# What's New and Improved

Jobs Section

➡ You can now have default service(s), such as "Preflight", automatically added to a new Item. This is accomplished by customizing each product type with its own service(s).

To implement this feature, do the following:

1. Create a new Template Job for the Walk-in customer (customer #31).
2. Change the number of the Template to 888. *(See below to learn how to change the Template number.)*
3. Add to the Template one Item for each of the Product Types to which you want to add a default service.
4. Add to an Item the desired default service(s), change any other specs (quantity, size, etc.) , and save.
5. If the Item is priced, set the Item price to zero in the Costs window.

Template number = 888

Product type

SPECS: Template 888 - ITEM 1

ITEM 1	Item Properties	
	Description	Brochure
	Quantity	1000
Brochure	Originals	1
	Sides	
SERVICES	Service Specs	
Add Services From:	Category	Service (rig
All Departments	Preflight	Preflight

Template | 888 | **Brochure**

To change Template number, click and select "Change the Number of this Job…"

Template	51	Brochure
Check for Missing Data…		
Show/Hide…		
Change the Number of this Job…		
Set the Next Job Number…		
Paste (this Job)		

Bill to Customer No.31 | Ship To
Walk-in *** | < Same as Bill To >

Customer: Walk-in***

Note: Quantity assigned to the Template overrides the default quantity assigned to the Product Type.

New Job
New Job same buye
Paste (this Job)

Rearrange

▼ Items	New Item	Edit Specs	Edit Costs			
Item	Description	Quantity	Time	ce/Hr	Unit Pr	
1	**Brochure 1 Original**	**1,000**				? = 🔒
	Preflight: Preflight	1	0:20	0.00	0.0000/Ea	?

Default service

Item price = 0

SPECS: Order 2438 - ITEM 1 - Copied from Template 888-1

ITEM 1	Item Properties	
	Description	Brochure
	Quantity	1000
Brochure	Originals	1
	Sides	
SERVICES	Service Specs	
Add Services From:	Category	Service (rig
All Departments	Preflight	Preflight

When Product Type "Brochure" is selected in a new Item of an Order/Quote, the service "Preflight" is automatically added.

If you do not use Product Types, this feature will still work with Product Type "?" (number 0).

➡ Business card Items: If the Document type is "Names", the unit price is shown as dollar amount (two decimal places) "per Name" instead of per Each or M.


➡ Price per Pad, Price per Set: This feature is similar to the Business Card feature above. If the Document Type is "Sheets/Pad" or "Tabs/Set", the Unit Price is per Pad and per Set respectively.

➡ Now you can have an Item Description print on a Quote/Invoice for information only - without Quantity or price as "No Charge". This feature is especially helpful when the customer prepays for the postage of a mailing job and you want to send him a paid invoice where the postage and paid amounts show at the bottom of the invoice (postage entered in the Postage field of the Job Totals window).
To enable this feature, you must type a tilde (~) in front of the Item Description.

Item Description with tilde (~)

You must still select Product Type and enter quantity and #origs. They will not print on Quote/Invoice.

Invoice printed without quantity, # orig, or "No Charge".

➡️ "Ship To" address now includes the "Ship To phone number" on the Job window and on work orders and invoices.
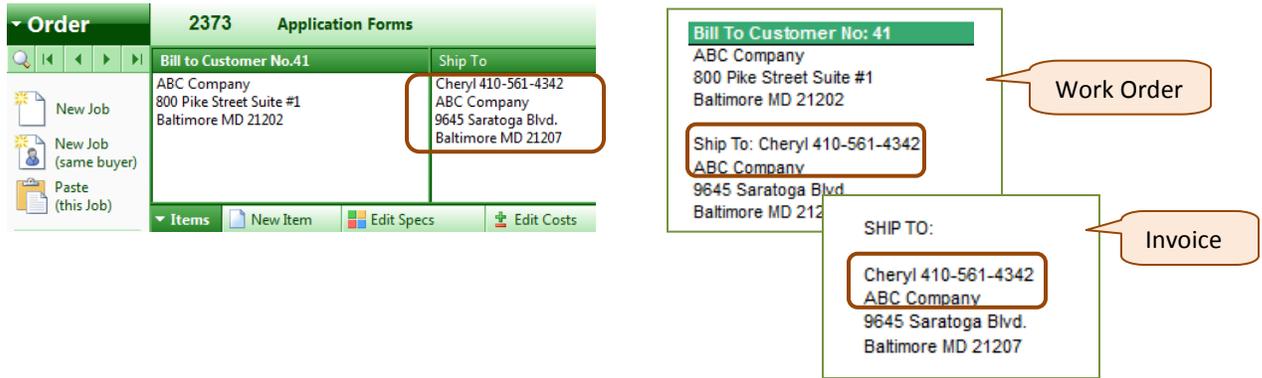
➡️ New shortcut: To open the Detail window (instead of the list window) of a "Ship To" address or of a "Buyer", hold the [Ctrl] key down and click **Ship To** (or **Buyer**).
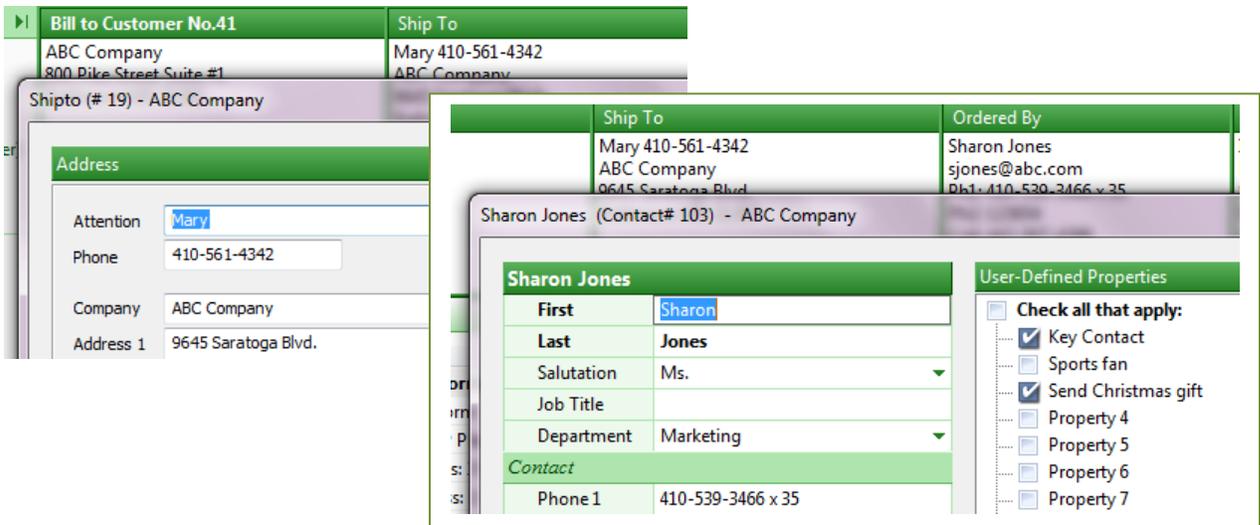
➡️ All Note windows (Job, Item, Service, Customer, Contact, Reminder, and other) include the default CSR name. When the name is clicked, it will be inserted at the cursor location.
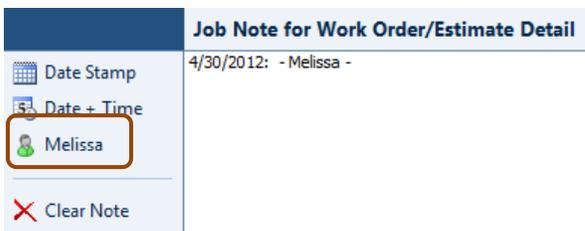
➡ New Document type: "Tabs/Set" for tab jobs where all tabs are printed on one sheet and then paper is die-cut.

500 sets, 6 tabs per set

Total finish size paper = 6 x 500 = 3,000

1 plate

➡ New option: You can now have the Job list to display only the "default CRS's" Jobs by default.

Click to open the "Include My Jobs Only" window.

Click here to assign a default CSR to this computer.

List Manager filters

This feature will work only when the Job list is selected from one of the filters in the List Manager. If you use the "Add Filter..." feature or the "Find" window to create the Job list, "My Jobs Only" feature will be ignored.

➡️ Orders list views include columns for "Customer Number" and "Job Time Due".

JobNo	Customer	CusNo	Title	DateIn	DateProof	DateDue	Time	Net
🟢 2376	Apex Realtors	81	Brochures	04/24/2012		04/30/2012	*2 pm	1776.71
🟢 2375	Attman & Associa...	43	Form	04/24/2012		04/30/2012		218.70
🟢 2364	Abel Laboratories	32	Letterhead	04/26/2012		04/30/2012	*	250.28
🟢 2354	ABC Company	41	Application Forms	04/25/2012		04/30/2012	4 pm	164.31
🟢 2441	Annapolis General ...	38	Postage	04/27/2012		05/01/2012		0.00
🟢 2359	Ascot Inc.	40	Business Cards	04/20/2012	04/20/2012	05/01/2012	*	61.25
🟢 2355	Action Business Sy...	37	Purchase Forms	04/25/2012		05/01/2012	*	3030.09

All Orders (44 listed)   My Jobs Only

TIP: You can add an asterisk in place of Time (or in front of it) to indicate that the due date is requested by the customer (firm due date).

➡️ Item Specs window | Paper Specs window | Bleed field: If the selection in the Bleed field is changed, a pop-up window asks if the Cutting Diagram window should be opened.

> Changing the bleed may require changes in the cutting layout and the number of finishing cuts.
>
> Do you want to review the layout and cutting?
>
> [Yes]   [No]
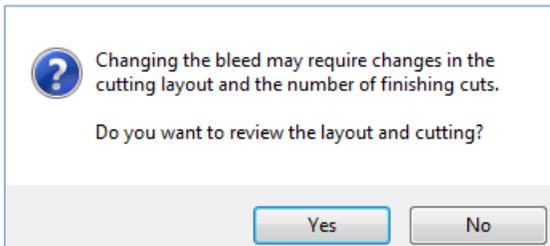
➡️ "Job Dates" report includes Proof Due Time.

Printer's Plan 2012.00 - April 27 (04.27.12 #587)
04/30/12 16:35:56

Printer's Plan
Job Dates
All Orders
Filter: Jobs.JobType = 0
List Size: 44

Proof Due Time

JobNo	Customer	CusNo	Job Title	In	Proof	ProofTi	Job Due	Time	ShipBy	Shipped	Pa
2359	Ascot Inc.	40	Business Cards	04/20/201	04/20/201	9 am	05/01/201	*	Our Truck		
2378	ABC Company	41	Brochure	04/20/201	04/25/201	1 pm	05/06/201	10 an	Our Truck		
2379	ABC Company	41	Booklet	04/20/201	05/04/201	4 pm	05/06/201	2 pm	Our Truck		
2380	ABC Company	41	Employee Manuals	04/20/201			05/05/201	2 pm	Our Truck		
2381	Alliance For The Bay	39	Newsletter	04/20/201	04/25/201	1 pm	04/27/201	1 pm	Our Truck		

➡ Item Price List has new options.

New Export the Price List to an XML file (available with the XML tool).

Click to open the "How to Set Quantity Breaks" window. *(See below.)*

New Options to show unit price as "Per Each" and "Auto" in addition to "Per 1000".

("Auto": 'Per Each' for quantities less than 1,000, 'Per 1000' for quantities 1,000 or higher)

HOW TO SET QUANTITY BREAKS:

Select a pre-defined interval from the list: 100, 250, 500, 1000 or type another interval. Example: If you select 250, you will see prices at every 250, starting at 250. Limit 30 quantities.

Select 'Varies' to list prices at pre-defined quantities of 500, 1M, 5M, and 10M. This list is useful to review prices.

Select 'Price List' to list prices from quantity 25 to 19,000 at varying intervals. Limit 120 quantities. Suggestion: Use this list when you generate a Price Book.

New Type the starting and ending quantities separated with hyphen (-). Example: If you type 20-100, you will see prices between 20 and 100 at every 20. Limit 1000 quantities.

New Type the starting and ending quantities and the interval. Example: If you type 20-100 @5, you will see prices between 20 and 100 at every 5. Limit 1000 quantities.

UNIT PRICE OPTIONS:
• Blank: Do not show unit prices
• Per Each: Show price/Ea for each quantity
• Per 1000: Show price/M for each quantity
• Auto: Show price/Ea if quantity is less than 1000, otherwise price/M.

OK

➡ The "Find" window (Jobs and Customers sections) includes additional criteria.

"Find" window
Jobs section

New fields are yellow highlighted.

Find	By this field	If the field
Orders	Job Number	= equal
Quotes	Job Title	<> not equal
Templates	Customer's Name	< less than
History Jobs	Customer's Number	> greater than
Key Orders	Customer's ID	<= less or equal
Key Quotes	Customer's City	>= greater or equal
	Customer's State	is between
	Customer's Zip	
	Ship To Company	
	Ship To City	
	Ship To State	
	Ship To Zip	
	Buyer's First Name	
	Buyer's Last Name	
	Buyer's Phone Number	
	Buyer's Email Address	
	CSR Number	
	SalesRep assigned to Job	
	SalesRep assigned to Customer	
	Date In	
	Date Proof	
	Date Due	
	Date Shipped	
	Date Payment Due	
	Date Paid	
	Date Reorder	
	Amount Paid	
	Balance	
	P.O.Number	
	Location Number (0 for Store1)	
	Posting Number	
	Posting Date	

Find Now   Cancel

Find Items...

☐ Show Advanced Find

Options...

"Find window"
Customers section

New fields are yellow highlighted.

"Contact" replaces "Buyer" and "Payer"

Find	By this field	If the field
Customers	Customer's Name	is exactly like
	Customer's Number	is not exactly like
	Customer's ID	starts with
	Customer's City	ends with
	Customer's State	contains
	Customer's Zip	does not contain
	Contact's First Name	is between
	Contact's Last Name	
	Contact's Phone Number	
	Contact's Email Address	
	Job Date In	
	Job Date Shipped	
	Job Date Reorder	
	SalesRep assigned to Job	
	SalesRep assigned to Customer	

Find Now   Cancel

☐ Show Advanced Find

➡ Invoice/Quote printing: New option is added.

☑ Sub-Items
☑ #Originals (or #Sheets)
☑ No Attention

Print window of a Quote/Invoice

If checked: Buyer's or Default Payer's names will <u>not</u> be printed with the "Bill To" address.

If <u>not</u> checked: Default Payer's name or, if there's no Default Payer, Buyer's name will be printed (the same as in versions 2011 and earlier).

➡ Work Order printing: New options are added; some existing ones are improved.

Select a Document:

For In-House:
- Work Order

For Customer:
- Invoice (Default)
- Order Receipt
- 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

Barcodes:
- Item Barcodes

Shipping:
- Sh...
- Sh...

Check Document Options:

Document Data
- ☑ Estimated (Chargeable) Time
- ☑ Estimated (Chargeable) Quantity
- ☑ '...' (a li...
- ☑ Price

Document Style (Format)
- ☑ Column Headers and Lines
- ☑ Vertical Job Number (for filing)
- ☑ Space between Service Categories
- ☑ Space between Services
- ☑ Page break between Items

Highlight Options
- ☑ Items (gray background)
- ☑ Papers and Printers (gray background)
- ☐ Other Services (gray background)
- ☑ Notes (yellow background)
- ☑ Notes (bold font)

More Options
- ☐ Print Service Barcode Page
- ☑ Print 'This job (Item) was copied from...' info
- ☑ Print 'End with # of good sheets (Run Size)' info
- ☑ Print Item Quantity with Item Description
- ☑ Print #Originals with Item Description
- ☑ Print Ship to Notes with Special Instructions
- ☑ Print Special Instructions and Notes on every page

Printing "Cost" disabled in Settings | Jobs | Job Options

New options
(See below for explanation.)

Address

Attention	Cheryl
Phone	410-561-4342
Company	ABC Company
Address 1	9645 Saratoga Blvd.

Note...
Delivery door is behind the building.

"Ship To" Note copied to work order.

Sample Work Order

Ship To: Cheryl
ABC Company
9645 Saratoga
Baltimore MD 21207

Cell: 443-567-4398
Fax: 410-539-5586

P.O:
Loc: Store 1

Special Instructions and Notes
Call customer when job is completed.
Delivery door is behind the building.

Special Instructions and Notes will print on every page if this is a multi-page work order.

Specs - This job has 1 Item		Time	ActualT	Quantity	ActualQ
ITEM 1	2 Posters 24 x 36 1 Original			2	
Wide Format	Medium: Stock - Gloss		____	1,728	____
	Wide Format Printer - C	0:33		1,728	

Item Quantity before Item Description

Printing #Originals on Work Order is now an option.

➡ New Job options are added to the "Job Options" table in Settings | Jobs.
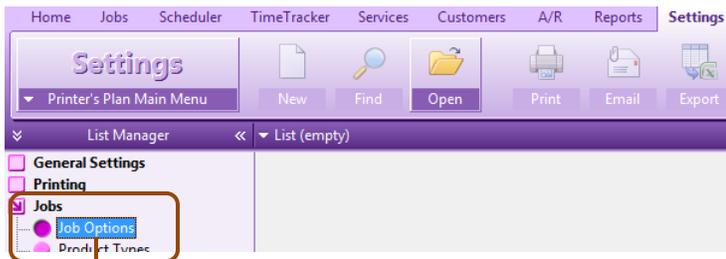
Job Options

	How to display/print Item Unit Prices	Per 1000 (in 2 decimals) ▾
	Require replacement of discontinued Services to print Order/Quote documents	Yes ▾
	How to display/print Service Unit Prices	Use Service Property ▾
❶	Set the New Quote Status as	Warm ▾
	Change the Quote Status to 'Won' after converting it to an Order	Yes ▾
	When entering a new Job, set the Job Title to Item 1 description	Yes ▾
	After creating a job	Ask me what to do next ▾
	In the Notes window, add the new date and text at the top (last note first)	Yes ▾
	In the Specs window, remind me if paper is assigned without a printer	Yes ▾
	How to open a Job, if Job's CSR does not match the Default CSR	Open it in View/Edit mode ▾
	After entering a deposit, add a payment note to the Memo field	Yes ▾
❷	After printing/emailing invoice/quote, add date printed to job note	Yes ▾
❸	After creating an Order, set Due Date = Date In + ? days	4 ▾
❹	After creating a job from scratch, add customer's default job notes	Copy both ▾
❺	Allow printing cost on work orders	Yes ▾

Explanation of the New Options

❹ Both Customer's "Work Order Note" and "Invoice Memo" from customer setup window are copied to Order.

❷ Date invoice printed is added to Job Note.

❶ Status of new Quote is set to "Warm".

❸ Due Date = Date In + 4 days

❺ Work orders — "Cost" option is hidden.

➡ The **Default Note or Memo** of the Quotations/Invoices may include any one or more of all the fields of the Job, Customer, and Contact. (In previous versions, this selection was limited to just a few fields.)
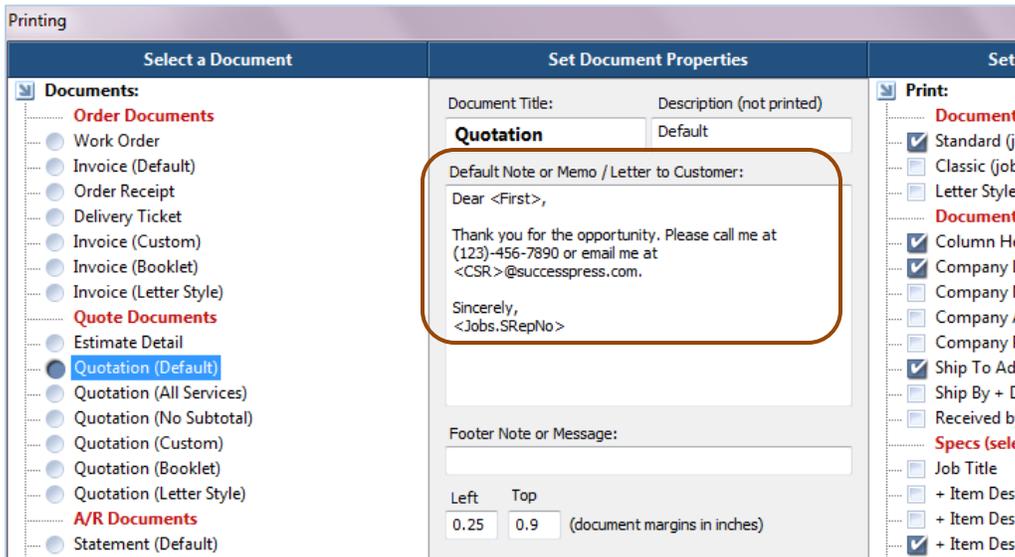
Settings | Printing | Document Options Window

To see a list of the field names available, click the **Find** button in the Jobs section and then click **Show Advanced Find**. The field names are listed in the **By this field** column.
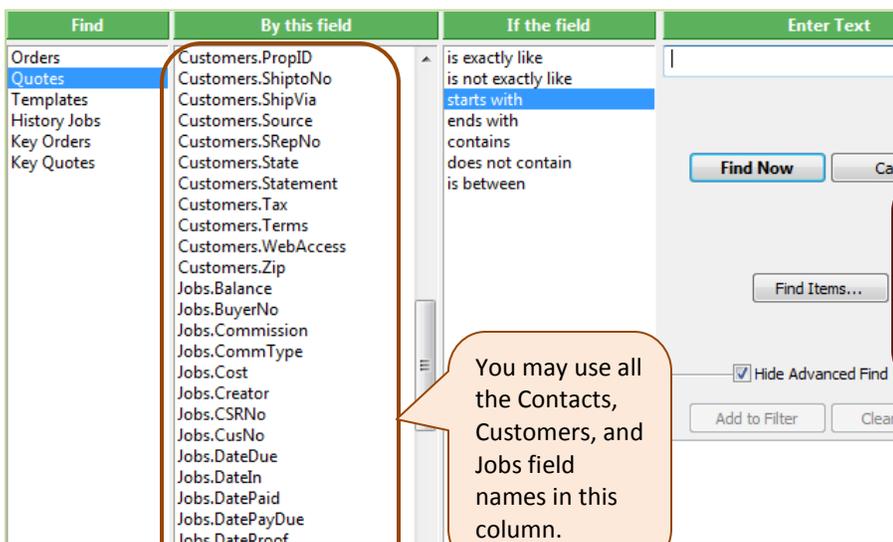
Services section

➡️ Difficulty Table for Digital Printers/Copiers: Now you can adjust the time and waste for digital printers according to the paper used in the job and the difficulties of the job.
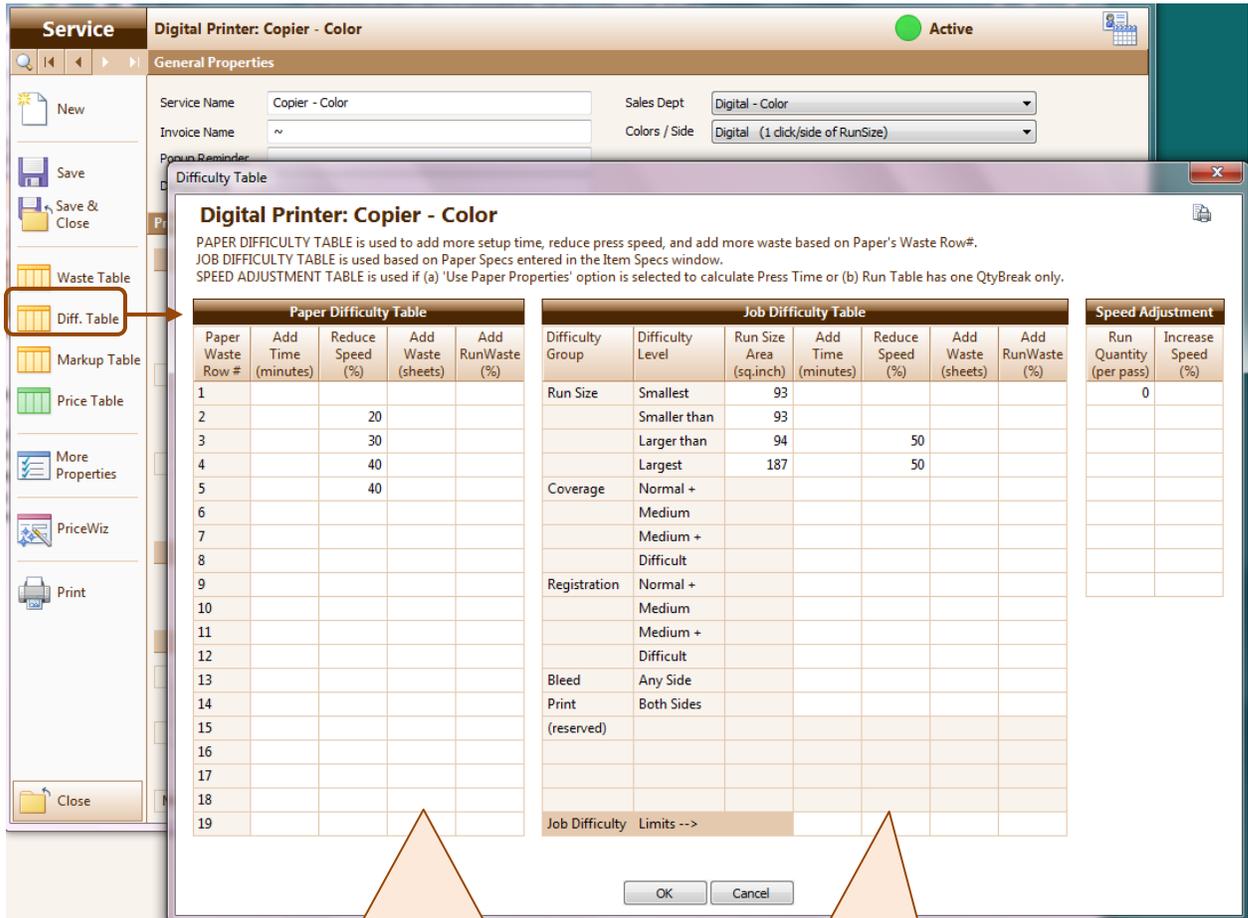
Paper Difficulty Table
Enter the setup time, speed, and waste adjustments for papers. This table is linked to a paper by the waste table row assigned to the paper.

Job Difficulty Table
Enter the setup time, speed, and waste adjustments for job difficulties.

➡️ You can now assign to a service a setup price that will be added to the Price Table prices.

Pricing Properties

Quantity	Impressions ▾

Round-up to [0]

Waste...	--- No Paper Waste --- ▾

Time...	Calculate time from #impressions (clicks) using 'Colors/. ▾

Cost	Time Cost + Material Cost ▾

Cost / Hour $ [80.00]
Multiplier... [0]

Price	Use Price Table

Setup Table

Per	Minutes	Mat.Cost	Setup Price
Lot (1)	3.00		10.00
Page/Set	0.17		

Run Table

QtyBreak	Units/Hour	Mat.Cost	Run Pric
1	3000.00	60.00	

Price Table

Digital Printer: Copier - Color
How to Use this Price Table

1. Select a column based on: How Sides Printed (Black | Black,
2. Select a row based on: Service Quantity = Impressions
3. Read the price in the selected cell as: Per Each

> Service uses Price Table.

> "Setup Price" column is enabled to enter setup price. ("Run Price" column is still disabled.)

➡️ More columns are added to the Services List View.

| Favorites | Security | | | Reminder | Meliss |

☑ Exclude Discontinued Services   ▾ Service Settings

Center	Operator	Tag	Vendor	SKU	UPC	FSC	AutoAdd

> Newly added columns

➡ Now you can assign Cost per Click to Digital Printers/Copiers set up as "Color/Black".

Digital Printer: Copier - Color

How to Use this Price Table

1. Select a column based on: **How Sides Printed (Black | Black/Black | Color | Color/Black | Color/Color)** ▼

2. Select a row based on: **Service Quantity** ...ons ▼

3. Read the price in the selected cell as: **Per Each**

4. Calculate the Service Price using this method: **Linear**

5. Multiply the price by: **(built-in)**

> If you select the "How Sides Printed" option, you may enter a per click cost for each column. If no cost is entered for columns, the unit cost of the Run Table will be used.

Service Price = Cell Price x Impressions

Sides ->	Black/	Blk/Blk	Color/	Col/Blk	Col/Col			
Cost/Click ->	0.0050	0.0050	0.0600	0.0325	0.0600			
Row #	Service Qty	Price	Price	Price	Price	...ce		
1	10	0.0800	0.0800	1.0000	0.54...			
2	50	0.0600	0.0600	0.9000	0.4...			
3	100	0.0400	0.0400	0.8000	0.4...			

> Col/Blk cost
> = **Average** Cost/Click
> = (Cost Side1 + Cost Side2) / 2

> Setup price (new feature) will always be used – whether you enter costs for columns or not.

	Setup Table		
Per	Minutes	Mat.Cost	Setup Price
Lot (1)	3.00		10.00
Page/Set	0.15		

	Run Table		
QtyBreak	Units/Hour	Mat.Cost	Run Price
1	3000.00	60.00	

Mat.Costs and
Run Prices are

Per M (1000) ▼

Method between

> You must still enter a cost in "Run Table" although the costs in "Price Table" will override it. If this field is zero or blank, Printer's Plan will ask for material cost in the job.

➡ Ask for Total Cost: If a service is set up as:

> Quantity = (any selection from the list)
> Cost = Material Cost only or Time Cost + Material Cost
> Mat. Cost is blank
> Mat. Costs and Run Prices are = Total

then Printer's Plan asks for the total cost of the service regardless of the selection in the "Quantity" field.

When the service above is used in an Item, the following window will appear:

Customers section

➡ When a customer window is opened in non-edit mode, such as when it is opened from the Job window, typing in the Note field will cause a warning window to open to let the user know that the notes will not be saved.

Window color is gray to indicate that the window is in non-edit mode.

Customer Note field

Warning window
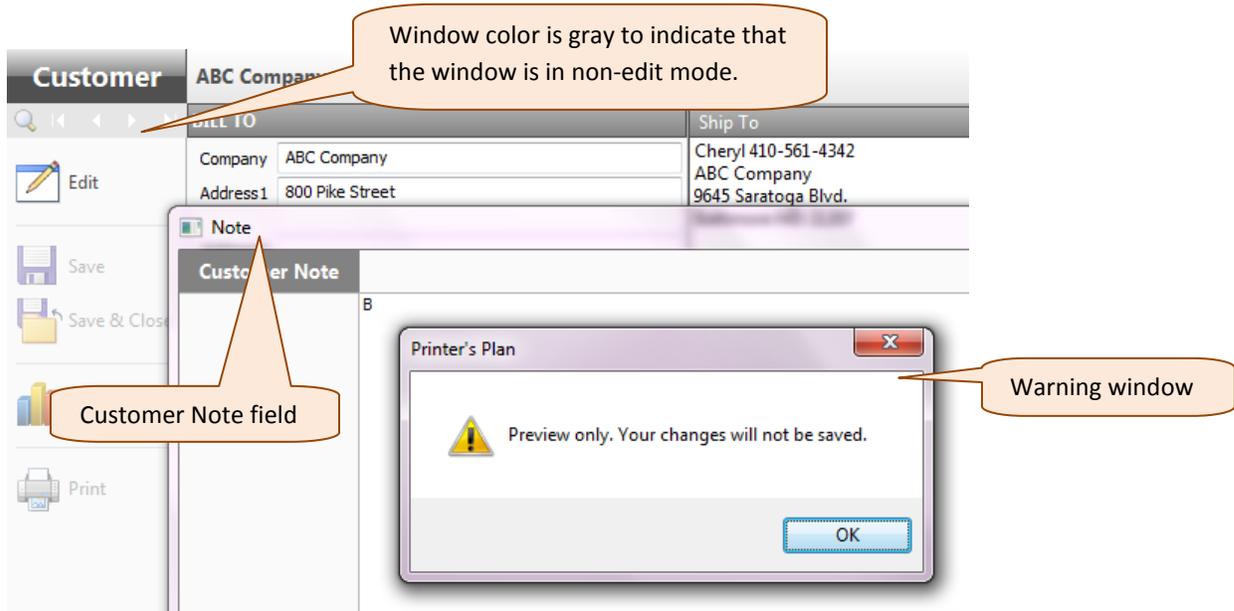
See **Settings | General Settings | Passwords** to set permissions for opening the Customer window: New tasks: #66 through #68

Reports section

➡ You can now add filters to "Profitability" and "Comparison" reports for Customer, Customer Ship To and Buyer, CSR, Sales Rep (assigned to Job), and Location No.

Right-click the report and then click "Add Filter…" to open the Find window.

Find Window

"Ship To" and "Buyer" numbers can be found on their Edit windows. *(See the following.)*

New report showing Quotes won and lost and their ratio is added to Special Reports.

Special Reports / Quotes Won/Lost
Date Range: Year-to-Date (1/1/2012 - 5/1/2012)

Year	Month	Count Total Quotes	Qty Quotes Won	% Quotes Won	Qty Quotes Lost	% Quotes Lost
2012	2012 04 April	17	9	52.9%	5	29.4%
	2012 05 May	11	5	45.5%	4	36.4%
		28	14	50.0%	9	32.1%
		28	14	50.0%	9	32.1%

Key Reports: Posting, A/R, Profitability, Comparison, Production, At a Glance, Special Reports (Activities of My Company, Activities of Customer No..., Quotes Won/Lost, Missing/Duplicate Jobs), More Reports

Tax reports are revised: If the tax amount of a Job is zero, the net sale amount for the Job is reported under Tax Exempt sales.

Posting / Summary of Taxes
Date Range: Year-to-Date (1/1/2012 - 5/1/2012)

Tax No	Tax Name	Tax For	Count	Net Sales Subtotal-Disc	Net Sales Tax Exempt	Net Sales Taxable	+ Shipping Taxable	+ Postage Taxable	= Total Taxable	Tax
0	Exempt	Invoices	138	66,674.28	66,674.28	0.00	0.00	0.00	0.00	0.00
			138	66,674.28	66,674.28	0.00	0.00	0.00	0.00	0.00
1	Maryland	Invoices	365	133,615.00	0.00	133,615.00	0.00	0.00	133,615.00	8,016.96
			365	133,615.00	0.00	133,615.00	0.00	0.00	133,615.00	8,016.96
2	Selena County	Invoices	4	1,668.69	1,668.69	0.00	0.00	0.00	1,668.69	0.00
			4	1,668.69	1,668.69	0.00	0.00	0.00	1,668.69	0.00
			507	201,957.97	68,342.97	133,615.00	0.00	0.00	135,283.69	8,016.96

Key Reports: Posting (Summary, Summary of Sales, Summary of Taxes, List of Invoices + QuickSales, List of Taxes, List of Payments, List of Credits Given/Applied, Changes to Earlier Invoices, Accounting), A/R, Profitability

Tax amounts on Selena County Jobs = $0

Reports by "Date (In, Shipped, Paid, Reorder)" and some of "Sales By" reports now include Shipping, Postage, and Tax totals.

New columns

Name	Subtotal	Discount	NetSale	Shipping	Postage	Tax	Co
Medical	201802.36	-10395.88	191406.48	554.77	38002.51	7416.37	252493.1

Sales by / Business Type: 10   (PostingDate between 1/1/2012 and 5/1/2012)

⏩ New report: "Activities of Customer No…", added to "Special Reports", shows the major transactions of a customer for a specified period of time.


Printer's Plan 2012.00 - May 03 (05.03.12 #587)   Printer's Plan   Page 1 of 1
05/07/12 10:57:50

Special Reports / Activities of Customer No: 41 - ABC Company

Date Range: April (4/1/2012 - 4/30/2012)
This report includes the activities of the selected customer during the selected date range plus the payments expected (any date) from the customer.

Customer	Created	Cus#	Name	Default Buyer	Phone			Credit Limit	Credit Due
	01/01/1998	41	ABC Company	Sharon Jones	410-539-3466 x 3			100,000.00	75.00

Orders	Received	Job#	Title	Ordered By	Status	Prepared I	Subtotal	Discount	JobTotal
	04/05/2012	2398	Newsletter	Sharon Jones	- In History	Paul	4,304.05	-215.20	4,293.29
	04/06/2012	2285	Brochure	Ann M Linz	- In History	Brad	2,917.60		3,063.48
	04/06/2012	2286	Booklet (Set)	John Smith	- In History	Lisa	2,551.34		2,678.91
	04/06/2012	2346	Direct Mail Envelopes	Ann M Linz	- In History	Lisa	1,376.86	-68.84	1,373.42
	04/06/2012	2395	Welcome Brochures	Sharon Jones	- In History	Paul	2,830.09	-141.50	2,823.02
	04/07/2012	2304	Flyers	John Smith	- In History	Lisa	26.42		27.74
	04/07/2012	2324	BUSINESS CARDS THERM. 1 COLOI	John Smith	- In History	Brad	105.00		110.25
	04/10/2012	2396	Purchase Forms	Sharon Jones	- In History	Paul	2,680.00	-134.00	2,673.30
	04/10/2012	2401	Newsletter	Sharon Jones	- In History	Paul	438.99	-21.95	437.89
	04/10/2012	2402	Envelopes	Sharon Jones	- In History	Paul	1,636.97	-81.85	1,632.88
	04/19/2012	2404	Newsletter	Sharon Jones	- In History	Paul	4,906.94	-245.35	4,894.67
	04/30/2012	2378	Brochure	Ann M Linz	On Hold	Paul	1,190.45		1,249.97
	04/30/2012	2379	Booklet	Sharon Jones	In Progress	Lisa	740.78	-37.04	738.93
	04/30/2012	2380	Employee Manuals	Sharon Jones	In Progress	Paul	251.40	-12.57	250.77
			Orders Received (14)				**25,956.89**	**-958.30**	**26,248.52**

Payments	Received		Applied To	Paid By	Reference	Group			PayAmount
	04/11/2012	0	2357	Check	123654	AR			171.94
	04/19/2012	0	1930	Visa		AR			407.69
	04/20/2012	0	1933	Visa		AR			34.77
	04/25/2012	0	1934	Visa		AR			444.04
	04/26/2012	0	2255 2251 2285	Check		AR			6,746.70
			Payments Received (5)						**7,805.14**

Payments	Expected	Invoice No	Title	Date Shipped			Invoice Total	Paid	Balance
	04/10/2012	1950	Newsletter	2/17/2012			423.58	-181.19	242.39
	04/26/2012	1952	Application Forms	3/29/2012			982.72	-827.03	155.69
	05/01/2012	2100	Letterhead	4/7/2012			211.50		211.50
	05/05/2012	2425	Newsletter	4/2/2012			1,087.23		1,087.23
	05/11/2012	2395	Welcome Brochures	4/13/2012			2,823.02	-1,800.49	1,022.53
	05/14/2012	2304	Flyers	4/18/2012			27.74	-4.15	23.59
	05/17/2012	2401	Newsletter	4/16/2012			437.89		437.89
	05/25/2012	2402	Envelopes	4/26/2012			1,632.88		1,632.88
			Payments Expected (8)				**7,626.56**	**-2,812.86**	**4,813.70**

Credit	Transaction	Job#	Reason						Amount
	04/10/2012	0	Prepress error						75.00
			Credit Transactions (1)						**75.00**

Write Off	Transaction	Job#							Amount
	04/10/2012	1931							-7.71
	04/26/2012	2394							-475.97
			Write Off Transactions (2)						**-483.68**

Late Fee	Transaction	Job#							Amount
	04/26/2012	1950							3.58
			Late Fee Transactions (1)						**3.58**

A/R section

➡️ You can now set a payment type as default. This feature is computer-specific.

Click to open this window.

Set 'Visa' as the default payment type for AR Payments? (local to this computer)
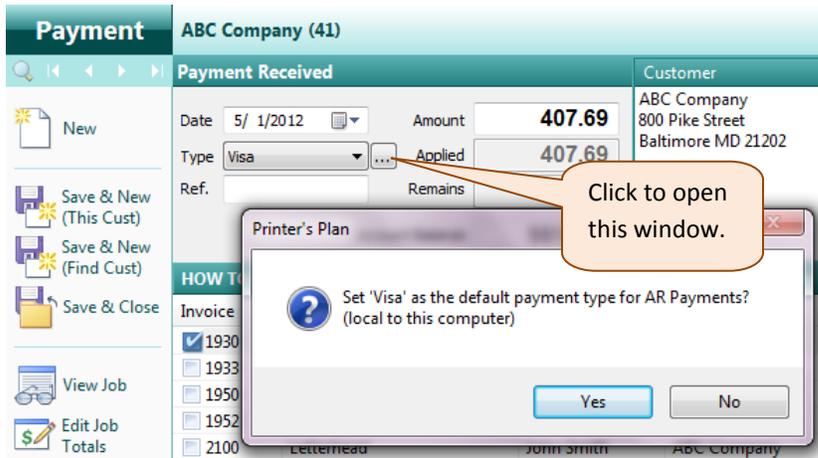
➡️ The word "Aging" is removed from the list names under "Invoices Unpaid". <u>No changes</u> are made to these lists.

Was

Now
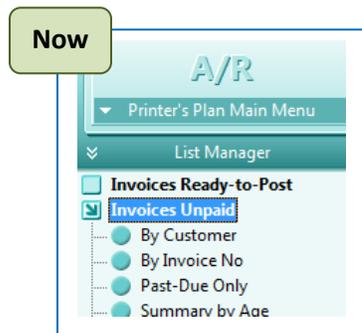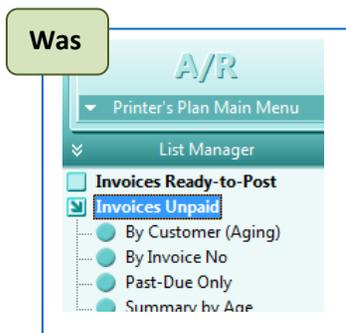
For Aging reports, go to **Reports | A/R**. Unpaid Invoices lists in A/R do not include credits.

➡️ Now you can send to a Parent Company a statement, which includes the children's invoices, even though the Parent Company does not have open invoices. To enable this feature, assign the customer number of the Parent Company to its "Parent No…" field

"Parent No…" field of Customer #41
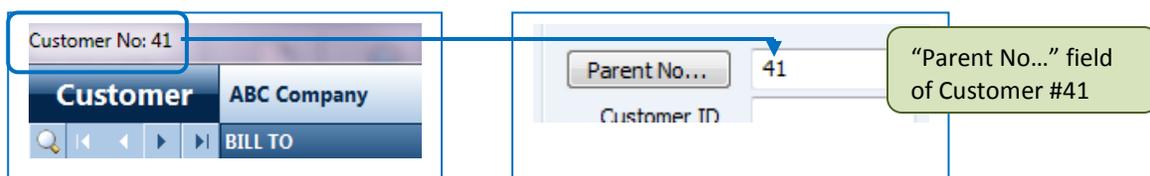
Settings section

➡️ More functions are added to the "Passwords" table.

ID	Tasks and Required Password Levels	Level
57		
58	Print List and Labels in Customers section	2
59		
60		
61	Enter Quick Sales	3
62	Enter Deposit	2
63	Reverse Payment	2
64	View/Edit Commission	2
65		
66	View Customer from Job window	2
67	Edit Customer from Job window	2
68	Edit Customer from Customers section	2
69		

New areas that can be password-protected

Misc

➡️ Now Printer's Plan remembers the location where you backed up the database the last time using the "Back up" feature in the "Home" section.

➡️ The window color for the second copy of Printer's Plan opened on the same computer is now dull for easy identification between the two copies.

First copy of Printer's Plan opened on this computer: Original colors
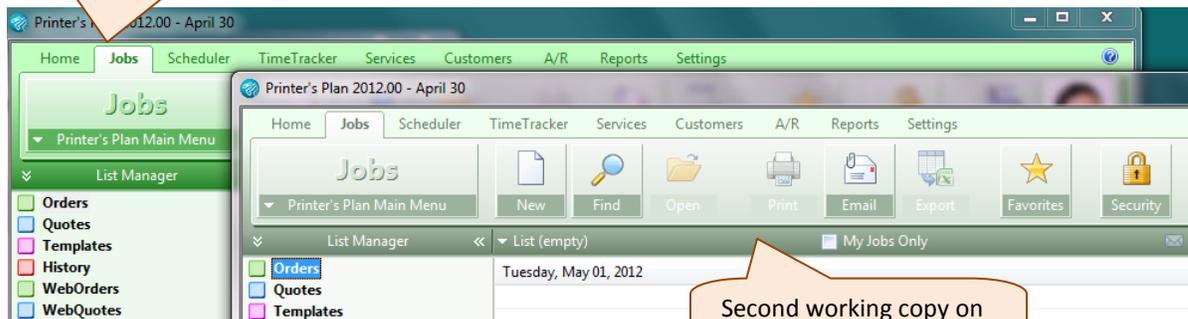
Second working copy on this computer: Color dull

Fixes

➡ Fix in Contact, Ship to, and Reminder list windows: After selecting a row, if you clicked "New", then "Cancel", and then "Edit", the "New" window was displayed instead of the "Edit" window of the selected row. This error is fixed.

➡ Invoice/Quote printing: When print "All Services & prices" option was selected, all services, including the ones marked with tilde (~), were printed. Now, "No Charge" services marked with tilde are not printed.

➡ Work Order printing: When only a portion of the Paper information could fit at the bottom of a Work Order page, the rest of the information did not print on the next page. Now, the complete Paper information is printed on the next page.

➡ The default selection in the Customer's "Price Rounding" field was ignored. Fixed.

➡ If a Plate is hidden, it no longer shows in the Default Plate list for a Press.

➡ Finishing services setup waste now factors in the number of parts of a paper (example: carbonless papers) when the setup waste is calculated.

QuickSale tool

➡️ Now a service selection is required on the QuickSale window.
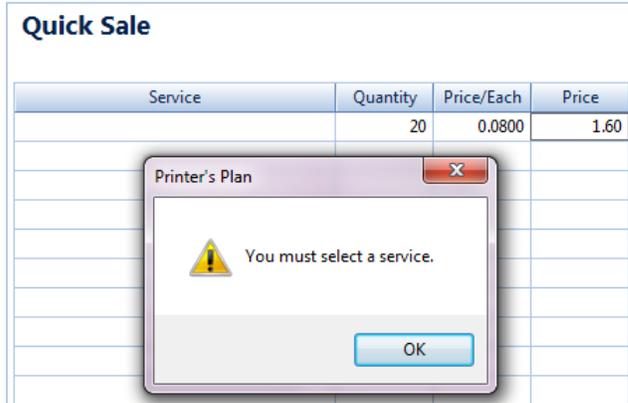
➡️ Unused fields in the QuickSale setup window are now hidden.

ShippingLabels tool

➡️ Now you can also include **Contact's Email**, **Phone2**, all **cell (Mobile)** fields, and **Ship To Phone** in Shipping Labels templates.

Reminder tool

➡️ New option allows you to combine or separate A/R and Customer reminders.
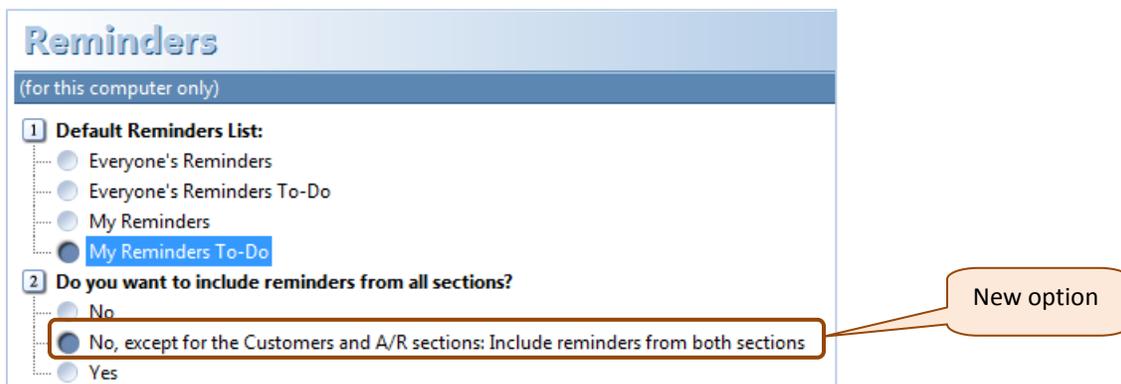
Scheduler tool

➡️ The "Favorites" feature is now added to Scheduler.

Right-click on a list and select "Add to Favorites…".
Later click "Favorites…" to display the report. This
feature is especially helpful and saves time when a
salesperson wants to see his/her jobs regularly.

➡️ Summary-To-Do by Category/Service view now also displays category totals.

➡️ Now a "View Schedule" window is available in the History Job window. It displays, along with other information, the operators who completed the tasks when the history job was an Order.

Fixes in the Scheduler tool

➡️ Printing an Inventory list: Each page added more blank lines. Fixed.

➡️ Option "Clear Service Date" in the "New Item Options" did not work. Now it does.

➡️ The When window of the Schedule window allowed changing the Job status to "Ready-to-Post" even if the Job was not priced, invoice was not printed, or Shipped date was not assigned. Now the program checks the Job if the above conditions are fulfilled before changing the status.

➡️ "Order No" column was not sorted correctly. Now it is.

XML tool

➡️ Printing Work Orders and Invoices: If the selected template (.xslt file) name starts with "WorkOrder" or "Invoice", the Shipped date, #printed, and status of the order are updated just like the way they are updated when the forms are printed from the regular Print window.

➡️ You can now export the Price Book to an XML file.

➡️ You can now export any list in Printer's Plan to an XML file.

Inventory tool

➡️ Inventory window is now larger.

➡️ Now you can view the Inventory detail of a service in the Item specs window.

> Right-click on service and select "View Service Inventory".
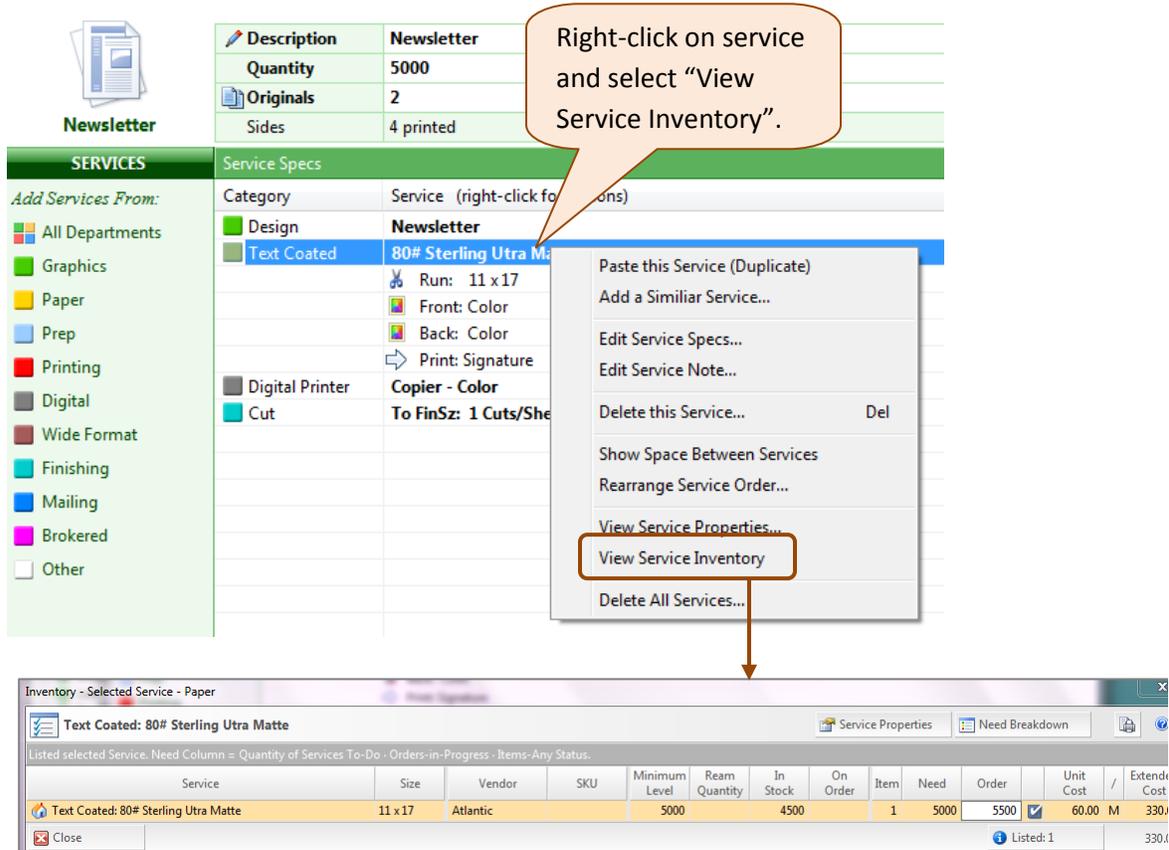
➡️ When the Inventory options are set so that the Inventory window is not available in the Job window when the "Inventory" button is clicked, you can still view the window in non-edit mode

> Hold [Ctrl] key down and click "Inventory" button.
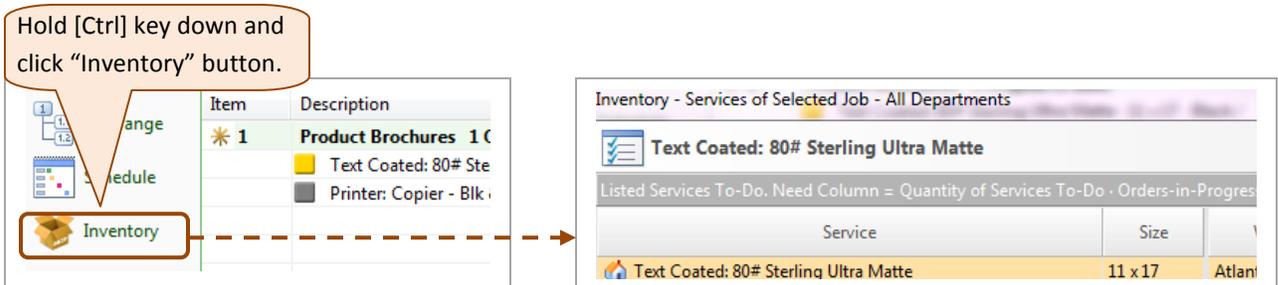
Fixes in the Inventory tool

➡️ Printing an Inventory list: Each page added more blank lines. Fixed.