



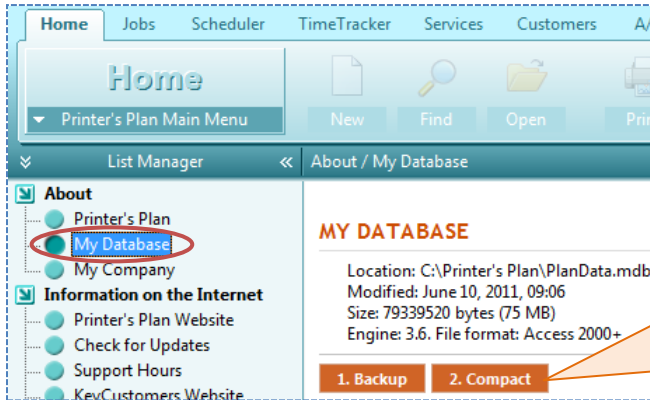
## PRINTER'S PLAN 2014

# To Do *After* You Upgrade

### ▶ **REQUIRED To-Do's**

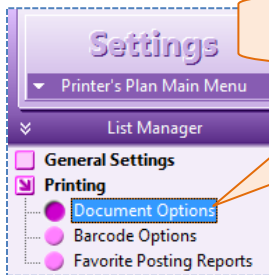
**IMPORTANT!** Before you start using the new version, do the following steps.

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



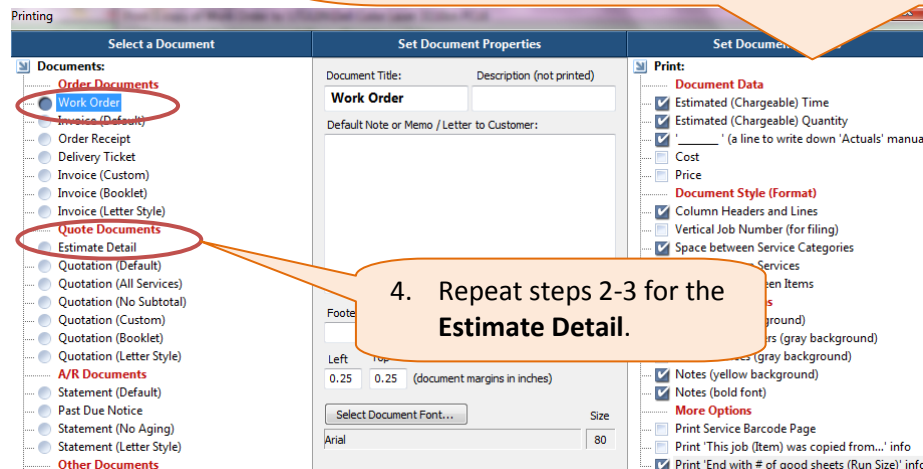
1. In the List Manager, open **About > My Database**.
2. Click **Compact**.
3. After Printer's Plan has confirmed that compacting and indexing have been successful, click **OK** to close the window.

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



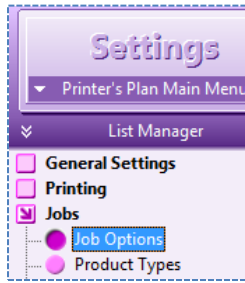
1. In the List Manager, open **Printing > Document Options**.

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.

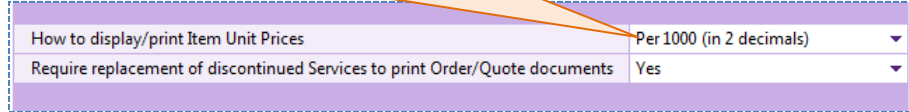


4. Repeat steps 2-3 for the **Estimate Detail**.

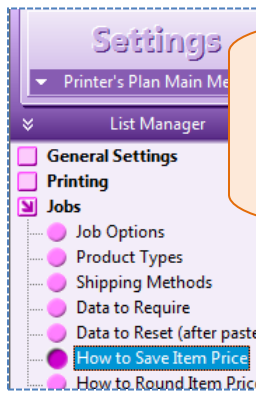
3. In the **Settings** section, set the new **How to display/print Item Unit Prices** option for Jobs:



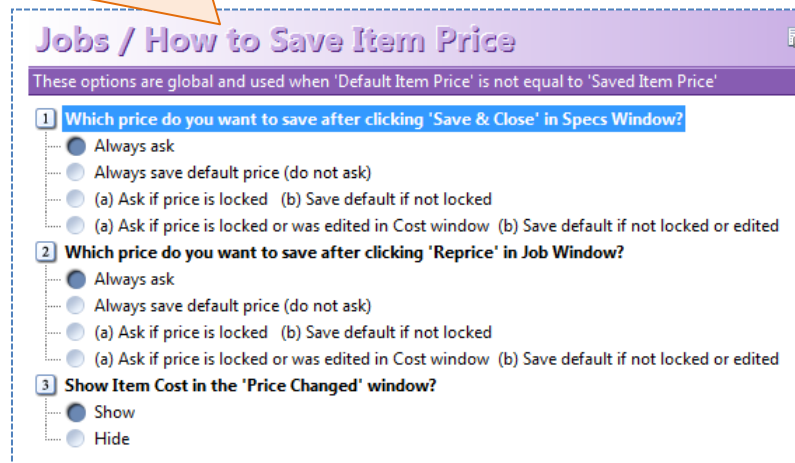
1. In the List Manager, open **Jobs > Job Options**.
2. Choose the default for displaying the Item Unit Price. (In the Item Specs window, you will have an option to change this selection for a specific Item.)



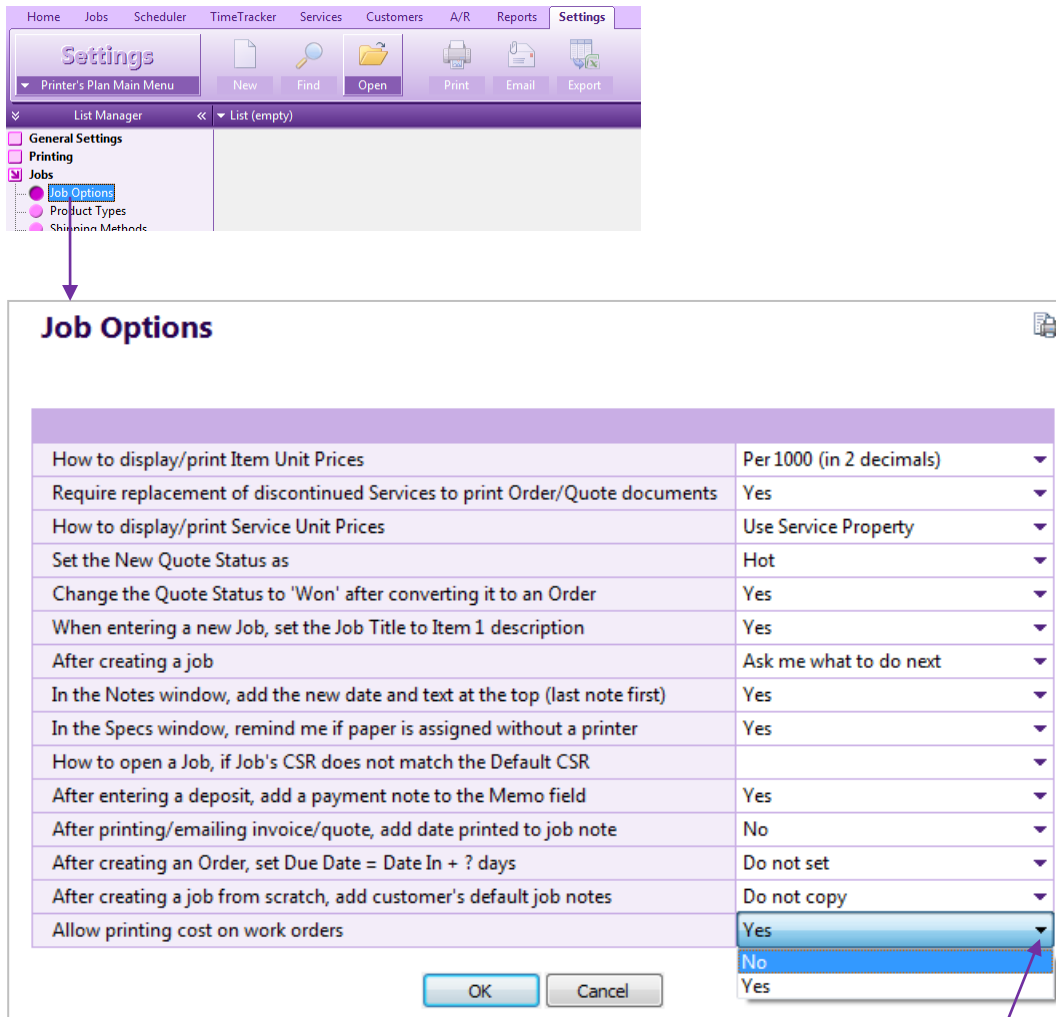
4. In the **Settings** section, reset the **How to Save Item Price** options:



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.



5. In the **Settings** section, reset the “Allow printing cost on work orders” option.



Click the arrow in the **Allow printing cost on work orders** field.

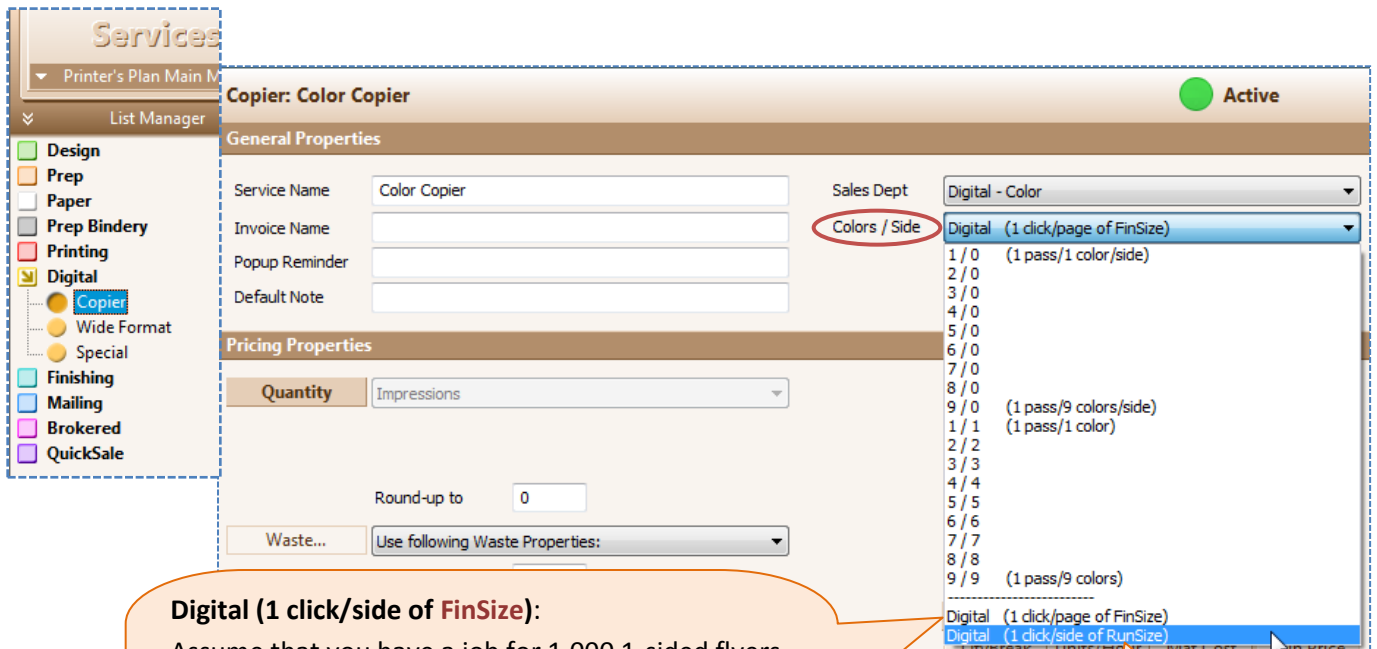
- If you want to keep the selection as “Yes”: First select “No”; then, click the arrow and select “Yes” again. *(This procedure is necessary because the selection “Yes” needs to be reset to become effective.)*
- If you want to change the selection to “No”: Select “No”.

6. 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 2012** 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 (#Fin Size sheets x 1 side) although the number of actual clicks is 500. Additionally, the program ignores the number of colors.

**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) which is the actual number of clicks. Additionally, the program ignores the number of colors.

7. In the **Jobs** section, take a look at the difference between the default prices in V2008 and in V2012:

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

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 V2011 is higher than the one calculated by V2008. A green plus sign appears if the V2011 price is lower.

8. In the **Jobs** section, review and set the new options for printing Work Orders.

**1 Select a Document:**

**For In-House:**

- Work Order

**For Customer:**

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

**2 Check Document Options:**

**Document Data**

- Estimated (Chargeable) Time
- Estimated (Chargeable) Quantity
- '\_\_\_\_\_' (a line to write down 'Actuals' manually)
- Cost
- 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

**New Options**

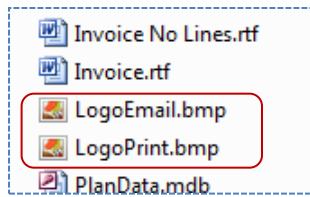
Printing #Originals on Work Orders is now an option.

## 9. 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 2012. 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.

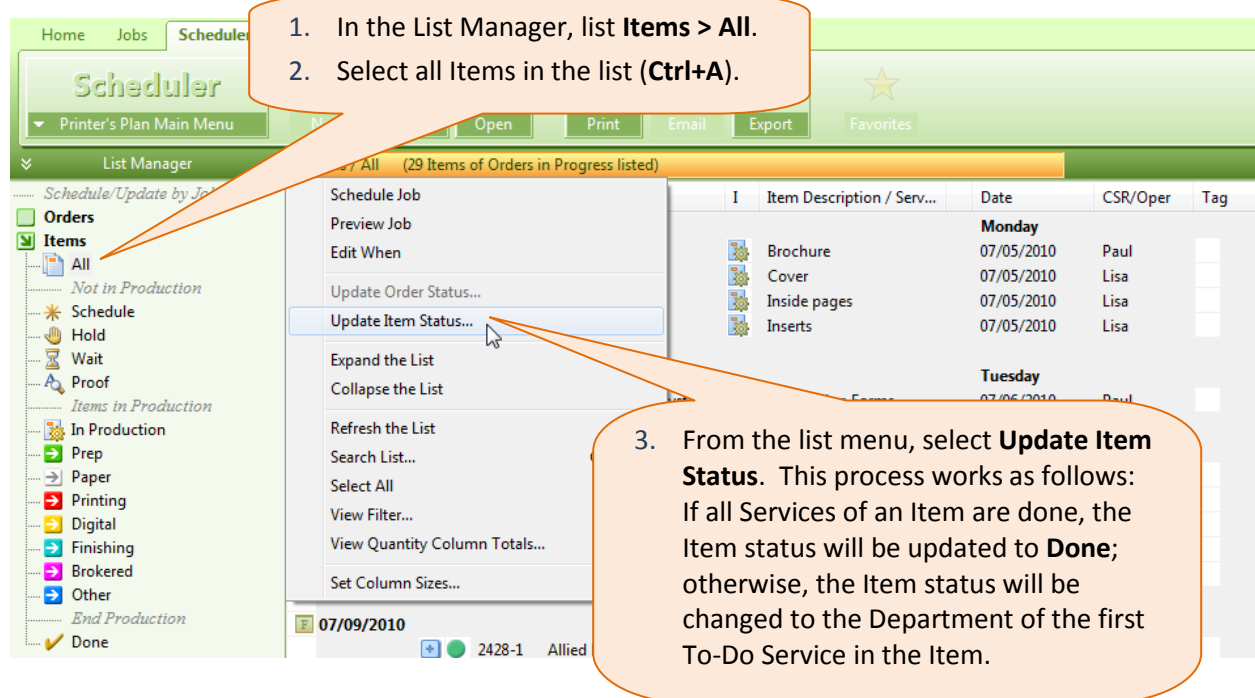
## 10. Logo image files

Be sure that 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 2012, 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, which are *LogoEmail.bmp* and *LogoPrint.bmp*. Then, delete the ones named *MyLogoEmail.bmp* and *MyLogoPrint.bmp*.



## 11. 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**.

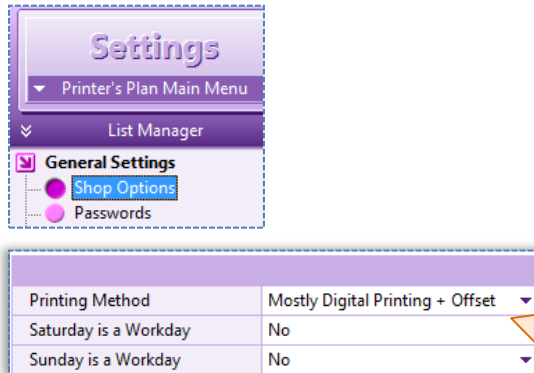
2. Select all Items in the list (**Ctrl+A**).

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 in the Item.

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: [info@printersplan.com](mailto:info@printersplan.com) 800-638-7526 Option 0.

## ► RECOMMENDED To-Do's (optional)

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



1. Open **General Settings > Shop Options**.
2. Select a **Printing Method**. Your selection determines how the **Colors** section of the Paper specs is displayed.
3. If Saturday or Sunday is a work day for your business, set the corresponding option to **Yes**. Printer's Plan will warn you if you assign a non-work day to the **Job Due Date** or **Proof Due Date** of an Order.  
***Scheduler users only:** The Auto Schedule feature will not schedule tasks for non-work days.*

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

The screenshot shows the 'Settings' window with 'Printer's Plan Main Menu' and 'List Manager' sections. Under 'List Manager', 'Printing' is expanded to show 'Document Options', 'Barcode Options', and 'Favorite Posting Reports'. Below this is a 'Select a Document' dialog box with the following content:

**Documents:**

- Order Documents**
  - Work Order
  - Invoice (Default)
  - Order Receipt
  - Delivery Ticket
  - Invoice (Custom)
  - Invoice (Booklet)
  - Invoice (Letter Style)
- Quote Documents**
  - Estimate Detail
  - Quotation (Default)
  - Quotation (All Services)
  - Quotation (No Subtotal)
  - Quotation (Custom)
  - Quotation (Booklet)
  - Quotation (Letter Style)

**A/R Documents**

The 'Set Document Options' dialog box shows the following options:

**Print:**

**Document Style (select one):**

- Standard (job totals at bottom)
- Classic (job totals in price column)
- Letter Style

**Document Info (check all that apply):**

- Column Headers and Lines
- Company Logo
- Company Name
- Company Address
- Company Phone and Fax
- Ship To Address
- Ship By + Due Date & Time
- Received by \_\_\_\_\_ Date \_\_\_\_\_

**Sub-Items and # Originals options:**

- Item Notes
- Service Notes
- Ask 'Shipped today?'
- Job Memo
- Sub-Items
- #Originals (or #Sheets) after Item Description

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 on the document.

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**.

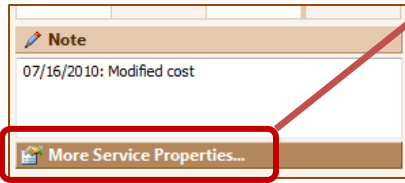
Name	CusNo	Jobs	Cost	NetSale	Margin	AvgMargin	LastOrd
Action Business Systems	37	12	24573.27	29292.98	4719.71	393.31	01/04/20
Ascot Inc.	40	12	21955.29	26434.67	4479.38	373.28	01/05/20
ABC Company	41	11	22274.92	25822.81	3547.89	322.54	01/07/20
Attman & Associates	43	11	9391.36	11184.15	1792.79	162.9	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	167.7	01/01/20
Allied Building Supplies	35	6	3602.95	4288.81	685.86	117.7	01/01/20

**3.** In the dialog box, checkmark the **Exclude Hidden Customers** option, and click **OK**. This option will also be applied to the other Customers lists mentioned; you do not need to go through these steps again for those lists.

# Notes on Version 2012

## Services > Service setup window > More Service Properties window:

Service Setup window:



The fields under **Scheduler (optional tool)** and **Inventory (optional tool)** are used only if you have purchased the optional tool under which they are listed. If you do not have either or both of these tools and would like a free trial, please contact our office:

[Info@printersplan.com](mailto:Info@printersplan.com)  
800-638-7526 Option 0

## Color / Black pricing

The new **Color / Black 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.

- If you assign multiple papers to an Item using this digital printer, you need to be aware of the following:

Paper 1 printed as:	Paper 2 printed as:	All clicks will be charged at:
Color one side	black one side	<b>Color/</b> rate
color/black	color one side	<b>Color/Black</b> rate
color/color	black/black	<b>Color/Color</b> rate
black/black	black one side	<b>Black/Black</b> rate
color/color	color one side	<b>Color/Color</b> rate

- Color / Black pricing** feature 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.

## Services Section

Although major improvements are added in the Services section, your Services set up will convert as is. After completing the steps listed in the *After You Upgrade* section of this document, you can continue using Printer's Plan without visiting the Services section again. Later, when you have time, you can return to the Services 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 2012](#) 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 assume the **Active** status instead of the **On Hold** status in version 2012.

## Reports

The PP Companion reports section has been eliminated entirely. Most of these reports have been re-created in the KeyReports section. 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/v2011/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 2012. 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

- **New**
  - Inventory
  - Reminder
  - XML
  - SurveyLink
- **Improved**
  - Scheduler
  - TimeTracker
  - JobTracker
- **Discontinued** (If you have been using either of these tools, please contact us at 800-638-7526 Option 0)
  - LaptopLink
  - PaperLink

For a brief review of the new and improved optional tools, please visit:  
<http://www.printersplan.com/v2011/download/OptionalTools-2011.pdf>

For a FREE TRIAL and pricing information for these tools, please contact us:  
800-638-7526 Option 0  
[info@printersplan.com](mailto:info@printersplan.com)

## Pricing changes (from earlier versions)

Due to the reorganization of the Services section and the major improvements in it, Printer's Plan 2012 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.

**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/v2011/download/PricingDifferences.pdf>

## Conversion

When you first open Printer's Plan 2012 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.

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# Notes on Version 2014

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**QUESTIONS?** Please contact Technical Support: Call 800.638.7526 Option 1 --- Email [support@printersplan.com](mailto:support@printersplan.com)