



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:

Customer No: 41

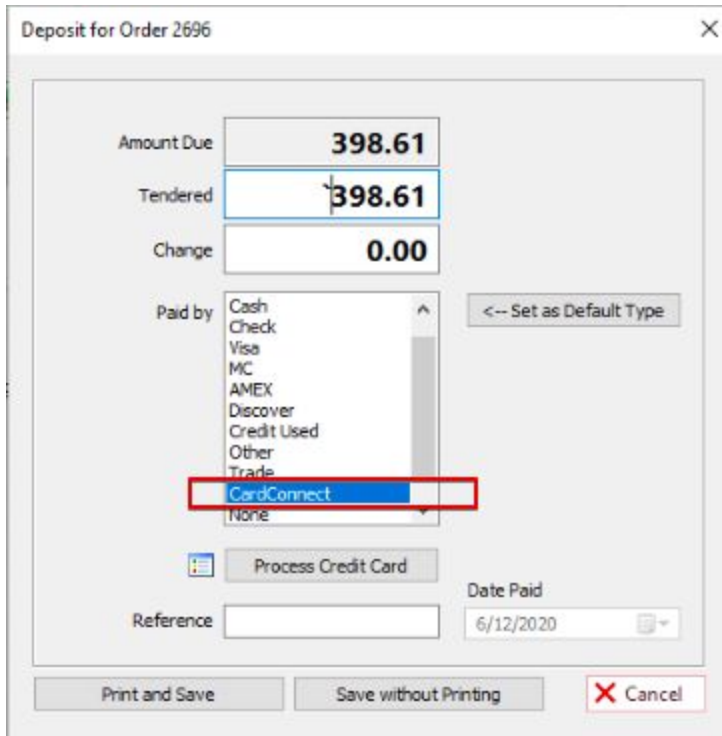
Customer **ABC Company** Active Declining

Bill To	Ship To	Buyer	Payer
ABC Company 800 Pike Street Baltimore MD A12234 < Country >	ABC Company 9645 Saratoga Blvd. Baltimore MD 21207	Ms. Michelle Greene Director mgreeneabc@gmail.com Ph1: 410-539-3466 x 35 Ph2: Cell: 443-567-4398 Fax: 410-539-5586	Mrs. Ann M. Linz alinz@abc.com Ph1: 410-727-4565 Ph2: Cell: Fax: 410-727-4752

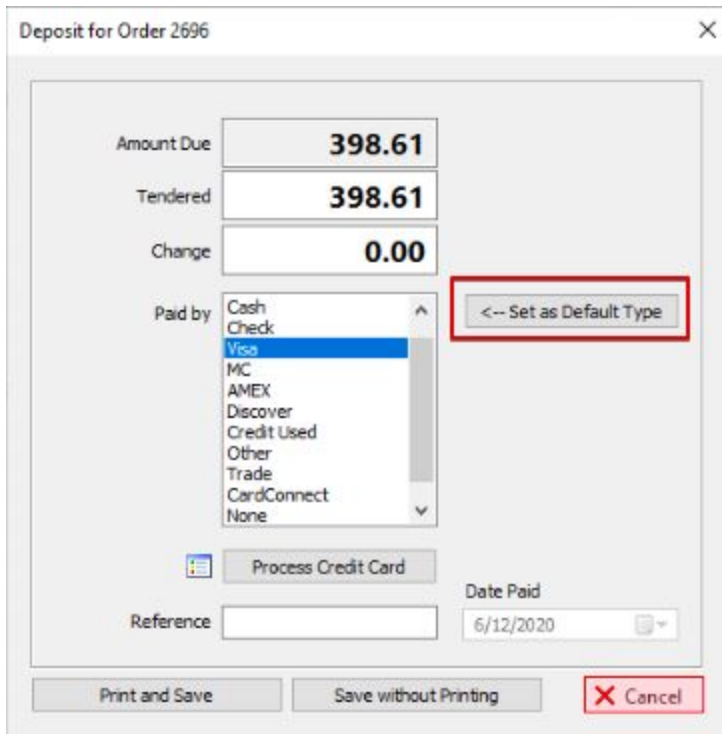
Website: < http:// >

General Properties	Financial Properties	User Defined Properties
Business: Manufacturing Source: Newsletter Sales Rep: Pat CSR: Paul Ship Via: Our Truck Location: Store 1 Alert: None Priority: Quality P.O.: No Parent No...: 41 Group ID: A Customer ID: ABC Co	Price Level: Normal Price Rounding: Off Paid By: CardConnect Late Fee: Charge Tax: Maryland Terms: Net 30 Days Discount: 0% Invoice Method: Attn: Buyer - Print Send Statement: Yes: Print Credit Due...: 0.00 Credit Limit \$: 100000.00	Check all that apply: <input checked="" type="checkbox"/> Key Customer <input type="checkbox"/> Buys signs <input type="checkbox"/> On Demand Books <input type="checkbox"/> Visit monthly <input type="checkbox"/> Property 5 <input type="checkbox"/> Property 6 <input type="checkbox"/> Property 7 <input type="checkbox"/> Property 8 Web Orders: Yes Created: 3/ 4/2018 Modified: 6/12/2020

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:



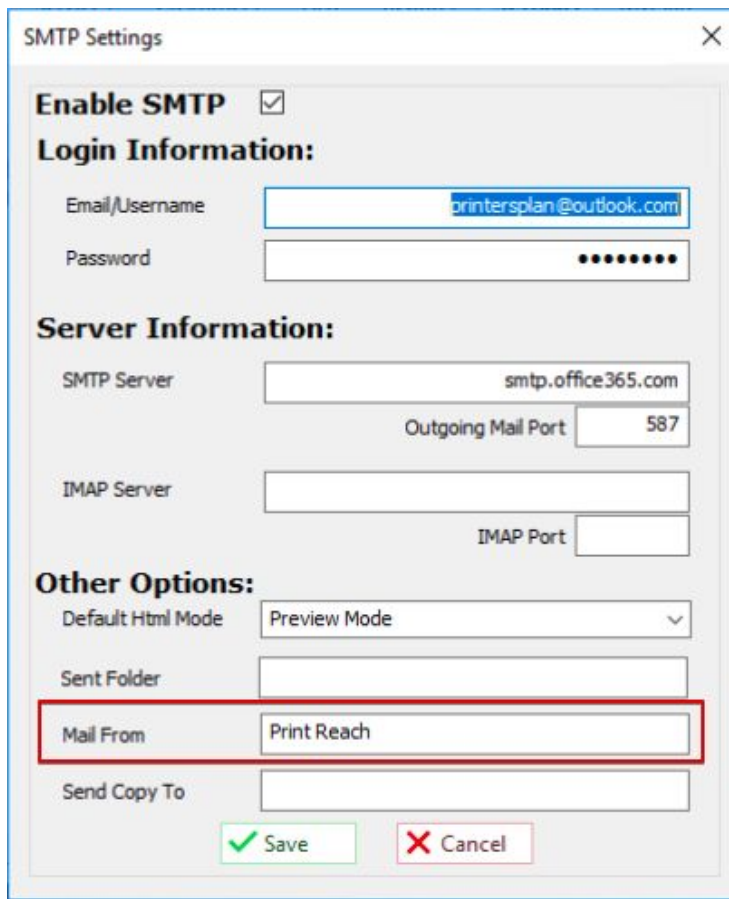
If the customer's **Paid By** field is set to a value of **None**, when entering a new payment the Paid By field will default to the Payment window's default value.



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:

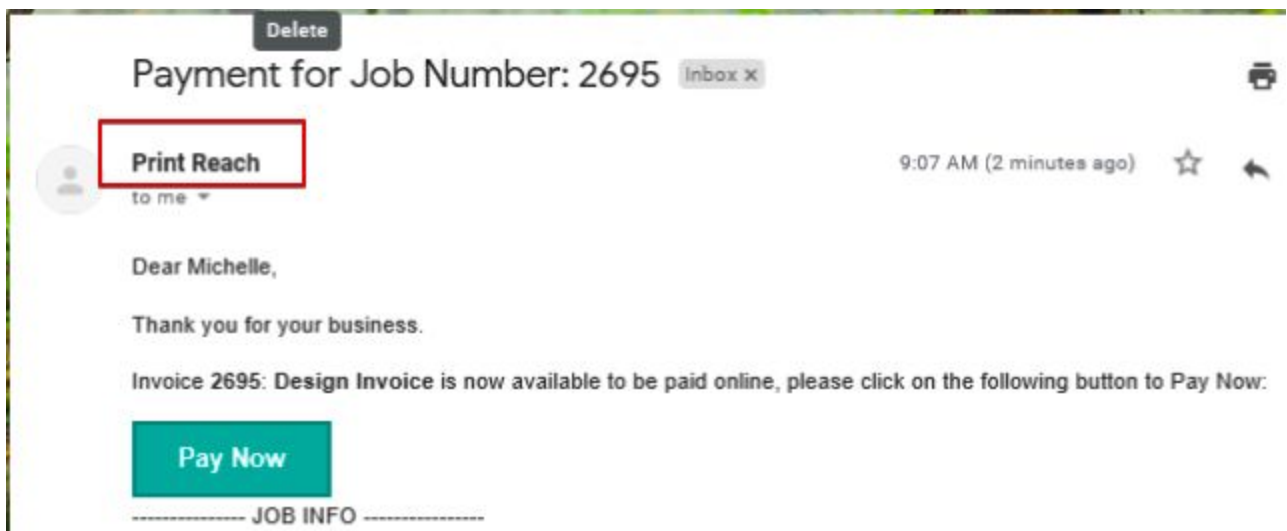
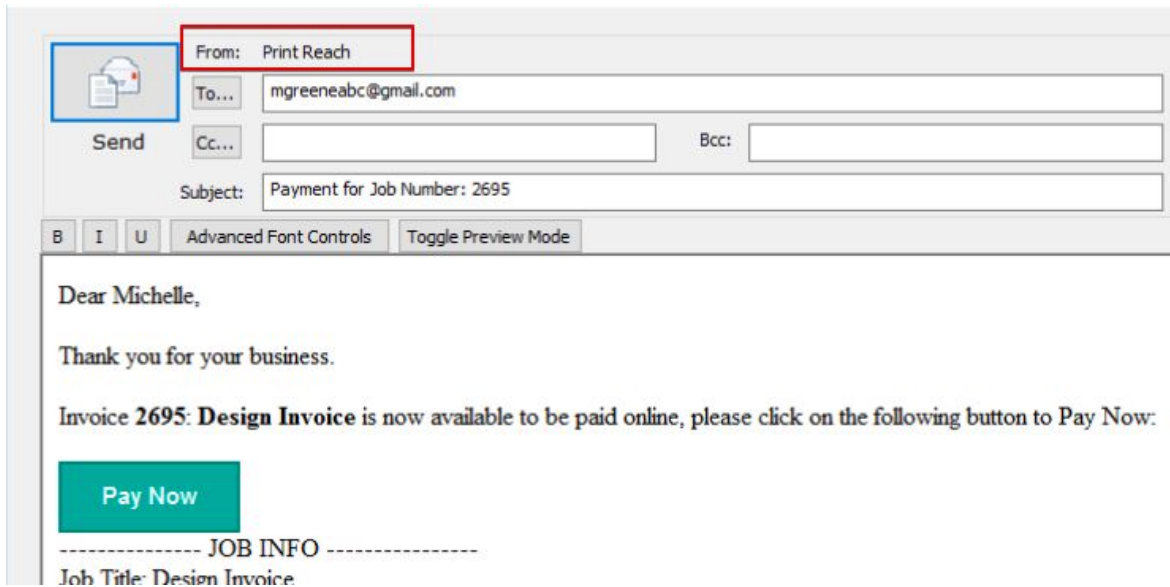


The screenshot shows the 'SMTP Settings' dialog box with the following fields and values:

- Enable SMTP:**
- Login Information:**
 - Email/Username:
 - Password:
- Server Information:**
 - SMTP Server:
 - Outgoing Mail Port:
 - IMAP Server:
 - IMAP Port:
- Other Options:**
 - Default Html Mode:
 - Sent Folder:
 - Mail From:** (highlighted with a red box)
 - Send Copy To:

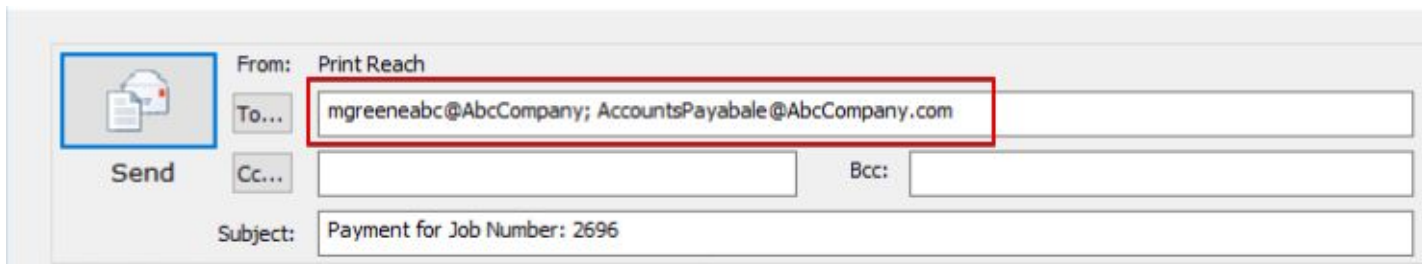
Buttons at the bottom: and .

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.

The screenshot displays the software interface with a sidebar on the left for document selection, a central panel for document options, and a job specification table on the right. A red arrow points to the 'Print Vendor info' checkbox, which is checked. The job specification table includes the following data:

Item	Description	Time	ActualT	Quantity	ActualQ
ITEM 1	1,000 Application Forms 1 Sheet (2 sides)			1,000	
	Graphics: Design: By Hour	1:00			
	Proof: Proof - Email			2	
	Proof: Proof < Approved			2	
	Paper: Text: 70# Beckett Cambric 11 x 17 Sheets: 1			500	
	Run: 11 x 17 500 sheets (1 out, 2 up)				
	Finish: 11 x 8.5 1,000 sheets				
	=> End with 500 good run-size sheets				
	Front: Color				
	Back: Color				
	Vendor: Chesapeake Papers Sasha Kalula 441-345-8956				
	SKU: 5648320904				
	Digital: Digital: Printer - Color	1:16		1,000	
	Finishing: Cut: To FinSz 1 Cuts/Sheet	0:03		2	
	Number: Sequentially Number	0:37		1,000	
	Starting No: 1				

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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