



Printer's Plan 2010 UPGRADE GUIDE

Please read me BEFORE you upgrade!

Major changes in version 2010

Services Section

Although major improvements are added in this section, your Services set up will convert as is, and you can continue using Printer's Plan without even visiting this section. Later, when you have time, you can visit this section to reorganize and make any modifications. Major changes in this section:

- You can add New Service Departments and Categories and reorganize the existing ones.
- The Service properties window includes new fields and is more flexible.
- The Copy Papers Category has been moved to the Paper Department. If you wish, you can now move the papers in this Category to other Categories in the Paper Department.
- We've renamed the Copying Department as **Digital**.

Jobs Section

- Item specs window has new fields and a new look. Although the interface has changed considerably, the functionality is still similar to that of V2008. It will be helpful to familiarize yourself with this window before you start entering jobs. We've prepared video tutorials to help you learn about this window. See [Learning Printer's Plan 2010](#) on page 2.
- The Item Specs window is the same for both Offset and Digital/Copy jobs.

Customers Section

The **Normal** status has been renamed as **Active**. New Customers, Contacts, and Ship To Addresses will now assume the **Active** status instead of the **On Hold** status.

Reports

The PP Companion Reports section has been eliminated entirely. Most of these reports have been re-created in the KeyReports section of Printer's Plan 2010. The following document will help you locate the reports in KeyReports that match the ones you were using in PP Companion:

<http://www.printersplan.com/v2010/download/Reports.pdf>

If you have been using a report in PP Companion and cannot find its match in KeyReports, please let us know.

If you are using a [report custom-made](#) by Printer's Plan, please confirm that it works in version 2010. If it does not, please let us know. We will modify it for this version. *(You can find your custom-made reports in Reports/Custom Queries.)*

Optional Tools

The following two tools do not currently exist in Printer's Plan 2010. If you have been using either of these tools, please contact us at 800-638-7526 Option 0.

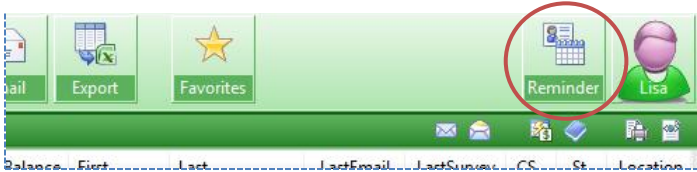
- **LaptopLink**
- **PaperLink**

We have made significant improvements to:

- **JobTracker** (now available from the Scheduler tab)

NEW TOOLS!

- **Reminder**



- **SurveyLink**

First	Last	LastEmail	LastSurvey
Chris	Hansen		06/15/2010
Mark	Sturm	07/02/2010	

For a **FREE TRIAL** and pricing information for the new tools, please contact us:

800-638-7526 Option 0

eleanor@printersplan.com

Pricing Information (changes from earlier versions)

Due to the reorganization of the Services section and the major improvements in it, Printer's Plan 2010 prices jobs a little differently than the earlier versions do. Following are the major changes:

- In earlier versions, if you enter a Copy Item with an odd number of originals and $1 > 2$, the Item still converts as 9 clicks with the same price; but, if you open the Specs window and Save & Close, the Item will change to 10 clicks and will be re-priced accordingly.
- Bindery (Finishing) waste is added to Digital jobs as well as to Offset jobs.
- In the Item Specs window, Ink Colors have been moved from the Press specs to the Paper specs; the Washup and ink Mix fields are still part of the Press specs. As a result, if, in an existing offset job, you change the number of Ink Colors, the number of Washups and Mixes will NOT be updated automatically; you must update them manually.

Rest assured that upgrading will not change the pricing of your existing jobs. Only if you re-price an Item or a Job will it be updated with the new default prices.

For more details on pricing differences, please see the Pricing.pdf document, which you can download here:

<http://www.printersplan.com/v2010/download/PricingDifferences.pdf>

Conversion

When you first open Printer's Plan 2010 after the upgrade process, Printer's Plan will convert your database. The conversion will take approximately 2 to 20 minutes, depending on the size of your database, the speed of your computer and the speed of your network if you're doing the conversion from a workstation.

Important: Do not use your computer during the conversion.

During the conversion, new fields and tables will be added to your database, increasing its file size by 40-50%. After you compact it following the conversion, your database will become smaller but will not return to its former size.

Learning Printer's Plan 2010

View the differences between Printer's Plan Version 2008 and 2010:

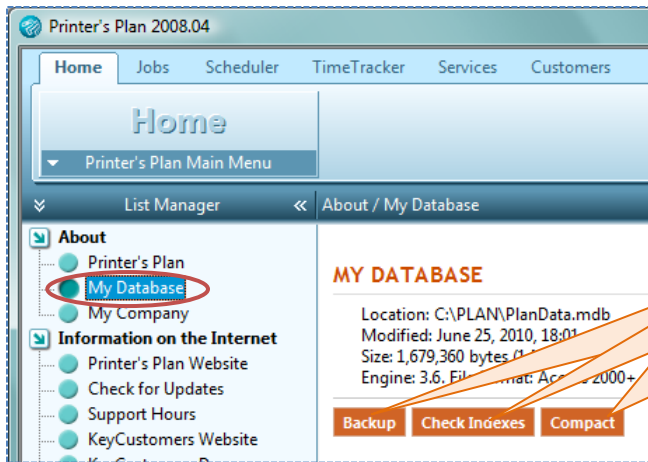
<http://www.printersplan.com/v2010/download/Compare2010vs2008.pdf>

Watch the video tutorials to learn Printer's Plan 2010:

<http://www.printersplan.com/v2010/tutorials.htm>

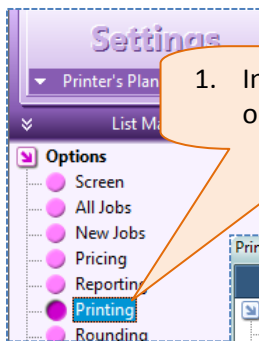
To Do *Before* You Upgrade

1. In the **Home** section, back up your database, then check indexes and compact it.

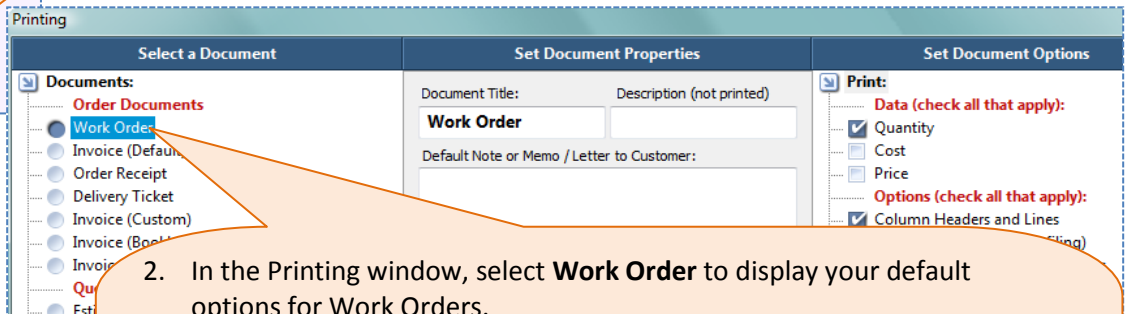


1. In the List Manager, open **About > My Database**.
2. Click **Backup**, and save the database (to a safe location) as **PlanData-[today's date]-v2008.mdb**.
3. After backing up, click **Check Indexes**.
4. After Printer's Plan has confirmed that all indexes exist, click **Compact**.

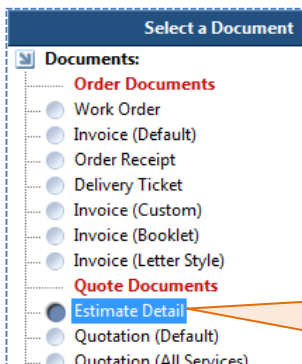
2. In the **Settings** section, capture screenshots of the default printing options for Work Orders, Estimate Details, and Quotations. You'll need to re-set these options in V2010, and these screenshots will be a helpful reference.



1. In the List Manager, open **Options > Printing**.



2. In the Printing window, select **Work Order** to display your default options for Work Orders.
3. Capture the active window by pressing **ALT+PRINT SCREEN** on your keyboard.
Note: If your keyboard doesn't have a Print Screen key or uses another keyboard combination for screen capture, check the information that came with your computer or the manufacturer's website for more information.
4. Paste the screen capture into an MS Word document, Paint, or other file.



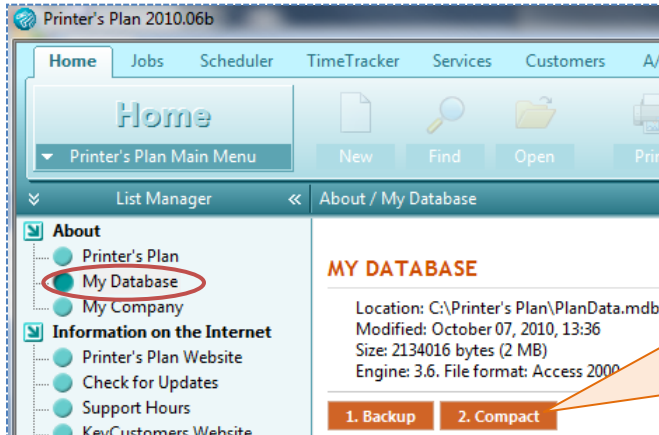
5. Go back to the printing options window in Printer's Plan and repeat steps 2-4 for **Estimate Detail**.
6. Save or print out the document/s to which you pasted the screen captures.

To Do *After* You Upgrade

► **REQUIRED To-Do's**

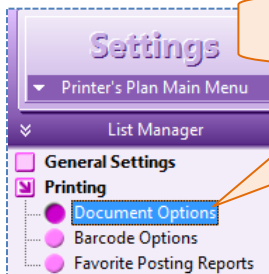
IMPORTANT! Do the following steps in Printer's Plan 2010 BEFORE you start using it.

1. In the **Home** section of Printer's Plan 2010, check the indexes and compact your database:



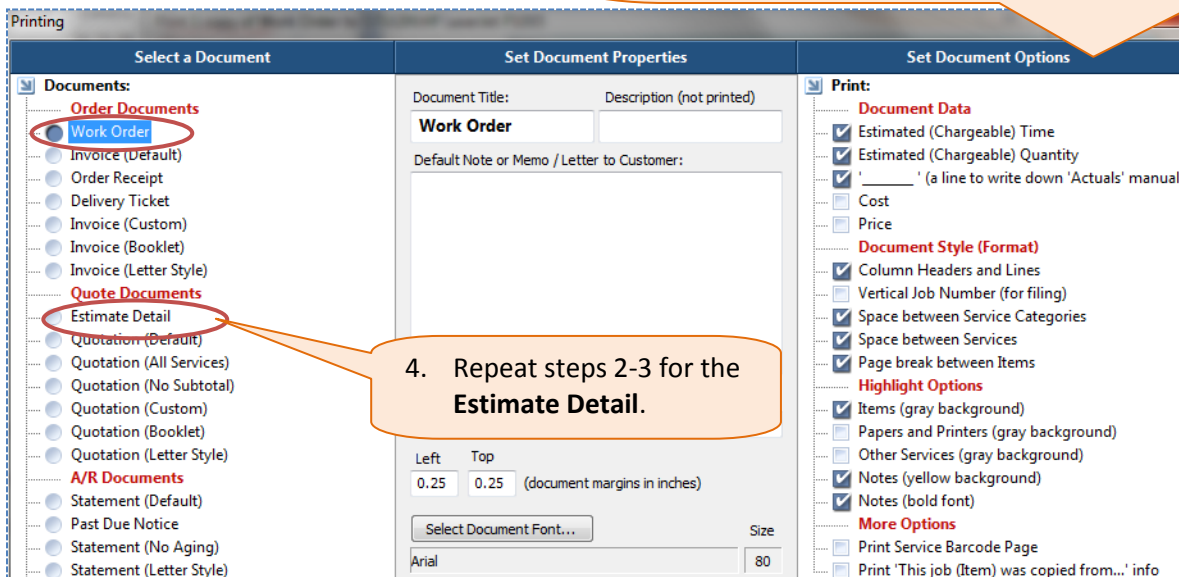
1. In the List Manager, open **About > My Database**.
2. Click **Compact**.
3. After Printer's Plan has confirmed that compacting and indexing have been successful, click **OK** to close the window.

2. In the **Settings** section, re-set the printing options for your Work Orders and Estimate Details using the screenshots you saved/printed before upgrading as reference.

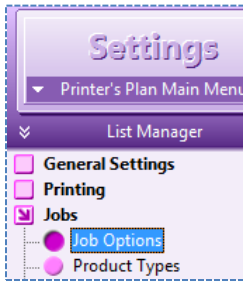


1. In the List Manager, open **Printing > Document Options**.

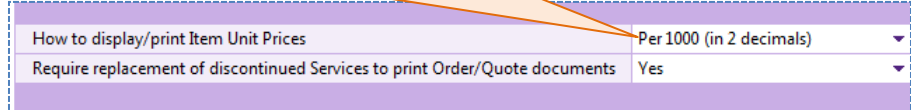
2. In the Printing window, select **Work Order** to display the options for Work Orders.
3. In the **Set Document Options** column, review the new options and checkmark the ones you want to set as default.



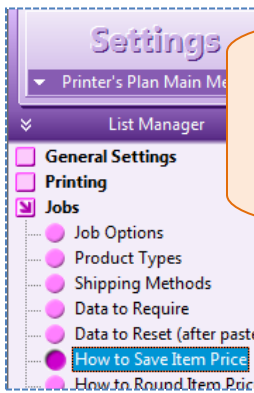
3. In the **Settings** section, set the new Unit Price option for Jobs:



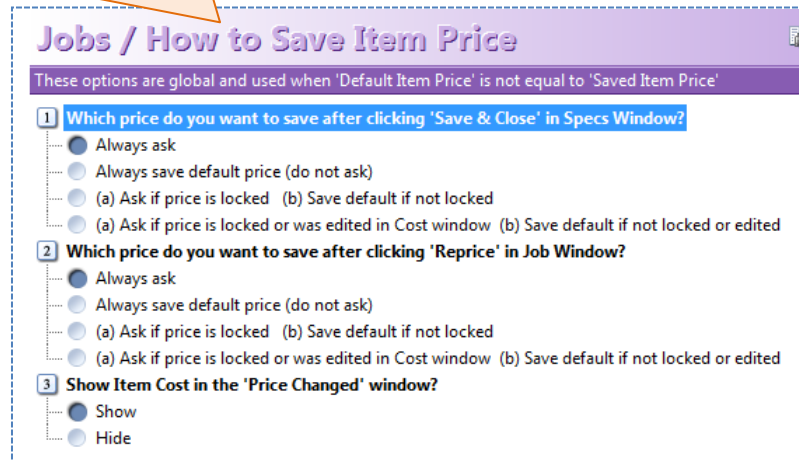
1. In the List Manager, open **Jobs > Job Options**.
2. Choose the default for displaying the Item Unit Price. (In the Item Specs window, you will have an option to change this selection for a specific Item.)



4. In the **Settings** section, reset the **How to Save Item Price** options:



1. In the List Manager, open **Jobs > How to Save Item Price**.
2. This window was previously named **Pricing** and has changed significantly. We have reset all the options to **Always Ask**. Reset them according your preferences.

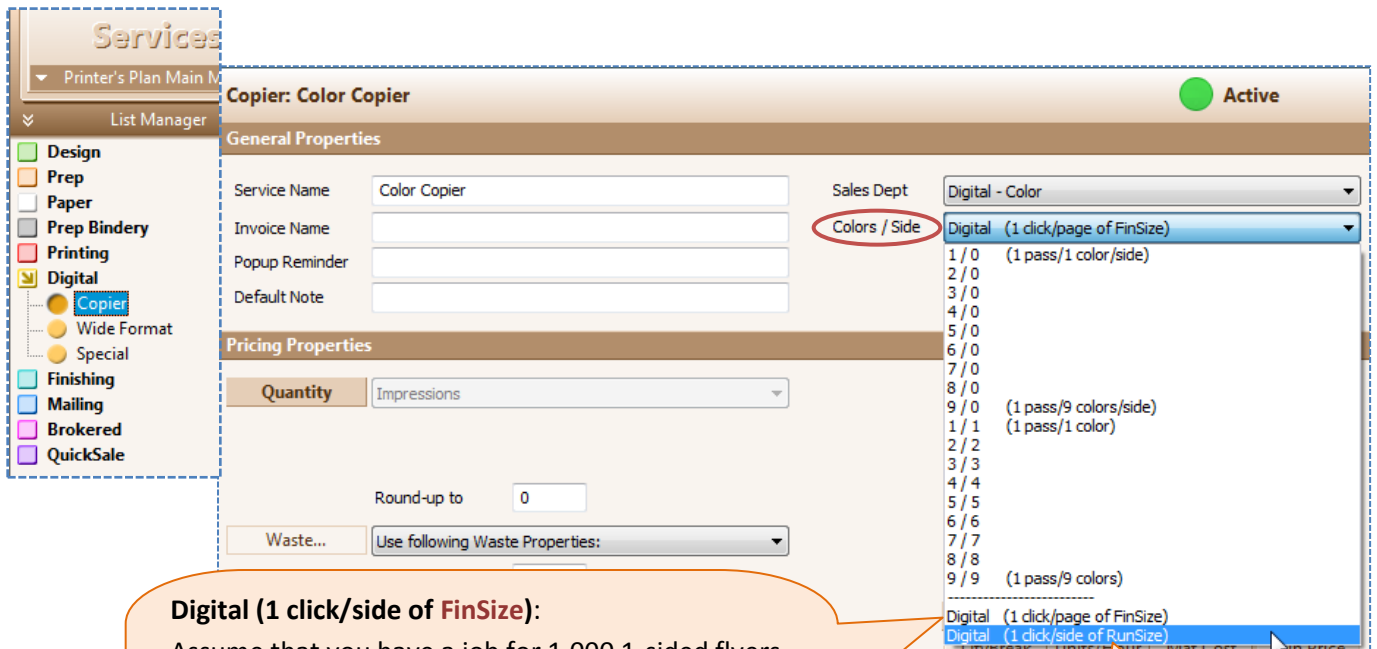


- In the **Services** section, open each Copier and review the **Colors/Side** field for accuracy. Select one of the two new Digital options unless you charge for more than one pass for one side of a color copy job

Explanation:

Earlier versions: If you used the Copy specs window, Printer's Plan ignored the option assigned in the **Colors/Side** field of the Copier and charged for only one pass per copied side.

Version 2010 uses the assigned option (2/0, 4/0, etc.) to calculate the number of passes per side and charges for full number of clicks for each pass. The new **Digital** options will make Printer's Plan charge for one pass for each copied side.



Digital (1 click/side of FinSize):

Assume that you have a job for 1,000 1-sided flyers and that you are printing (copying) it as 2-up. With this option, Printer's Plan charges for 1,000 clicks (#Run Size sheets x 1 side), regardless of the number of colors/side.

Digital (1 click/side of RunSize):

With this option, for the same job described above, Printer's Plan charges for 500 clicks (#Run Size sheets x 1 side), regardless of the number of colors/side.

6. In the **Jobs** section, take a look at the difference between the default prices in V2008 and in V2010:

Item	Description	Quantity	Time	Unit Price	Price
1	Cover (1 Original)	300		1.3778/Ea	413.36

1. Open an Order or a Quote in which the prices are the same as Default (look for the green equal sign).

Item	Description	Quantity	Default	Time	Default	Price	Default Price	Difference
1	Cover (1 Original)	300	300			413.36	451.50	-38.14
	Graphics: By Hour Design			0:30	0:30	42.50	42.50	
	Plate: Metal	2	2			44.00	44.00	
	Cover Coated: 10pt C1S · 23 x ...	112	111			51.41	50.96	0.45
	Press: 2 Color - Quickmaster ...		444	1:33	1:52	191.45	230.04	-38.59

2. Click the **Compare Saved vs. Default** button.

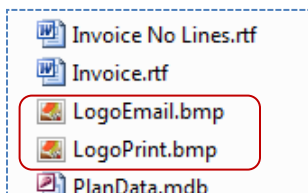
3. You'll see a red minus sign in the **Difference** column if the default price calculated by V2008 is lower than the one calculated by V2010. A green plus sign appears if the v2008 price is higher.

7. **Term 'Original' in Digital Printing jobs**

If you had been using the Digital Printing/Copying Specs page in version 2008 or earlier, you must train your staff to understand the term 'Original' in version 2010. One 'Original' is the final printed one sheet of a set, whether it is one-sided or two-sided. For example, if there are five sheets in the final printed set, then the job has five originals.

8. **Logo image files**

Be sure your company logo image files are named as **LogoEmail.bmp** and **LogoPrint.bmp**. In versions 2003.5 and earlier, these files were named as *MyLogoEmail.bmp* and *MyLogoPrint.bmp*. Versions 2005 through 2008 recognized both names. Version 2010, however, recognizes only *LogoEmail.bmp* and *LogoPrint.bmp*. For this reason, if you have files in both names, confirm that the correct images have the acceptable file names. Then, delete the ones named *MyLogoEmail.bmp* and *MyLogoPrint.bmp*.



9. **Scheduler users only:** (If you do not have the optional Scheduler tool, skip this step.)
Update the Item locations (new feature):

1. In the List Manager, list **Items > All**.

2. Select all Items in the list (**Ctrl+A**).

3. From the list menu, select **Update Item Status**. This process works as follows: If all Services of an Item are done, the Item status will be updated to Done; otherwise, the Item status will be changed to the Department of the first To-Do Service.

I	Item Description / Serv...	Date	CSR/Oper	Tag
Monday				
	Brochure	07/05/2010	Paul	
	Cover	07/05/2010	Lisa	
	Inside pages	07/05/2010	Lisa	
	Inserts	07/05/2010	Lisa	
Tuesday				
		07/06/2010	Paul	

We have made some significant improvements in Scheduler. A tutorial video and a printable guide will be available soon. Until then, if you would like to join a tutorial webinar, please contact us:
eleanor@printersplan.com 800-638-7526 Option 0.

► **RECOMMENDED To-Do's** (optional)

1. In the **Settings** section, set your shop options (these are all new options):

Settings	
Printer's Plan Main Menu	
List Manager	
General Settings	
Shop Options	
Passwords	
Printing Method	Mostly Digital Printing + Offset
Saturday is a Workday	No
Sunday is a Workday	No

1. Open **General Settings > Shop Options**.
2. Select a **Printing Method**. Your selection determine how the Colors section of the Paper specs is displayed.
3. If anyone works on Saturday or Sunday, set the corresponding option to **Yes**. Printer's Plan will warn you if you try to schedule a Job's Due Date or Proof Date for a non-workday.
Scheduler users only: The Auto Schedule feature will not schedule tasks for non- workdays.

2. In the **Settings** section, set the new options for Order documents and Quote documents.

The image shows a software interface with a 'Settings' window. On the left, a 'List Manager' sidebar has 'Printing' expanded, with 'Document Options' selected. A 'Printing' dialog box is open, showing a list of document types under 'Documents:'. 'Invoice (Default)' is selected. To the right, a 'Set Document Options' window is shown for the selected document. It has sections for 'Print:', 'Document Style (select one):', 'Document Info (check all that apply):', and 'Other Options (check all that apply):'. 'Sub-Items' and '#Originals (or #Sheets) after Item Description' are highlighted in the 'Other Options' section. A callout box with two numbered steps points to these options.

1. Open Printing > Document Options.

2. For each document shown (Invoices, Order Receipt, Delivery Ticket, and Quotations), select whether **Sub-Items and/or **# Originals** should be displayed.**

3. In the **Settings** section, set the Default Document Type and Default Quantity for Product Types:

1. Open **Jobs > Product Types**.

2. For each Product, select a **Default Type** and enter a **Default Quantity**, both of which will be applied to new Items.

No	Product Name	Default Type	Default Qty	Sort
0	?	Originals	1000	
1	Letterhead	Originals	1000	1
2	Envelope	Originals	1000	2
3	Business Card	Originals	1000	3
4	Brochure	Originals	1000	4
5	Form	Originals	1000	5
6	Flyer	Originals	1000	6
7	Manual	Originals	1000	7

4. In the **Customers** section, exclude Hidden Customers from the Top Customers, Inactive Customers, Contacts, and Shipping Addresses lists as follows.

1. List **Top Customers > 10 This Year**.

2. Click **Exclude Hidden**.

Name	CusNo	Jobs	Cost	NetSale	Margin	AvgMargin	LastOrd
Action Business Systems	37	12	24573.27	29292.98	4719.71	393.31	01/04/20
Ascot Inc.	40	12	21955.29	26434.67	4479.38	373.28	01/05/20
ABC Company	41	11	22274.92	25822.81	3547.89	322.54	01/07/20
Attman & Associates	43	11	9391.36	11184.15	1792.79	162.9	01/01/20
Allstate Cleaning Services	34	6	8268.28	10024.91	1756.63	292.7	01/04/20
Annapolis General Hospital	38	6	6852.18	8138.27	1286.09	214.7	01/05/20
Abel Laboratories	32	9	6549.66	8005.77	1456.11	161.7	01/01/20
Albright Associates	36	9	6431.79	7836.16	1404.37	156.7	01/01/20
Atlantic Insurance Compa...	33	8	6172.60	7522.44	1349.84	162.7	01/01/20
Allied Building Supplies	35	6	3602.95	4288.81	685.86	111.7	01/01/20

3. In the dialog box, checkmark the **Exclude Hidden Customers** option, and click **OK**. You don't need to go through these steps again for the Inactive Customers, Contacts, and Shipping Addresses lists; this option will be applied to them, too.

Notes on Version 2010

- 1) The new fields in the 'Ship To' window of a customer, **Ship by** and **Tax**, are not used in version 2010. In version 2011, we plan to use them for partial shipment and tax purposes.

A screenshot of a 'Ship To' window. It shows a 'Created' date of 12/13/2010 and a 'Modified' date of 12/13/2010. Below these are three dropdown menus: 'Ship by' (set to 'Customer Pickup'), 'Tax' (set to 'Exempt'), and 'Status' (set to 'Active'). A red box highlights the 'Ship by' and 'Tax' dropdowns.

- 2) The new fields in the Paper set up window/More Service Properties, **Minimum Quantity, Reorder Quantity, In Stock, On Order**, are not used in Printer's Plan version 2010. In version 2011, we plan to use them for a new Inventory tool.

A screenshot of a 'Vendor' window. It shows a 'Default Vendor' dropdown set to 'xpedx'. Below are input fields for 'SKU', 'LPC', and 'FSC'. At the bottom, there are four input fields: 'Minimum Quantity' (0), 'In Stock' (0), 'Reorder Quantity' (0), and 'On Order' (0). A red box highlights the 'Minimum Quantity' and 'Reorder Quantity' fields.

- 3) The new **Black/Color pricing** feature of the 'Price Table' is good for pricing digital jobs where one side is copied in color and the other side in black.

A screenshot of a 'Copier: Copier - Color' window. It has a title bar and a subtitle 'How to Use this Price Table'. Below the subtitle are two numbered instructions: '1. Select a column based on:' and '2. Select a row based on:'. A red box highlights the first instruction and the dropdown menu below it, which contains options: 'How Sides Printed (Black | Black/Black | Color | Color/Black | Color/Color)'. The second instruction and its dropdown are partially visible below.

About this feature:

- A) If you use multiple papers in an Item, all of the papers must have the same 'Side' specs.

Examples of what you may not have:

- One paper: color one side; another paper: black one side
- One paper: color one side, black other side; another paper: color one side.

In addition, if your copy price is different for the second side copying even if the same color, then you may not have one paper copied one side and the other paper copied two sides. The papers must be copied all one side or all both sides.

- B) Although this feature prices color and black copy prices well, it does not capture the exact 'per copy' cost because you can assign only one 'per copy' cost in the 'Run Table' of Service set up window. The best option for now is to assign an average cost of color and black copy.

- 4) When there are sub-items in a Quote/Order, Item 1.1 description and price are displayed in bold on the Job window (like other regular Items). This may lead to an incorrect conclusion of the total price. The price of Item 1.1 is **not** the total price; it is only the price of Item 1.1. However, the total price of all Items is printed on Quotes/Invoices.

A screenshot of a Job window showing a table of items. The table has columns: Item, Description, Quantity, Time, Price/Hr, Unit Price, and Price. Item 1.1 is highlighted with a red box. Item 1.2 is also visible below it.

Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
1.1	Books Cover (1 Sheet/Set) 8.5 x 11	500			2.6592/Ea	1,329.60
1.2	Books Inside pages 4 Sheets/Set (8 sides) 8.5 x 11	500			1.4657/Ea	732.87