PRINTREACH

Printer's Plan
MIS for Printers

New 2020.5 Version

What's New and Improved

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Integrated Credit Card Processing

At Print Reach we have partnered with CardConnect to provide an integrated credit card processing solution. Because of our growing ecosystem, and the increasing amount of customers that we serve, Print Reach was able to negotiate with CardConnect to provide competitive transaction rates.

To use this feature you will need a CardConnect merchant account. For information about obtaining this account please visit the following link: https://cardconnect.com/signup/printreach or contact CardConnect at (877) 948-9733.

Once enabled, the Printer's Plan - CardConnect integration allows you to enter credit card payments directly into Printer's Plan giving you a single point of data entry. These payments are then automatically processed by CardConnect. Additionally, an email message with a payment link can be generated from Printer's Plan allowing the customer to pay for an invoice online. Transactions entered using this integration are PCI compliant, because Printer's Plan does not store any of the credit card data.

For a comprehensive explanation of this feature please view the following guide: CardConnect Integration Guide

Customers - New Default Payment Type

In the properties window of a customer account there is a new field called **Paid By.** In this field you can select the default payment type for the customer account:

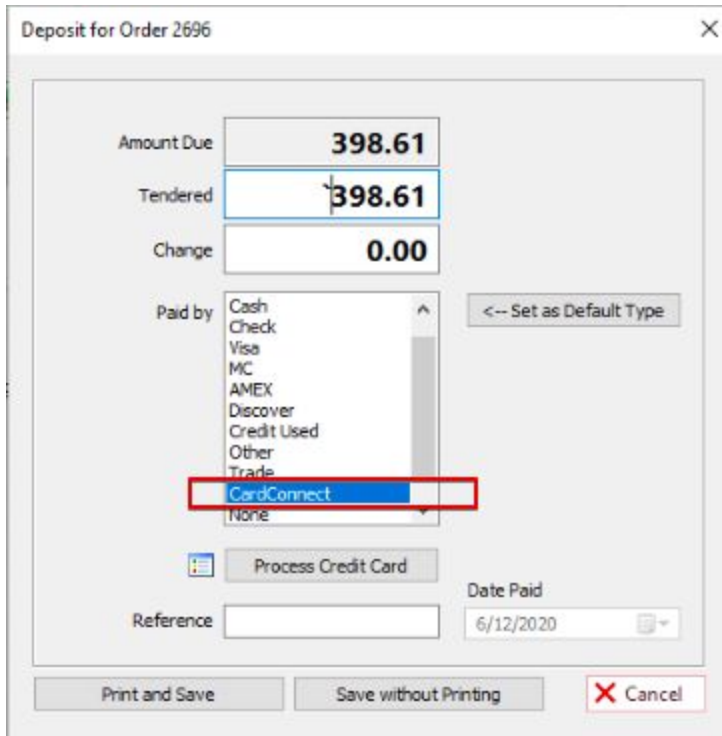When entering a new payment for the customer, the value in the **Paid By** will be set as the default payment type in the Payment window:
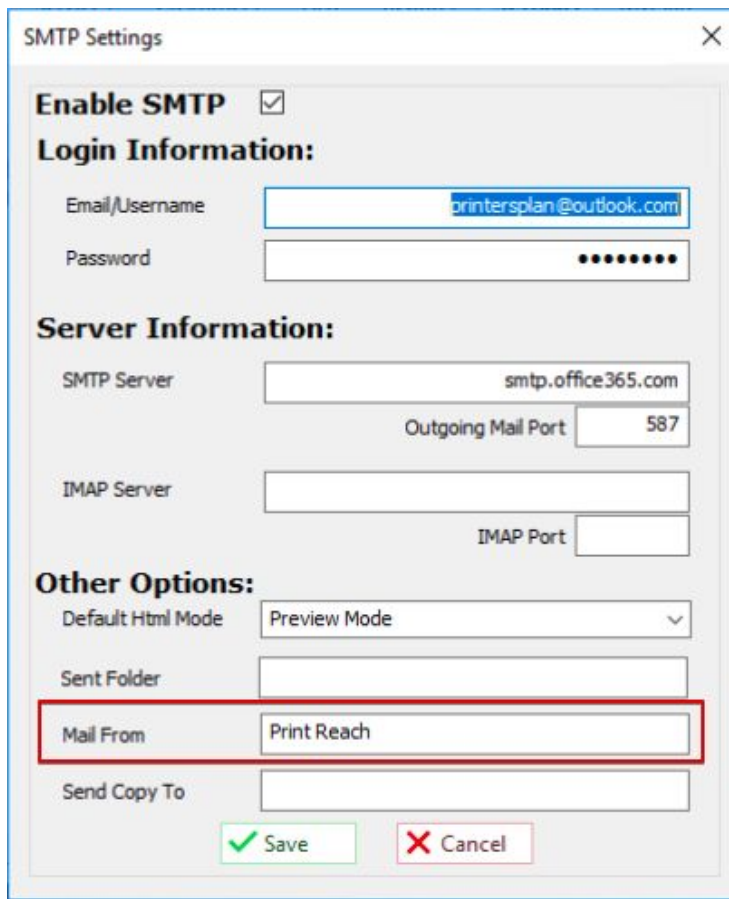
If the customer's **Paid By** field is set to a value of **None**, when entering a new payment the Paid By field will default to the Payment window's default value.
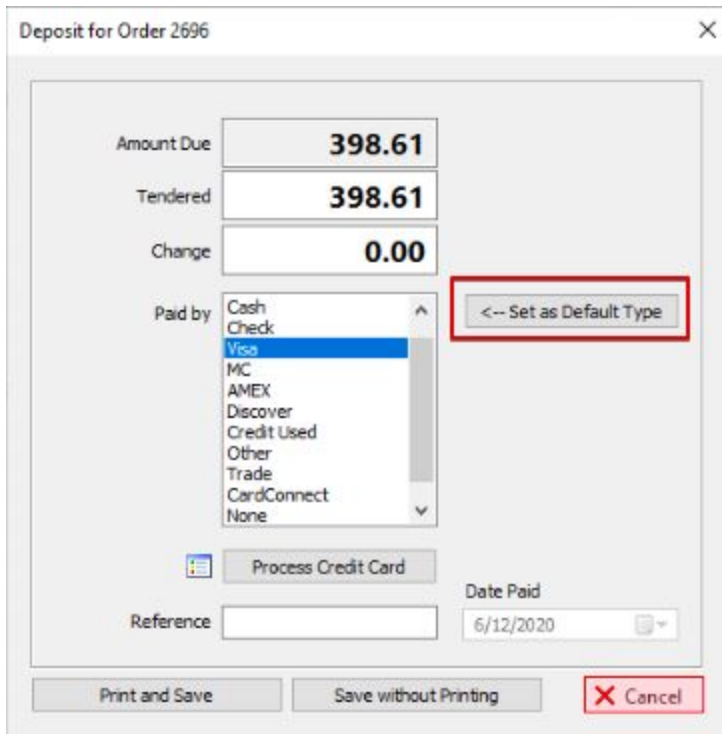
Email: SMTP Changes and Improvements

Customizable *From* Field Value

In the Printer's Plan SMTP client you can set the value of the **From** field for an email message. To set this value go to the **Settings/General Settings/SMTP Settings** window:

The value entered in the **Mail From** field will display in the **From** field of the email message:
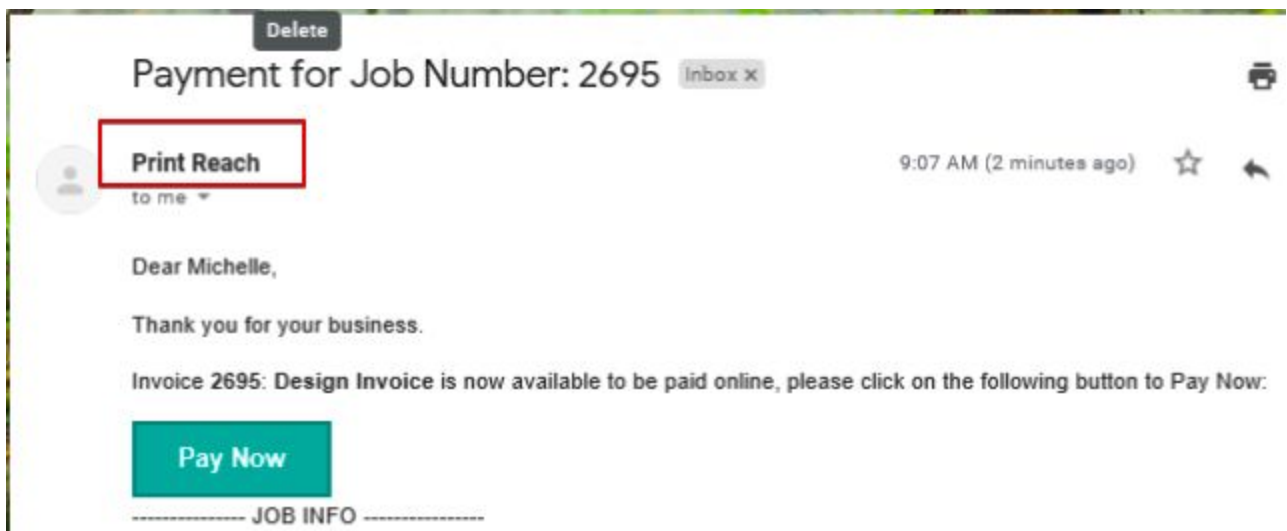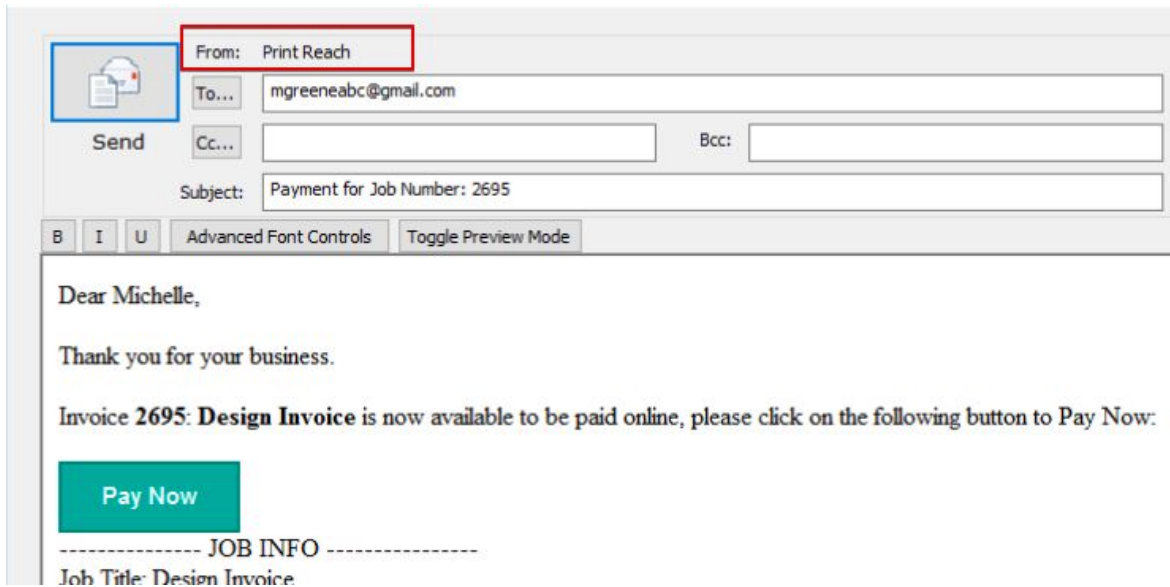
Multiple Email Addresses in the To Field

When sending an email message you can enter more than one email address in the **To** field. Each email address entered in this field needs to be separated by a semicolon (**;**) character.
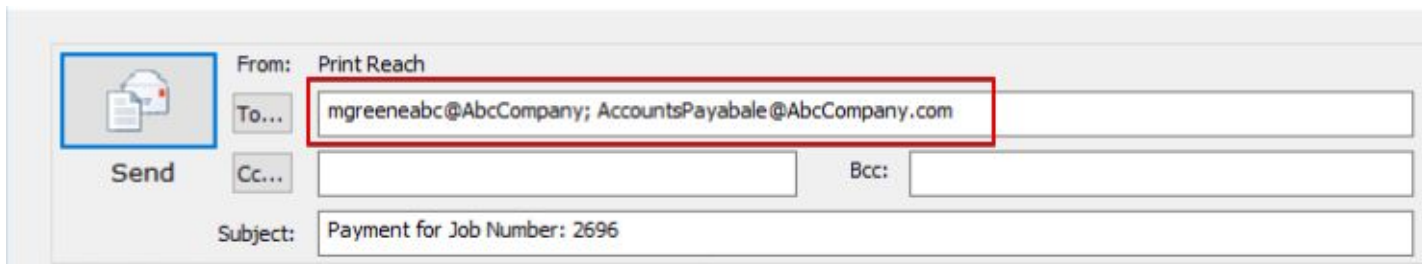
TIP: You can enter more than one address in the email field of a contact record provided the email addresses entered in this field are separated by a semicolon (;). When sending an email to this contact, the **To** field of the email message will automatically populate with both email addresses.

Program Fixes and Improvements

Large Format

- On large format jobs if the **Document Size** field had a width value of less than 1 inch the program crashed. This is now fixed.
- In some instances, large format paneling jobs that used both a roll material and flat material on the same item caused a calculation discrepancy for the print area. This is now fixed.

Intelligent Documents

- If the path of an attached document contained a special character, such as an apostrophe, opening the Documents window produced an error message. This is now fixed.
- When a Purchase Order document was manually attached to an item, if this job was copied as a new job, the item retained the attached Purchase Order document. This is now fixed and the manually attached Purchase Order document will not be retained when a job is copied.

Work Order

- When printing the Work Order document, if the **Print Vendor info** option is checked, Printer's Plan will now print the **SKU** number of a paper service. Previously this information only printed if you had the Inventory module.

Cutting Diagram

- Previously, while creating a new item if you printed the cutting diagram the job number was not printed. In the 2020.5 version, if you print the cutting diagram while creating a new item, the job number will be included on the printed document. After the item is saved, if you print the cutting diagram both the job number, and item number will be included on the printed document.

API (Web2Pan)

- On converted Web orders, the **WebID** is always copied to the new job. Previously the **WebID** was only copied if notifications were turned on in the **Settings/Third Party Integrations/Web2Print** window.

QuickBooks Integration

- In the **Settings** section, under the **Employees** folder, the **Operators** and **Service Reps** tables now have the **IntegrationID** column enabled. Previously this column was only enabled on the **Sales Rep** table.

Employees   ✕

Operators

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

No	Name	Sort	IntegrationID
0	?		
6	Matt		
7	Kendall		
10	Brenda	1	
9	Pat	2	
8	Lena	3	
5	Scott		
4	Melissa		
3	Dave		
2	Anna		
1	Tim		

Employees   ✕

Service Reps

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

No	Name	Sort	IntegrationID
102	Paul	1	
101	Lisa	2	
103	Tim	3	

Shipments and Labels

- If you printed a shipping label, and the template for this label was not in the same directory as the Printer's Plan database (PlanData.mdb), the next time you printed (or emailed) a document that included a logo the logo did not print. This is now fixed.

Printer's Plan 2020.5

Upgrade Guide

(Revised June 15, 2020)

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