



PRINTER'S PLAN

NEW VERSION

PRINTER'S PLAN 2014

What's New & Improved

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Services Section

New Wide Format Services

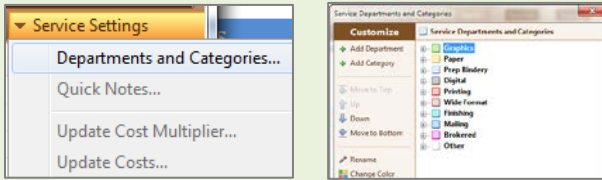
Wide Format services are greatly improved in version 2014. How to set up the new Wide Format Categories depends on whether you have already created a Wide Format department and its categories in an earlier version of Printer's Plan.

- a) If you have not created any Wide Format categories yet, follow the instructions under Case A.
- b) If you have already created some Wide Format categories, follow the instructions under Case B.

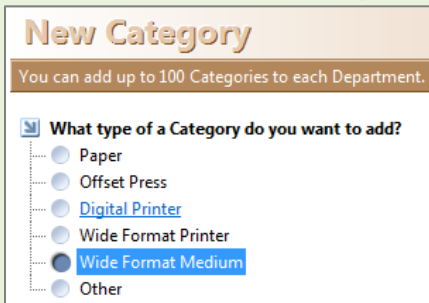
Case A: Creating a Wide Format Department and its Categories

Follow these instructions if you have not created a Wide Format department and its categories yet.

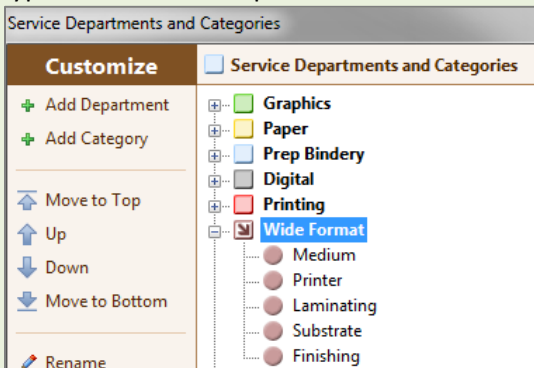
1. In the Services section, click **Service Settings** and select **Departments and Categories**.



2. Click **Add Department** to create a Wide Format department.
3. Highlight the Wide Format Department and click **Add Category**.
4. Select **Wide Format Medium** (new category type) and click OK.



5. Name the category, such as Medium.
6. Repeat steps 3 through 5 to add a **Wide Format Printer** category and name it, such as Printer.
7. Repeat steps 3 through 5 to add other Wide Format categories. Select **Other** as the category type. Here's an example of a Wide Format department and its categories:



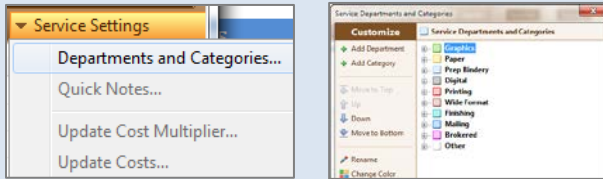
8. Click **Save & Close** and then restart Printer's Plan.

Case B: Reorganizing the Existing Wide Format Department and Services

Follow these instructions if you have already created a Wide Format department and its categories in an earlier version of Printer's Plan.

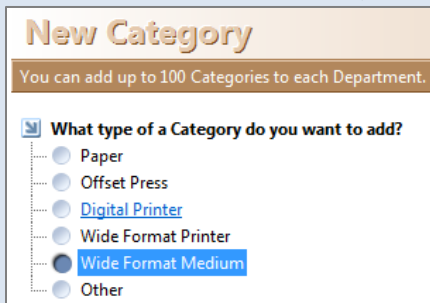
Please note that you will not lose your existing Wide Format Services.

1. In the Services section, click **Service Settings** and select **Departments and Categories**.



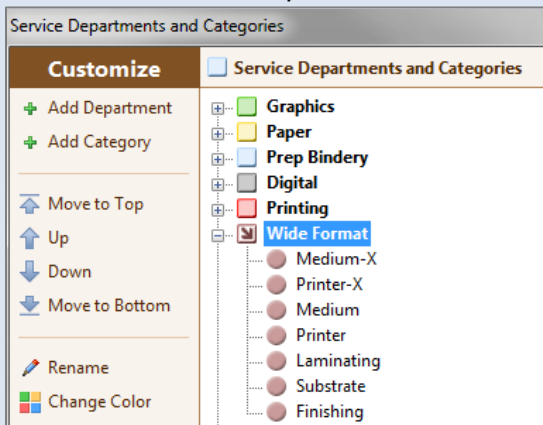
2. Expand the existing Wide Format department.
3. Rename the existing Wide Format "Printer" and "Medium" categories as Medium-X, Printer-X.

4. Highlight the Wide Format department and click **Add Category**.
5. Select **Wide Format Medium** (new category type) and click **OK**.



6. Name the category, such as Medium.

7. Repeat steps 4 through 6 to add a **Wide Format Printer** category and name it, such as Printer. Move the newly created categories so that all categories are listed in the desired order. Your window may look like as follows:



8. Click **Save & Close** and then restart Printer's Plan.

Continued on the next page...

Case B continued

- Drag the existing Wide Format Medium and Printer Services into the new categories you just created.

- Close Printer's Plan and open it again.
- Click **Service Settings** and select **Departments and Categories**.
- Delete the Medium-X and Printer-X categories.

- Open the Services you moved into the new Medium and Printer categories in step 9 and complete the additional fields. (See the following instructions on how to complete them.)

Properties of Wide Format Medium

Medium: Stock - Canvas 36 Active + Header

General Properties

Service Name: Sales Dept:

Invoice Name:

Popup Reminder:

Default Note:

Size...: Thickness...:

Pricing Properties

Quantity: Total Height (Length):

Divide by...:

Round-up to:

Setup Table	Per	Minutes	Mat.Cost	Setup Price

Run Table	QtyBreak	Units/Hour	Mat.Cost	Run Price
	1		1.00	

Wide Format Material Setup Options

If the material type is:	In the Size field, enter:	To enter Costs per	In the Quantity field, select:	In the Divide by field, enter:
ROLL	Roll Width in inches	Linear Foot	Total Height (recommended)	12
		Linear Inch		0
		Square Foot	Total Area	144
		Square Inch		0
FLAT	Sheet Size as Width x Length in inches	Sheet	Run Size Sheets (recommended)	0
		Linear Foot	Total Height	12
		Linear Inch		0
		Square Foot	Total Area	144
		Square Inch		0

Properties of Wide Format Printer

Printer: Wide Format Printer Active

General Properties

Service Name: Sales Dept:

Invoice Name:

Popup Reminder:

Default Note:

Total Area = Document Size x #Documents Printed

Pricing Properties

Quantity:

Divide by...:

Round-up to:

Speed and Ink costs are per square foot based on the Divide by field.

Per	Minutes	Mat.Cost	Setup Price
Lot (1)	15.00		

Resolution and Coverage Difficulty Levels

Diff.Level	Speed	Ink Cost	Run Price
1	50.00	1.00	
2	40.00	2.33	
3	30.00	3.33	
4	20.20	4.00	
5	20.00	5.00	

Cost:

PRODUCTION SPEED, INK COST, AND DIFFICULTIES

Printer's Plan uses this table to calculate Run Time and Ink Cost based on Resolution and Coverage difficulties. Each difficulty has five levels 1 (normal) through 5 (most difficult).

- a) The Resolution difficulty effects production speed and time.
- b) The Coverage difficulty effects ink usage and material cost.

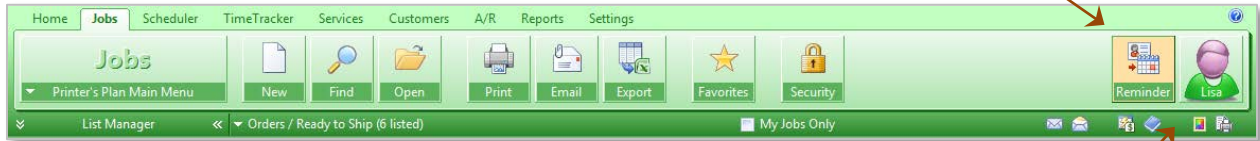
Enter the speed based on the Quantity property. If Quantity is:

- a) Total Length: Speed is linear inch (or foot) per hour.
- b) Total Area: Speed is square inch (or foot) per hour.

Run Time (Hour) = Total Printed Length (or Area) / Speed
 Time Cost (\$) = (Setup + Run Time) x Cost per Hour
 Ink Cost (\$) = Total Printed Area x Ink Cost

Jobs Section

Reminder tool improved (See Page 28 for more.)



New Feature: Job Documents (See Page 23 for more.)

More Information

DateIn	DateProof	DateDue	Time	DateShipped	PO	Inv	InvPrinted	Subtotal	Discount	Shipping	Postage	Tax	Paid
03/06/2014		03/15/2014	1 pm	03/08/2014		Email	2	210.00	0.00	0.00	0.00	10.50	0.00
03/01/2014		03/10/2014	11 am	03/08/2014	89675	Email	1	61.25	0.00	0.00		2.05	0.00
03/06/2014		03/15/2014	11 am	03/08/2014	14	Print	2	2315.09	0.00	0.00			
03/06/2014		03/10/2014	10 am	03/08/2014	94883211...	Print	2	3030.09	0.00	0.00			
03/06/2014		03/10/2014	1 pm	03/08/2014	8546	Print	1	164.31	0.00	0.00			

- Job No
- Customer
- CusNo
- Title
- DateIn
- DateProof
- DateDue
- Time
- DateShipped
- PO
- Inv
- InvPrinted
- Subtotal
- Discount
- Shipping
- Postage
- Tax
- Paid
- Balance
- First
- Last
- LastEmail
- LastSurvey
- CSRNo
- SRepNo
- Status
- Location

Job lists include new columns.

The column "Inv" shows how to send an invoice (email or print) based on the customer's settings. (See Page 12 for more.)

The column "InvPrinted" shows how many copies of an invoice has been printed.

List Orders with reminders.

- New filters**
- With Reminders To-Do
 - Quotes
 - All
 - Hot
 - Warm
 - Cool
 - Won
 - Lost
 - Received Today
 - Received This Week
 - Received This Month
 - Received Last Week
 - Received Last Month
 - Older Than 1 Month
 - Older Than 2 Month
 - Discrepancies
 - With Reminders To-Do

List Quotes with reminders.

Job Window

Reminder tool improved.
(See Page 28 for more.)

New Feature: Job Documents.
Attach multiple documents to an Item. (See Page 23 for more.)

A red icon appears when a Service has a Service Reminder or a Question (Ask: How many...) or its assigned Vendor is different from its default Vendor. Click the icon to view the Reminders/Questions/Default Vendors.

This feature is especially helpful after copying a History job into a new Order.

Job Note		Memo to Customer		Job Totals		Balance Due	
				Subtotal	1,607.86	Total	1,704.34
				Discount	0.00	Paid	0.00
				Shipping	0.00	Balance	1,704.34
				Postage	0.00		
				Taxable	1,607.86		
				Tax	96.48	Net 30 Days	

Specs Window

The screenshot shows the 'Specs Window' for 'ITEM 1'. The 'Item Properties' section includes:

Description	Forms	Price Level	Use Price Table
#Packs	500	Price Rounding	On
Sheets/Pack	100	Format Unit Price	
Sides	1	Size (W x H)	

The 'SERVICES' section shows 'Printer - Color' selected. A 'Services' sidebar on the left lists various departments like Graphics, Paper, and Printing.

New Document Type: Sheets/Pack
 This information will be printed on invoice
Document Types
 Select Document Type
 Originals
 Sheets
 Envelopes
 Names
 Originals/Set
 Sheets/Set
 Sheets/Pad
 Tabs/Set
 Sheets/Pack

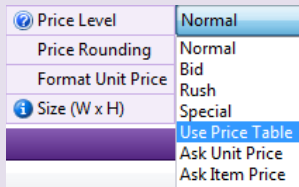
New Price Table option
 (See Page 9 for more.)
Option to use Price Table
 You may price this Item by using a price table.
 Do you want to use Price Table?
 Yes. Open...
 Yes but use another table...
 No.

How to Set Up and Use the New Item Price Tables

How to Set Up

To use this feature, you must first create Item Price Tables for Template Items.

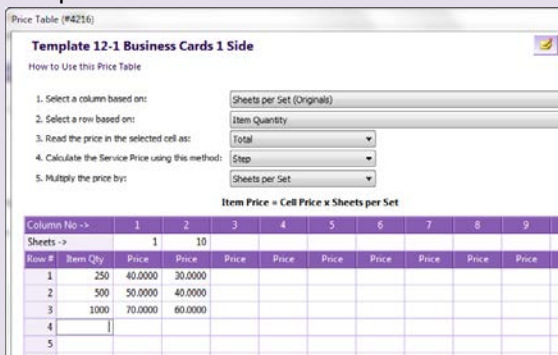
1. In the Jobs section, open a Template.
2. Open the Specs window of an Item of the Template.
3. In the Specs window, click Price Level or select Use Price Table from the list.



4. Select Create...



5. Setup the table and Save.

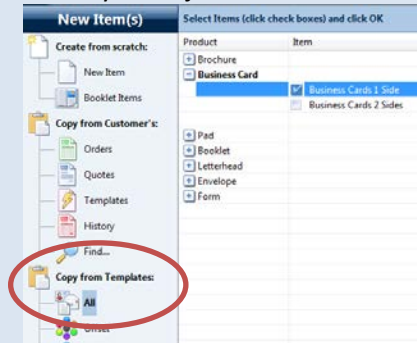


6. Now this table can be assigned to an Item of an Order or Quote.

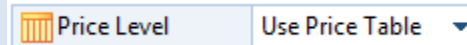
How to Use

After creating Price Tables, you can assign them to Quotes and Orders.

1. Create a 'test' quote. Click New Item.
2. In the New Item window, select the Template for which you've just created a Price Table. Click OK.



3. In the Specs window, you will see:



4. Save & Close the Specs window.
5. In the Job window, click Price List button:



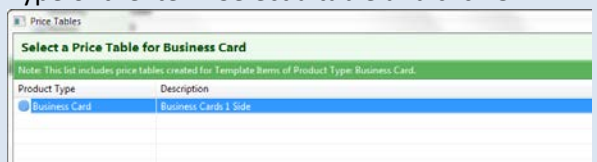
6. In the Price List window, select 'Varies' to see prices at 500, 1000, 5000, and 10,000.

List prices at every... **Varies**

Default prices of Business Cards 1 Side		
Quantity	Price	Unit Price
500	50.00	0.1000/Ea
1,000	60.00	0.0600/Ea
5,000	100.00	0.0200/Ea
10,000	100.00	0.0100/Ea

The steps above are based on a **New Item**. You may also assign the same Price Table to an **Existing Item** that has the same Product Type.

1. In the Specs window of the Item, click Price Level. Click 'Yes' to use Price Table.
2. You will see a list of tables created for the Product Type of the Item. Select a table and click OK.



3. Click Save & Close the Specs window.

Specs Window - Wide Format Medium

ROLL	Widthwise Layout	Lengthwise Layout
<p>PRINTING ON ROLL MATERIAL</p> <p>Roll Width 48"</p> <p>Finish Size 18" x 24"</p>		
<p>PRINTING ON FLAT MATERIAL</p> <p>Flat Sheet Size 48" x 96"</p> <p>Finish Size 24" x 36"</p>		

Customers Section

<input type="checkbox"/> Customers	Name	CusNo	First
<input type="checkbox"/> Prospects	<input type="radio"/> <Your Company Name>		1
<input checked="" type="checkbox"/> Customers + Prospects	<input type="radio"/> Default Customer	10	
<input type="checkbox"/> All (any status)	<input checked="" type="radio"/> PlanWeb Customer	20	
<input type="checkbox"/> All (not hidden)	<input type="radio"/> Walk-in ***	31	
<input type="checkbox"/> Active			
<input type="checkbox"/> On Hold			
<input type="checkbox"/> Hidden			
<input type="checkbox"/> New This Week			
<input type="checkbox"/> New This Month			
<input type="checkbox"/> New This Year			
<input type="checkbox"/> Special Customers			

Customer #20 is the new default customer for "online" orders. It is similar to the Walk-in customer #31 and has been created for use by Web2Plan*.

*Web2Plan is a new Web solution from Printer's Plan. It integrates Web-to-print systems with Printer's Plan.

CusNo	First	Last	Email	Phone	Phone2	Cell
41	Sharon	Jones	sjones@abc.com	410-539-3466 x 35		443-567-4398
32	Linda	Wertheimer	lwertheimer@abel.com	410-777-7544		
37	David	Kirschner	dkirschner@abs.com	410-777-7544		

New columns are added to customer lists.

- All (any status)
- All (not hidden)
- Active
- On Hold
- Hidden
- Default Buyers
- Default Payers
- With Orders
- Without Orders
- Of Prospects
- With Reminders To-Do

New filters
Click to view and follow-up prospects and customers.

Customer Window

Customer ABC Company Active

Buyer: Michelle Greene, greene@abcc.com, Phone: 410-539-3466 x35, 410-539-4398, 410-539-5586
 Payer: Ann M. Linz, alinz@abcc.com, Phone: 410-727-4565, 410-727-4752

Website: www.abcco.com

General Properties: Business: Manufacturing, Source: Newsletter, Sales Rep: Jim, Ship Via: Our Truck, Location: Store 1, Alert: Past-Due, Priority: Quality, Web Orders: Yes

Financial Properties: Price Level: Normal, Price Rounding: Off, P.O.: No, Late Fee: Charge, Tax: Maryland, Terms: Net 30 Days, Discount: 0%, Invoice Method: Email, Send Statement: Yes: Email, Credit Due: 0.00, Credit Limit: 20000.00

Quick info: Last Order: 03/19/2014 (Today), Last Quote: 03/19/2014 (Today), Last Payment: 03/22/2014 (In 2 days), Next ReOrder: 12/31/2014 (In 9 months)

Callouts:
 - New Documents button creates / opens a special folder for each customer. (See Page 23 for more.)
 - New website field: Click the button to open customer's website.
 - New field: CSR
 - New options: How to send invoices? Print or email. How to send statements? Print or email. The Job and Statement list will show this information.
 - Quick info

New Invoice Alert:
 This message will appear in red when Invoice is selected in the Print window. Then, when a Print button is clicked, a pop-up window will display the message.

Print Window:

- Select a Document: For In House, For Customers (Invoice (Default), Order Receipt, Delivery Ticket, Invoice (Custom), Invoice (Booklet), Invoice (Letter Style))
- Check Document Options: Document Style (Standard, Classic, Letter), Document Info (Column Headers and Lines, Company Logo, Company Name, Company Address, Company Phone and Fax, Ship To Address), Other Options (Item Notes, Service Notes, Ask 'Shipped today!', Job Memo, Sub-Items, Originals after Item Description, No Attention)

IMPORTANT NOTE: Remember to enter shipping charges if any. Do you want to continue? [Yes] [No]

Alert: Remember to enter shipping charges if any...

Ship to Window

Ship To Address (#19) Status: Active

Attention: Jennifer Sorenson
 Phone: 443-887-9234
 Company: ABC Company
 Address 1: 9645 Saratoga Blvd.
 Address 2:
 City: Baltimore MD 2120
 Country:
 Tax: < use customer's >
 Shipping:
 Route: A
 Distance: 25 miles
 Charge \$: 20.00
 Created: 10/ 1/2012
 Modified: 3/26/2014

Click to change the Status of this Ship To address.

Note
 Use the back door for delivery of cartons.

New fields:

Tax, Ship by:
 When this Ship To address is assigned to a Job, Printer's Plan will override the customer's default Tax/Shipping Method with the information in these fields. To keep the customer's default Tax/Shipping Method, select the **<use customer's>** option.

Charge \$:
 When this Ship To address is assigned to a Job and if the Shipping charge of a Job is zero, Printer's Plan will use the amount in this field as the shipping charge. However, if this Ship To address is assigned to a Job with an existing shipping charge, Printer's Plan will ignore the amount in this field and keep the Job's existing shipping charge.

Route (alpha-numeric field; up to 30 characters):
Distance (numeric field; enter whole numbers in miles):
 These fields are currently for information only and may be used in custom queries and reports.

Contact Window

The screenshot shows the 'Contact Window' for 'Ms. Sharon Jones'. The window is divided into several sections:

- Name:** First: Sharon, Last: Jones
- Salutation:** Ms.
- Job Title:** Director
- Department:** Marketing
- Contact:** Phone 1: 410-539-3466 x 35, Phone 2: , Cell: 443-567-4398, Fax: 410-539-5586, Email: sjones@abc.com
- Options:** Send Email: Yes, Send Survey: Yes, Key Contact: Yes, Order Online: Yes, **Contact ID:** (new field), ShipTo No
- User Defined:** Send card, Send cool, Visit mon, Sports fan, Property 5, Property 6, Property 7, Property 8
- Created:** 04/06/2010
- Modified:** 01/23/2014
- Other:** 01/23/2014
- Status:** Active

Callout boxes provide the following information:

- Click to change the Status of this contact.** (Points to the 'Status: Active' dropdown)
- Click to add/view Reminders for this contact.** (Points to the 'User Defined' section)
- New field: Contact ID (alpha-numeric field; 30 characters)** (Points to the 'Contact ID' field)
- Click to assign a default Ship to address. When this buyer places an order, Printer's Plan will override the customer's default Ship To address with this one.** (Points to the 'ShipTo No' field)

Reports Section

New reports

Posting

- Summary
- Summary of Sales
- Summary of Taxes
- Summary of Taxes (Paid Invoices)**
- List of Invoices + QuickSales
- List of Taxes
- List of Taxes (Paid Invoices)
- List of Payments
- List of Credits Given/Applied
- Changes to Earlier Invoices
- Accounting

Posting / Summary of Taxes (Paid Invoices)
 Date Range: Last 12 Months (02/07/2013 - 02/06/2014)

Tax No	Tax Name	Tax For	Count	Net Sales Subtotal-Disc	Net Sales Tax Exempt	Net Sales Taxable
0	Exempt	Invoices	4	7,191.19	7,191.19	0.00
			4	7,191.19	7,191.19	0.00
1	Maryland	Invoices	15	17,498.27	0.00	17,498.27
	Maryland	Quick Sales	5	193.00	0.00	193.00
			20	17,691.27	0.00	17,691.27
			24	24,882.46	7,191.19	17,691.27

Production

- Orders
- Orders Expected
- Services To-Do
- Services Done and Posted
- Date In vs Date Shipped
- Date Due vs Date Shipped**
- Printer and Paper Summary
- Paper Usage by Digital vs OI

Production / Date Due vs Date Shipped (16)
 Date Range: Last 12 Months (02/07/2013 - 02/06/2014)
 This report does not include Credit and Credited invoices.
 This report only includes jobs that are posted.

Number of Days Date Shipped - Date Due	Invoice Count	Net Sale \$	% of TOTAL
More than 10 days early	0	0.00	
6 to 10 days early	4	19,050.54	21.1%
5 days early	0	0.00	
4 days early	0	0.00	
3 days early	1	332.86	0.4%
2 days early	0	0.00	
1 day early	0	0.00	
0 (same day)	12	18,085.59	20.0%
1 day late	13	30,459.99	33.7%

Sales by

- Sales Department
- Service Category
- Product Type
- Business Type
- Customer Source
- Shipping Type
- Location
- CSR
- Sales Rep
- Tax Type
- Department + Service
- Department + Job
- Category + Service
- Category + Job
- Customer + Category
- Customer + Product
- Customer + Contact + Product**
- Product + Customer + Contact
- Press

Sales by / Customer + Contact + Product: 44 (PostingDate between 02/07/2013 and 02/06/2014)

Customer	Cus...	First	Last	Product	#Items	Quantity	Price
ABC Company	41	Ann M	Linz	Brochure	1	1000	2917.60
ABC Company	41	John	Smith	Brochure	3	11450	6601.01
ABC Company	41	John	Smith	Guidebook	1	5000	1769.76
ABC Company	41	Sharon	Jones	Form	1	1000	332.86
Abel Laboratories	32	Linda	Wertheimer	Brochure	1	500	45.20
Abel Laboratories	32	Linda	Wertheimer	Letterhead	1	1000	319.77
Abel Laboratories	32	Mark	Sturm	Brochure	5	21000	2672.91
Abel Laboratories	32	Mark	Sturm	Business Card	1	10000	364.49
Abel Laboratories	32	Mark	Sturm	Letterhead	1	10000	1159.78
Action Business Syst...	37	David	Kirschner	Brochure	3	11000	3170.25

Settings Section

- General Settings
 - Shop Options
 - Passwords
 - Reminder Types
- Printing
 - Document Options
 - Barcode Options
 - Favorite Posting Reports
- Jobs
 - Job Options
 - Product Types
 - Shipping Methods
 - Data to Require
 - Data to Reset (after paste)
 - How to Save Item Price
 - How to Round Item Price
- Customers
- Accounting
- Employees
- Vendors
 - Paper Vendors
 - Other Vendors
- Frequently Used Text
 - Job/Item Titles
 - Paper Run Sizes
 - Paper Finish Sizes
 - Paper Colors
 - Ink Colors
 - Quick Notes -
 - Services
 - Work Orders
 - Invoices
 - Items
 - Customers
 - Alerts
 - A/R
 - Contacts
 - Ship To
 - Vendors

New password-protected areas: Add a customer from the Job window; Add/edit Item Price Tables.

65 Add Customer from Job window

27 Add/Edit Item Price Tables

Set left margin for All Reports:

Other Documents

Receipt

All Reports

Left: .05 Top: 0.25 (document margins in inches)

New Job Options (added to the bottom of the existing options list):

On invoices/quotes, print a blank space if Shipping or Postage amount is zero	Yes
On invoices/quotes, include sides info if 'Print #Originals...' option is checked	Yes
In the Job window, alert (flash) if a Service has reminders or default vendor is replaced	Yes

Set the new alert (flash) option to [Yes] if you want the red icon in the Job window to flash a few seconds after an Item is created. *(This icon appears when a Service has a Reminder/Question (How many...)/vendor different from the default vendor. See Page 7 for more.)*

New option (under "History to Order"):

Reset 'Document Options' for printing Invoices

Checkmark this option if you want to use the current default settings for printing an invoice. If unchecked, Printer's Plan will print the invoice with the options selected when the History Job was originally printed (as has been the case in the earlier versions).

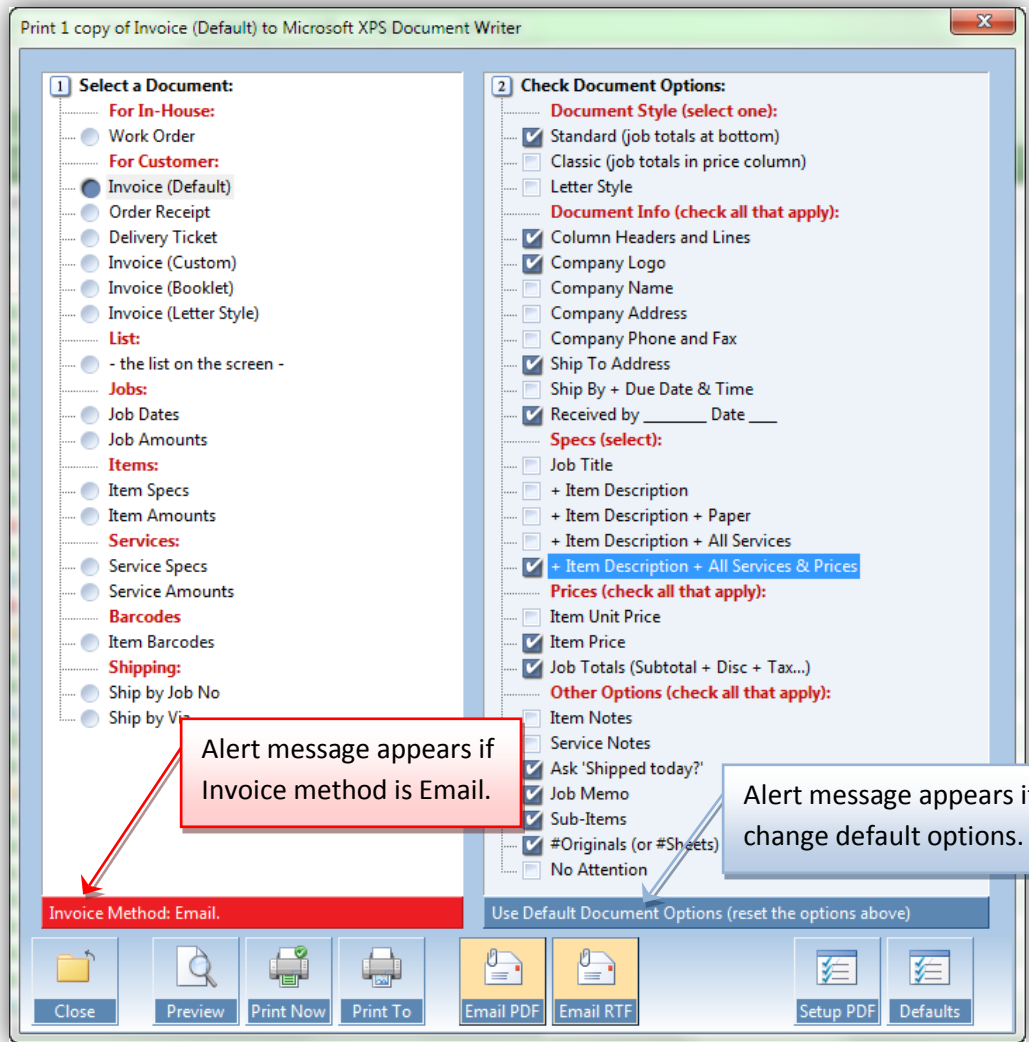
Vendors:

The Buyout Vendor category has been eliminated and your Buyout vendors have been moved into the Other Vendors category.

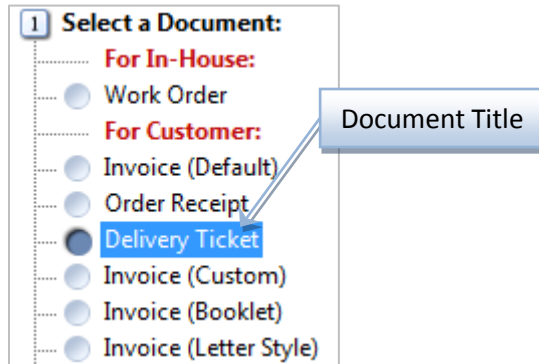
The Vendors area has been expanded to include new fields and a filter. *(See Page 19 for more.)*

Quick Notes: Create Quick Notes to use in various Note fields to save time and eliminate errors. *(See Page 21 for more.)*

Printing – New Alerts



Printing - New Logo Options

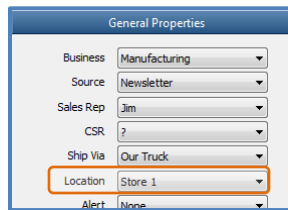


LogoPrint.bmp and **LogoEmail.bmp** files are the default files for all job documents. Now you can use a different logo with each job document based on **Document Title** and **Location (Store)*** number. You accomplish this by adding the **Document Title** and/or **Location Number** to the file name.

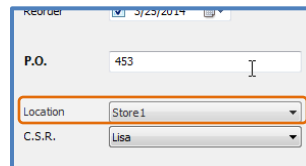
You have three new options to name logo-image files (LogoPrint and LogoEmail):

1. Using the **Title**: LogoPrint-**Invoice**.bmp, LogoPrint-**Delivery Ticket**.bmp
2. Using the **Location (Store Number)**: LogoPrint-**2**.bmp, LogoPrint-**3**.bmp
3. Using the **Title** and **Location**: LogoPrint-**Invoice-2**.bmp, LogoPrint-**Delivery Ticket-3**.bmp

*Location (Store) Number can be assigned to a customer and a Quote/Order/Template. It can be used in filtering Jobs, customers, and reports.



Customer Window



Order | When Window

Vendors

The Vendors area has been expanded to include new fields, a Vendor properties window for each vendor, and a new Vendor Documents feature.

The Buyout Vendor category has been eliminated and your Buyout vendors have been moved into the Other Vendors category.

To add/modify vendors, go to the Settings section.

The screenshot shows the 'VENDOR LIST' interface. On the left is a 'SETTINGS' sidebar with a tree view including 'General Settings', 'Printing', 'Jobs', 'Customers', 'Accounting', 'Employees', and 'Vendors'. Under 'Vendors', 'Other Vendors' is selected. The main area is titled 'Vendors for Outside and Buyout Services' and contains a table with columns: Name, ContactName, Phone, Email, Status, and Sort. The table lists six vendors: Raven Promo, Star Promotions, Harbor Bindery, Signs Now, Speedy Labels, and Sun Printing. Above the table are buttons for 'Filter', 'New', 'Edit', and a delete icon. Callout boxes provide instructions: 'Click to modify the selected vendor.' (pointing to 'Edit'), 'Click to delete the selected vendor.' (pointing to the delete icon), 'Click to add a new vendor.' (pointing to 'New'), 'Click to open the Find window to filter the vendor list.' (pointing to 'Filter'), and 'Click to export the vendor list. (Requires the optional Export tool.)' (pointing to an export icon).

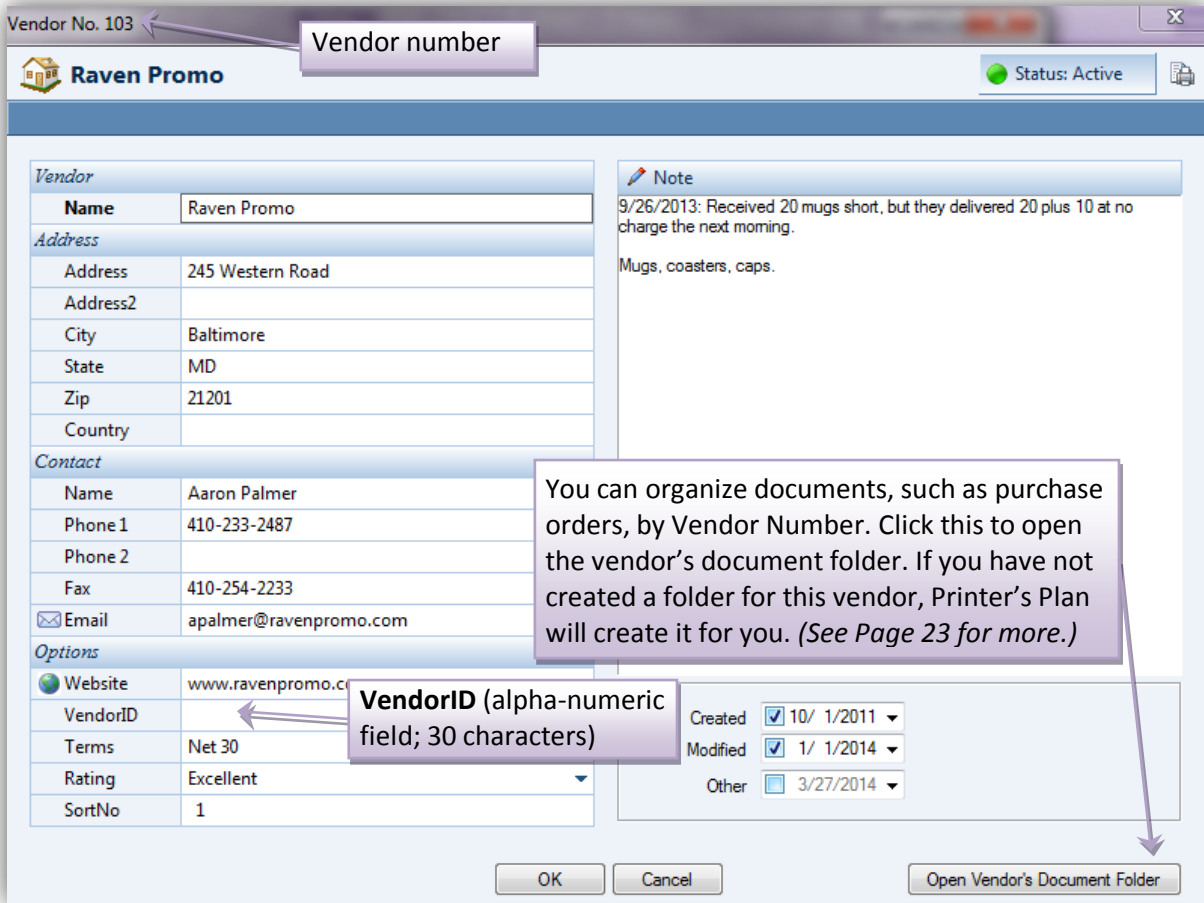
The screenshot shows the 'Find' window. It has four columns: 'Find', 'By this field', 'If the field', and 'Enter Text'. The 'Find' column has 'Vendors' selected. The 'By this field' column lists: Name, Address, Zip, Contact, Phone, VendorID, Notes, and Status. The 'If the field' column lists: is exactly like, is not exactly like, starts with, ends with, contains, does not contain, and is between. The 'Enter Text' column has a text input field containing 'Notes contains'. There are 'Find Now' and 'Cancel' buttons at the bottom.

You can filter the vendor list by one of these filtering criteria.

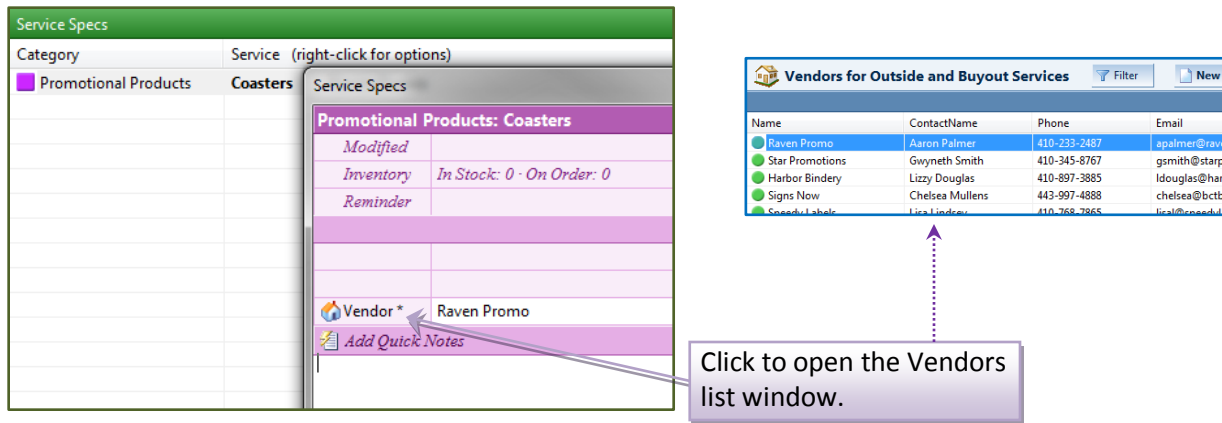
Tip: Enter the vendor products you buy from a vendor, such as coasters, in the vendor's Notes field. Then, to see a list of the vendors that sell coasters, search the list by the word "coasters" in the Notes field.

See the next page for the new Vendor properties window.

New Vendor Properties Window



You can open the Vendors list from the specs window of a Service in a Job with all the functions of the list view enabled. This allows you to open the vendor window to view notes and other information or search for another vendor selling the same product.



Quick Notes

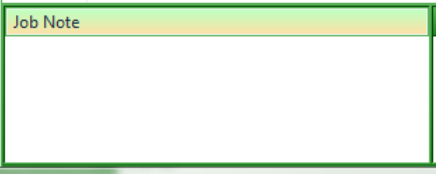
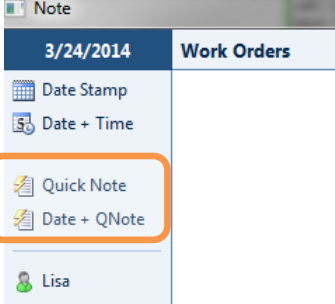
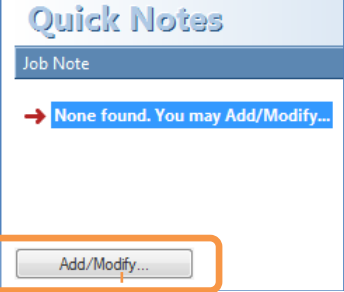
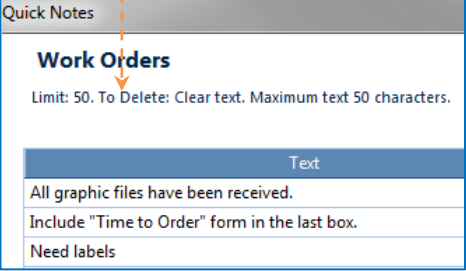
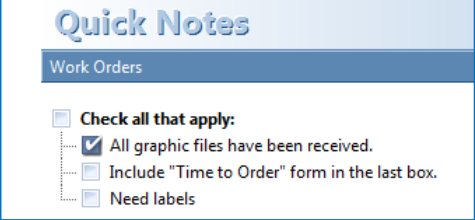
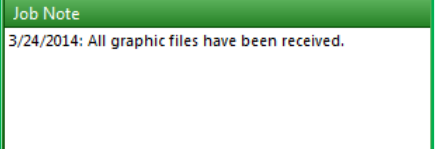
Printer's Plan allows you to preset the notes that you use often as lists, each list specific to an area of Printer's Plan. Then, you select from these lists to quickly add notes to Jobs, customers, Services, etc.

To create the Quick Notes lists, go to **Frequently Used Text** under the **Settings** tab. (See Page 16.)

Quick Notes List Name	Where the List is Used
Services	Note in Service setup window
Work Orders	Job Note; Work Order Note in Customer window
Invoices	Job Memo; Invoice Memo in Customer window
Items	Item Note
Customers	Customer Note in Customer window <i>Although Customer Notes show in the Note field of the Payment window in A/R and vice versa, each of these two Note fields has its own list, not available to the other one.)</i>
Alerts	New Job Alert and Customer Alert in customer window
A/R	Note in Payment window
Contacts	Note in Contact window
Ship To	Note in Ship To window
Vendors	Note in Vendor window

Example:

The following example shows how to use the Quick Notes feature for the Job Note field.

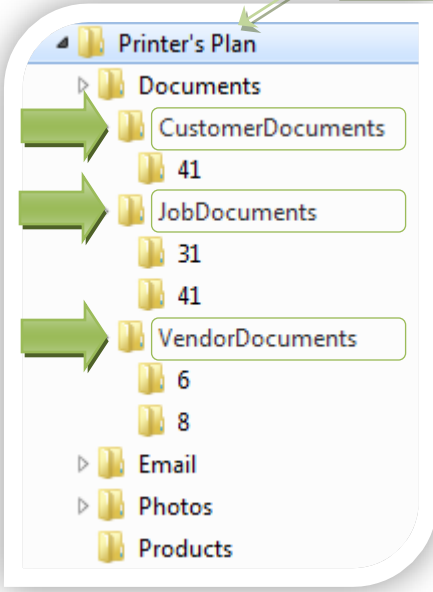
<p>1</p>	<p>In the Job window, click Job Note.</p>	
<p>2</p>	<p>In the Note window, click Quick Note or Date + QNote if you want to automatically add the date to the note.</p>	
<p>3</p>	<p>If a list of Quick Notes has not been created yet, click Add/Modify.</p>	
<p>4</p>	<p>Enter notes that you often use in the Job Note field. You can add up to fifty notes, each up to 50 characters.</p>	
<p>5</p>	<p>Next time, when you click Quick Notes in the Job Note window (step 2 above), you will see the list of Quick Notes you added.</p>	
<p>6</p>	<p>Checkmark the notes you want to add to the Job.</p>	

New Document Folders

The upgrade setup program creates a new folder on your server where your Printer's Plan database is located and names it Documents. It also creates three sub-folders within the Documents folder and names them CustomerDocuments, JobDocuments, and VendorDocuments. You can use these folders to organize your digital document and graphic files. To create individual customer and vendor folders: a) Create a new folder and name it with the customer's/vendor's number, or b) Click the **Documents** button in the Customer/Vendor window and Printer's Plan will automatically create the Document folder for that customer/vendor.

You maintain the contents of these folders in Windows Explorer. The folders can be easily accessed from within Printer's Plan. See below.

Printer's Plan folder on your **server** computer



SUB-FOLDERS OF THE DOCUMENTS FOLDER

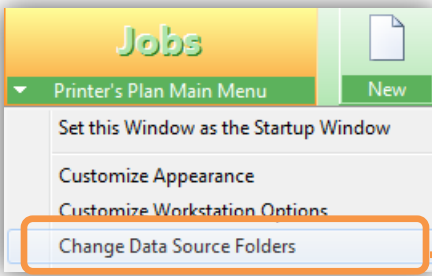
CustomerDocuments to store digital documents, such as a Tax Exempt form. Folders are named with customers' numbers, such as 41. In the Customer window, click the **Documents** button to view the contents of that customer's folder.

JobDocuments to store digital graphic files attached to Jobs. Folders are named with numbers of customers to whom the files belong. Use folder 31 to store the files attached to Templates. See next page for more about Job Documents.

VendorDocuments to store vendors' documents, such as Purchase Order forms. Folders are named with vendors' numbers. In the Vendor window, click the **Open Vendor's Documents** button to view the contents of that vendor's folder.

You may move the **Documents** folder or just one of its sub-folders to another location. If you do, you must set the new location (path) in Printer's Plan. For example, to relocate the JobDocuments folder:

1. Select **Change Data Source Folders** from the Printer's Plan Main Menu (as shown below).
2. In the Data Source Folders window, click the **Job documents** option.
3. In the Browse window, find the JobDocuments folder.
4. Repeat steps 1 through 3 on each workstation.



Data Source Folders

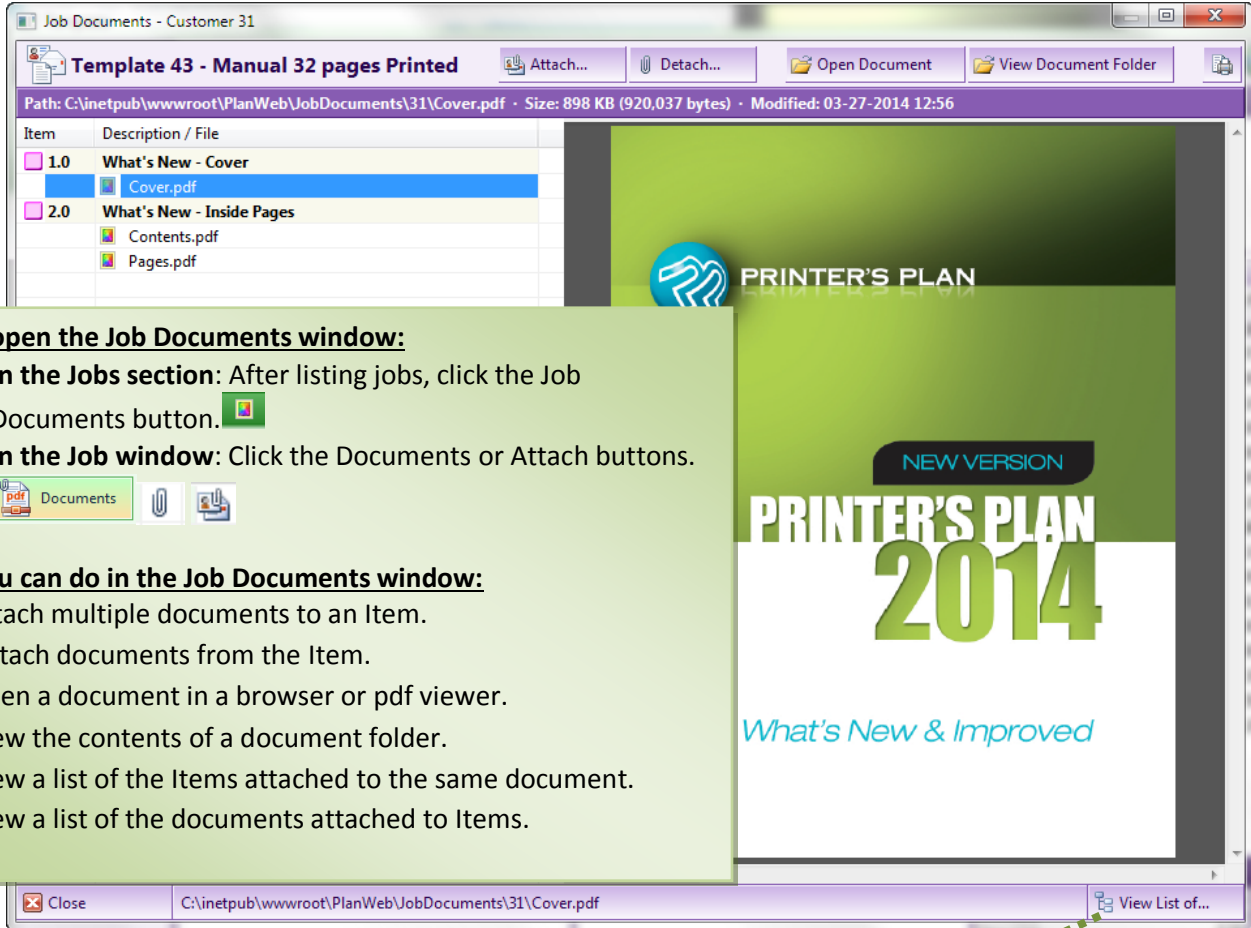
Data Sources:

- PDF attachments: C:\zTemp\
- Label data: C:\zTemp\
- Export data: C:\zTemp\
- Job documents: \\server2\c\$\Plan\Documents\JobDocuments\
- Customer documents: \\server2\c\$\Plan\Documents\CustomerDocuments\
- Vendor documents: \\server2\c\$\Plan\Documents\VendorDocuments\

Be sure the new location is accessible from all workstations.

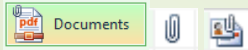
Job Documents

Use the Job Documents folder to store customers' digital graphic files and job-related documents. You must first create for each customer a new folder and name the folder with the customer's number. Then, move the customer's digital graphic files and job-related documents into this folder.



How to open the Job Documents window:

- **In the Jobs section:** After listing jobs, click the Job Documents button.
- **In the Job window:** Click the Documents or Attach buttons.



What you can do in the Job Documents window:

1. Attach multiple documents to an Item.
2. Detach documents from the Item.
3. Open a document in a browser or pdf viewer.
4. View the contents of a document folder.
5. View a list of the Items attached to the same document.
6. View a list of the documents attached to Items.

Job Documents

- List
 - Documents attached to Templates
 - Items attached to JobDocuments\31\Cover.pdf

List of Documents used by Templates

The list is sorted by Customer Name, Job and Item No.

Document Path

- JobDocuments\31\Pages.pdf
- JobDocuments\31\Contents.pdf
- JobDocuments\31\Cover.pdf

This list shows all documents used by Templates.

List of Jobs using the same document

The list is sorted by Customer Name, Job and Item No.

Document Path

- JobDocuments\31\Cover.pdf

This list shows the Items that use the same document.

Miscellaneous

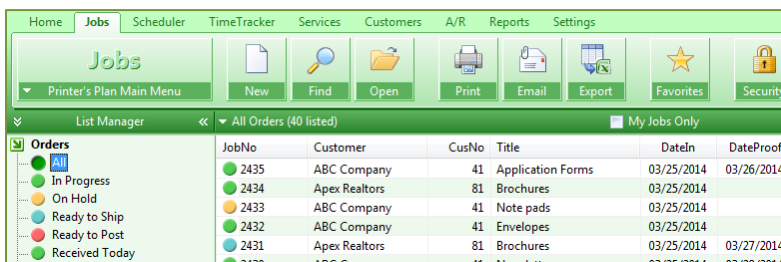
Customizing Column Locations in List Views

Now you can modify the order of columns of the lists in the main Printer's Plan window in the following sections: Jobs, Scheduler, Services, Customers, A/R, and Reports (reports under "More Reports" only).

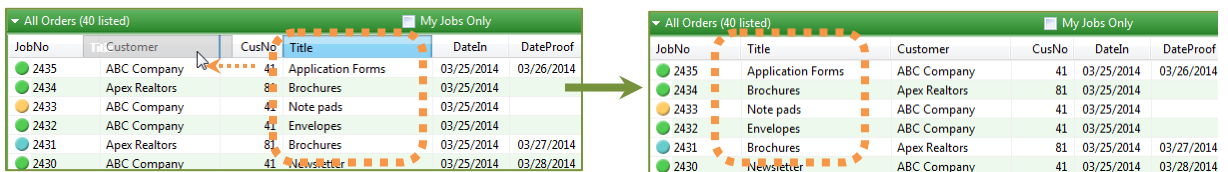
Note: The modifications are list specific. For example, the order saved for "All" orders will not hold for "Ready to Ship" orders.

To modify the order of the columns:

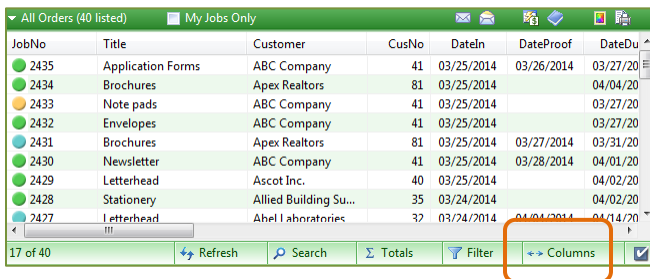
1. Display the list.



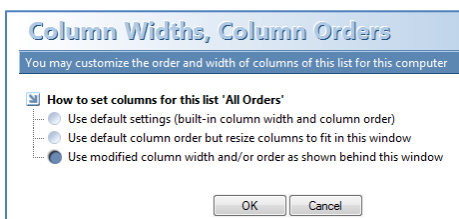
2. Click the header of the column you want to move and drag it to the desired location.



3. To save the new order, click **Columns**.



4. Select the "Use modified column width and/or order as shown behind this window" option and click **OK**.

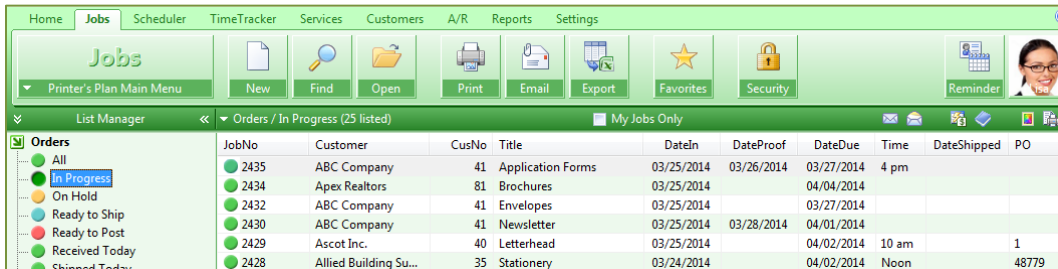


Hiding Columns in List Views

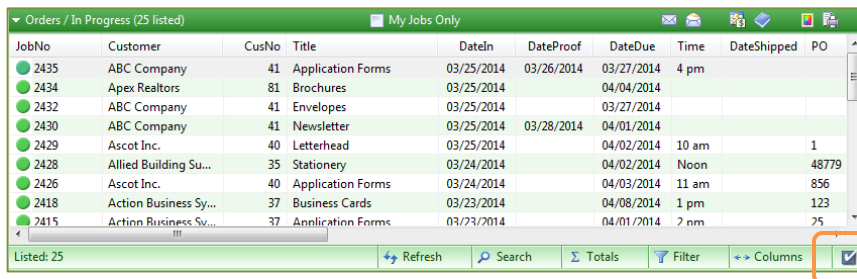
Hiding columns in list views has been made easy. This feature, as in the Customizing Column Locations feature, applies to the lists in the following sections: Jobs, Scheduler, Services, Customers, A/R, and Reports (reports under "More Reports" only).

Note: The modifications are list specific. For example, the order saved for "All" orders will not hold for "Ready to Ship" orders.

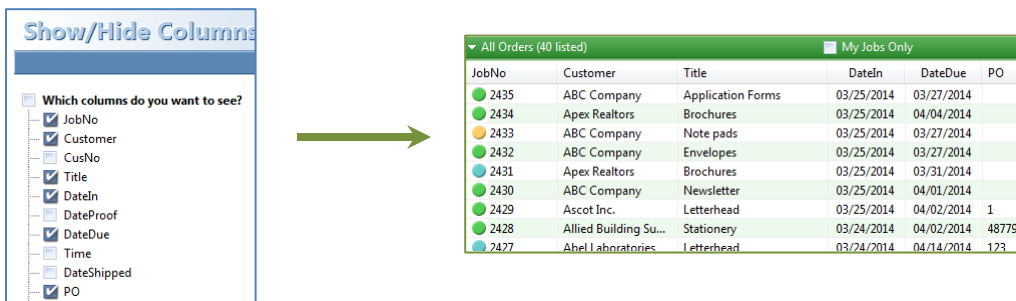
1. Display the list.



2. Click the checkmark button.

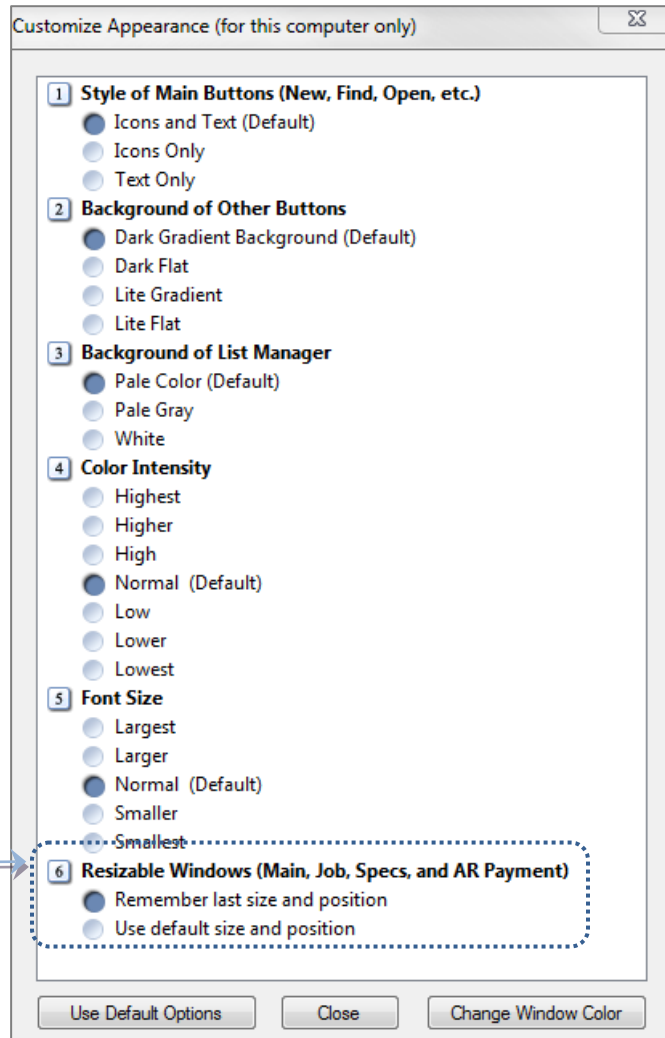
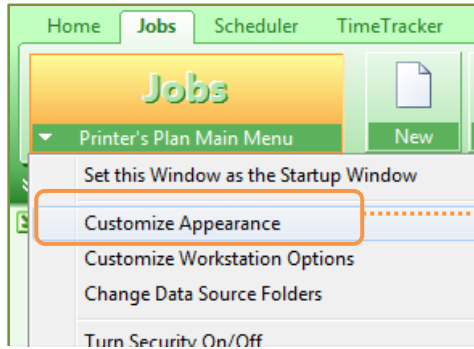


3. In the Show/Hide Columns window, checkmark the columns you want to see in the list view.

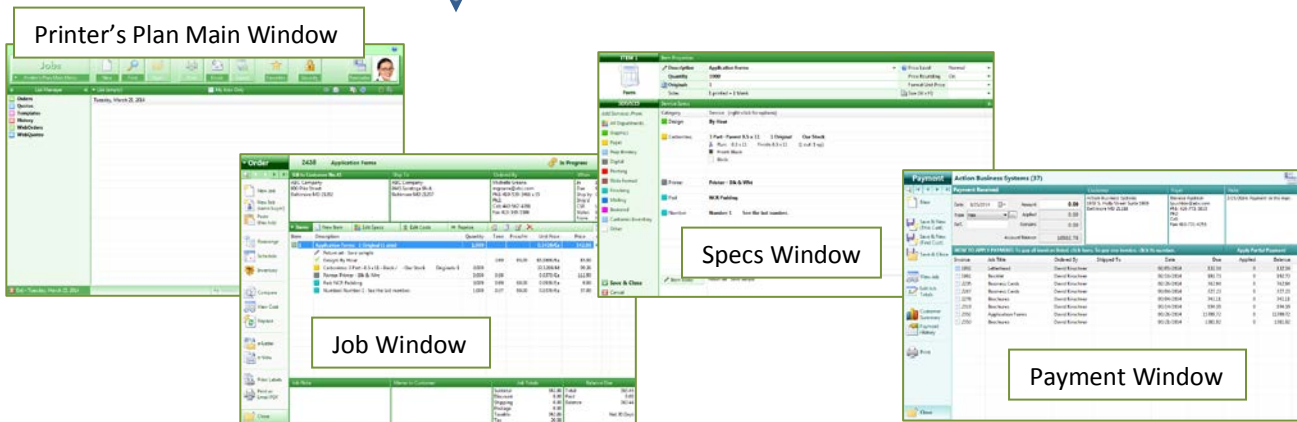


4. To return to the default view, click **Use default settings** in the Show/Hide Columns window.

New Customize Appearance Options



The **Remember last size and position** option allows Printer's Plan to remember the new sizes and positions of the following windows after you resize them.



Tools

Reminder (Optional Tool)

New features have been added to the Reminder tool.

New Reminder Window

Quick List buttons

- Click **All** to list everyone's reminders
- Click **All Mine** to list the default CSR's reminders.
- Click **Default** to revert to the default filter selections.
- Click **Save as Default** to save the current filter selections as default.

Reminder List Options

(for this computer only)

- Check all that apply:
 - Auto-Popup if there are reminders due today/earlier for current section and default CSR
 - Show Filter Boxes
 - Job window: Include the reminders of customer and buyer
 - Customer window: Include the reminders of customer's contacts

See next page for an explanation of these options.

Now you can access the Reminder window from a Contact window, also.

Reminder List Options

Reminder List Options

(for this computer only)

Check all that apply:

- Auto-Popup if there are reminders due today/earlier for current selection
- Show Filter Boxes
- Job window: Include the reminders of customer and buyer
- Customer window: Include the reminders of customer's contacts

If checked, the filter box will always be displayed in the Reminders List window.

If checked, the Reminder window of a Job will include the reminders of its customer and buyer. The Reminder button will flash in orange if there are any reminders for today.

If checked, the Reminder window of a customer will include the reminders of its contacts. The Reminder button will flash in orange if there are any reminders for today.

New List Filter: With Reminders To-Do

A new filter is added to the Orders and Quotes (Jobs section) and to Contacts (Customers section) to list only the Orders/Quotes/Contacts with reminders to-do.

In the Jobs section

Orders

- All
- In Progress
- On Hold
- Ready to Ship
- Ready to Post
- Received Today
- Shipped Today
- Late
- Due Today
- Due Tomorrow
- Due This Week
- Due Next Week
- Discrepancies
- With Reminders To-Do

Quotes

- All
- Hot
- Warm
- Cool
- Won
- Lost
- Received Today
- Received This Week
- Received This Month
- Received Last Week
- Received Last Month
- Older Than 1 Month
- Older Than 2 Month
- Discrepancies
- With Reminders To-Do

In the Customers section

Contacts

- All (any status)
- All (not hidden)
- Active
- On Hold
- Hidden
- Default Buyers
- Default Payers
- With Orders
- Without Orders
- Of Prospects
- With Reminders To-Do

Quotes / With Reminders To-Do (4 listed)

JobNo	Customer	CusNo	Do	When	Who
504	Atlantic Insurance Company	33	Follow up	04/07/2014	Lisa
502	ABC Company	41	Follow up	04/07/2014	Lisa High
499	Annapolis General Hospital	38	Follow up	04/07/2014	Lisa High
497	Attman & Associates	43	Follow up	04/10/2014	Lisa Medium

Contacts / With Reminders To-Do (4 listed)

Customer	First	Last	Do	When	Time
Atlantic Insurance Company	Chris	Allenton	Follow up	04/08/2014	
Attman & Associates	Doug	Asner	Meet	04/08/2014	10 am
Baltimore Art Institute	Elly	Reinhardt	Follow up	04/08/2014	
Baltimore Art Institute	Sarah	Finkelstein	Follow up	04/08/2014	

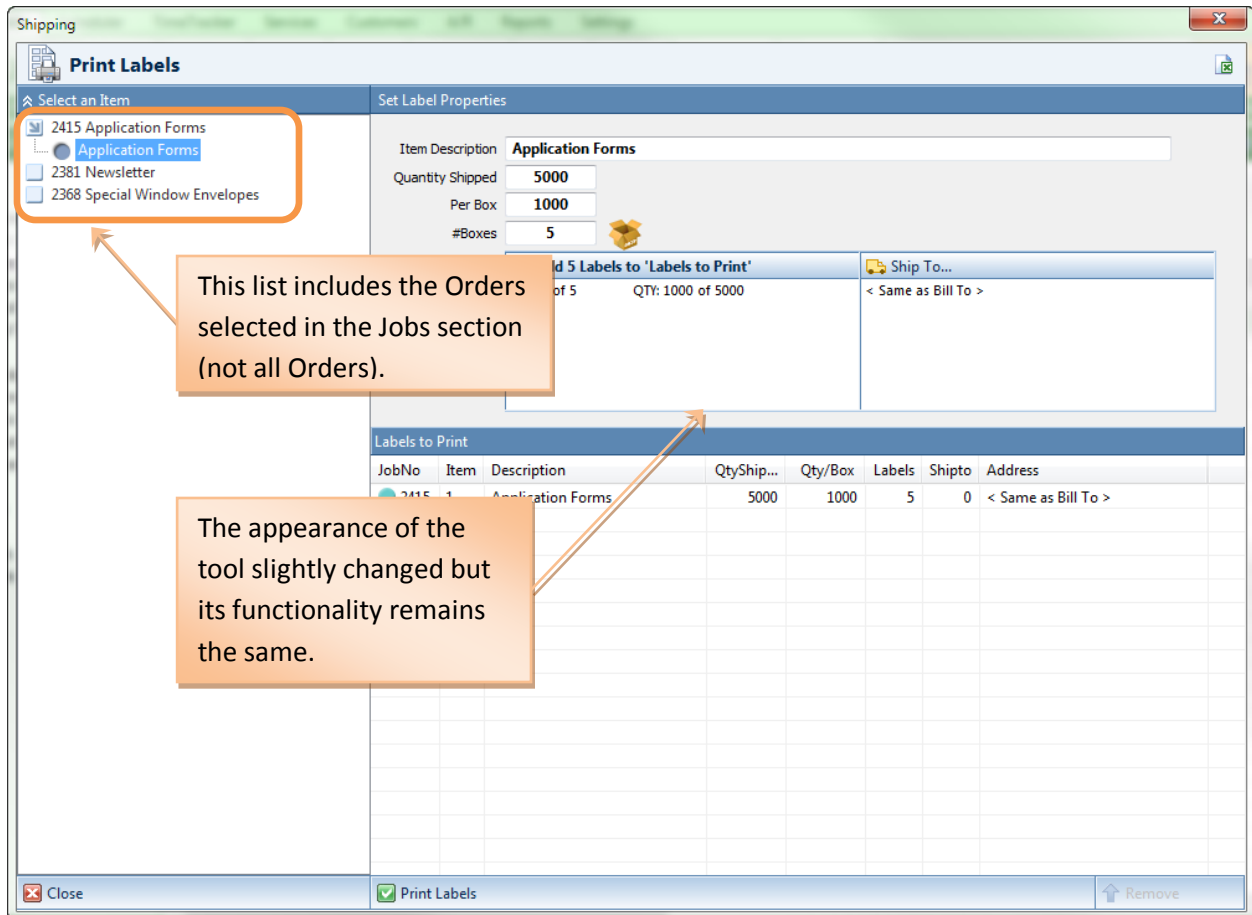
Open an Order/Quote/Contact to enter notes and to assign a new follow-up reminder.

Reminder is an optional Power Tool. To purchase Reminder or to try it for one month, contact us at:
 800-638-7526 Option 0
 eleanor@printersplan.com

Shipping Labels (Optional Tool)

You can access the Shipping Labels:

1. From Jobs/Orders section: Now the list in the Shipping Labels tool includes only the *selected* Orders. Earlier versions included *all* Orders.
2. From the Job window: Now you can print labels for any Job Type (Order, Quote, History). Earlier versions let you print labels only for Orders.



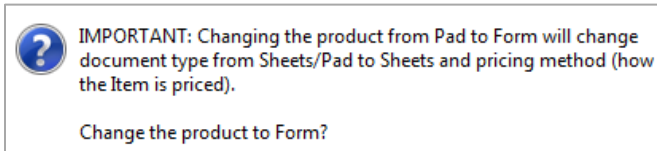
ShippingLabels is an optional Power Tool. To purchase ShippingLabels or to try it for one month, contact us at:

800-638-7526 Option 0
 eleanor@printersplan.com

Fixed or Changed

Jobs

1. Job window: Resizing the window did not adjust the width of top (Customer to When) and bottom (Note to Balance) boxes evenly. Fixed.
2. Job window: Converting walk-in to a regular customer did not copy country data. Now it does. Changed: Previous version deleted the original Ship To record. New version does not.
3. Note window: Clicking the [Date Stamp] or [Date + Time] buttons added extra blank line at the end of the note. Now it does not.
4. Specs window: Printer's Plan now asks you to confirm when you change the Product Type that affects pricing. The earlier versions did not.



5. Specs Window: If you click Cancel after making changes, PP asks "Do you want to save the changes?" and gives you three choices: Yes, No, and Cancel. If you click Cancel, the Specs window is closed and you lose your changes (same as clicking No). Fixed. Clicking Cancel does not close the Specs window.
6. Paper Specs window: If you replace a paper that was marked as done using the replace command, the status of the new paper remained as done. Now, Printer's Plan asks if you want to reset it as 'To-Do'.
7. Mixed Grain Cutting: Cutting 26 x 40 to 8.5 x 11 can yield 10 out if the bottom two rows are cut mixed grain (2 rows of 3 + 2 rows of 2 = 10). Printer's Plan calculates 9 out (3 rows of 3) because it checks only the last row (not multiple rows) for mix grain cutting. This exception is not fixed.
8. Pricing: Waste was not added when an Item has just paper and a folding Service but no press or copier. Now, waste is added if the waste formula of the paper is "Use Waste". If the formula is "No Paper Waste", no waste is added.

Jobs-Printing

9. Invoice: Item price did not include negative sub-item prices. Now it does.
10. Work Order and Invoice: The quantity of "Originals" was printed when the Originals label was "blank". Now it does not. A number without a text is confusing for the customer.

Specs		Old Version		New Version	
Description	Letterhead	Quantity	Description	Quantity	Description
Quantity	5000	5,000	Letterhead 2 Color 1 Design: Writing: 24# Classic I	5,000	Letterhead 2 Color Design: Writing: 24# Classic Lin
Sides	1 printed + 1				

11. Work Order and Invoice: The space after a quote character (") was lost when printing italic text in Times New Roman font. It's fixed by using the italic style of the font assigned to the document.
12. Printing option for "All reports": Now you can set the left margin.
13. Payment Receipt: Two address lines were printed without a space between them. Fixed.
14. Terms line did not print on a quote when using the classic style if "Prices for more quantities" unchecked. Fixed.
15. When adding <Terms> to the Memo field only the terms number printed, not the term name. Fixed.
16. Quote: If Item 1 has multiple quantities and Item 2 is "no-charge", additional quantities were printed for Item 2. Now additional quantities are not printed for the second Item.

Customers

17. Shipping Address 2 field: If the number of characters exceeds 50, the warning message showed an incorrect field name: "too many characters in *City* field". Now it shows the correct field name: Address 2.
18. New: Default text in <>, such as <GroupID> is printed on work orders.
19. Inactive customer list: The Buyer column was blank if either the first name or the last name of the buyer was missing. Now it shows what's available, either or both names.
20. Survey Link: when you email survey the last survey field gets updated but not the last email. Now both fields are updated.

AR

21. A statement was printed when a customer has a credit on the account even though the customer's Send Statement option is set to No. Now the statement is not printed.
22. Resizing A/R window did not adjust the width of top (Payment to Note) boxes evenly. Fixed.

Scheduler

23. Schedule Job window: When you mark all services as "Done", the job status was not updated. Now it is updated.
24. If you print the list on the screen after clicking a column header to sort the list, the printout did not include the colorful icons. Now it does.

PriceWiz

25. Digital printer/copier was shown as in "Other" field. Now it is correctly shown in the "Printer" field by replacing the "Offset Press" Service, if any.

TimeTracker

26. If you start a day before assigned start time (see TimeTracker Settings) and immediately pause and then resume the start time records the actual start time and not the assigned start time. Fixed.

Inventory

27. Check Inventory window: The status of Service was set to "On Order" when there was an amount in the On Order column -- even if you had enough "In Stock" for the service. Now, the status is set to "In Stock" if the On Order amount is zero and the In Stock amount exceeds the amount required for the service.

Export

28. Special characters (opening and closing quotes, " ", " ") are replaced by ""

WebLink

29. Set the Item Status as 'In production' or 'Schedule' based on the New Item Options in the Scheduler tool.