/28/2013 17:09 Invoice printed (#1)	

Option After creating an Order, set Due Date = Date In + ? days 7

Selection "0-9 days":

Printer's Plan automatically assigns a Due Date that is the selected number of calendar days after the Date In.

When

Job Title: Brochure

Received: 2/20/2013

Proof Due: 2/28/2013

Job Due: 2/27/2013

The Due Date assigned is 7 days after the Date In.

Selection "Do not set":

Printer's Plan does not assign a Due Date and lets you assign it manually.

Option After creating a job from scratch, add customer's default job notes Copy both

Selection "Copy both":

CUSTOMER SETUP WINDOW

New Job Alert	Work Order Note	Invoice Memo	Customer Note
	Deliver before 3 pm. Receiving closes at 3 pm.	Please see the red box at the bottom for the invoice balance.	

Work Order Note copies to Job Note and prints on Work Order.

Invoice Memo copies to Memo to Customer and prints on Invoice.

ORDER WINDOW

Job Note	Memo to Customer	Job Totals
Deliver before 3 pm. Receiving closes at 3 pm.	Please see the red box at the bottom for the invoice balance.	Subtotal Discount Shipping

Option Allow printing cost on work orders Yes

Print 1 copy of Work Order to HP LaserJet P1005

1 Select a Document:

For In-House:

- Work Order

For Customer:

- Invoice (Default)
- Order Receipt
- Delivery Ticket

2 Check Document Options:

Document Data

- Estimated (Chargeable) Time
- Estimated (Chargeable) Quantity
- '_____' (a line to write down 'Actual')
- Cost
- Price

Selection "Yes"

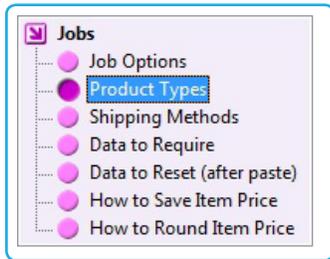
2 Check Document Options:

Document Data

- Estimated (Chargeable) Time
- Estimated (Chargeable) Quantity
- '_____' (a line to write down 'Actual')
- Price

Selection "No"

Jobs > Product Types



Product Types

Default Document Type and Default Quantity will be assigned to new Items. Limit: 100 Product Types. To Hide: Type ~ before text.

No	Product Name	Default Document Type	Default Quantity	Sort
0	?	Originals	1000	
1	Brochure	Sheets	1000	1
2	Business Card	Names	500	2
3	Wide Format	Originals	1	3
4	Pad	Sheets/Pad	100	4
5	Booklet	Sheets/Set	500	5
6	Letterhead	Sheets	1000	6
7	Envelope	Envelopes	1000	7
8	Invitation	Sheets	100	8
9	Newsletter	Sheets	1000	9
10	Guidebook	Sheets/Set	100	10
12	Form	Sheets	1000	11
11	Other	Sheets	1	12

You can categorize the products you sell into Product Types, such as Newsletter or Business Card. Using Product Types is not mandatory, but highly recommended. Product Types do not affect costs or prices; however, they are useful for job searches and reporting. (See the sample reports below.) Using Product Types also saves time and may reduce errors during job entry.

Sample Reports that use Product Types

These reports are available in the Reports section of Printer's Plan.

Profitability | Products Report

Product Name	Item Count	Cost \$	Price \$	Discount \$	Discount %	Discounted Price	% of TOTAL	Margin \$	Margin %
Brochure	31	27,082.92	32,924.45	-335.87	-1.0%	32,588.58	58.0%	5,505.66	16.9%
Form	8	10,065.22	11,829.68	0.00		11,829.68	21.1%	1,764.46	14.9%
Newsletter	3	3,131.93	3,784.62	-110.44	-2.9%	3,674.18	6.5%	542.25	14.8%
Business Card	8	2,167.04	2,664.76	0.00		2,664.76	4.7%	497.72	18.7%

Sales By | Customer + Product Report

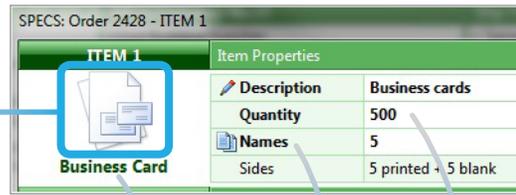
Customer	ProdTotal	Brochure	Business Card	Envelope	Form	Guidebook	Letterhead	Newsletter	Other	Pad
ABC Company	14011.42	11911.54	268.87	61.25		1769.76				
Abel Laboratories	3990.18	2465.91		364.49			1159.78			
Action Business Systems	10304.65	3825.25		299.32	4514.70			1575.88	89.50	

Using Product Types in Jobs

1 The Product Type for an Item is selected in the New Item window.



2 In the Specs window, the Product Type is automatically assigned as well as its default Quantity and default Document Type.

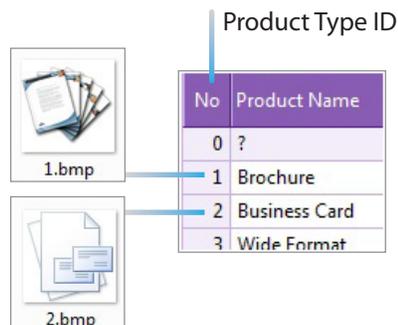


Product Type Images (optional):

You can assign an image to each Product Type. The image is displayed on the Item Specs page for clarity.

The Product Type images are located in the "Products" sub-folder just below the location that contains your Printer's Plan database (PlanData.mdb) on your server. If the Products sub-folder does not exist, create it in that location and name it Products.

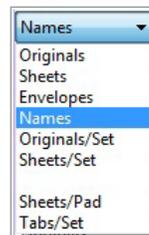
Product images must be 64 x 64 pixels and saved in bmp file format (*.bmp). The file name of each image must be the corresponding ID number in the Product Types window.



No	Product Name	Default Document Type	Default Quantity	Sort
0	?	Originals	1000	
1	Brochure	Originals	1000	1
2	Business Card	Names	500	2
3	Wide Format	Originals	1000	3

Default Document Type (optional):

Specifying a default Document Type for each Product Type saves time and reduces errors. If you need to change it in the Specs window, click it to select another one from the list.

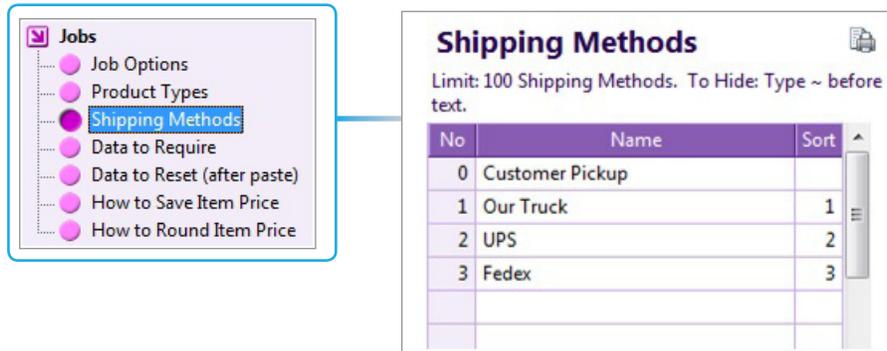


Default Quantity (optional):

Enter the quantity that is ordered most frequently for the Product Type. It will be assigned to the Item with the Product Type, but can be edited.

NOTE: If you think your staff may forget to validate the Quantity as they enter the specifications of a job, do not assign Default Quantity to Product Types. Then Printer's Plan will prompt the user each time.

Jobs > Shipping Methods

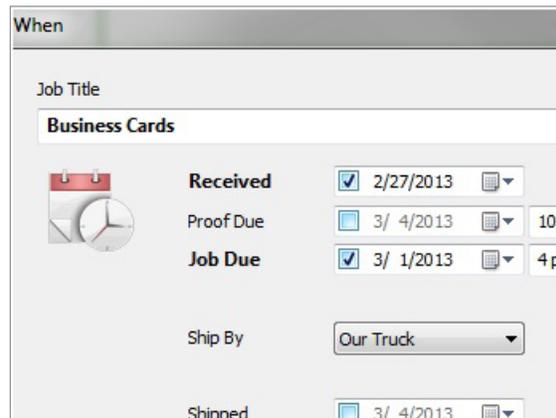


In the setup window of each customer, you can assign a default Shipping Method.



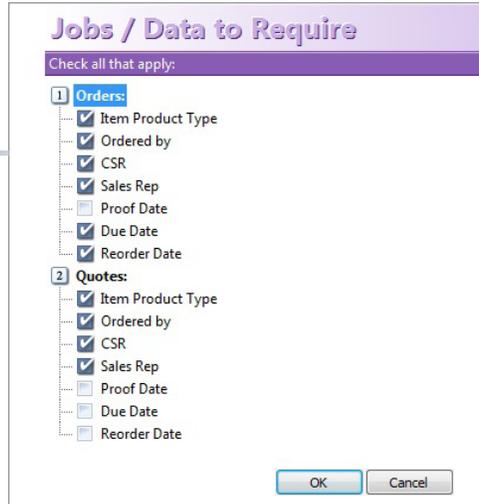
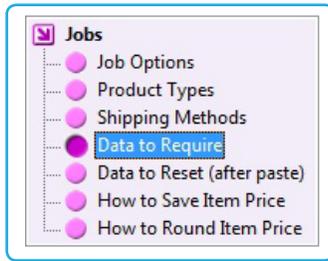
Customers | Customer Window

The default Shipping Method will be assigned to all new Orders/Quotes created for the Customer. It can be edited for each Order/Quote in the When window of the Job.



Jobs | Order/Quote | When Window

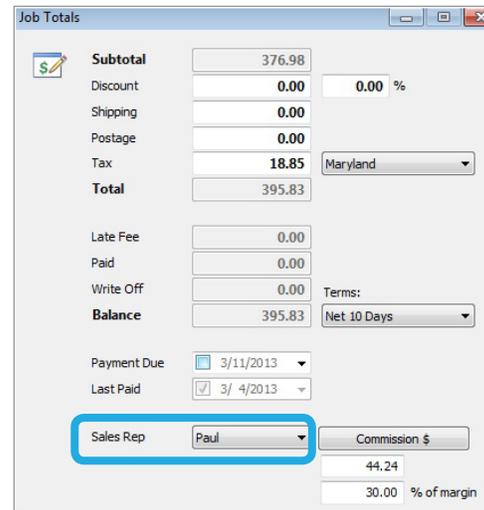
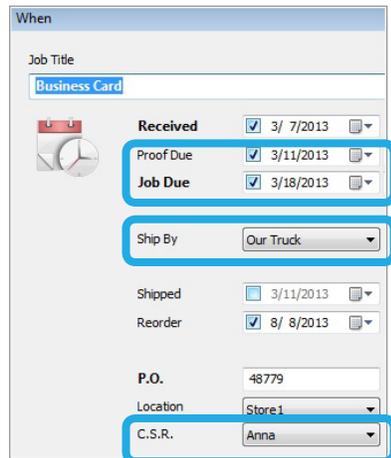
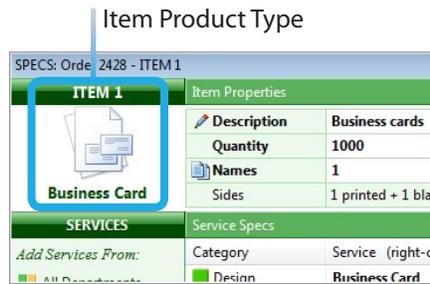
Jobs > Data to Require



All Orders and Quotes require a Job Title and Item Description.

In the "Data to Require" window, you can select additional job specifications ("specs") for Printer's Plan to require on Orders and Quotes.

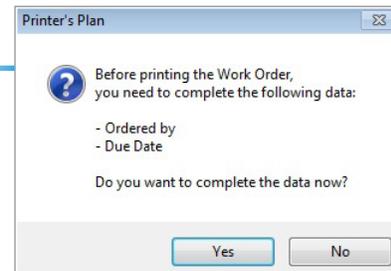
Locations of the specs data listed above



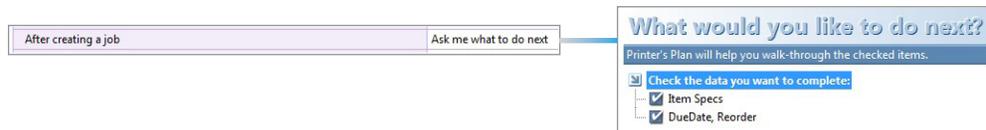
NOTES:

- If required data is missing on an Order or a Quote, Printer's Plan prevents you from previewing or printing a Work Order, Invoice, Quotation, or Estimate Detail by informing you with a popup message to provide the missing data first.

(If you select No in this window, Printer's Plan will display it again when you attempt to print a document.)

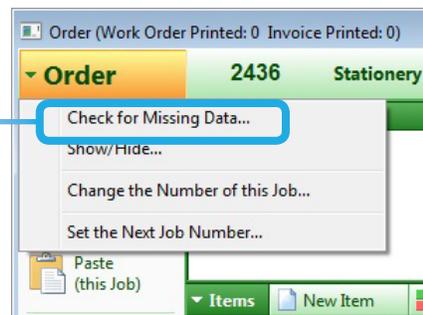


- If you set the following option as shown in Settings | Jobs | Job Options,

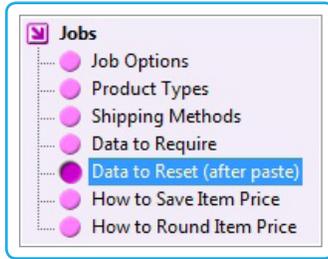


then Printer's Plan helps you remember to enter the required data when you are creating an Order or a Quote by displaying the window shown.

- After you select which data to complete, Printer's Plan then sequentially opens the appropriate windows to allow you to enter the data.
- To check for missing required data in an open Order or a Quote, select "Check for Missing Data..." from the Job menu.

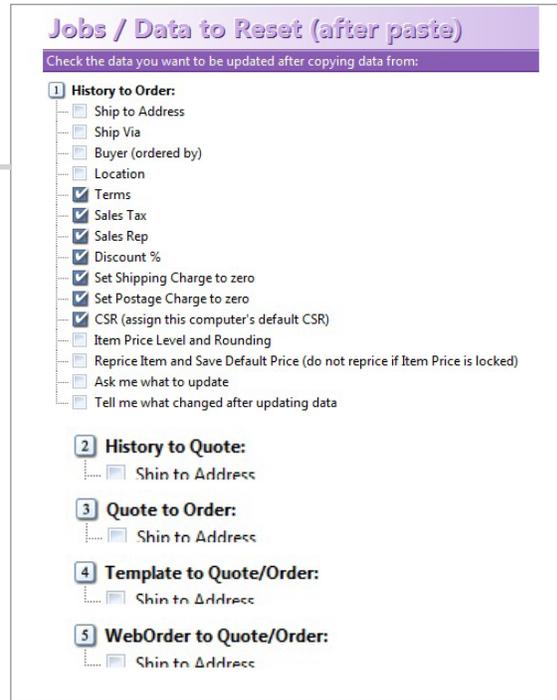


Jobs > Data to Reset (after paste)

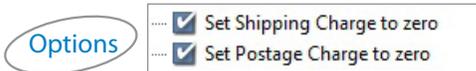


When you copy and paste an existing Job to a new one, such as copying from an existing History Job to a new Order, Printer's Plan also copies the original Job's data to the new Job.

In the "Data to Reset" window, however, you do have the opportunity, to specify which copied data should be replaced with current default data in new Jobs by selecting and de-selecting options for the various original and new Job combinations.

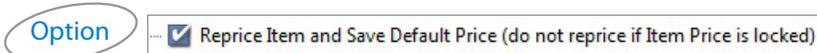


Following are some of the options on the list that are frequently overlooked by users.



When one or both of these options are selected, shipping and/or postage charges will be set to zero in the new Job despite any nonzero values that were present in the original Job.

Subtotal	1251.84
Discount	0.00
Shipping	45.00
Postage	1395.00
Tax	62.50 M



If you select this option, Printer's Plan will re-price the new Item (or the Items in the new Job) with the current default values automatically unless the price was locked in the original Item.

The current default price may be different from the price on the original Item because:

- The cost/price of one or more Services in the Item may have been changed since the date of the original Item,
- The price of the original Item was edited before the Order was invoiced.

Option Ask me what to update

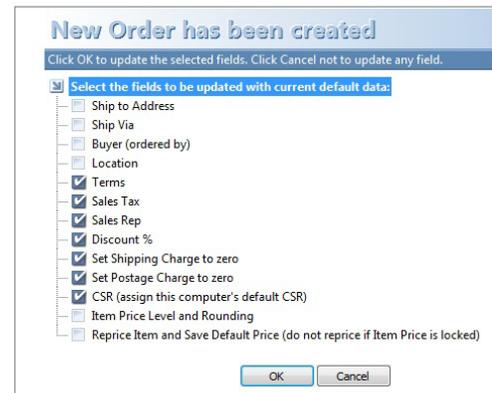
If you select this option, Printer's Plan displays a window in the new Job listing the options you may want to update.

EXAMPLE:

Assume the options in the "History to Order" section of the "Data to Reset (after paste)" window are selected as follows:



Then, Printer's Plan displays the following window (the same list) after you copy and paste a History Job into an Order for you to select and deselect the desired options for the specific Order.



Option Tell me what changed after updating data

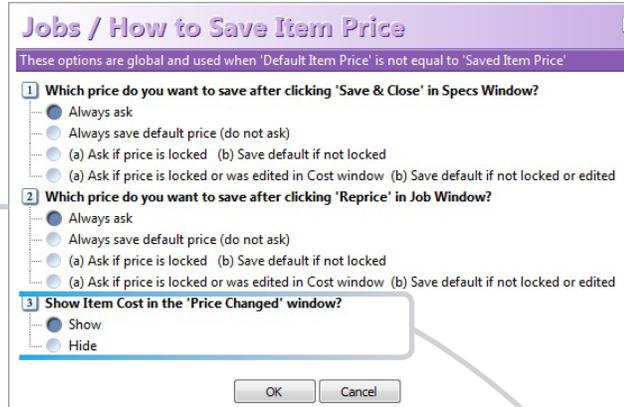
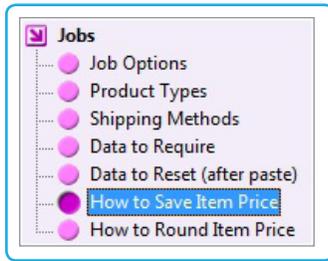
If you select this option, Printer's Plan displays a window in the new Job listing all the data that changed.

EXAMPLE:

After copying and pasting a History Job into an Order:



Jobs > How to Save Item Price



The options in this window tell Printer's Plan what to do when one of the following conditions takes place:

- a) In the Specs window, you make changes that affect the cost/price of the Item,
- b) After the cost/price of the Item has been edited in the Costs window, you make a change in the Specs window that may or may not affect the cost/price,
- c) After the cost/price of the Item has been edited in the Costs window, you click the **Reprice** button.

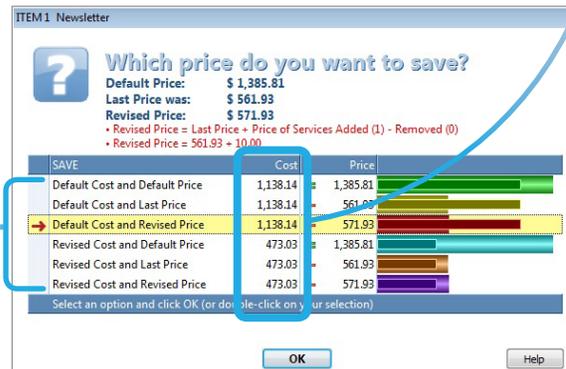
Options:

- **Always ask**
You will see the window below - with some or all of the options shown, depending on the changes – so you can choose which cost/price you want to save.
- **Always save default...**
The default cost/price will be saved automatically. The window below will not appear.
- **(a) Ask if price is locked (b) Save...**
If the Item price is locked, you will see the window below. Otherwise, the default cost/price will be saved automatically.
- **(a) Ask if price is locked or was edited...**
If the Item price is locked or the Item cost/price was edited in the Costs window, you will see the window below. Otherwise, the default cost/price will be saved automatically.

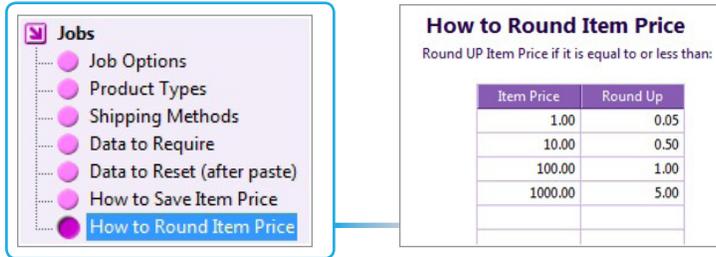
Default cost/price: Item cost/price calculated using the values assigned during the setup of the Services used by the Item.

Last cost/price: Item cost/price after default cost(s)/price(s) was (were) edited in the Costs window.

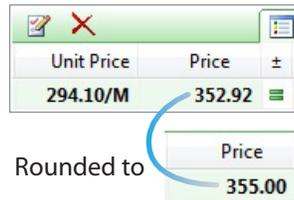
Revised cost/price: Last Item cost/price + cost(s)/price(s) of Services added to the Item.



Jobs > How to Round Item Price



Use the Rounding Table to round Item prices up to a nearest specified number.



The following explains the use of the “How to Round Item Price” table:

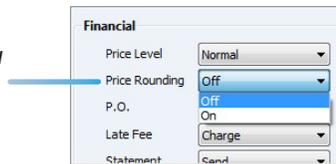
If calculated price is (\$)	It will be rounded up to the nearest (\$)
0 – 1.00	0.05
1.01 – 10.00	0.50
10.01 – 100.00	1.00
100.01 – 1000.00	5.00
Greater than 1000.00	5.00

EXAMPLES:

Original price (\$)	Rounded price (\$)
0.83	0.85
6.02	6.50
46.14	47.00
371.73	375.00
108383	108500

NOTE: Once you set up the Rounding table, Item price rounding is on. However:

In the setup window of each customer, you can turn price rounding on or off by default for all future Orders/Quotes.



Customer window

You can also turn the price rounding on/off for a specific Item in the Item Specs window.



Item Specs window

Customers

You can set up your Customers and Contacts in the Customers section of Printer's Plan. (See the "Customers" chapter.)

Some fields of the customer and contact setup windows offer drop-down lists of options for selection. These lists must be initialized first via the appropriate tables under Customers in the Settings section.

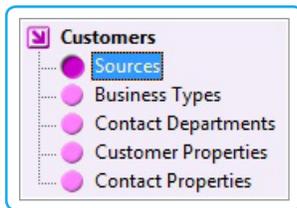


Customer setup window



Contact setup window

Customers > Sources



The screenshot shows the 'Sources' window with a limit of 100 sources. The list is as follows:

No	Name	Sort
0	unassigned	
1	Sales Call	1
2	Referral	2
3	Internet	3
4	Newsletter	4
5	Other	5

A customer source is the method by which you gained this customer's business.

Printer's Plan offers sales reports categorized by customer sources as shown. (See the "Reports" chapter.)

The screenshot shows a sales report titled 'Sales by / Customer Source: 3 (PostingDate between 1/1/2013 and ...)'. The data is as follows:

Name	Subtotal	Discount	NetSale
Sales Call	19926.55	0.00	19926.55
Referral	11152.11	0.00	11152.11
Internet	10511.49	0.00	10511.49

Additionally you can include customer source as one of the filters (*Customers.Source* in Advanced Find) when you create searches for customers and Jobs.

Customers > Business Types

Business Types
Limit: 100 Business Types. To Hide: Type ~ before text.

No.	Name	Sort
0	unassigned	
1	Accounting	1
2	Advertising	2
3	Banking	3
4	Contracting	4
5	Software	5
6	Education	6
7	Government	7
8	Broker	8
9	Insurance	9
10	Legal	10

A business type defines the nature of a customer's business.

Printer's Plan offers sales reports categorized by customer business types as shown. (See the "Reports" chapter.)

▼ Sales by / Business Type: 8 (PostingDate between 1/1/2012 and 1/1/2012)

Name	Subtotal	Discount	NetSale
Manufacturing	24316.07	-289.65	24026.42
Medical	8945.23	0.00	8945.23
Retail	7800.91	-110.44	7690.47
Insurance	4772.52	0.00	4772.52

Additionally you can include customer business type as one of the filters (`Customers.Business` in Advanced Find) when you create searches for customers and Jobs.

Customers > Contact Departments

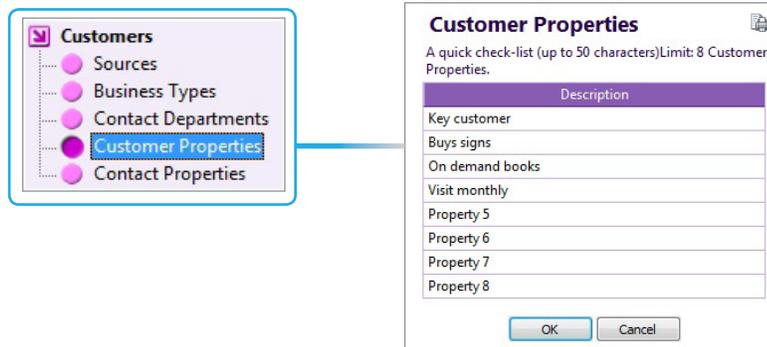
Contact Departments
Limit: 100 Contact Departments. To Hide: Type ~ before text.

No.	Name	Sort
0	Unassigned	
1	Accounting	
2	Accounts Receivable	
3	Accounts Payable	
4	Administration	
5	Advertising	
6	Collections	
7	Communications	
8	Consulting	
9	Customer Service	

A contact department identifies where in a company a contact works.

You can include contact department as one of the filters (`Contacts.Department` in Advanced Find) when you create searches for customers, contacts, and Jobs.

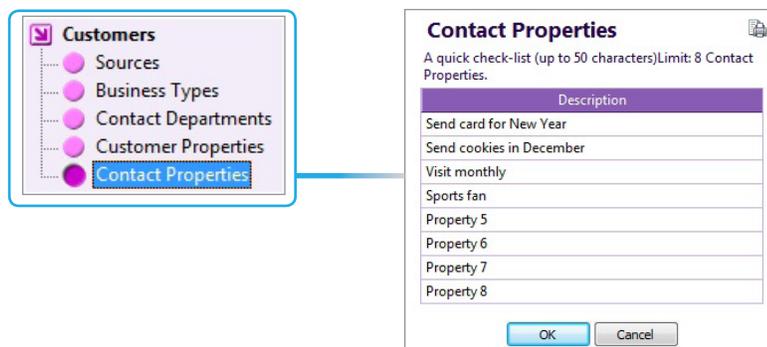
Customers > Customer Properties



EXAMPLE: You want to know which customers need a monthly visit and also buy signs, so you can take, on this visit, the memo pads that promote your new sign services. To create such a list, you should search the customers with the Advanced Find feature using two filters – “Buys signs” and “Visit monthly”.

(To learn how to search customers by their properties, see “Finding Customers and Contacts by User-Defined Properties” in the “Customers” chapter.)

Customers > Contact Properties

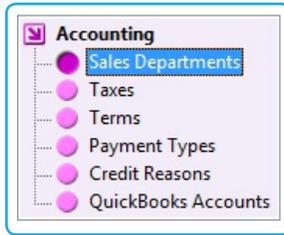


EXAMPLE: You want to know which contacts need a monthly visit and also are sports fans, so you can take, on this visit, the memo pads that have a baseball image. To create such a list, you search the contacts with the Advanced Find feature using two filters – “Visit monthly” and “Sports fan”.

(To learn how to search contacts by their properties, see “Finding Customers and Contacts by User-Defined Properties” in the “Customers” chapter.)

Accounting

Accounting > Sales Departments



A screenshot of the Sales Departments list. The 'Group' column is highlighted with a blue box. The list shows various departments and their assigned group numbers.

No	Department ID and Name	Group
0	?	
1	Graphics	1
5	Digital - B&W	2
6	Digital - Color	2
7	Wide Format	2
4	Offset	3
2	Plate	3
3	Paper	4
8	Finishing	5
9	Mailing	6
10	Broker	7
11	Misc	8

Sales Departments are used to group Services for sales reports.

When you set up Services, you will assign a Sales Department to each one. The sales for each Service are reported under the assigned Sales Department, as shown in the report below. Therefore, when you set up your Sales Departments, consider how you want to see your sales itemized.

The numbers in the **Group** column have two functions:

- 1) You can group multiple Sales Departments together. The Sales Department reports (see sample below) show totals for each group as well as for each Department. To group Sales Departments, assign the same group number to each member of the group.
- 2) Printer's Plan also uses the group numbers to indicate the sort order for lists and in reports.

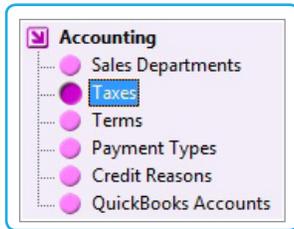
Profitability / Sales Departments

Sales Group	Department Name	Service Count	Cost \$	Price \$	Discount \$	Discount %	Discounted Price	% of TOTAL	Margin \$	Margin %
1	Graphics	25	9,019.87	11,622.24	-30.25	-0.3%	11,591.99	3.7%	2,572.12	22.2%
		25	9,019.87	11,622.24	-30.25	-0.3%	11,591.99	3.7%	2,572.12	22.2%
2	Digital - B&W	8	4,528.78	8,656.54	0.00		8,656.54	2.7%	4,127.76	47.7%
	Digital - B&W QS	2	32.50	32.50	0.00		32.50	0.0%	0.00	
	Digital - Color	5	130,394.91	195,618.24	0.00		195,618.24	62.0%	65,223.33	33.3%
		15	134,956.19	204,307.28	0.00		204,307.28	64.7%	69,351.09	33.9%
3	Offset	74	39,858.90	47,214.78	-206.33	-0.6%	46,918.45	14.9%	7,059.55	15.0%

Sample Sales Departments Report

QuickBooks™ users: If you use the Export tool to export data for QuickBooks, the names of your Sales Departments must match the names of your QuickBooks income accounts exactly. (See the "Exporting Data for QuickBooks" document for more information.)

Accounting > Taxes



Taxes
Limit: 250 Taxes. To Hide: Type ~ before text.

No	Name	Rate (%)	Tax Shipping?	Tax Postage?	Round Tax Up?	Sort	Type
0	Exempt		No	No	No		
1	Maryland	5.0000	No	No	Yes	1	

Sample Tax Table: One Sales Tax Jurisdiction

Taxes
Limit: 250 Taxes. To Hide: Type ~ before text.

No	Name	Rate (%)	Tax Shipping?	Tax Postage?	Round Tax Up?	Sort	Type
0	Exempt		No	No	No		
1	No Tax/ Out of state		No	No	No	1	
2	Butler County/BUTCO	6.5500	Yes	No	No	2	
3	Douglas County/DOUCO	7.3000	Yes	No	No	3	
4	Greenwood County/GRW	7.3000	Yes	No	No	4	
5	Harney County/HAYCO	8.3000	Yes	No	No	5	

Sample Tax Table: Several Sales Tax Jurisdiction

The Type column is intended for future use by Printer's Plan and can be ignored.

Set up the Taxes table with the name(s) of the sales tax jurisdictions and the tax rate for each one.

You can assign a default jurisdiction to each customer in the customer setup window. The tax for a specific Job can be edited in the Job's Totals window.

Tax Shipping and Postage: Select Yes or No for each jurisdiction.

Round Tax Up? Select Yes to let Printer's Plan round the tax up to the next whole cent. If you select No, the tax will be rounded up only if the fraction of the tax is 0.5 cent and higher.

IMPORTANT:

After you change a tax rate in this table:

- *The new rate will be applied to Orders going forward. Existing Orders/Quotes will not be updated with the new rate. To update existing Jobs with the new rate, you must open the Totals window for each Job and re-select the tax from the drop-down list.*
- *Go to Settings | Jobs | Data to Reset (after paste). Select "Sales Tax" for each Job type. Then, when you copy and paste a History Job into a new Order/Quote, the tax will be automatically updated with the new rate.*

Businesses in Canada

Set up the Tax table similar to the following:

Taxes						
Limit: 250 Taxes. To Hide: Type ~ before text.						
No	Name	Rate (%)	Tax Shipping?	Tax Postage?	Round Tax Up?	Sort
0	Exempt		No	No	No	
1	GST	5.0000	No	No	No	1
2	PST	8.0000	No	No	No	2
3	GST + PST	13.0000	No	No	No	3
4	HST	13.0000	Yes	Yes	Yes	4
5	Manitoba	5.0000	Yes	Yes	No	5

Even if GST and PST do not apply to any of your sales, leave rows #1, #2, and #3 as they are, and set up any additional tax jurisdictions starting with row #4.

Explanation for rows 1 – 3:

Printer's Plan calculates the total tax at the rate assigned to row #3 (named GST + PST in the above table). On the invoice, taxes in rows 1 and 2 are displayed separately, the amount for each calculated at the rate assigned to that row, as shown below:

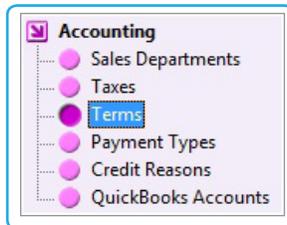
GST \$27.24, PST \$43.59		
Postage	Tax	Total
0.00	70.83	615.66
s invoice		

IMPORTANT:

(Numbers in parentheses are examples and match the entries in the above table.)

- The rate assigned to row #3 (13%) must equal the sum of the rates in rows #1 (5%) and #2 (8%).
- You can enter any text for the name in row #3, such as "Both" or "GST & PST" (as above).

Accounting > Terms



Terms		
Terms 0 and 4 have special features. Limit: 10 Terms. To Hide: Type ~ before text.		
No	Name	Net Days
0	C.O.D.	
1	Net 30 Days	30
2	Due Upon Receipt	2
3	Net 15 days	15
4	Net 10th of Month	

Set up the payment terms you offer to your customers in this window.

You assign default payment terms in the setup window of a particular customer. Edit the terms in the Totals window for a specific Job.

The "Name" field is text and does not have an effect in calculations.

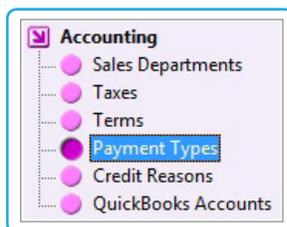
"Net days" is the number of days from the invoice date after which, the invoice will be past due.

#0 (C.O.D.) and #4 (Net 10th of Month) are not editable because they have special properties:

- If **C.O.D.** is assigned to an Order, Printer's Plan automatically displays a Deposit window popup when the Order is created so you can enter a payment.
- If **Net 10th of Month** is assigned to an Order: The invoice becomes past due after the 10th of the following month. (Note: Currently, Printer's Plan does not use the Net Days column value of row 4, so you may disregard any value that may appear in this cell.)

NOTE: Printer's Plan does not apply % discounts for early payments.

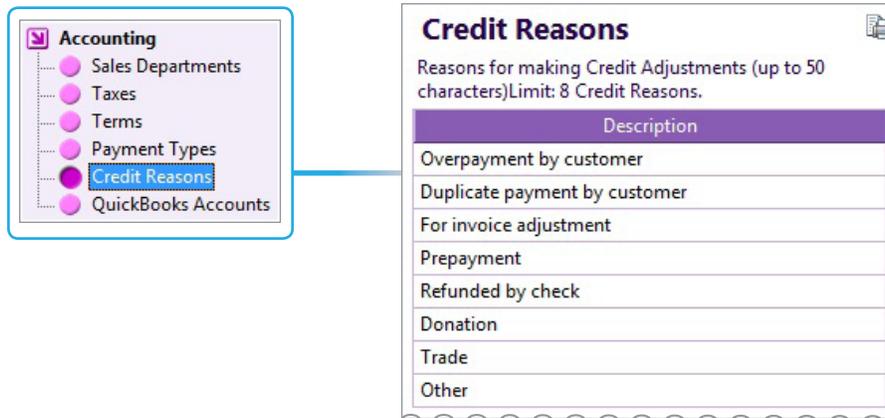
Accounting > Payment Types



Payment Types			
Limit: 16 Payment Types. To Hide: Type ~ before text.			
No	Name	Type	Sort
0	Cash		
1	Check		1
2	Visa		2
3	MC		3
4	AMEX		4
5	Discover		5
6	Credit Used		6
7	Other		7

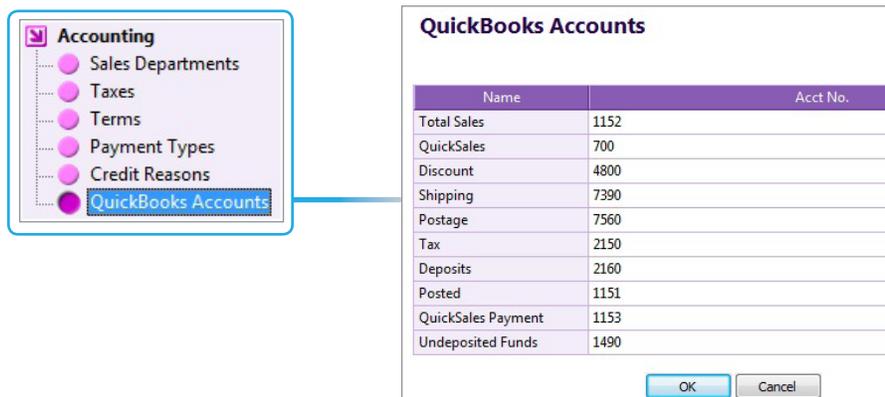
You assign a payment type from this list when you apply a payment to an Invoice.

Accounting > Credit Reasons



When you enter a credit to a customer's account, you will select a reason from this list. Credit reasons are solely for internal use by your business and provide a means to record additional information for future reference.

Accounting > QuickBooks Accounts

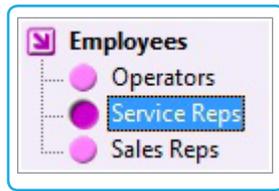


You need to set up this table only if you are going to use the Export tool to export data from Printer's Plan for QuickBooks.

To learn more about setting up this table, please refer to the "Export for QuickBooks" guide.

Employees

Employees > Operators, Service Reps, Sales Reps



Operators

Limit: 100 Operators. To Hide: Type ~ before text.

No	Name	Sort
0	?	
1	Tim	1
2	Anna	2
3	Dave	3
4	Melissa	4

Operators are used only with the Scheduler and TimeTracker tools.

To learn more about Operators, please refer to the user's guides for these tools.

Service Reps

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

No	Name	Sort
101	Lisa	1
102	Justin	2
103	Caitlin	3

Service Representatives (CSR) enter Quotes and Orders. Each Quote and Order has a field in its When window where a CSR can be assigned.

(See the Jobs chapter to learn how to assign a default CSR to a workstation.)

A default Sales Representative is assigned in the setup window of each customer. This Sales Rep is automatically assigned to a Job created for the customer.

The Sales Rep assigned to a specific Job can be edited in the Totals window of the Job.

Printer's Plan generates commission reports in the Reports section.

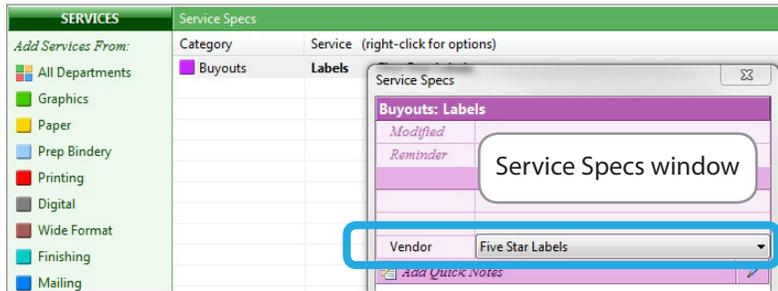
Sales Reps

Limit: 55 Sales Reps. To Hide: Type ~ before text.

No	Name	Sort	Comm%	of
201	Jim	1	10.00	Net Sale
202	Paul	2	30.00	Margin

Vendors

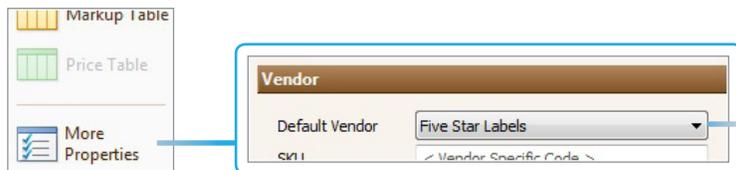
If a Service is a product you buy from a vendor, you can assign the vendor name when you add the Service to an Item. The vendor name prints along with the Service name on the work order.



To assign a vendor to this Service, click the arrow and select from the drop-down list.

Jobs | Job Window | Item Specs Window

If you buy a product from the same vendor most or all of the time, you can assign the vendor to be the default for the Service. A default vendor can be assigned in the "More Properties" section of the Service setup window.



Click to assign the default vendor.

Service Setup Window

More Service Properties Window

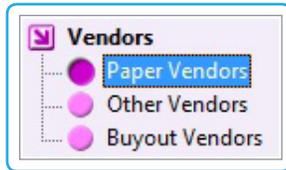
Setting Up Vendors

In Printer's Plan, vendors are grouped into three categories. Each category has one table, and each table allows for up to 100 vendor entries, with one row for each vendor.

No	Vendor Name	Contact Name	Phone	Fax	Email	Terms	Address	Sort
201	Five Star Labels	Mike Smith	410-456-7890 x 34567	410-4560987	mike@fivestarlabs.com	Net 30 days	123 Main St. Baltimore, MD 212...	201
202	Charm City Finishing	Amy Dawson	410-206-5647	410-206-3244	amy@charmsake.com	Net 10 days	80 Allston St. Baltimore, MD 21...	202

Jobs | Job Window | Item Specs Window

Vendors > Paper Vendors



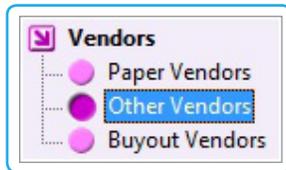
“Paper” vendors are available only to Services (Papers) set up in the Paper category. Similarly, vendors from the other two categories are not available to Papers.

Paper vendor rows 0 through 5 are disabled because they have special properties. *(To learn how the options in rows 1 through 5 are used, please see the “Jobs” chapter.)*

Paper Vendors
Please click Help to learn more.
Limit: 100 Paper Vendors. To Hide: Type ~ before text.

No	Vendor Name	Contact Name
0		
1	Our Stock	
2	Our Stock (Scrap)	
3	Customer Stock (Charge)	
4	Customer Stock (No Charge)	
5	Imprint (No Charge)	
6	Chesapeake Papers	Angela Hopkins
7	Atlantic Paper	Chris Lennon
8	Russell Paper	Ahmed Torun

Vendors > Other Vendors

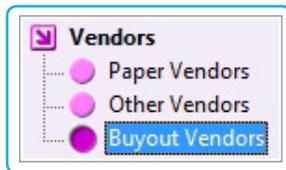


“Other” vendors are available to Services that are set up in categories other than the Paper category and Category #502.

Other Vendors
Limit: 100 Other Vendors. To Hide: Type ~ before text.

No	Vendor Name	Contact Name
101	Ontime Mailing Services	Alex Parkton
102	Amazing Designs	Michael Guilin

Vendors > Buyout Vendors



“Buyout” vendors are available only to Services set up in Category #502.

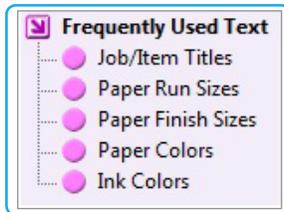
(Category #502 was the original “Buyout” category in Printer’s Plan. It has been preserved for backward compatibility.)

Contact Properties
A quick check-list (up to 50 characters)Limit: 8 Contact Properties.

Description
Send card for New Year
Send cookies in December
Visit monthly
Sports fan
Property 5
Property 6
Property 7
Property 8

OK Cancel

Frequently Used Text



Some of the descriptive information in Printer's Plan that you use frequently can be pre-set and made available for selection when you need it. This section allows you to set up such information.

Jobs | Items Specs Windows

Job/Item Titles
Limit: 32 Job/Item Titles. To Delete: Clear text. Maximum text 50 characters.

Job/Item Titles	Sort
Marketing Brochures	1
Product Guides	2
Poster	3

Paper Colors
Limit: 32 Paper Colors. To Delete: Clear text. Maximum text 50 characters.

Paper Colors	Sort
White	1
Bright white	2
	3
	4
	5

Paper Run Sizes
Limit: 32 Paper Run Sizes. To Delete: Clear text. Maximum text 50 characters.

Paper Run Sizes	Sort
12 x 18	1
11 x 17	2
11.5 x 17.5	
17.5 x 22.5	
8.5 x 11	

Paper Finish Sizes
Limit: 32 Paper Finish Sizes. To Delete: Clear text. Maximum text 50 characters.

Paper Finish Sizes	Sort
8.5 x 11	1
	2
	3
	4
	5
	6

Ink Colors
Limit: 32 Ink Colors. To Delete: Clear text. Maximum text 50 characters.

Ink Colors	Sort
CMYK	1
Reflex Blue	2
PMS 294	3
PMS 440, 216	4
PMS 172	5

Item Properties
Description: Marketing Brochures

When

Job Title: Marketing Brochures

Received: 4/ 5/2013

Proof Due: 4/ 5/2013

Job Due: 4/11/2013

Paper Specs for Offset Printing

Text Coated: 80# Sterling Gloss 12 x 18 Replace

Modified: 07/16/2010

Reminder

In Stock

How many?

Sheets: 1

Paper Color: Soft white

Paper Vendor: Atlantic Paper

Sizes (1 Out x 2 Up = 2)

Parent Size: 12 x 18

Run Size: 12 x 18

Finish Size: 11 x 8.5

Side

Front: 2 Colors

Back: PMS 440, 216

Note the following properties that differentiate the above tables from the previous ones, such as Vendors and Employees:

- The items of the following tables are not numbered (no "No" column). Therefore, you can edit or delete an item in these tables without any impact on existing jobs.
- When you select an item from one of the corresponding lists in a Job, you can edit the selected text or overwrite it.
- The dimensions in all paper sizes must be separated by an "x" (lower or upper case).

Some of the descriptive information in Printer's Plan that you use frequently can be pre-set and made available for selection when you need it. This section allows you to set up such information.