PRINTER'S PLAN

NEW VERSION

PRINTER'S PLAN 2015

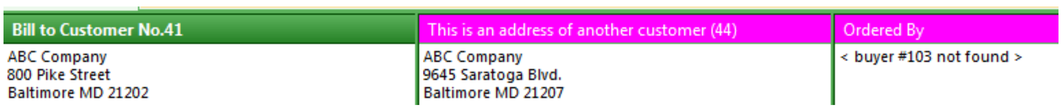
What's New & Improved

Jobs Section

♦ Jobs

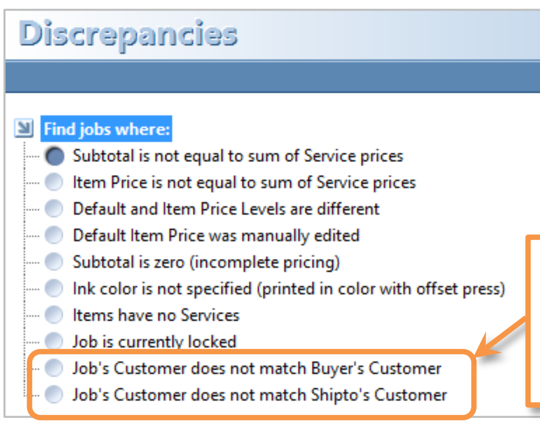
➔ Unmatched Contact and Ship to Address

If there is a conflict between the customer of the job and the customer of ship to or buyer or if the ship to address or buyer is not found, you will see the following warnings. To fix the problem, click the address or buyer to select a correct one.



➔ List Unmatched Contacts and Ship to Addresses

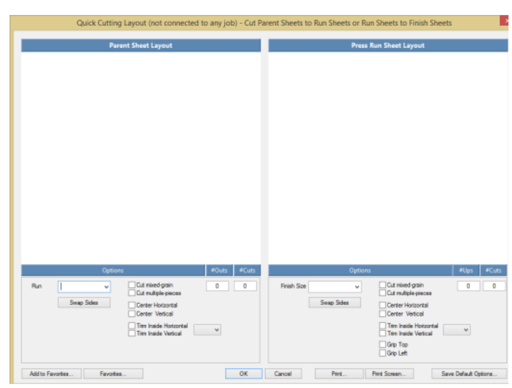
Use the following two reports to ensure that the buyer and/or ship to address assigned to a job belongs to the job's customer.



To see a list of Ship to and Buyer Discrepancies: click Discrepancies under Orders, Quotes, and History jobs and select Ship to or Buyer options.

➔ Quick Cutting Layout Button

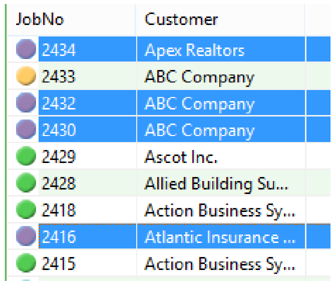
Click the new scissors icon to open the Cutting Layout window. The layout is not connected to any job. You may use this tool to view the layouts for cutting Parent Sheets to Run Sheets or Run Sheets to Finish Sheets.



➔ List Totals

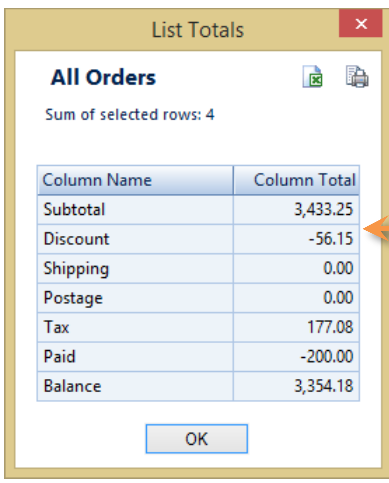
Now you can see the sum of selected rows. The earlier versions summed all rows. This feature is also available in Customers, AR and Services sections.

1. Select two or more rows (by holding the Ctrl key down)



2. Click the Totals button (at the bottom of the window).

3. You will see the sum of selected rows:

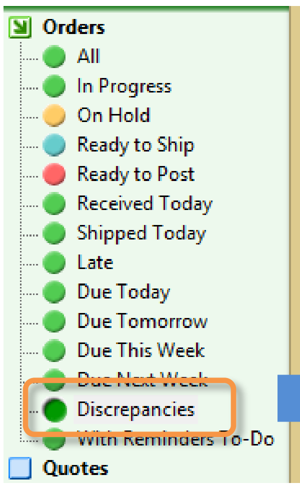


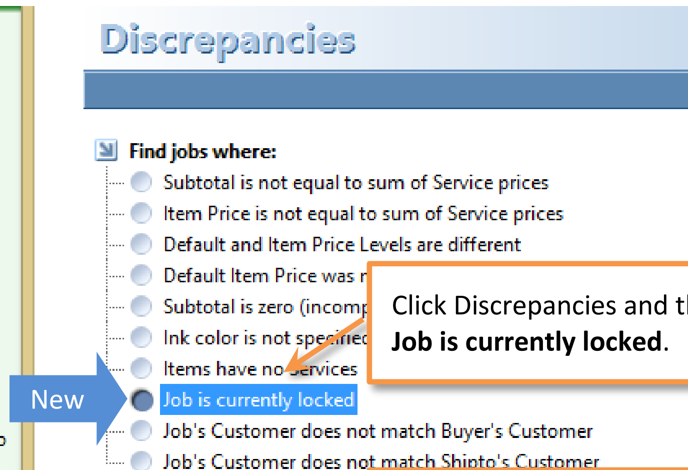
The list includes columns that can be summed (money, time, count). Earlier versions listed all columns.

➔ Locked Jobs

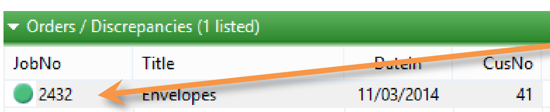
When you open a job, Printer's Plan marks it as "locked" to prevent other users from editing it. When another person opens a "locked" job, Printer's Plan shows the job data in gray color (Preview mode). Printer's Plan removes the "lock" after the person who locked the job closes the Job window. Due to a program error or network or power failure, Printer's Plan may not be able to remove the lock.

How to remove locks from jobs that remained as locked due to an error:

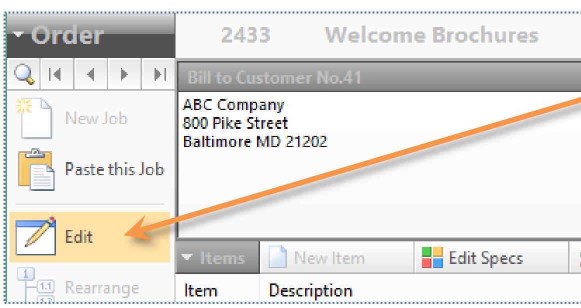




Click Discrepancies and then select **Job is currently locked**.



Open the job that remained locked due to an error. Be sure the job is not currently opened by another user.



Click the **Edit** button.
You'll see the window color change.
Close the job to remove the lock.

NOTE: Another reason for the Preview mode (gray color) is the following setting:

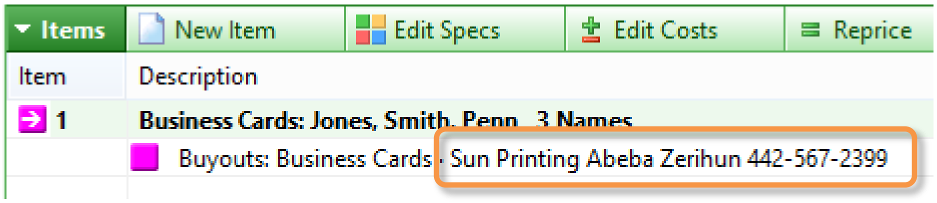
How to open a Job, if Job's CSR does not match the Default CSR

You can change this option in **Settings / Jobs / Job Options** by selecting Edit or Preview mode (the blank choice defaults to Edit mode).

♦ Job Window

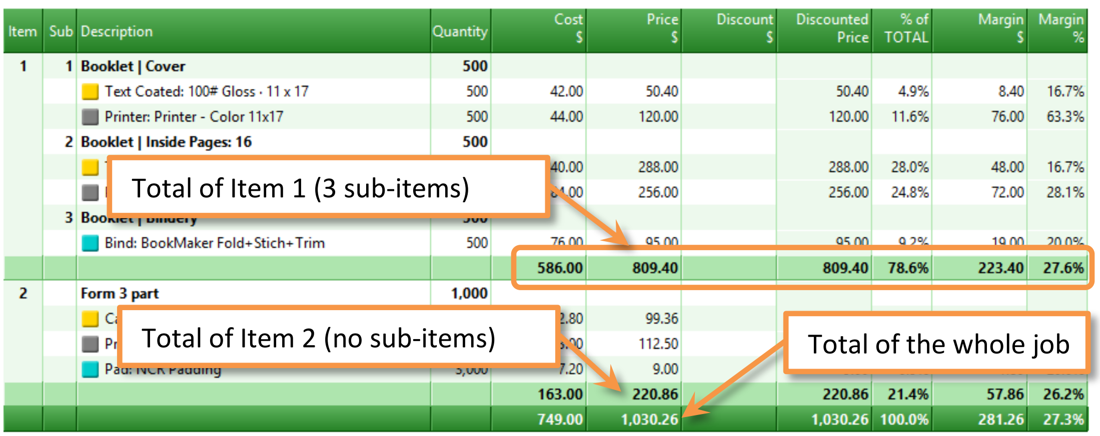
➔ Vendor Information

Vendor information now includes Contact Name and Phone Number after the Vendor Name. The same information is also printed on work orders.



➔ View Costs

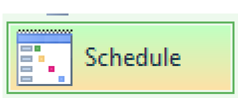
View Costs window now shows the total of sub-items as shown in the following example. The previous version showed the sum of each sub-item.



➔ Item price

If Item price is distributed (after editing or reading from price table) and a service price is too small, set it to No Charge not to zero, which causes Item not priced.

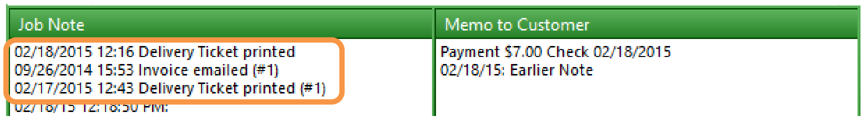
➔ Schedule Button



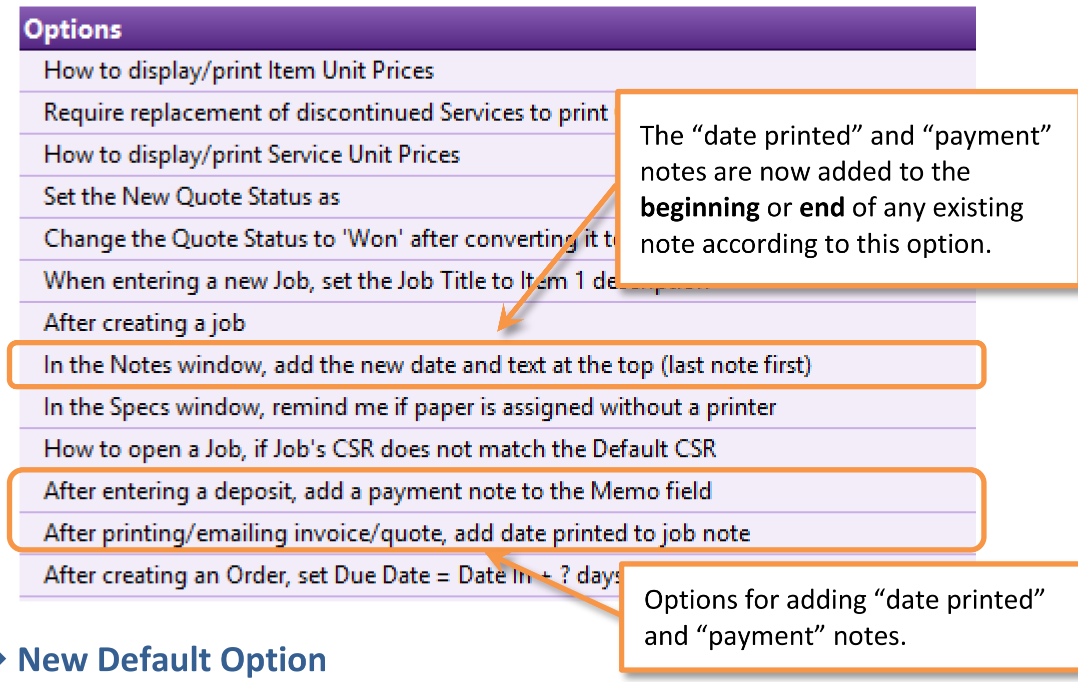
The Schedule button now requires the "Go to Scheduler password", if any. If you do not have the password, click Cancel to open the Job Schedule window in preview mode.

➔ Job Note and Memo to Customer

This version also adds a "date printed" note after printing/emailing an Invoice, Order Receipt and Delivery Ticket. Earlier versions added the note only for Invoices.

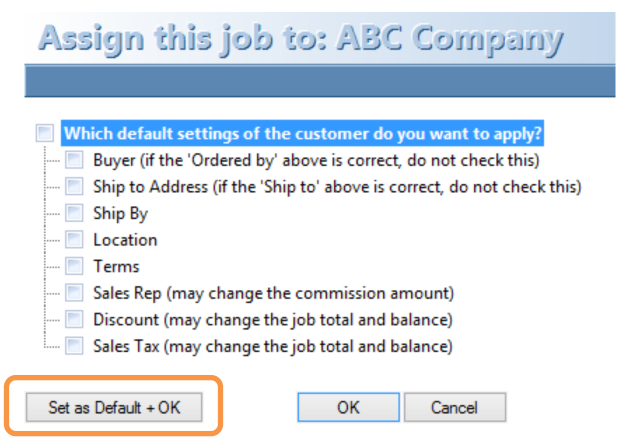


You can set the options for adding notes in Settings / Jobs / Job Options:

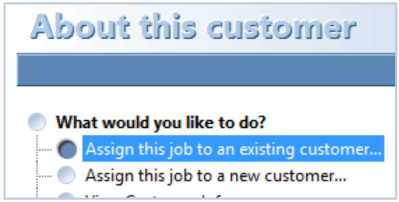


➔ New Default Option

Now you can save the "How to assign a job to an existing customer" options.



➔ Walk-in Customer's Job



After converting a Walk-in customer's job to a new customer or an existing customer, Printer's Plan will assign the jobs that have the same "Ship to" and/or "Buyer" number of the converted job to the selected (new or existing) customer.

➔ New Fields for e-Letter Templates

You may use the following fields in the email templates:

- CONTACT:
  - <Phone2>
  - <Cell>
- BILL TO:
  - <BilltoCompany>
  - <BilltoAddress>
  - <BilltoAddress2>
  - <BilltoCity>
  - <BilltoState>
  - <BilltoZip>
  - <BilltoCountry>
  - <CusID>
  - <GroupID>
- SHIP TO:
  - <Attention>
  - <Address2>
  - <Country>
- JOB:
  - <ProofTime>

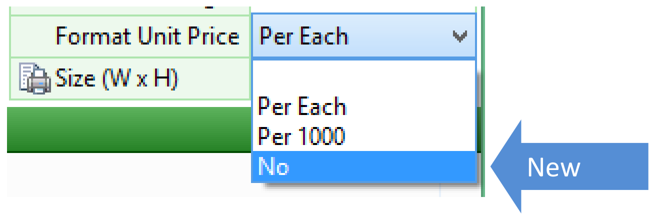
The Setup program will copy the revised Email Help.txt file to Printer's Plan Email folder. To see the complete list of the email fields, click:

http://www.printersplan.com/_docs/Email Help.txt

♦ Specs Window

➔ Format Unit Price - New Option

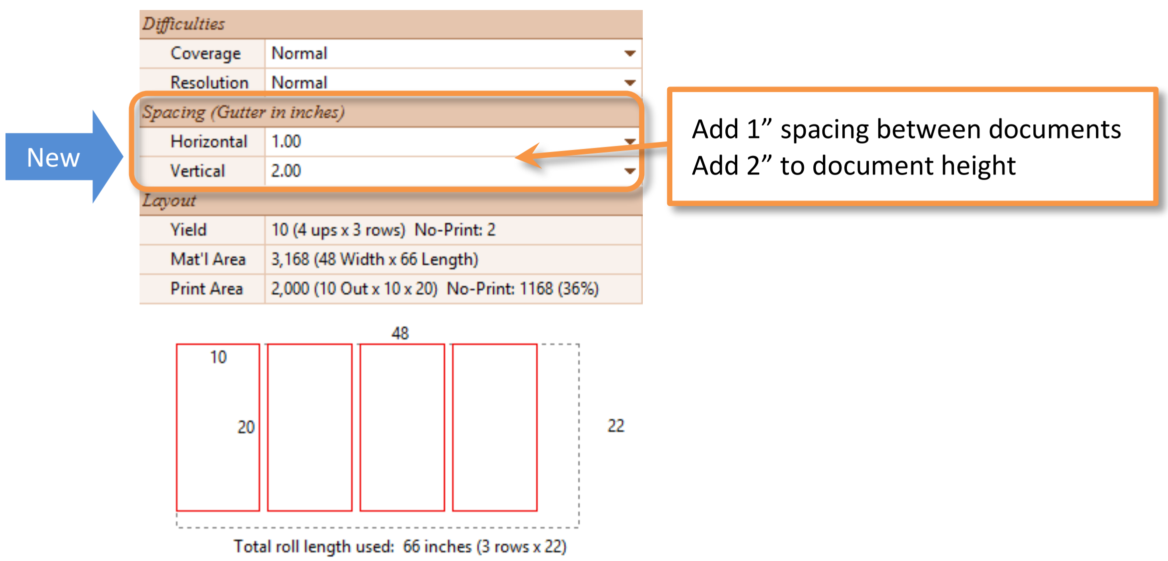
Select "No" not to print Item Unit Price on Invoices/Quotes.



➔ Wide Format – New Spacing Fields

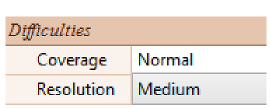
Bleed field is replaced by two new fields: Horizontal and Vertical spacing. The earlier version automatically added 0.5" to the document size when bleed (1 to 4 sides) was selected. This version calculates as follows:

- Total Width = (Document Width + Horizontal Spacing) x (Number of Ups – 1)
- Total Height = (Document Height + Vertical Spacing) x (Number of Rows)

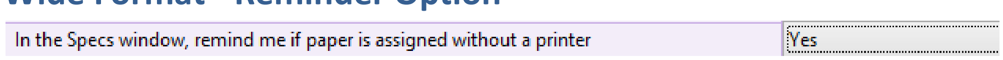


➔ Wide Format - Coverage and Resolution Difficulty Levels

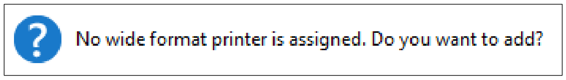
The earlier versions set both levels to Normal. This version sets them according to default settings of the Service. *See Services Section for more.*



➔ Wide Format - Reminder Option



The option above (Settings/Jobs/Job Options) was used for Offset and Digital printing. Now the same option is also used for Wide Format printing if paper is assigned without a printer.

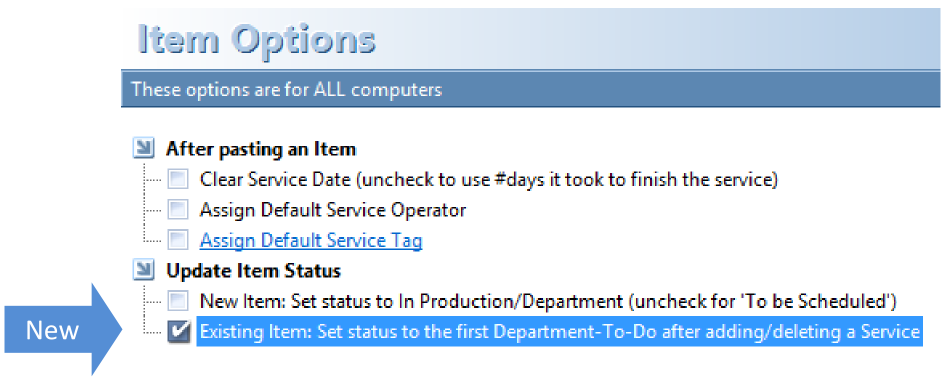


➔ Auto Add Service

Auto-add services of built-in special services (plate/cutting/carbonless padding) were not added. Now they are.

➔ Item Status

If you add a Service to an existing Item or delete a Service from it, Printer's Plan updates the Item status. This feature works if you have the optional Scheduler tool and the following option is checked.

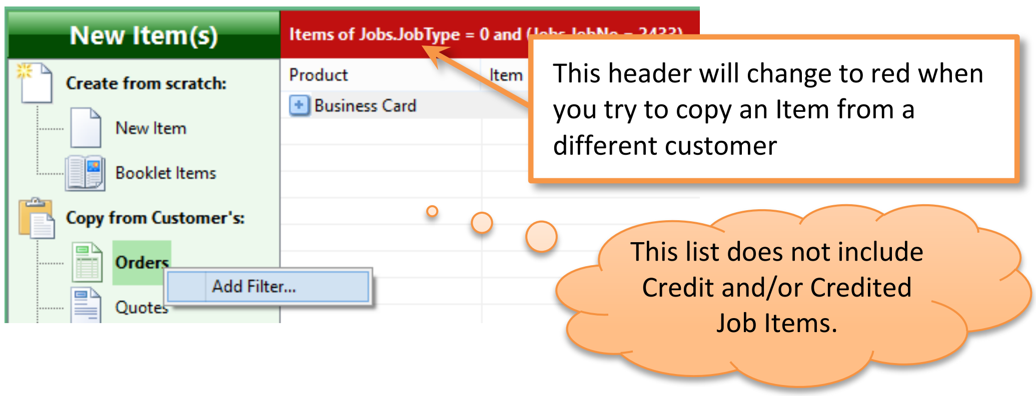


♦ New Item Window

➔ Copy from a different customer's job

You can add an Item by copying from a different customer's job.

1. Click Find or right-click on Customer's Orders, Quotes (or any other job type) and click Add Filter.
2. In the Find window, select Job Number field to enter the number you're looking for. Printer's Plan searches the number in the selected job type.

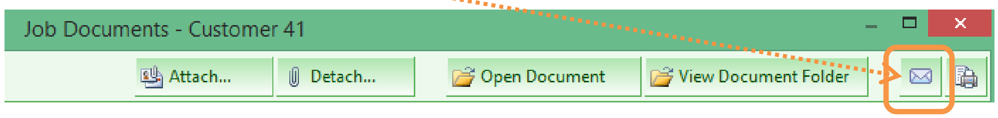


♦ Job Documents Window

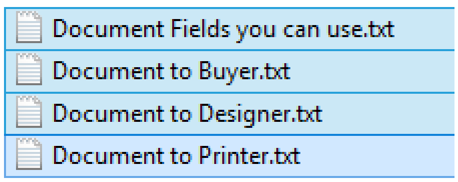
➔ Email Documents

You can email the document as an attachment to buyers or email the location (path) of the document to employees by using custom templates.

1. Click the Email button.



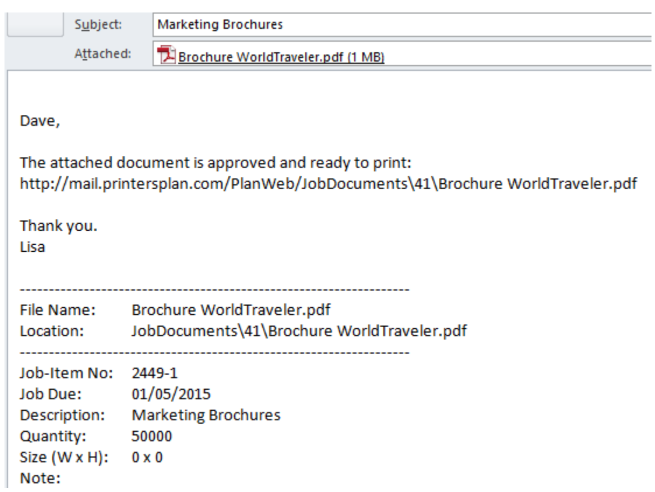
2. Select an email template from the Email folder of Printer's Plan.



The Setup program will copy these files to Printer's Plan Email folder. You can also download these sample email templates from:

http://www.printersplan.com/_docs/Email Templates for Documents.zip

3. Review the email in your Email application and click Send.



Subject: Marketing Brochures
Attached: Brochure WorldTraveler.pdf (1 MB)

Dave,

The attached document is approved and ready to print:
http://mail.printersplan.com/PlanWeb/JobDocuments\41\Brochure WorldTraveler.pdf

Thank you.
Lisa

File Name: Brochure WorldTraveler.pdf
Location: JobDocuments\41\Brochure WorldTraveler.pdf

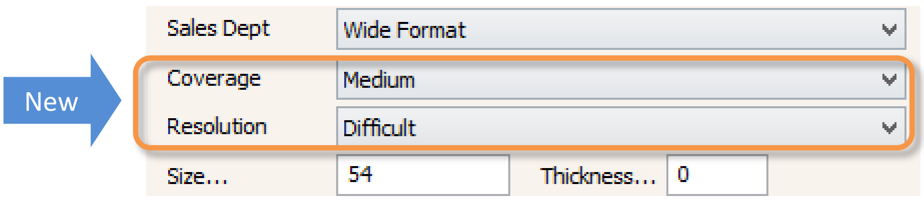
Job-Item No: 2449-1
Job Due: 01/05/2015
Description: Marketing Brochures
Quantity: 50000
Size (W x H): 0 x 0
Note:

Services Section

♦ Service Window

➔ Wide Format - Default Coverage and Resolution Difficulty

You can assign a default Coverage and Resolution difficulty to each medium.

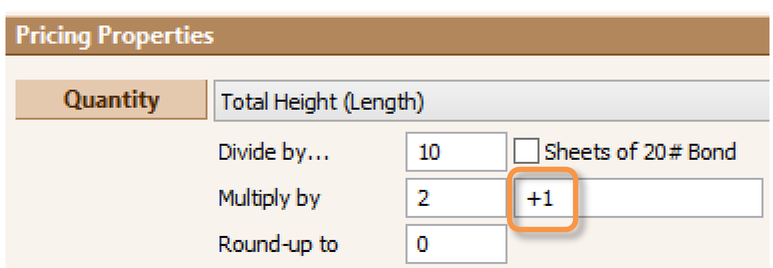


➔ New Option "+"

This feature is added mainly for calculating number of grommets. To use this feature, you must enter:

1. A value in the Divide by field.
2. A + sign and number in the How many field.

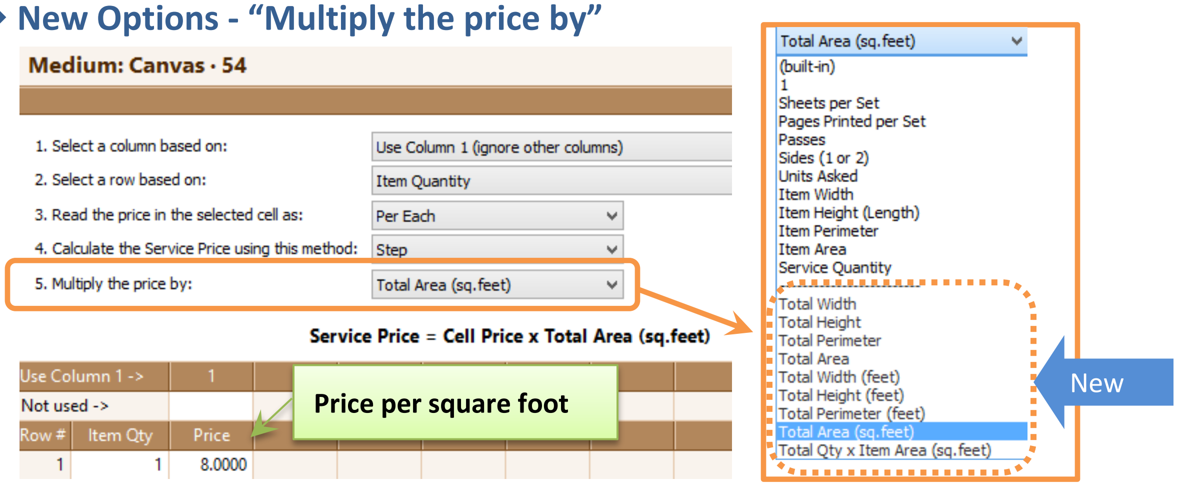
The following example is for grommets (10 inch apart) of a banner on each side (2).



NOTE: This feature is not used if the Divide by field is zero.

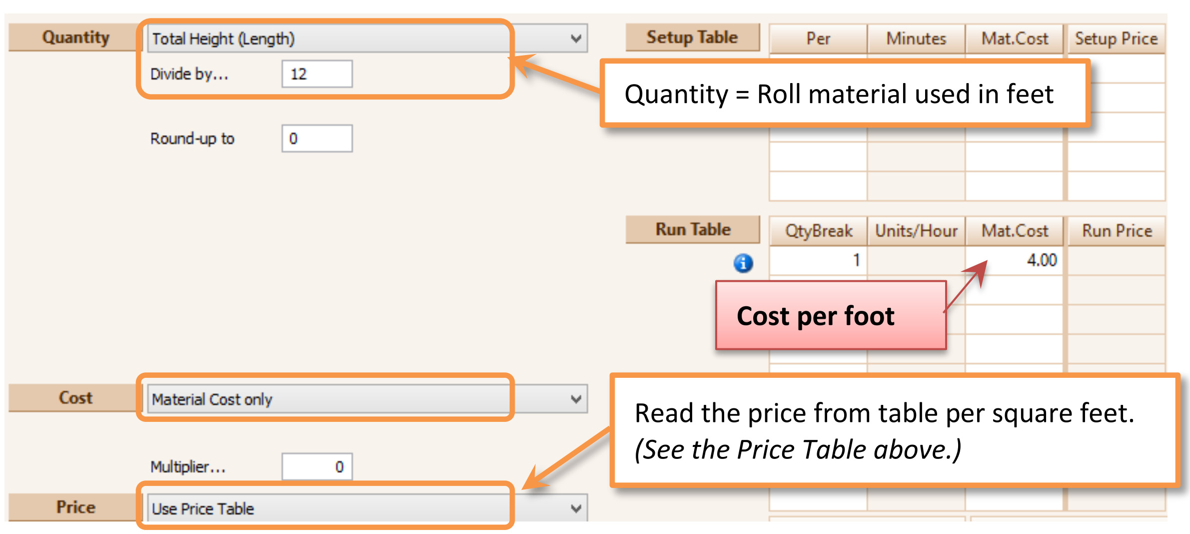
♦ Price Table Window

➔ New Options - "Multiply the price by"



These new options allow you calculate the cost and price of Wide format roll materials based on different quantities. For example, you can setup a roll material where its cost is calculated by "Total Length" (in inch or in feet) and its price is calculated by "Total Document Area" (in square inches or in square feet).

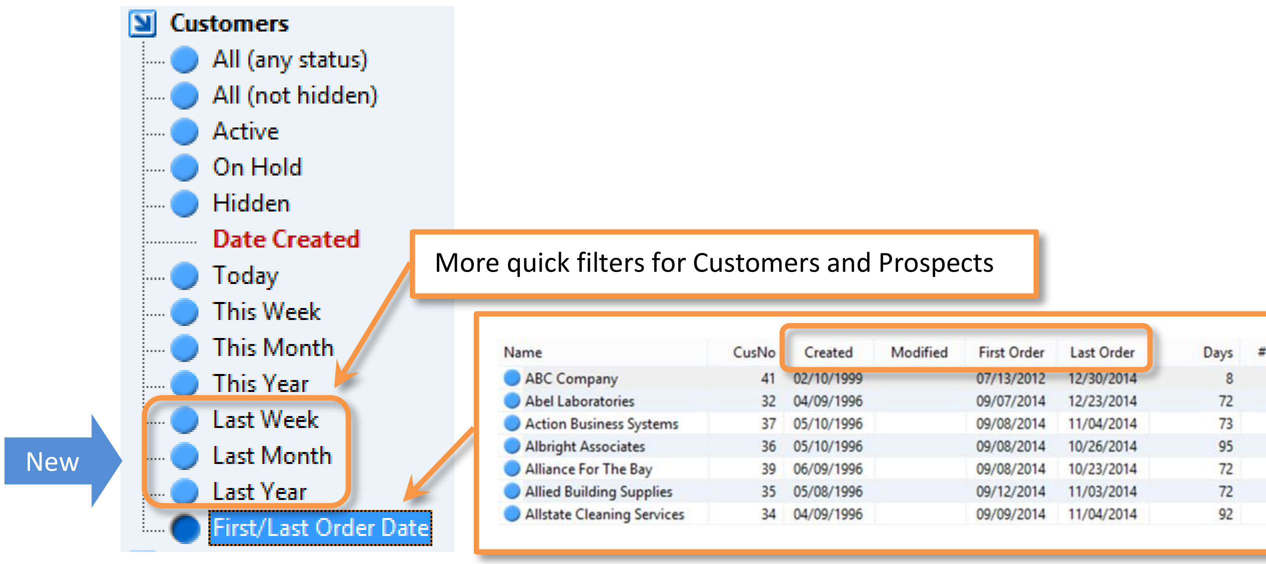
Example: Setup a Wide format roll material. Calculate Cost b



Customers Section

♦ Customers

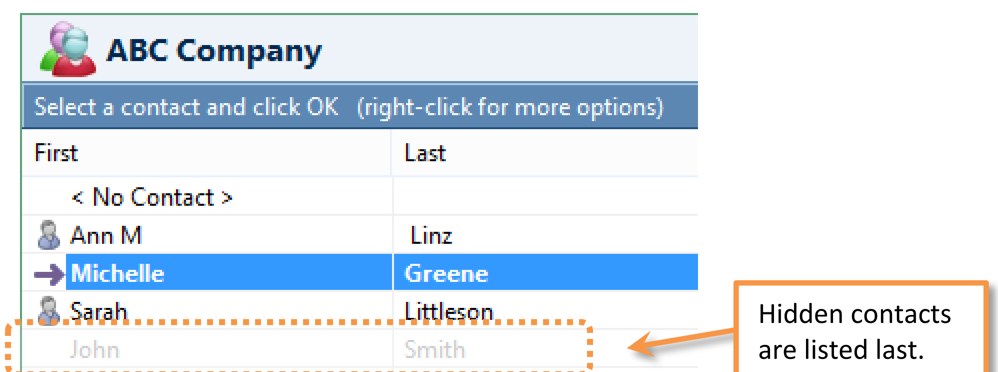
➔ New Reports



♦ Customer Window

➔ Contact and Ship to Lists

Contact and Ship to lists are first sorted by Status (Active, On Hold, and Hidden) then Name. Therefore, the Hidden contacts are listed last.

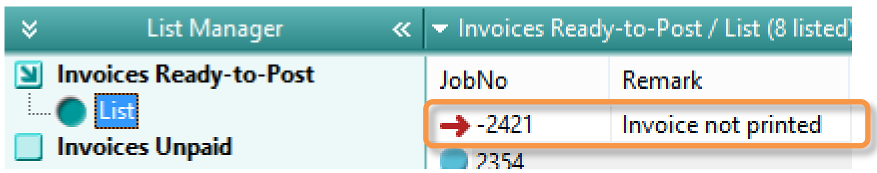


A/R Section

♦ A/R

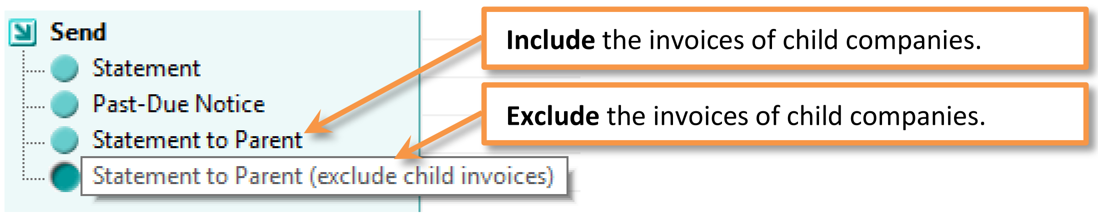
➔ Invoice Ready-to-Post

The list always includes "Credit" invoices even if its status is not "Ready-to-Post" (Invoice is printed or not).



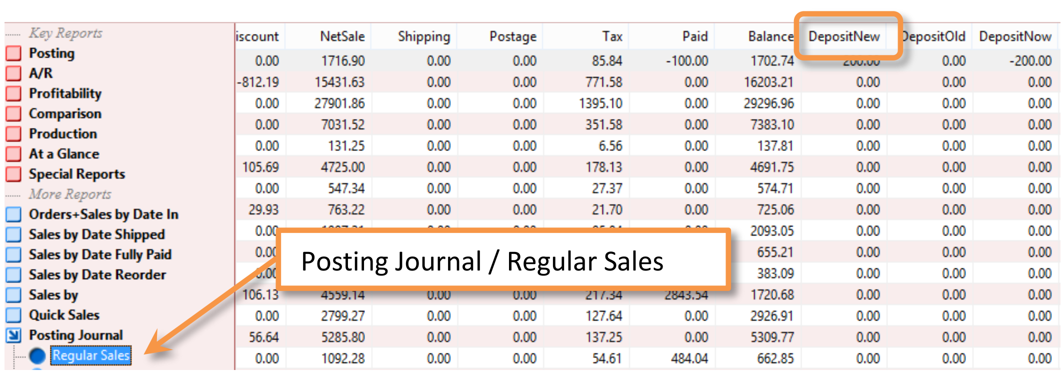
➔ Send Statement to Parent - New Option

New Option for sending statements to parents: Exclude child invoices.



➔ Posting Journal – DepositNew Amount

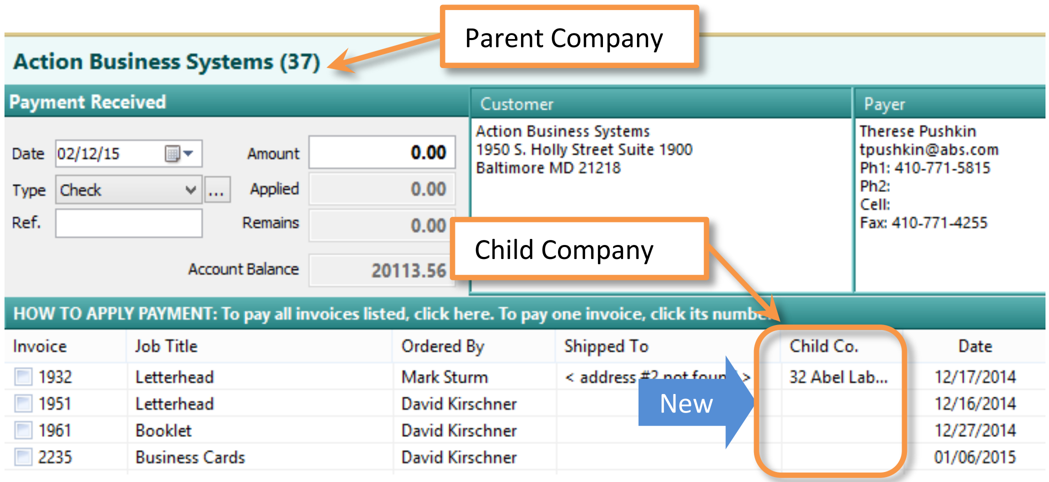
Posting Journal / DepositNew amount now includes the deposit applied to an Order, then reversed and then the Order is deleted.



♦ Payment Window

➔ New Child Company Column

The invoice list includes the invoices of "Child Companies". In previous versions, you could not easily identify which invoices belong to child companies, if any. Now you can.

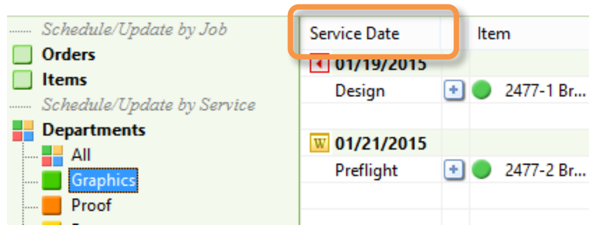


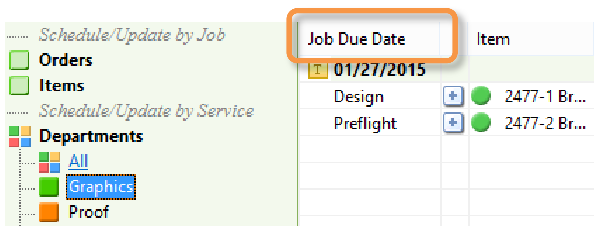
Scheduler Section

♦ Scheduler

➔ Group Services by Job or Service Due Date

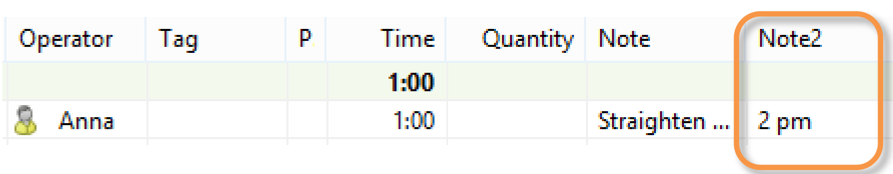
The default sort of Service Lists is Service Due Date. Now you can sort (group) the Services by Job Due Date: **Hold Ctrl key down and click** a Service a Department, Center, Operator, etc. Note: Dates (Any Date, Monday, etc.) ignore this feature.



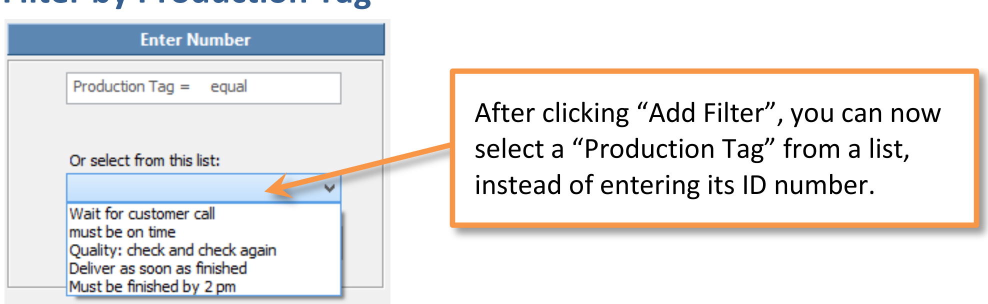


➔ Service Lists

Service lists (by Department, Centers, etc.) now show the **Job Time Due** data in the **Note2** column (the last column of the list).



➔ Filter by Production Tag

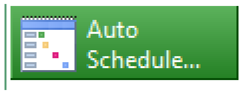


♦ Schedule Job Window

➔ Auto-Done Services

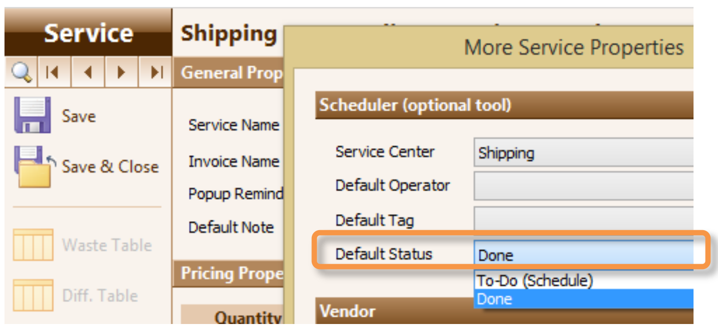
They are automatically marked as "Done" when you:

- Click the Auto Schedule button in the Schedule Job window



- Paste an Order in the Jobs window
- Paste an Item in the Job window

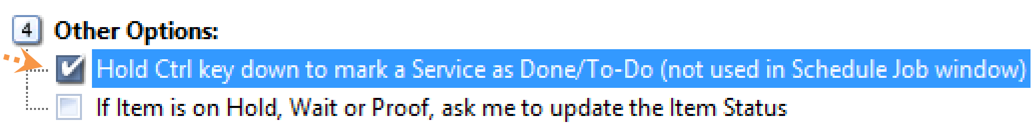
You can set the Default Status of a Service as "Auto-Done" in the "More Service Properties" window.



➔ Ctrl Key Exception

In this window, you use the Ctrl key to select multiple rows and then assign a date, operator, tag or priority the selected rows. Therefore, the option "Hold Ctrl key down to mark a Service as Done/To-Do" is not used.

"Hold Ctrl key down" option is not used in the Schedule Job window.



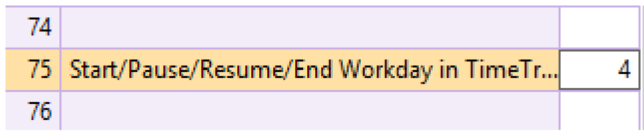
TimeTracker Section

♦ TimeTracker

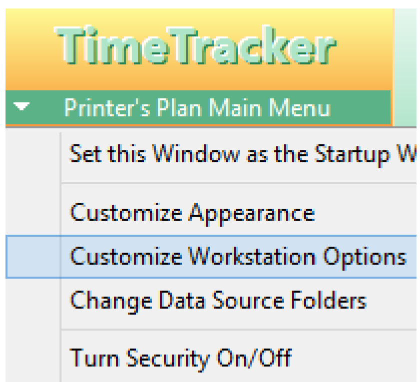
➔ New Password Option

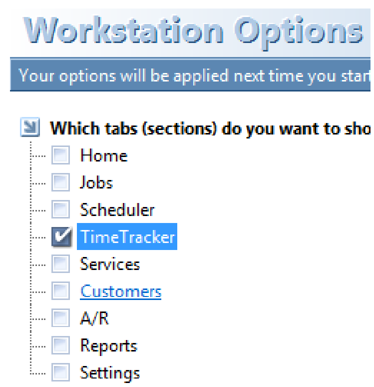
Now you can require operators to use a dedicated workstation to Start / Pause / Resume / End their workdays. To use this feature:

1. Set a password level for these tasks (ID 75) in Settings / General / Passwords.



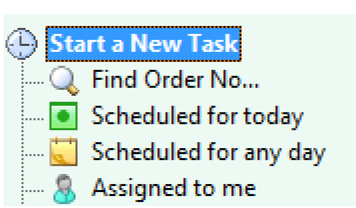
2. On the dedicated workstation, hide all sections (tabs) except the TimeTracker section and turn the security level (you assigned for this task) off.

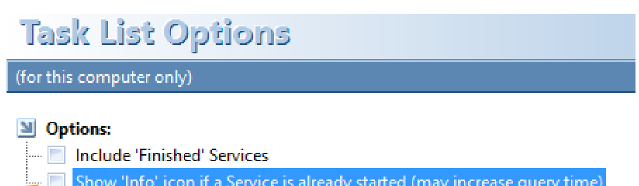




➔ Show 'Info' Icon Option

After clicking one of the "Start a New Task" buttons (see below), Printer's Plan opens a "Start a Task" window and lists Services-To-Do. The list may include an "Info" column to show if another task already started for a Service. If the "Start a Task" window takes too long to open, turn the **Show 'Info' Icon** option off.



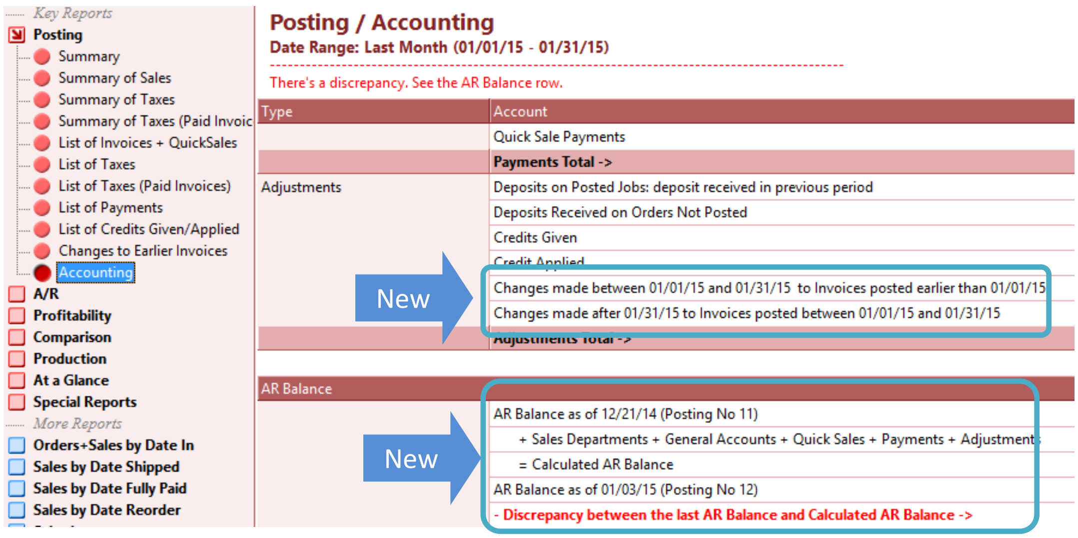


To turn this option off: Click **Scheduled for today**. In the **Start a Task** window, click the Options button (bottom-right corner) and uncheck the option.

Reports Section

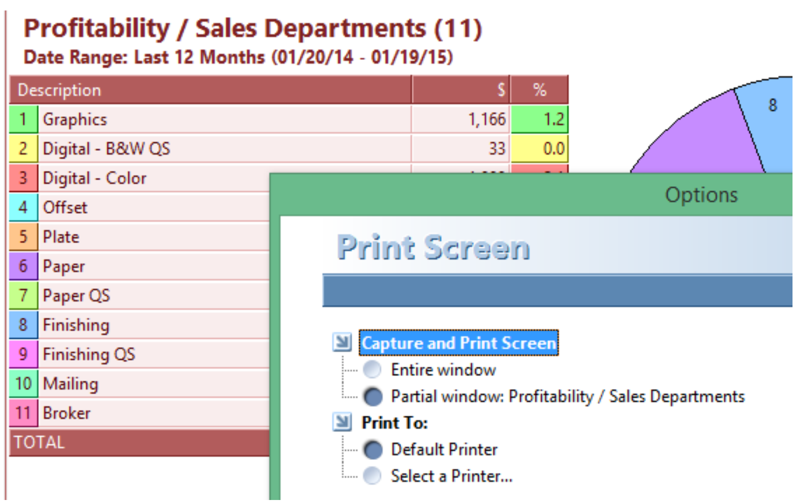
♦ Reports

➔ Posting / Accounting Report



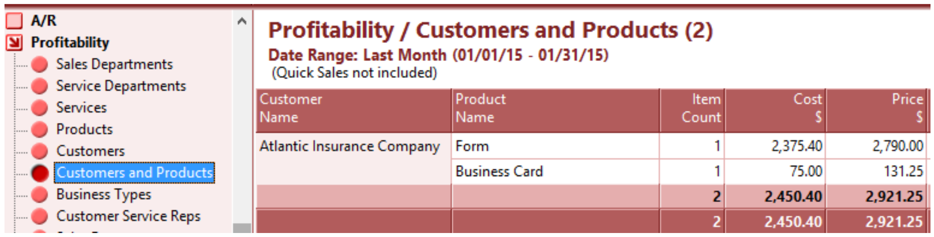
➔ Print Charts

Press Ctrl+F7 and select "Partial window" option.

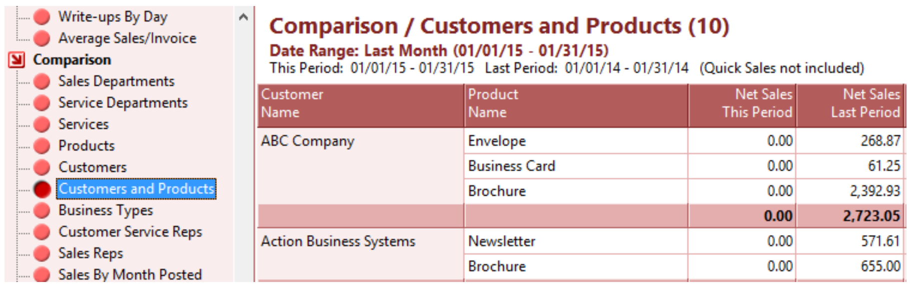


➔ New Reports

- Profitability / Customers and Products



- Comparison / Customers and Products



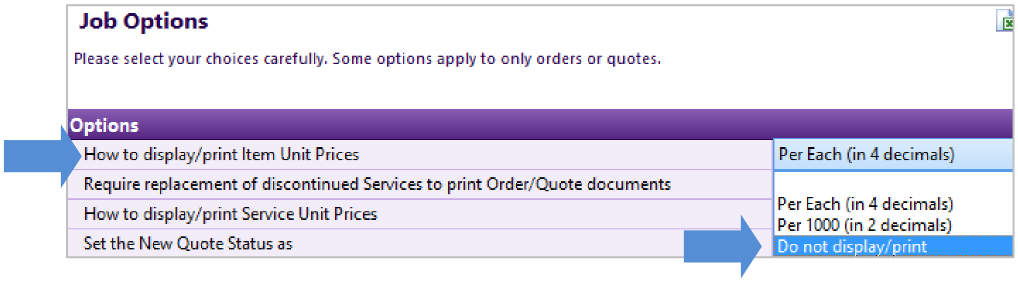
➔ Fixes

- Custom Queries: The last column of the report was hidden if it contained numeric values. Now all columns are displayed.
- Product Compare report ranks current and last periods correctly.
- Special Reports/Activities of My Company now shows the Date Range.

Settings Section

♦ Settings

New option for **Item Unit Price**: "Do not display/print".

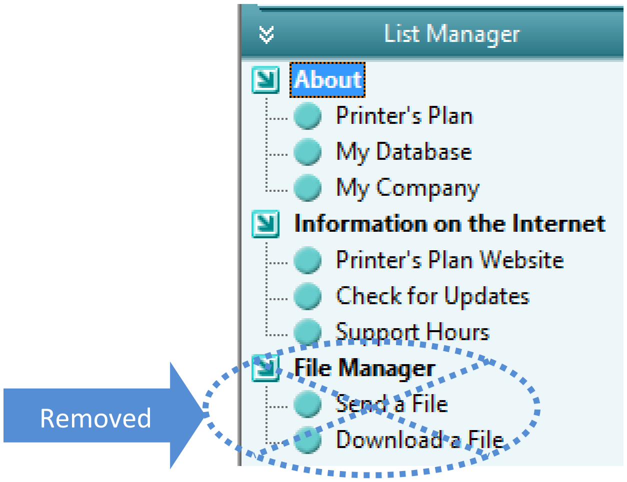


Home Section

♦ Home

➔ File Manager

File Manager is removed. Please contact us when you need to upload/download a file.

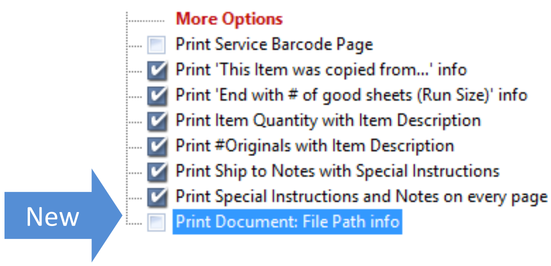


Other Windows

Printing

➔ Work Order

- Option to print Document File Path info.

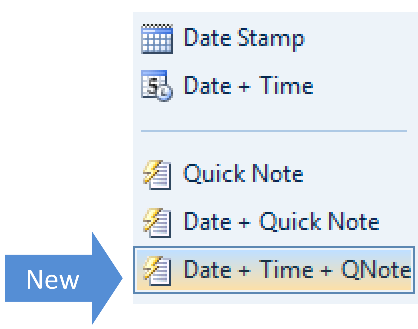


➔ Invoice

- "Copy of" is not printed on Invoices of History jobs.
- (0/) was printed next to a Service if Quantity field = Item Quantity, Divide By field > 0 and Ask How Many field = / (which means the value in Divide field is Lift). Fixed. (0/) not printed anymore.
- Option not to print Item Unit Price. See the Settings section.

Note Window

- New option to add a Quick Note: Date + Time + Quick Note.



Find Window

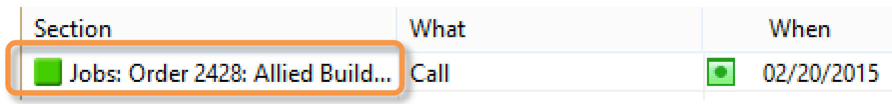
- Changing the Advance Find text enables the Find Now button.
- "By this field" list includes more choices when "Advance Find" option is checked.

Inventory Tool

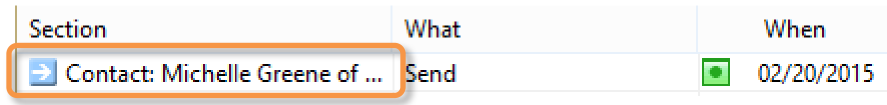
- If you click on the Check Box of another row after changing the Order or Receive Quantity, previous row data was copied to the new row. Fixed.

Reminder Tool

- Reminder List for specific jobs includes customer's and buyer's name.



- Reminder List for specific contacts includes customer's name.



Shipping Labels Tool

- Order List now includes customer names.

New

- Exported label data includes Item Note. You may add it to label templates as: «ItemNote»

Export Tool

- Export "Buyers only" and "Payers only" did not include customers with blank buyer/payer. Fixed.
- Export to QuickBooks: No data was exported if the selected posting journal included deposit and/or payment but no orders. Now deposits are exported.