What's New and Improved

Jobs

Viewing Book Items

In the Job window, the **Book Title** and **Total Book Price** are displayed in one line in extra-bold font.

Sub-Item Descriptions and Prices are displayed in bold font.

Printing Book Items

To print the finished **Book Size** next to the Book Title:
- *You must enter the size in the Specs of the **first Sub-Item**.*

To print the paper specs of each sub-Item:
- *You must check the "Sub-Items" option in the Print window.*

To print multiple prices for Book Items on Quotes:
- *You must assign the multiple quantities in the **first Sub-Item**. Multiple quantities assigned to the other sub-items will be ignored.*
- *You must check "Prices for more quantities".*

Showing Ink Colors in Job Window

New Item	Edit Specs	Edit Costs	Reprice

Description

Newsletter 1 Original (2 sides)

🟩 Design: Newsletter

🟥 Plate: CTP Plate

🟨 Text: 70# Carnival Linen · 11 x 17 · 2 Colors Warm Red, PMS 453/ 1 Color PMS 453 · Russell   Originals: 1

🟥 Small Press: 2 Color Press · Using Paper Properties · Wash: 2 Mix: 1

> Ink colors are now displayed in the Job window.

Applying Customer's Credit to Customer's Order

In addition to applying customer's credit to Invoices in A/R, now you can apply them to Orders.

1. Click the Credit Due button in the Job window.
2. Click Yes when asked:

    ❓ Do you want to apply the customer's credit to this order?

3. Enter the amount and click OK.

    Apply Credit

    How much?

    150.00

    Enter an amount greater than 0 and less than or equal to 150.00

Job Totals		Credit Due $150.00	
Subtotal	.44	Total	353.26
	0.00	Paid	0.00
	0.00	Balance	353.26
	0.00		
	336.44		Net 30 Days
	16.82		

4. Verify the Payment and Balance Due amounts.

Depending on your options, Printer's Plan may add this information.

Memo to Customer	Job Totals		Balance Due	
Payment $150.00 Credit Used 03/07/2011	Subtotal	336.44	Total	353.26
	Discount	0.00	Paid	-150.00
	Shipping	0.00	Balance	203.26
	Postage	0.00		
	Taxable	336.44		Net 30 Days
	Tax	16.82		

Printing Item Specs and Service Specs with or without Prices

Click Print in the Jobs section and then select Item or Service Specs.

Check this box to print prices in the report.

ActTime	hargeTime	ActualQ	ChargeQ	Price
0:50	0:50	1	1	54.18
0:00	0:00	4	4	88.00

Printing the Quantity of "Good Run Size Sheets" on Work Orders

This information is especially helpful when finishing services need additional "good" sheets due to waste.

Check the following option in the Print window.

More Options
- Print Service Barcode Page
- Print 'This job (Item) was copied from...' info
- ☑ Print 'End with # of good sheets (Run Size)' info

Viewing Cost, Price, and Margin of a Job

Now you can see the Costs, Prices, and Margins of all the Items and sub-items of a Job in one view.

To open Cost/Price/Margin window, click **View Cost** in the Job window:

See the Settings section to assign a password level to open the Cost/Price/Margin window.

Click here to Show/Hide Services.

Comparing Items of Jobs in History

New 'Compare This Item…' hot key-click is added.

Note: This feature has been available from the right-click menu of Items. In History jobs, you can access the right-click menu after clicking the Edit button, which may be password-protected. This new feature lets you compare Items easily without a password.

To open the Compare Items window, hold [Ctrl] key down and click Compare.

Asking for the Shipping Method for New Orders

This feature is useful when a customer needs varying shipping methods for different Orders and each Order must have a shipping method assigned in the 'Ship Via' field. To use this feature, do the following:

1. In Settings/Jobs, click Shipping Methods.
2. In Shipping Methods window, select the next available row (empty row #), type a question mark (?), assign a sorting number and click **OK**.

3. In the Customer's setup window, assign the question mark item to the 'Ship Via' field.

Printer's Plan will remind you to select a Shipping Method when you add a new Order for this customer. However, it will not require you to enter that information to print a work order and an invoice.

How Sheets/Set and Pages/Set are calculated for Padding Jobs

If a padding job includes a Service, which is set up as Quantity = **Sheets/Set** or Quantity = **Pages/Set**, Printer's Plan will calculate the service quantity based on the following two rules:

❖ The number of Sheets/Set is always 1, even if the pads include more than one paper type.

❖ The number of Pages/Set is always 1 or 2, depending on how they are printed.

Item Properties	
Description	PADS 5.5 X 8.5
#Pads	100
Sheets/Pad	50
Sides	1

Other Changes in Jobs Section

❖ Job window shows Price Level assigned in Item Specs window.

❖ Ship to window has a new 'Paste' button:

To add a new address with similar properties as the selected one, click Paste.
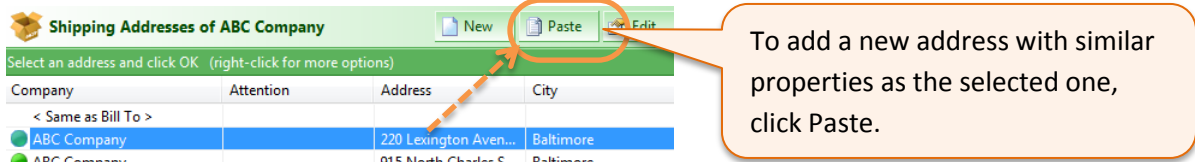
❖ Ordered by window has a new 'Paste' button:

To add a new contact with similar properties as the selected one, click Paste.
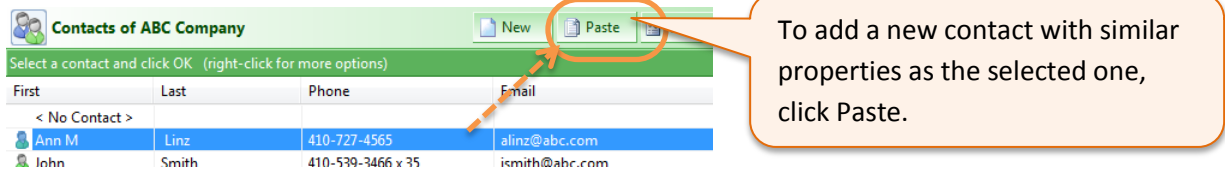
❖ The 'Send Email...' button on the left side of the Job window is changed to read 'e-Letter' for better definition of the feature that it opens.
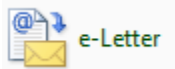
❖ Printer's Plan does not add plates for papers that are blank (no printing on either side).

❖ In version 2010, when a paper, which had no Parent Size ('Other' paper), was selected in an Item and the Finish size was equal to the Run size, the size information was lost after closing the Specs window. Now it is not.

❖ The Locations table is increased to 32 locations from 16.

In the Customer's setup window

In the When window of a job
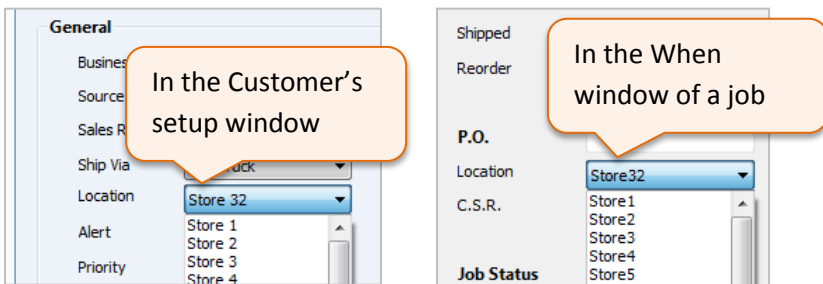
❖ Specs window: 'Work & Turn' suggestion would pop up even though 'Work & Other' was already selected. Now it does not.

❖ Specs window: Now every Service has a 'Vendor' field, which was available only for Brokered and Paper services. When a Service is added to a job, its default vendor is automatically assigned.

❖ Cutting Diagram: Was reformatting paper Run and Finish Sizes assigned in the job as Small Side X Large Side. Now it maintains the assigned size.

❖ Job window: You may not edit "special customers" when you select "View Customer Info" from the Job window:

There's **no Edit** button to edit special customers: #1 - #31.
Go to the Customers section to edit special customers.

Click the Edit button to **e**dit regular customers: #32 and up.
You still need a password to edit regular customers.

Jobs / Printing Documents

❖ Work Orders: Ink colors are printed in bold.

Paper	Bond: 20# White 11 x 17 Originals: 2 Our Stock
	Run: 11 x 17 6,150 sheets (1 out, 2 up)
	Finish: 8.5 x 11 10,000 sheets
	Front: Black + 1 Color • PMS 633
	Back: Black + 1 Color • PMS 633
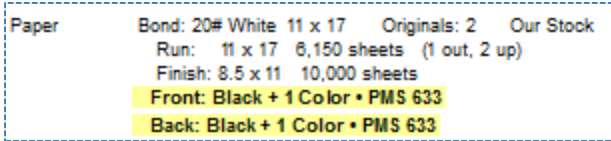
❖ Invoices: The format and the font size of the SHIP TO address are adjusted so the address fits in the space.

Invoice 2435

Date: 03/07/11   Page

SHIP TO:

ABC Company
9645 Saratoga Blvd. - behind the red brick building
Baltimore MD 21207

❖ Invoices/Quotes: If 'Print All Services & Prices' option is checked, Services with (~) in 'Invoice Name' field will not be skipped. If they are skipped, as they were in version 2010, the Item price may not equal to the sum of prices of the Services shown. To skip, select the 'All Services' option.

❖ Printing emails with pdf attachments of Quotes/Invoices: If the pdf copy of the same Quote/Invoice was previously created, Printer's Plan deletes that copy and then re-creates a new one before attaching it to the Quote/Invoice.

❖ Job Amounts Report: The total Discount amount is changed from red font color to black for better legibility.

- ◉ Invoice (Custom)
- ◉ Invoice (Booklet)
- ◉ Invoice (Letter Style)
- **List:**
- ◉ - the list on the screen -
- **Jobs:**
- ◉ Job Dates
- ◉ Job Amounts
- **Items:**
- ◉ Item Specs
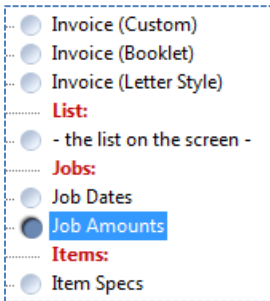
Services

❖ New 'No Paper Price' option for Digital jobs: If the price assigned to a Copier, say Copier A, already includes the price of a certain Paper, assign (-1) in the 'Digital Markup' field of the Paper's setup window. When you use this Paper with the Copier A in a job, Printer's Plan will add the cost of this paper to the job but will not add a price for it.

Price	Cost + Markup		
Markup...	% or #	Digital	Blank
	30	-1	50

❖ Price Table has a new option in the 'Multiply the price by' field: 'Service Quantity'. This option allows Printer's Plan to multiply the cell price by the Service Quantity even if 'Item quantity' is selected in 'Select a row based on' field (#2).

5. Multiply the price by: Service Quantity ▼

(built-in)
1
Sheets per Set
Pages Printed per Set
Passes
Sides (1 or 2)
Units Asked
Item Width
Item Height
Item Perimeter
Item Area
Service Quantity

olumn No ->	1	2	
heets ->			
ow #	Item Qty	Price	Price
1			
2			
3			

❖ 'Divide By' EXCEPTION: If a Service is set up as 'Quantity = Item Quantity', Printer's Plan divides the 'Divide by Value' by '# Sheets per Set', instead of dividing the Item Quantity by the 'Divide by Value'.
Example: You want to trim 1,000 books after they are assembled. Assume each book has 75 sheets and your cutter can handle up to 500 sheets. How many books can you trim per lift?
Answer: #Books per Lift = 500 / 75 = 6. Service Quantity = 1000 / 6 = 167 lifts.

Quantity	Item Quantity		
* Divide by...	500	☑ Sheets of 20# Bond	
Multiply by	0	< or ask How many? >	

Now, you can turn off this behavior by typing '/' in the < ask > field.

Quantity	Item Quantity	
Divide by...	500	☑ Sheets c
Multiply by	0	/

This special character turns the exception off:
Service Quantity = Item Quantity / Divide by Value
Service Quantity = 1000 / 500 = 2.

Note: Services, such as Cutting, Padding, Wrapping sheets, are usually set up as Quantity = Finish Size sheets or Quantity = Run Size sheets. For this reason, these services are not affected by this exception.

❖ You must enter a value (zero or greater) into the 'Cost/Hour', 'Min. Price', and 'Wage/Hour' fields. You may not leave them blank.

Customers

❖ Exporting customers and printing labels improved:

Export Customers

Which information do you want to export
- the list on the screen -
- Address List of All Contacts
- ● Address List of Default Buyers only
- Address List of Default Payers only
- Address List of Customers (without
- Customer List for QuickBooks

Which Rows?
- ● All Rows: 14
- Selected Rows: 1

Replace Line-Breaks with Spaces?
- No
- ● Yes

Customers without default Buyers or Payers are also included.

This new option may be useful for mail merging.

Print Address Labels

Labels for:
- All Contacts
- ● Default Buyers
- Default Payers

Which Rows?
- ● All Rows
- Selected Rows

Replace Line-Breaks with Spaces?
- ● No
- Yes

❖ 'Ship To' and 'Contacts' windows have a new 'Paste' button. *See the Jobs section for more information.*

Ship To

Shipping Addresses of Albright Associates   New | Paste | Edit

Select an address and click OK (right-click for more options)

Company	Attention	Address	City	ST
< Same as Bill To >				
→ Albright Associates		4687 Caldor Street	Towson	MD

A/R

❖ Additional cautionary features are added to the 'Invoices Read-to-Post/List' view:

JobNo	Remark	CusNo	Customer	First	Last	Subtotal	Discount	Shipping	Postage	Tax	Paid	Balance
2354										8.?2	0.00	172.53
2355										.50	0.00	3181.59
2359										.06	0.00	64.31
2411	Over Paid									.00	-220.50	-31.50
2416										.75	0.00	2430.84

▾ Invoices Ready-to-Post / List (5 listed)   Post Now…

This new column will show you if there are any issues with the jobs listed, such as Over Payment and Pricing Discrepancy.
If there are issues, Post Now will be displayed in red.
Fixing the issues before posting is highly recommended but not required (you may still post the jobs with issues).

❖ If you open the job from this view and uncheck its Date Shipped field, the list will be automatically refreshed. The refreshed list will not include the edited job, thus preventing it from being posted.

❖ While in this view, if the status of one of the Jobs is changed from Ready-to-Post, Printer's Plan does not post that Job. (Changing of a Job status in this manner usually occurs when someone at another computer removes the Shipped Date of the Job.)

Reports

❖ Posting/Summary and AR/Summary: Both reports now include a new row to show information about invoices without Payment Due dates. In earlier versions, it was possible to post invoices without Payment Due dates. Now it is not. However, it is still possible to remove the Payment Due dates in the A/R section.
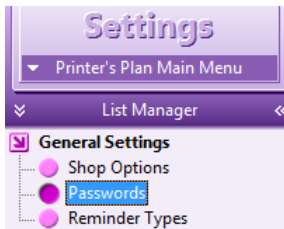
Settings

❖ New Password option allows Printer's Plan to ask for a password when creating an Order for a customer that is Past-Due/Over-Credit Limit. To use this feature:

Enter a Password Level at row 28.

In the Customer setup window, assign an Alert Level for the customers you are concerned.

❖ New Password option to open the new 'View Cost' window.
*See the Jobs section for more information about the new View Cost window.*

❖ Table size is increased to 100 for Product Types, Shipping Methods, Customer Sources, Customer Business Types, Contact Departments, and Sales Departments.
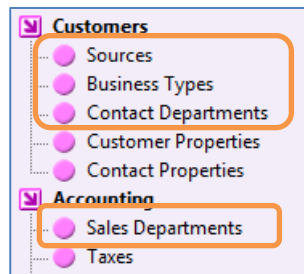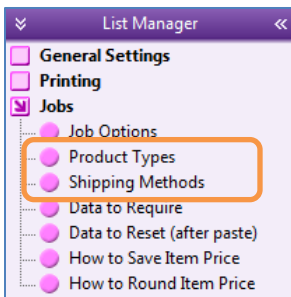
Security Level

❖ You can change Security Level temporarily. Click the Security button to open Security Level window, which available from all sections.
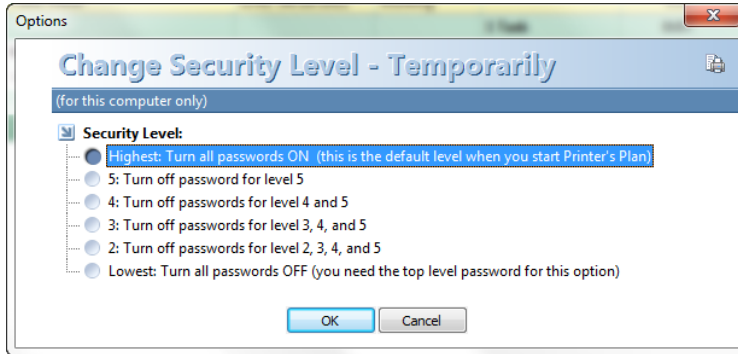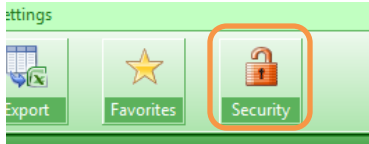
The above selection allows the user to turn off the selected password level for the duration of the current session. This feature is computer-specific; i.e., it will turn off the password(s) only on the computer on which you're working at the time.

- You do not need any password to select the **Highest** Security Level.
- You need the **top** level password to select the **Lowest** Security Level, which turns off all the passwords for this computer.
- To select a Level 2- 5, you need the password assigned to the selected level.

Example: *You have password-protected the following sections with the password levels as shown:*
- *Jobs section*   *Level 5 password*
- *Home section*   *Level 4 password*
- *Customers section*   *Level 3 password*
- *Reports*   *Level 2 password*
- *Services*   *Level 1 password*

*If you select **Level 3**, Printer's Plan will turn off passwords for level 3, 4, and 5.*
- *No password will be asked when you go to Customers (3), Home (4), and Jobs (5) sections.*
- *A password is required for the Reports (2) and Services (1) sections.*

Scheduler

New Options

Select **List Options** from the Scheduler Settings menu.

Old Options

New Options:
You **must** **re-set** your options on each workstation.

New Sort options

If this new option is checked and the status of an Item is Hold, Wait or Proof, Scheduler will alert you if you try to mark one of its Services as 'Done'.

Order is On Hold.
Do you still want to mark the Service as DONE?

Yes   No

Options for New Items Changed

The 'New Item' options are revised. Now, when you copy and paste an Item, Printer's Plan can assign to Services their Default Operators and Default Tags. Option to assign the same operators and tags as the ones in the original Item is removed. Select **New Item Options** from Scheduler Settings.

Old Options

Revised Options

If this new option is checked, the status of new Items will be 'In Production', otherwise, 'Schedule'.

❖ If the Service Due Date is outside the date limit (earlier than the Date In or later than Date Due of the job),
   Scheduler asks if you want to set the service date to the limit (later than the Date In or earlier than the Date
   Due respectively).
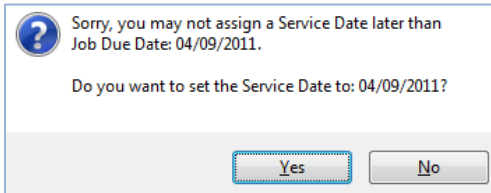
❖ Schedule Job window: If you change the Date In or Date Due of a job, Scheduler asks if you want to Auto-
   Schedule.
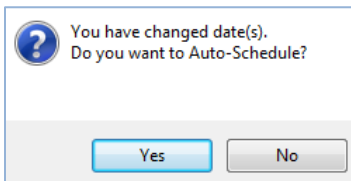
❖ Printing with Page Breaks sometimes did not work in previous versions. Now it does.
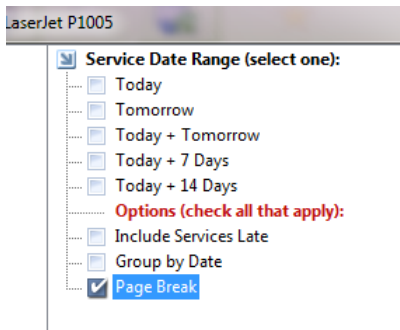
❖ If an Order is 'On Hold', its status will not change as its services are marked Done/Undone. To change the
   status, right-click on it and select 'Update Status...' or just right-click on its number.

TimeTracker

❖ New options: Select Options for All Computers…
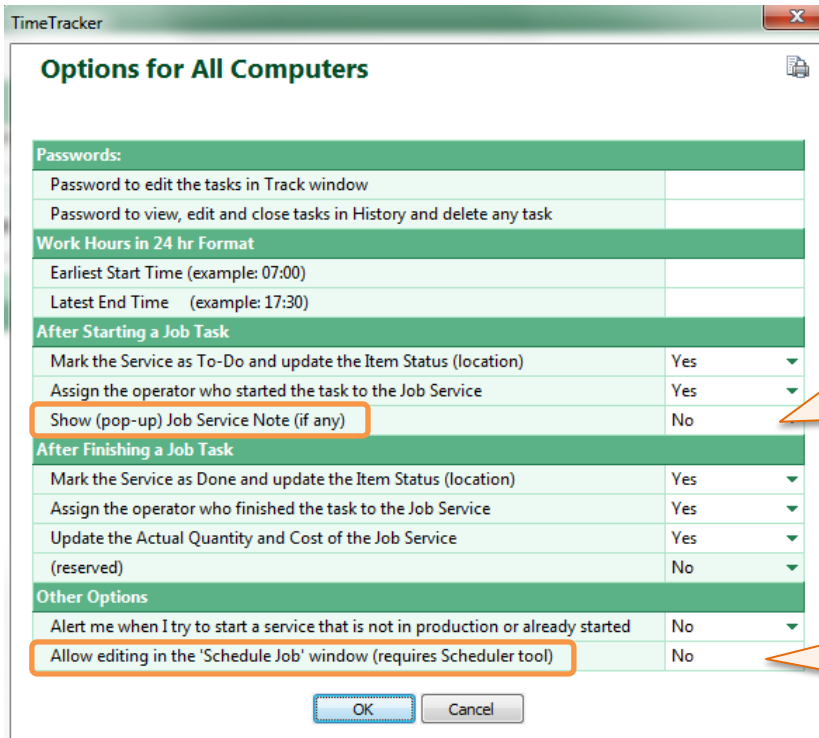
Option to pop-up Service Note after starting a task

⚠ Lisa, please note:

Letter Fold - Text In

Option to edit Item Status, Tags, Priority, etc. in the Schedule Job window

❖ New features: View Schedule and View Service Inventory. Right-click on a task to see the menu.
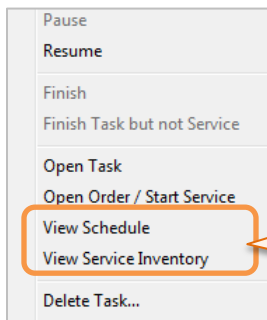
- If you have the Scheduler tool, you can open the Schedule Job window: Right-click on a task and select View Schedule.
- If you have the Inventory tool, you can open the Inventory window: Right-click on a task and select View Service Inventory.

Order 2414 - Brochure
Ascot Inc. (40)

Item Status	Item and Service Description	Service Date		<<	To-day	Th 07	F 08	S 09	Su 10	M 11	T 12	W 13	Th 14	F 15	S 16	Su 17	M 18	T 19	W 20	>>	Operator	Tag	P...	Note	Time	Quantity
Finishing	Brochure																								0:00	1,000
	Text: 70# Beckett Camb	04/06/11			✓																Scott				0:00	1,000
	Copier: Copier - Blk & \	04/06/11																			Dave				0:39	2,000
	Fold: Auto 2 Folds	04/06/11																			Lisa				0:20	1,000
																								0:59	

Auto...	When		Ordered By	Job Note	Memo to Customer
Help	In Proof	3/28/2011	Paul Coven pcoven@ascot.com		
	Due	4/8/2011 3 pm	Ph1: 410-243-5674		
	Ship'd		Ph2:		
Close	CSR	Paul	Cell:		
	Status	Ready to Ship	Fax: 410-243-7115		

❖ If an operator finishes a task when there is another unfinished task for the same service, TimeTracker alerts the operator.

> ⚠ Anna, your task is finished but there is at least one more UNFINISHED TASK for this Service.
>
> Therefore, the status (and cost) of the Service will not be updated until all tasks are finished for this Service.
>
> OK
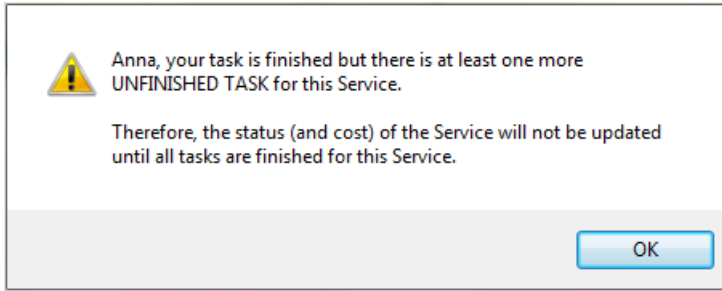
❖ Task lists include Task Notes.

Time Worked	Mat'l Used	Task Note	Job-Item Customer
6:41			
0:47		see Mike	2430-1 ABC Company
0:47			
1:17		waiting for cus	2428-1 Allied Building Supplies
6:06			
1:17			

Note: Task Notes are entered in the 'Task Details' window:

waiting for custome 2428-1 Allied Building Supplies
Pause
Resume
Finish
Finish Task but not Service
Open Task
Open Order / Start Service
View Schedule

Material Used

Time Group   Regular

Task Note   waiting for customer
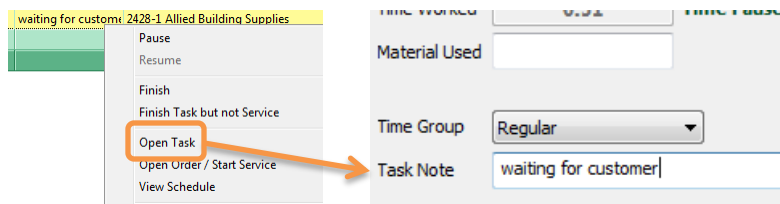
❖ If multiple staff members have worked on the same task, the 'History/Update Job Services' and 'Tracked vs. Charged' reports for this task show the Time for each person.

❖ When all services are finished in TimeTracker, the status of the Item in Scheduler is updated to Done.

2434-1	Apex Realtors	✔	Product Brochures
		✔	Design: Brochure
		✔	Text Coated: 80# Ster

Reminder

❖ Unassigned reminders appear on everyone's list.

PriceWiz

❖ The free PriceWiz tool is available from any Service setup window.
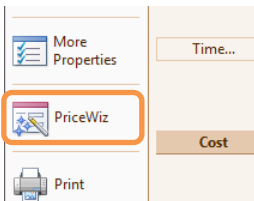
❖ After opening the PriceWiz window in a Service setup window, if you change any properties of the Service, click 'Save' on the Service window to refresh the prices in PriceWiz.
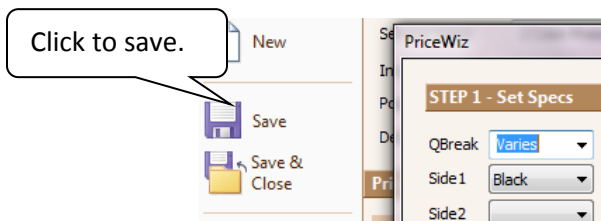
New Inventory Tool

This optional tool is designed to help you track and manage stock and other selected Services.

Inventory - Order														

Paper   Service Properties   Need Breakdown

Listed Services To-Do in Paper. Need Column = Quantity of Services To-Do · Orders-in-Progress · Items-in-Production.

Service	Size	Vendor	SKU	Minimum Level	Ream Quantity	In Stock	On Order	Item	Need	Order		Unit Cost	/	Extended Cost
Bond: 20# White	11 x 17	xpedx				10000		1	5515		☐	13.80	M	
Bond: 20# White	8.5 x 14	xpedx				333		2	562	229	☑	8.70	M	1.99
Offset: 60# Color	8.5 x 11	Kelly				5000		2	5260	260	☑	11.60	M	3.01
Carbonless: 2 Part	8.5 x 11	Chesapeake						1	31200	31200	☑	21.00	M	655.20
Carbonless: 3 Part	8.5 x 11	Chesapeake					6344	2	6344		☐	23.00	M	
Writing: 24# Classic Linen	8.5 x 11	Russell				14538		3	8716		☐	34.00	M	
Cover: 65# Carnival Linen	8.5 x 11	Russell				500		2	656	156	☑	31.00	M	4.83
Cover: 80# Beckett Cambric	8.5 x 11	Russell						1	595	595	☑	55.00	M	32.72
Cover Coated: 10pt C1S	23 x 35	Atlantic						1	140	140	☑	278.00	M	38.92
Env: Business: 24# Window White	#10	Chesapeake						2	2136	2136	☑	17.00	M	36.31
Env: Book/Catalog: 24# Catalog	9 x 12	Atlantic						1	10593	10593	☑	44.50	M	471.38

❌ Close   ☑ OK --> Update OnOrder field of Services and Priority field of Job Services   ⓘ Listed: 11   1,244.36

Please call SoftUSE to learn more about this new tool.

New XML Tool

This tool is designed to create, email, and print special job-documents that you can customize.

- Invoice - Items and Papers.xslt
- Invoice - Items and Services.xslt
- Invoice - Items Only.xslt
- Letter - Editable.xslt
- Letter - PO.xslt
- List - Items.xslt
- List - Using Query.xslt
- Paper Slip.xslt
- WorkOrder - Basic.xslt
- WorkOrder - With Barcodes.xslt
- XMLOnly.xslt

Please call SoftUSE to learn more about this new tool.