



## What's New and Improved

### Jobs

#### Viewing Book Items

Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
<b>Guide Books</b>						
1.1	<b>Guide Books   Cover (1 Sheet)</b>					<b>433.84</b>
	(700 800 1000)					226.40
	Cover: 65# Carnival Linen · 11 x 8.5					21.60
	Copier: Copier - Color					200.00
	Cut: To FinSz 1 Cuts/Sheet					4.80
1.2	<b>Guide Books   Inside Pages: 16 4 Sheets/Set (8 sides) 5.5 x 8.5</b>	<b>500</b>			<b>0.2248/Ea</b>	<b>112.44</b>
	(1000 1500)					
	Offset: 60# White · 11 x 17 (1 out)					30.24
	Copier: Copier - Blk & Wht					77.40
	Cut: To FinSz 1 Cuts/Sheet					4.80
1.3	<b>Guide Books   Bindery (5 Sheets/Set) 5.5 x 8.5</b>	<b>500</b>			<b>0.1900/Ea</b>	<b>95.00</b>
	Bind: BookMaker Fold+Stich+Trim	500	1:35	60.00	0.1900/Ea	95.00

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

Acct.No	Ordered By	Phone
41	Sharon Jones	410-539-3466 x 35 410

Quantity	Unit Price	Price
500	0.8676/Ea	433.84
700	0.8542/Ea	597.94
800	0.8484/Ea	678.79
1,000	0.8402/Ea	840.28

Cover 5.5 x 8.5  
 Cover: 65# Carnival Linen 11 x 8.5  
 Front Color  
 Inside Pages: 16 5.5 x 8.5  
 Offset: 60# White 11 x 8.5  
 Front Black  
 Back Black  
 Bindery 5.5 x 8.5

To print the finished **Book Size** next to the Book Title:

- You must enter the size in the Specs of the **first Sub-Item**.

Size (W x H) 5.5 x 8.5

To print the paper specs of each sub-Item:

- You must check the "Sub-Items" option in the Print window.

Sub-Items

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".

Prices for more quantities  
 Job Memo  
 Sub-Items

### Showing Ink Colors in Job Window

New Item		Edit Specs	Edit Costs	Reprice
Description				
<b>Newsletter 1 Original (2 sides)</b>				
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 336.44	Total 353.26
Discount 0.00	Paid 0.00
Shipping 0.00	Balance 353.26
Postage 0.00	
Taxable 336.44	Net 30 Days
Tax 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.

**1 Select a Document:**

**For In-House:**

- Work Order

**For Customer:**

- Invoice (Default)
- Order Confirmati
- Delivery Ticket
- Invoice (Custom)
- Invoice (Booklet)
- Invoice (Letter Style)

**List:**

- the list on the screen -

**Jobs:**

- Job Dates
- Job Amounts

**Items:**

- Item Specs
- Item Amounts

**Services:**

- Service Specs
- Service Amounts

**Print:**

Prices

Check this box to print prices in the report.

ActTime	ChargeTime	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

Specs - This job has 1 Item

ITEM 1	Brochure 1 Original (2 sides)
Paper	Text: 70# Beckett Cambic 11 x 17 Originals: 1 Russell Run: 11 x 17 687 sheets (1 out 2 up) => End with 500 + 30 (for finishing) good sheets
	Finish: 11 x 8.5 1,000 sheets
	Front: Black
	Back: Black
	Print: Work & Turn
Printing	Plate: CTP Plate Small Press: 2 Color Press - Using Paper Properties
Finishing	Cut: To FinSz 1 Cuts/Sheet Fold: Auto 2 Folds

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.

**Job Cost, Price, Margin**

**Quote 509 - Guide Books**

Item	Sub	Description	Quantity	Cost \$	Price \$	Discount \$	Discounted Price	% of TOTAL	Margin \$	Margin %
1	1	Guide Books   Cover	500							
		Cover: 65# Carniv...	11 x 17				21.60	2.5%	3.60	16.7%
		Copier: Copier - Col...					200.00	23.2%	181.00	90.5%
		Cut: To FinSz					4.80	0.6%	2.40	50.0%
	2	Guide Books   Inside Pages: 1								
		Offset: 60# White · 11 x 17					30.24	3.5%	5.04	16.7%
		Copier: Copier - Blk & Wht					77.40	9.0%	27.40	35.4%
		Cut: To FinSz					4.80	0.6%	1.60	33.3%
	3	Guide Books   Bindery								
		Bind: BookMaker Fold+Stich+Trin					95.00	11.0%	19.00	20.0%
							<b>433.84</b>	<b>50.3%</b>	<b>240.04</b>	<b>55.3%</b>
2	0	Brochures								
		Text: 70# Beckett Cambric · 11 x 17					82.69	9.6%	8.53	10.3%
		Plate: CTP Plate					35.20	4.1%	7.04	20.0%
		Small Press: 2 Color Press - Using P					285.43	33.1%	57.09	20.0%
		Cut: To FinSz					4.80	0.6%	1.60	33.3%
		Fold: Auto 2 Folds					20.00	2.3%	4.00	20.0%
			1,000	16.00	20.00					
							<b>428.12</b>	<b>49.7%</b>	<b>78.26</b>	<b>18.3%</b>
							<b>861.96</b>	<b>100.0%</b>	<b>318.30</b>	<b>36.9%</b>

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

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

Callout: 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.

**History**

- New Job
- Paste (this Job)
- Edit
- Rearrange
- Compare**
- View Cost

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

**Compare Items**

The Item you've selected was copied from the following Item(s). To compare 'Saved vs Default' prices of this Item, click here.

History 2422: Marketing Brochures	When	History 2425: Newsletter	When
ABC Company 800 Pike Street Suite #1 Baltimore MD 21202 Sharon Jones	In : 03/09/2010 Due : 03/09/2010 Ship'd : 02/21/2010 CSR : Lisa Status : In History From : Scratch	ABC Company 800 Pike Street Suite #1 Baltimore MD 21202 Sharon Jones	In : 01/29/2011 Due : 01/31/2011 Ship'd : 01/05/2011 CSR : Lisa Status : In History From : History 2401

Item	Description	Quantity	Time	Price
1	Marketing Brochures	30,000		20,000.00
	Text: 70# Beckett Cambric ...	6,814		9,941.31
	Cutting - prep: To RunSa ...	2	2.04	440.50
	Plate: CTP Plate	2		125.04
	Small Press: 2 Color Press ...		18.41	7,099.15
	Cut: To FinSz	1	2.40	355.24
	Fold: Auto 1 Fold - Text wk...		0.45	1,438.36
2	Newsletter	5,000		1,072.07
	Design: Clip-art	2 Pieces	2	0.16
	Pr...			17.34

## 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:

The image shows two screenshots from the software. The top screenshot shows the 'Settings' window with 'Shipping Methods' selected in the 'Jobs' section. The 'Shipping Methods' window displays a table with columns 'No' and 'Name'. The table contains the following rows:

No	Name
0	Customer Pickup
1	Our Truck
2	UPS
3	Fedex
4	Other
?	

Callout 1: In Settings/Jobs, click Shipping Methods.

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

The bottom screenshot shows the 'Properties' window for a customer. The 'Ship Via' dropdown menu is open, showing the same list of shipping methods as the top screenshot. The '?' option is selected. Callout 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.

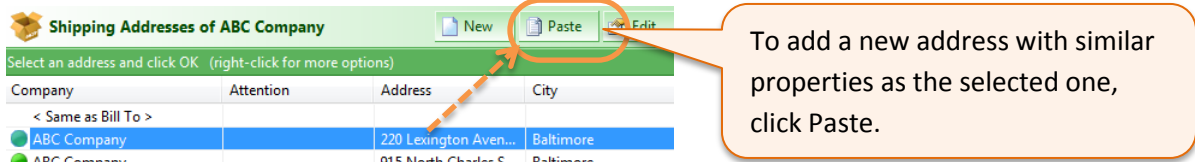
Item Properties	
Description	PADS 5.5 X 8.5
#Pads	100
Sheets/Pad	50
Sides	1

## Other Changes in Jobs Section

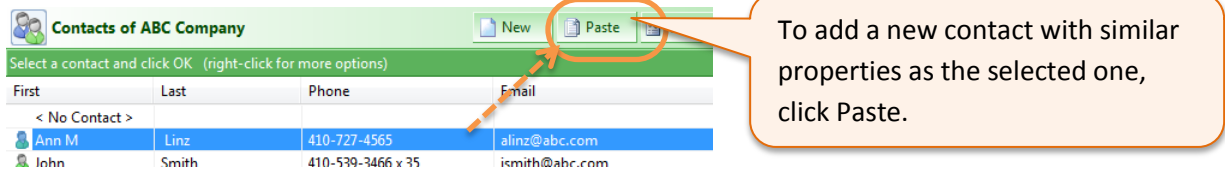
- ❖ Job window shows Price Level assigned in Item Specs window.



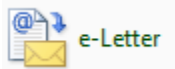
- ❖ Ship to window has a new 'Paste' button:



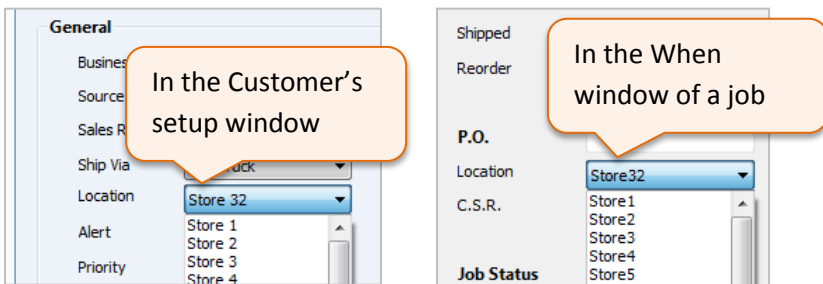
- ❖ Ordered by window has a new 'Paste' button:



- ❖ 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.



- ❖ 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:

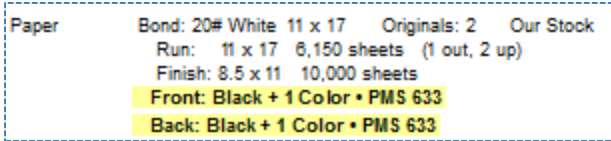
There's **no Edit** button to edit special customers: #1 - #31. Go to the Customers section to edit special customers.

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

Customers + Prospects / Special Customer	Name	CusNo
<input type="radio"/>	<Your Company Name>	1
<input type="radio"/>	Default Customer	10
<input type="radio"/>	Walk-in ***	31

# Jobs / Printing Documents

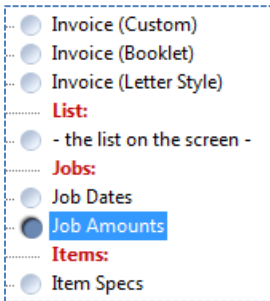
- ❖ Work Orders: Ink colors are printed in bold.



- ❖ Invoices: The format and the font size of the SHIP TO address are adjusted so the address fits in the space.



- ❖ 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.





# 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)

Service 1

Column No ->	1	2	
Sheets ->			
Row #	Item Qty	Price	Price
1			
2			
3			

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

- ❖ '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	<input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/> Sheets of 20# Bond
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:

The image shows two dialog boxes side-by-side. The left one is titled 'Export Customers' and the right one is 'Print Address Labels'. Both have several radio button options. Orange callout boxes point to specific options in both dialog boxes.

**Export Customers Dialog:**

- 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

**Print Address Labels Dialog:**

- Labels for:**
  - All Contacts
  - Default Buyers
  - Default Payers
- Which Rows?**
  - All Rows
  - Selected Rows
- Replace Line-Breaks with Spaces?**
  - No
  - Yes

**Callouts:**

- One callout points to the 'Address List of Default Buyers only' option in the 'Export Customers' dialog, stating: "Customers without default Buyers or Payers are also included."
- Another callout points to the 'Selected Rows: 1' option in the 'Export Customers' dialog, stating: "This new option may be useful for mail merging."

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

The screenshot shows a window titled 'Ship To' with a sub-header 'Shipping Addresses of Albright Associates'. At the top right of the window, there are three buttons: 'New', 'Paste', and 'Edit'. The 'Paste' button is highlighted with an orange box. Below the buttons is a table of shipping addresses.

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										8.22	0.00	172.53
2355										1.50	0.00	3181.59
2359										1.06	0.00	64.31
2411	Over Paid									1.00	-220.50	-31.50
2416										1.75	0.00	2430.84

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.

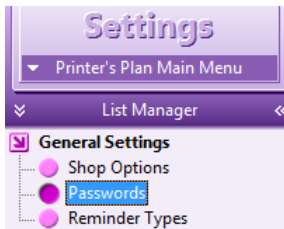
The screenshot illustrates the integration of a new report feature. On the left, the 'Key Reports' menu shows 'Posting' and 'A/R' sections. A dashed arrow points from 'Posting' to the 'No Payment Due Date' row in the 'A/R' section of the 'PAYMENTS' table. Another dashed arrow points from 'A/R' in the menu to the 'No Payment Due Date assigned' row in the 'Number of Days' table.

PAYMENTS	
	For Quick Sales
	Deposits for Orders
	A/R Payments
	<b>Total Payments</b>
As of Now	Current Balances as of M
A/R	Current
	Past Due
	<b>No Payment Due Date</b>
	<b>Balance of A/R</b>
ORDERS	Total

Number of Days Today - Payment Due Date	
Current	
Past Due 1 to 7 days	
Past Due 8 to 14 days	
Past Due 15 to 30 days	
Past Due 31 to 60 days	
Past Due 61+ days	
<b>No Payment Due Date assigned</b>	
Credit Due to 2 Customers	
<b>TOTAL</b>	

# 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:



21	Add/Edit Orders	5
22	Add/Edit O	5
23	Add/Edit	4
24	Add Histo	3
25	Add/Edit	
26	Add/Edit K	
27		
28	Add if PastDue/CrLim	

Enter a Password Level at row 28.

Password

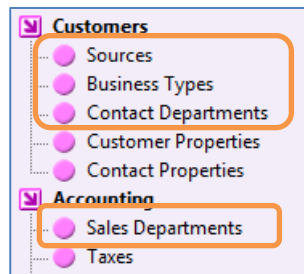
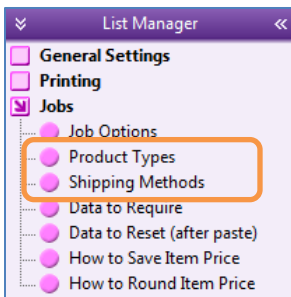
**Please type your password:**

You need a password to create order

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

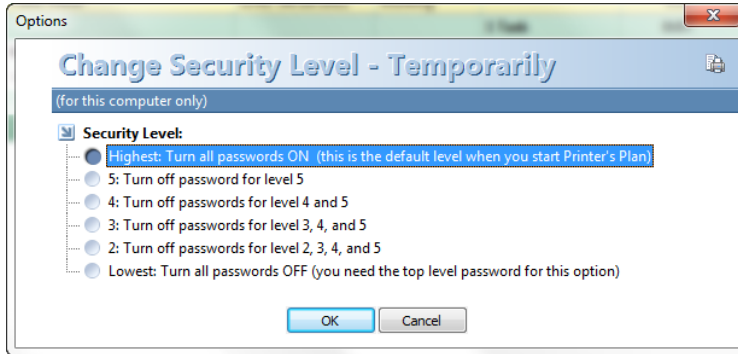
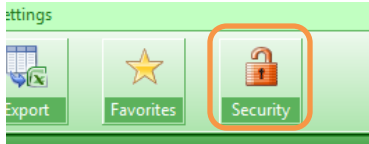
45	Edit Cost-KeyOrders
46	Edit Cost-KeyQuotes
47	
48	View Cost (any job)
49	

- ❖ 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**

- 1 Order List:
  - Group by Job Due Date
  - + then by Order Status
  - + then by Customer
  - Sort Orders Ascending 1-> 9 (uncheck to list the last Order first)
- 2 Item List:
  - Group by Job Due Date
  - + then by Item Status
  - + then by Customer
  - List All Items (uncheck to list only Items of Orders in Progress)
- 3 Service Lists:
  - Group by Service Date
  - + then by Service Operator
  - + then by Customer
  - List All Services (uncheck to list Services of Orders in Progress & Items in Production)
  - Include Services Done (uncheck to list only Services To-Do)
- 4 Other Options:
  - Hold Ctrl key down to mark a Service as Done/To-Do (to reduce errors)

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

- 1 Order List:
  - Group by Job Due Date
  - + then by Order Status
  - + then by Customer Name
  - Sort Orders Ascending 1-> 9 (uncheck to list the last Order first)
- 2 Item List:
  - Group by Job Due Date
  - + then by Item Status
  - + then by Customer Name
  - + then by Item Tag Sort Number
  - + then by Item Priority
  - List All Items (uncheck to list only Items of Orders in Progress)
- 3 Service Lists:
  - Group by Service Date
  - + then by Service Category Sort Number
  - + then by Service Operator Sort Number
  - + then by Customer Name
  - + then by Service Tag Sort Number
  - + then by Service Priority
  - List All Services (uncheck to list Services of Orders in Progress & Items in Production)
  - Include Services Done (uncheck to list only Services To-Do)
- 4 Other Options:
  - Hold Ctrl key down to mark a Service as Done/To-Do (to reduce errors)
  - If Item is on Hold, Wait or Proof, ask me to update the Item Status

**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**

Which data do you want to keep or clear after you 'Copy & Paste' an Item?

- Clear Service Date
- Clear Operator
- Clear Tags

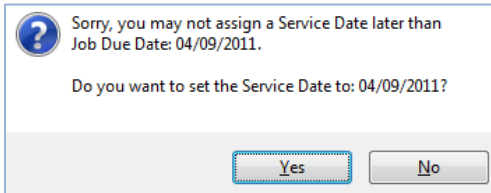
**Revised Options**

These options are for ALL computers

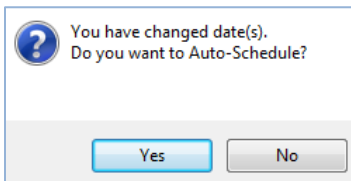
- After pasting an Item:
  - Clear Service Date
  - Assign Default Service Operator
  - Assign Default Service Tag
- After creating a new Item:
  - Set Item status to In Production (uncheck to Schedule)

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

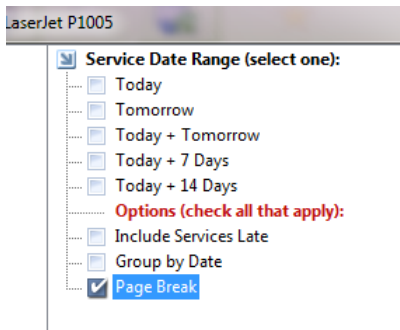
- ❖ If the Service Due Date is outside the date limit (earlier than the Date In or later than Date Due of the job), Scheduler asks if you want to set the service date to the limit (later than the Date In or earlier than the Date Due respectively).



- ❖ 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.

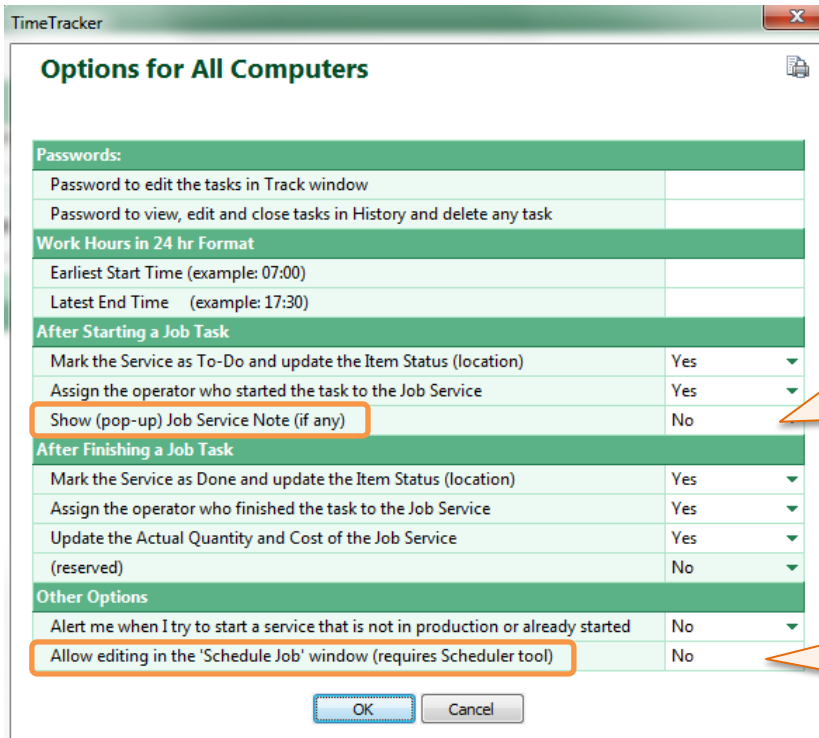


- ❖ If an Order is 'On Hold', its status will not change as its services are marked Done/Undone. To change the status, right-click on it and select 'Update Status...' or just right-click on its number.



# TimeTracker

❖ New options: Select Options for All Computers...

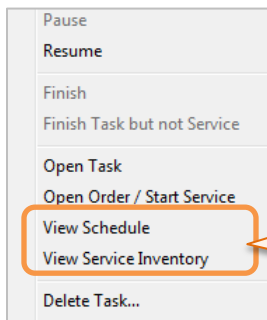


Option to pop-up Service Note after starting a task

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.



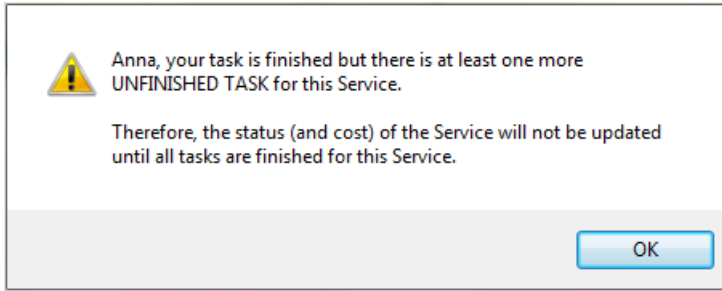
- If you have the Scheduler tool, you can open the Schedule Job window: Right-click on a task and select View Schedule.
- If you have the Inventory tool, you can open the Inventory window: Right-click on a task and select View Service Inventory.

**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																		Scott				0:00	1,000
	✓ Text: 70# Beckett Camt	04/06/11																	Dave				0:39	2,000
	✓ Copier: Copier - Blk & \	04/06/11																	Lisa				0:20	1,000
	✓ Fold: Auto 2 Folds	04/06/11																					0:59	

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

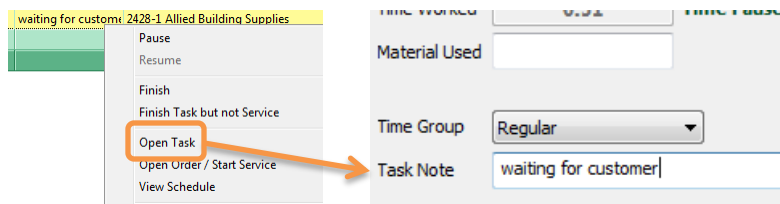
- ❖ If an operator finishes a task when there is another unfinished task for the same service, TimeTracker alerts the operator.



- ❖ 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:



- ❖ 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

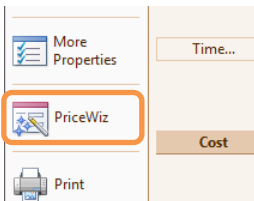
- ❖ Unassigned reminders appear on everyone's list.

▼ My Reminders To-Do: All Sections

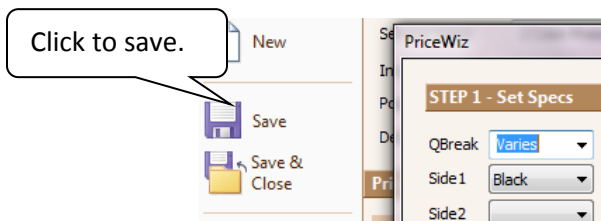
What	When	Time	Who	Reference
Call	03/07/2011	10 am	Lisa	Jobs
Call	03/08/2011		unassigned	Jobs
Meet	03/09/2011		Lisa	Customers

## 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.

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

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.