

NEW VERSION PRINTER'S PLAN 2019

What's New & Improved

JOBS

➔ Vertical Data List

Home Jobs Scheduler	TimeTracker	Services Customers	A/R Re	eports Settings				He
Jobs Printer's Plan Main Menu	*	<u>></u>				7		Reminder
	New	Find Open	Print	Email Export	Favorites C	Dn	🖂 🖾	Reminder 🦉
ist Manager Orders		(41 listed) Customer	CusNo	The	Dateln	DateProof ^	FIELD NAME	FIELD DATA
 All 	JODINO							
In Progress	2437	Action Business S	37	Special Mugs	12/11/2016	Su	JobNo	2437
On Hold Ready to Ship	 2435 2434 2433 	Show h	orizo	ntal data ver	tically	•	Customer Title	Action Business Systems
Ready to Post Received Today	2432	ABC Company	41	Envelopes - Pike Street	12/09/2016	· .	DateIn	1/2016
Shipped Today	2430	ABC Company	41	abc-news	12/09/2016	F	DateProof	
Late	2429	Ascot Inc.	40	Letterhead	12/09/2016		🔤 DateDue	2016
Due Today	2428	Allied Building Su	35	Stationery	12/08/2016		Time	
Due Tomorrow	2427	Abel Laboratories	32	Letterhead	12/08/2016	Т	DateShipped	12/16/2016
Due This Week	2426	Ascot Inc.	40	Application Forms	12/08/2016		Invc	Email
Due Next Week	2418	Action Business Sy	37	Business Cards	12/07/2016	F	- F	-
Discrepancies	2416	Atlantic Insurance	33	Brochures	12/07/2016	F		
With Reminders To-Do	2415	Action Business Sy	37	Application Forms	12/07/2016	F	· · · · · · · · · · · · · · · · · · ·	/ertical
Quotes	2414	Ascot Inc.	40	Brochure	12/07/2016	•		rtical
🔵 All	2411	Attman & Associa	43	Form	12/07/2016	F		ata List
🛑 Hot	2407	ABC Company	41	Brochure, Form	12/07/2016	•		
🛑 Warm	2406	ABC Company	41	Booklet	12/07/2016			
Cool	2405	ABC Company	41	Staff Manuals	12/07/2016	•	Balance	114
Won	2381	Alliance For The Bay	39	Newsletter	12/02/2016	•	First	David
🛞 Lost	2380	ABC Company	41	Employee Manuals	12/02/2016	S	Last	Kirschner
Received Today	2379	ABC Company		Annual Report	12/02/2016	Su	LastEmail	
Received This Week	2378	ABC Company		Brochure	12/02/2016		LastSurvey	09/12/2013
Received This Month	2377	Ascot Inc.		Letterhead	12/06/2016		CSRNo	101
Received Last Week Received Last Month	2376	ABC Company		Direct Mail Envelopes	12/06/2016		SRepNo	201
Received Last Month Older Than 1 Month	2375	Attman & Associa		Form	12/06/2016	•	Status	Ready to Post
Older Than 1 Month	2374	Allied Building Su		Stationery	12/06/2016	•	Location	1
Discrepancies	2373	ABC Company		Application Forms	12/06/2016	S	PO	1234
With Reminders To-Do	2372	Abel Laboratories		Letterhead	12/06/2016	•	JobID	502
Templates	2370	Attman & Associa		Envelopes	12/06/2016	S		
History	2368	Attman & Associa		Envelopes	12/08/2016	• •		
WebOrders	× <	a service a solution	45		12,00,2010	>	.	

This feature allows you to see a selected row as a two-column list: Column Name and its Data.

Vertical Data List:

- Click here to display the Vertical Data list.
- helps you see more information without scrolling horizontally.
- is especially useful when the main list has many columns.
- shows all columns of the main list (includes hidden columns).
- is automatically refreshed when you select another row from the main list.
- is available in the Jobs, Scheduler, Services, Customers, A/R, and Reports sections.
- **TIP**: If you want to view the data of a specific column, such as Paid or Balance, click the corresponding row in the Vertical Data List so that it remains bold when you select a different row from the main list.

→ Jobs / "Date Due" Icons for Order Lists - Visual Help

lew "Date Due" ic	ons will help	you easily identify	y "Late	" Orders.		
Orders	JobNo	Customer	CusNo	Title	Dateln	DateDue
All	2437	Action Business Sy	37	Special Mugs	12/21/2016	M 12/26/201
In Progress	2435	ABC Company	41	Form - Purchase Order	12/21/2016	F 12/23/201
On Hold Ready to Shin	2434	Apex Realtors	81	Brochures	12/21/2016	W 12/28/201
 Ready to Ship Ready to Post 	2433	ABC Company	41	World Traveler Brochures	12/21/2016	F 12/23/201
Ready to Post Received Today	2432	ABC Company	41	Envelopes - Pike Street	12/13/2016	12/19/201
Shipped Today	2430	ABC Company	41	abc-news	12/21/2016	W 12/28/201

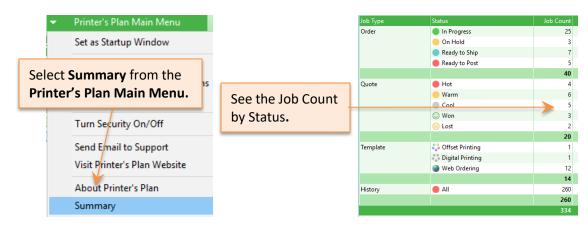
→ Jobs / "Status" Icons for Quote Lists - Visual Help

New "Status" icons will help you easily identify if a Quote is Hot, Lost, or Won.

	\checkmark			
Cuotes	5 06	ABC Company	41	Yard Signs
	504	Atlantic Insurance	33	Brochures
Hot Warm	502	ABC Company	41	Information Books
	3 501	ABC Company	41	Employee Manuals
Cool 😳 Won	3 500	Atlantic Insurance	33	Business cards
	499	Annapolis General	38	Forms
Received Today	498	Ascot Inc.	40	Registration Forms
Received This Week	8 496	Ascot Inc.	40	Brochure
Received This Month	8 495	Atlantic Insurance	33	Brochure

→ Jobs / Summary

The new **Summary** list groups jobs by Job Type and Status.



JOB WINDOW

→ Job / Purchase Order

With this easy-to-use and flexible tool, you can print and email Purchase Orders.

n Palmer 410-434-2389 A Eleanor Smon 410-561-4342 A 2427, 1, 521				
	Vendor_		P.O. NUMBER	
		Eleanor Simon 410-561-4342 Printer's Plan	2437-1-531	
	35 Pratt Ave.	116 Old Padonia Road Suite C		
<image/>	sitmore MD 21203	Hunt Valley MD 21030		
And the set of the			Ship Date 22/26/16	
And the set of the				
And the set of the		а.	Marriel and Marrie	
And the set of the	Durathy Description / Instructions		100 Arr Address Arr Chr State Zo	Purchase Order
And the set of the			(556) 123-6555, Fax (556) 123-6666	
				2437-1-531
				Date: 12/19/2016
	Do that			
			Raven Promo Eleanor Simon 410-561.43	0
	Beachul Mugs		765 Pratt Ave	
	- Ship by: Our Truck		Baltimore MD 21303	
	- Ship Date: 12/26/16 - Customer: Action Business Systems		Suite C	
	If you have any questions about this order, Thank you.	please call me at (123)-456-7890 or email me Lisa @successpress.com.	Eleanor Simon 410-561-4	342
View View <th< td=""><td></td><td></td><td></td><td>10.04</td></th<>				10.04
	Lisa		Quantity Optimizing	
			12 Special Muse	
				Cost
Image: Part of Part			Beachul Mugs	
Cotte Martin Martin Martine Cotte Martin Martin Cotte Martin Martin Solution Solution Marking Total Solution Solution Nation Total			The	60.00
In MS MICE Do rise Do rise Do rise Structures Str	Close Print Now Print Tu., Email PD		12 Good Mugs 55 x 8 5	
Gradie Britanie Brita			TEM CREWER	
And that How the How the Ho			Do this	
Brit Classified Mage Sc:			Do that	
VOI - Ship Syn Thuki - Ship Syn Thuki <tr< td=""><td></td><td></td><td></td><td></td></tr<>				
VOI - Ship Syn Thuki - Ship Syn Thuki <tr< td=""><td></td><td></td><td>SERVICE Beating Mugs</td><td></td></tr<>			SERVICE Beating Mugs	
 - Oug by Conf Ndl - Oug by Conf Ndl - Out owner we have been stated with the state existing and and the state existing and the state existing				
 - Conserve Kinds Mark Strates - Serve Kinds Mark			308	
- See Sey Jam Pyte has any cantoo addot dis once, please cal me at (12)-456-7800 or amail me Lis Is Total Total 60.000 Total 70.000 Total 70.000 Total 70.000 Total 70.000 Total 70.000 Total 70.000 Total 70.000 Total 70.000 Total 70.0000 Total 70.00000 Total 70.00000 Total 7			* Ship by: Our Truck + Ship Date state	
Pie has any outstook should be shoul			- Customer, Action Burlines	
Total 60.00			- Sales Rep: Jim	
Total 60.00			If you have any questions	
Total 60.00			Usa@ouccespress.com. Thank	
Tenix Yos TOTAL 60.00			Usa Usa 100. Usa 1123)-456-7890 or en	al ma
60.00				
40,00				
60.00				
60.00				
60.00				
40,00				
			Thank You	TOTAL
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	10		o, preuse see page	

→ Job / Reprice All: Additional Options

When you clicked the **Reprice All** button, earlier versions simply asked you a Yes or No question. This version offers more options.

Rearrange 2 Items Schedule	Earlier Versions simply asked you a Yes or No question	This Version gives you more options
Ocuments Inventory Compare View Cost Reprice All Email Form Letter View as Web Page	 Do you want to reprice all Items of this job? If you click Yes, each Item will be priced based on the customer's default setting and the price will be saved automatically. If you are not sure about this feature, click No. 	 Which Price Level do you want to use? Use customer's default Price Level and Rounding Option Keep Item's current Price Level and Rounding Option Normal Price Level Bid Rush Special or Keep current Price Level and Rounding but change Item Quantities

Reprice Options

- → Use customer's default Price Level and Rounding Option Items will be repriced after setting their Price Levels and Rounding Options to the customer's defaults. This is the same as the Yes option of previous versions.
- → Keep Item's current Price Level and Rounding Option

Items will be repriced without changing Item Specs.

→ Use a Price Level Normal, Bid, Rush, Special

Items will be repriced after setting their Price Levels to the selected level. Their Rounding Options will not change.

→ Keep current Price Level and Rounding but change Item Quantities...

Printer's Plan will ask you to enter a new quantity for each Item. After clicking the **Reprice** button, Items will be repriced based on the new quantities. Price Level and Rounding Options will not change. **This option is especially useful for:**

✓ Changing the quantities of **multi-part jobs** and **sub-Items**.

Item Description	Quantity	New Quantity
1.1 Booklet Cover	500	750
1.2 Booklet Inside Pages: 16	500	
1.3 Booklet Bindery	500	

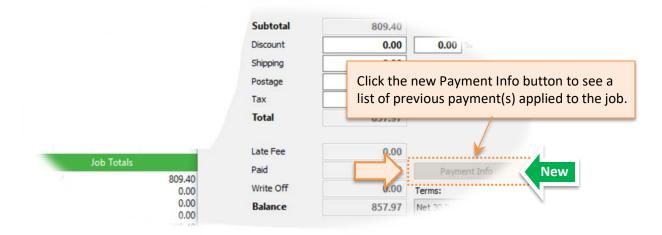
✓ Applying the requested quantity before converting a **multi-quantity Quote** to an Order.

ltem	Description	Qua	ntity	New Quantity	
1	Business cards	N	500		1500
2	Envelopes		1000	2000	1500, 2000, 2500, 5000

→ Job / Ordered By Info

	Ordered By data includes the buyer's salutation and position
Ordered By	When
Ms. Michelle Greene	In 12/
Director	W Due 12/
mgreene@abc.com	Ship by Ou
Ph1: 410-539-3466 x 35	Ship'd
Ph2:	CSR Lis
Cell: 443-567-4398	SRep Jim
Fax: 410-539-5586	From Ord

→ Job / Totals window: Payment Information



→ Job / Specs / Price level: Ask Unit Price

Unit Price	x
Enter Unit Price: Default 0.0440/Ea. Last 0.0500/Ea	B Price Level Ask Unit Price -
0.0440	Price Rounding On 👻
Default Item Price = 110.09 (2500 x 0.0440/Ea)	Format Unit Price 👻
Last Item Price was = 100.00 (2000 x 0.0500/Ea) Using the Last Unit Price = 125.00 (2500 x 0.0500/Ea)	Size (W x H)
To enter price per 1000: Type m after the price.	You can make more informed decision with additional data.
Set Item Price = 100.00	

→ Job / Service / Vendor / Email Templates

New

Now, emails you send to vendors can be populated automatically with data about a specific Item Service.

To send an email to a vendor about a specific Item / Service:

- 1. In the Job window, right-click on a Service to which a vendor is assigned, and select View Vendor...
- 2. In the Vendor window, click the **Email** button. Printer's Plan will ask you to select a template.
- 3. Select a template.

▼ Items	New Item	Edit Specs	de Cal	it Costs	Reprice		Vendor	
• items			🛓 Eu	it Costs	- Reprice		Name	Raven Promo
ltem	Description						Address	
21	Coffee Mugs	5.5 x 8.5 · Ask Item Price					Address	785 Pratt Ave.
	Promotion	al Products: Mugs · Raven	Pr	New Item			Address2	Second Floor
							City	Baltimore
				Sub-Iter	m		State	MD
				Paste this Ite	m		Zip	21203
				E dia Caraca			Country	
				Edit Specs			Contact	
				Edit Costs			Name	Sean Palmer
				Edit Service			Phone 1	410-434-2389
			┙╲	March Manada a			Phone 2	
			~	View Vendor.			Fax	410-434-3333
				Purchase Ore	der		🖂 Email	Spalmer@ravenpromo.com
					_	V		

• Review the sample template: The upgrade program copied two files to the Email folder, which is in the Printer's Plan directory of your server: Vendor Email Fields.txt and Vendor Sample.txt. Please review these files before you start using this email feature.

Vendor Email Templates

• Create new templates. You can copy and paste the Vendor Sample.txt file and rename it. Start the template file name with the word "Vendor", then add some text to it, such as the name of the vendor or service category. Examples: Vendor ABC.txt, Vendor Broker.txt, Vendor Paper.txt, Vendor Thank You.txt.

Vendor email templates can include the following fields. These fields are also included in the **Vendor Email Fields.txt** document mentioned above.

VENDOR FIELDS	JOB / ITEM FIELDS	SERVICE FIELDS
<email> <vendors.name> <contactname> <phone> <phone2> <fax> <notes></notes></fax></phone2></phone></contactname></vendors.name></email>	<jobno> <title>
<ItemNo>
<ActualQty>
<ChargeQty>
<TimeCost>
<MatCost>
<Cost>
<ServiceNote></td><td><CatName>
<Services.Name>
<Name2>
<Size>
<SKU>
<UPC>
<FSC>
<UnitCost>
<Unit></td></tr></tbody></table></title></jobno>	

→ Job / Specs window: Item Document Types

em Properties		8	
Description	Form - I	Document Types	
Quantity	1000	This information will be printed on invoi	iner
Originals	1	This information will be printed on invol	ices
Sides	1 printed	Salast Desument Tune	
ervice Specs		Select Document Type Originals	
ategory	Service	- O Sheets	You can customize the names of thes
Design	By Hour	- Cinvelopes	Document Types, except for "Names"
Carbonless	3 Part ·	Names	
	👗 Run	- Originals/Set	See Page 17.
	Fror	- O Sheets/Set	
	Back		
		O Sheets/Pad	
Printer	Printer	····· 🔵 Tabs/Set	
Pad	NCR Pa	Sheets/Pack	

→ Job / Specs window: New Cut-to-Finish-Size Option

When you set the Finish Size of a paper smaller than its Run Size, Printer's Plan automatically adds the default Cut-to-Finish-Size Service to the Specs. Now you can turn this auto-add option off:

- 1. In the Settings section, select Jobs > Job Options.
- 2. In the Job Options window, set the last option to No, and click OK. Now, it is your responsibility to add a cutting Service to the job specs.

In the Specs window, add Cut-to-Finish-Size Service automatically

→ Job / Costs window: Wider Service Column



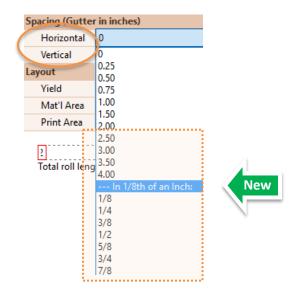
→ Job / Specs / Cutting Layout: More Trim Width Options



No

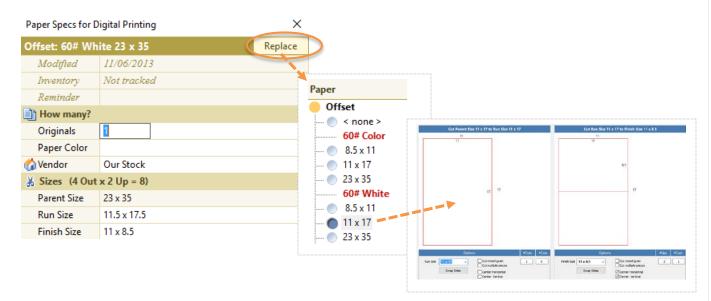
→ Job / Specs / Large Format / Medium: Additional Spacing Width Options

The list for Horizontal and Vertical spacing now also includes 2.5, 3.0, 3.5 and 4.0 inches and additional 1/8th intervals.



→ Job / Specs / Paper / Replace

If you click the Replace button in the Paper Specs window and then select a paper with a different parent size, Printer's Plan asks you "Do you want to replace the paper?" and alerts you "...cutting specs may change". If you replace the paper, earlier versions calculated the number of cuts and showed the results in the Specs window. This version opens the Cutting window for you to view and modify the new layout.



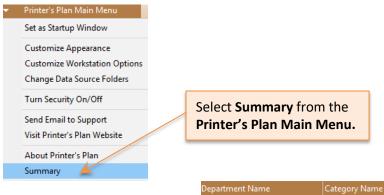
→ Service / Increase Price Table Prices by a Percentage

SERVICE

This feature is available for Services with the Use Price Table option. Price Use Price Table % or # Markup... 0 How to increase Price Table prices by a percentage In the Service window, 1 Diff. Table click the Price Table Markup Table button. Price Table In the Price List window, 2 Cost/Click -> 0.0200 0.0200 0.1000 0.0600 0.1000 click the Increase Prices by... button. 1 10 0.0800 0.0800 0.4200 0.2500 0.4200 2 100 0.0600 0.0600 0.3200 0.1900 0.3200 3 500 0.0400 0.0400 0.2400 0.1400 0.2400 4 1000 0.0400 0.0400 0.2000 0.1200 0.2000 5 6 7 8 9 10 11 12 Increase Prices by %... ✓ Save X Cancel Enter a percentage. Type a percentage, such as 5 or 5.5. 3 (type a minus percentage to decrease) Select a Round-up 4 Round-up the updated prices to: 🔵 \$0.0001 option. 🔵 \$0.0010 ---- **\$0.0100** ···· 🔵 \$0.1000 🔵 \$1.0000 💭 🔘 Don't round Row # Price Price Check the results. 5 0.4620 0.4620 1 10 0.0880 0.0880 0.2750 2 100 0.0660 0.0660 0.3520 0.2090 0.3520 0.2640 0.0440 0.0440 0.1540 3 500 0.2640 4 1000 0.0440 0.2200 0.0440 0.1320 0.2200 Click Save. 6

➔ Services / Summary

The new Summary shows the count of the Services in each Category. The count includes discontinued Services.



Department Name	Category Name	Service Count
늘 Graphics	Design	10
	Preflight	1
		11
늘 Proof	Proof	5
		5
늘 Paper	🛑 Bond	12
	Offset	15
	Vellum Bristol	10
	😑 Index	10
	Carbonless	19
	Writing	7
	Announcement	8
	Misc Paper	6
	Text	11
	Cover	12
	Text Coated	10
	Cover Coated	14
	Env: Business	11
	Env: Announcement	6
	Env: Book/Catalog	5
	Env: Other	2
		158

♦ CUSTOMERS

→ Customers / Prospects / First/Last Quote Date

This report shows when a prospect requested the first and last quotes and the number of days since then.

Customers	Name	CusNo	Created	Modified	First Quote	Last Quote	Days	#Quotes	CSR	SRe
Prospects	Default Customer	10	06/02/2005					0	0	(
All (any status)	Hunt Valley Florist	78	01/24/2017		01/25/2017	02/03/2017	4	2	0	202
All (not hidden)	MICA	79	08/16/2016		08/17/2016	11/24/2016	75	2	0	20
Active	Printer's Plan	1	07/01/2003					0	0	
On Hold Hidden	Star Computer	83	01/03/2017		01/03/2017	01/20/2017	18	2	0	20
Date Created	Symphony Products	82	10/18/2016		10/18/2015	01/25/2017	13	2	0	20
Today	Web Customer	20	06/17/2017					0	0	
This Week										
This Month										
This Year										
Last Week										
Last Month										
📙 Last Year										
Other									•••••	
First/Last Quote Date										

→ Customers / Summary

The new Summary shows the count of Contacts, Ship to addresses, Orders, Quotes, Templates, and History Jobs for each customer.

 Printer's Plan Main Menu 							
Set as Startup Window							
	This list includes ALL CUSTOMERS (any stat	tus).					
Select Summary from the	Name	Contacts	Shipto	Orders	Quotes	Templates	History
Printer's Plan Main Menu.	<your company="" name=""></your>						
	ABC Company	4	3	16	7	6	43
Turn Samuita On (Off	Abel Laboratories	2	1	4	2		20
Turn Security On/Off	Action Business Systems	2		3			22
Send Email to Support	Albright Associates	2	1				25
	Alliance For The Bay	2		2	1		16
Visit Printer's Plan Website	Allied Building Supplies	2	1	3	1		14
About Printer's Plan	Allstate Cleaning Services	2					14
	Annapolis General Hospital	2			1		19
Summary	Apex Realtors	1		2			1

NOTE: Depending on the size of your database, this Summary may take from a few seconds to a few minutes.

The Summary window now includes **Average Days Paid** in the Aging section.

To view the data, click the **Summary** button in the Customer window.

Customer										
		Ra	anking	Or	ders (last	10)	Paymer	nts (last 4)	Ag	ing
	Year	Rank	Net Sale	DateIn	JobNo	Net Sale	Date	Amount	Age	Amount
New	2017	n/a	0.00	12/21/2016	2433	293.78	12/14/2016	21000.00	31-60	6051.87
i i i i i i i i i i i i i i i i i i i	2016	1	49096.92	12/21/2016	2430	643.36	12/08/2016	26787.08	61-90	1200.52
Save	2015	1	46612.86	12/21/2016	2435	175.50	12/03/2016			
n Save	2014	1	28845.12	12/20/2016	2362	2581.15	11/30/2016	New	Average Days Paid	267
	2013	n/a	0.00	12/20/2016	2366	451.82				
~ .				12/19/2016	2356	0.00				
Documents				12/19/2016	2354	164.31		,	T	
				12/19/2016	2407	2467.73				
Summary				12/19/2016	2406	809.40			Average Da	ys Paid
				12/19/2016	2405	643.27		l		

→ Customer / Ship to List window

😻 ABC Company			Company	y Na	ame column is wi	der.
Select an address and click OK		for m Atter		_	Address	
< Same as Bill To >	_					
ABC Company					220 Lexington Avenue	
ABC Company					915 North Charles St	

♦ A/R

→ Reverse Payment Function

1. List Payment	s Received 2. Se	lect a pay	ment	3.	Click the	Reverse Paym	ent button		
	≪ 🗢 Payments Received / Last Mor	nth (16 listed)						Rev	
📄 Invoices Ready-to-Post	Name	Date 🔪	Amount	Group	Paid By	Reference	Appliedto	CusNo	PayNo
Invoices Unpaid	ABC Company	12/03/2016	58612.57	AR	Check		2383 2384 2385	41	27
Invoices Paid-in-Full	ABC Company	12/08/2016	26787.08	AR	Check		2286 2346 2357 239	41	28
Payments Expected	ABC Company	12/14/2016	21000.00	AR	Check		2422	41	30
Today	Abel Laboratories	12/07/2016	50.00	Deposit	Check		2409	32	44
This Week	 Action Business Systems 	12/07/2016	200.00	Deposit	Check		2415	37	42
This Month	 Action Business Systems 	12/08/2016	9285.86	AR	Check		2230 2327	37	29
This Year	Alliance For The Bay	12/04/2016	200.00	Deposit	Check		2367	39	32
Last Week	Alliance For The Bay	12/07/2016	-200.00	Deposit	Check		2367	39	39
Last Month	 Allied Building Supplies 	12/04/2016	100.00	Deposit	Check		2369	35	33
Lart Year	Allied Building Supplies	12/07/2016	50.00	Deposit	Check		2413	35	43

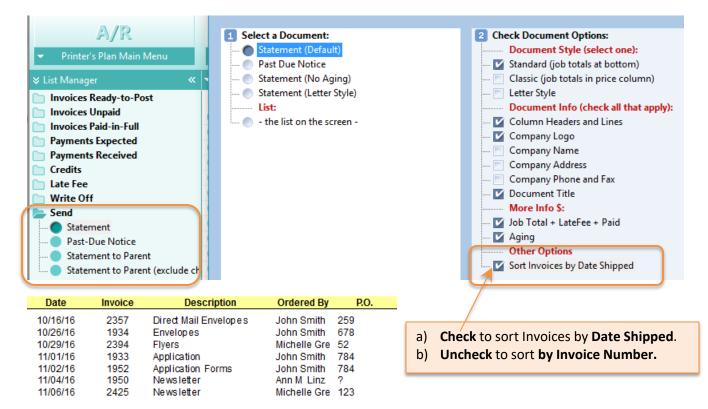
Which Payments Can Be Reversed with the New Feature?					
Reversible If you select one of these payments, Printer's Plan will ask you to confirm.	Not Reversible with this Feature If you select one of these payments, this feature will not allow you to reverse it. You need to manually reverse it.				
 Deposit payment on an Order. AR payment that partially or fully paid off an invoice. This payment can be for a single invoice or multiple invoices. AR payment where the <u>entire</u> amount of the payment was applied as credit to the customer's account. 	 Quick Sale Payments. Payment where only a part of the payment was applied as credit to the customer's account. Payment that had been applied to an invoice, where the invoice was later credited. 				

→ Which Orders Do You Want to Post?

 Invoices Rea 	dy-to-Post / List (8 liste	ed)					Po	ost Now
JobNo	Remark	CusNe	o Customer	First	Last	Dateln	DateShipped	Subtota
2354		Af	fter vou click t	he Post Nov	button, th	e next window you	12/11/2016	164.31
2355			vill see depend			•	12/11/2016	3543.96
2359			•				12/11/2016	61.2
2411		(h	nighlighted) fro	om the Invoid	ces-Ready-to-	-Post list.	12/11/2016	94.0
lf v		Irders	lf you	select only C	NE Order			Orders
lf ye	ou select ALL O	orders,	If you	select only O	NE Order,	If you select TV	VO or more (Orders,
γοι	ו'll be asked a א No question.		All	listed orders selected.		Highlighted o se	orders only w lected	ill be
	u want to start posting you backed-up the dat		🔘 All li	rders do you war sted orders: 8 Ilighted orders on		All listed ord	o you want to pos lers: 8 orders only: 2	st?

→ AR / Statements: Option to sort Invoices by Date Shipped or by Invoice Number

Check the new option to sort invoices by **Date Shipped**, un-check to sort by **Invoice Number**.



→ AR / Email Payment Information to Payer

	 Payments Received / This Mor 	nth (17 listed)			
Invoices Ready-to-Post Invoices Unpaid	Name	Date	Amount		
 Invoices Paid-in-Full Payments Expected 	ABC Company ABC Company	12/03/2016 Open	58612.57	1. Select payment(s) fro	
Payments Received	ABC Company Abel Laboratories	Print Email Form Le	ther and	2. Right click and select	
This Week	Action Business Systems Action Business Systems	View as Web F		Form Letter. 3. Select an AR template	ρ
This Year	 Alliance For The Bay Alliance For The Bay 	Copy and Pas	te		

The email template can include the following new fields.

<PayDate> <PayAmount> <PayType> <PayReference> <PayApplied>

→ AR / Summary

The new Summary shows the financial settings for each customer.

Printer's Plan Main Menu
 Set as Startup Window

Printer's Plan Main Menu. ABC Company 10000 0.00 8303.04 Charge Turn Security On/Off Abel Laboratories 6000.00 0.00 3216.72 Charge	KaxMarylandMaryland	
ABC Company 10000 0.00 8303.04 Charge Turn Security On/Off Abel Laboratories 6000.00 0.00 3216.72 Charge		Net 30 Net 30 D
Turn Security On/Off	6 Maryland	Net 30 D
Action Business Sys 20000.00 0.00 16446.00 Charge		
Action Business Syst. 2000.00 0.00 Charge	% Maryland	Net 30 D
Send Email to Support O Albright Associates 4000.00 0.00 4104.88 Charge	% Maryland	Net 30 D
Visit Printer's Plan Website O Alliance For The Bay 5000.00 0.00 4151.51 Charge	% Maryland	Net 30 D
	% Maryland	Net 30 D
About inter's Plan Allstate Cleaning Se 1000.00 0.00 11343.57 Charge	% Maryland	Net 30 D
Summary Annapolis General 2000.00 0.00 4585.27 Charge	% Maryland	Net 30 D

Reports

→ New Report: Profitability / Business Type and Customer

This new report shows the profitability of customers grouped by Business Type.



Business Type	Customer	Order Count	Cos
Advertising	Ascot Inc.	6	17,365.5
Advertising		6	17,365.5
Manufacturing	Action Business Systems	6	17,113.
		5	10,501.
	ABC Company	11	27,614.
		5	9,071
	Allstate Cleaning Services	3	6,03
Retail	Attman & Associates	8	15,110
	Atlantic Insurance Company	1	3.94

Profitability / Business Types and Customers (11)

→ New Report: Compare / Business Type and Customer

This new report compares the above report for two time periods.



Comparison / Business Types and Customers (12) Date Range: Last 12 Months (12/29/15 - 12/27/16)

This Period: 12/29/15 - 12/27/16 Last Period: 12/29/14 - 12/27/15 (Quick Sales not included)

Business Type	Customer	This Period Sales	Last Perio Sale
- Andrew - A	Ascot Inc.	20,816.64	0.0
Advertising	Hacor me	20,816.64	0.0
	A via Duringer Systems	20,140.65	1,226.
Manufacturing	Action Business Systems	11,331.58	2,723
	ABC Company	31,472.23	3,949.
		9,638.69	0
	Allstate Cleaning Services	7,043.38	(
Retail	Attman & Associates	16,682.07	(
	Atlantic Insurance Company	1744.07	

Insurance

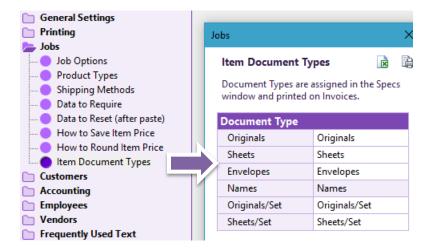
♦ SETTINGS

→ Customize Item Document Types

Item Properties			
/ Description	Form - I	Document Types	
Quantity	1000	This information will be printed on invoices	
Originals		This mornation will be printed on involces	In the Specs window, you assign a
Sides	1 prin et	Select Document Type	Document Type to an Item.
Service Specs		Originals	
Category	Service	···· 🔵 Sheets	
Design	By Hou	🔵 Envelopes	
Carbonless	3 Part ·	Names	
	👗 Run	····· 🔵 Originals/Set	
	Fror	····· 🔵 Sheets/Set	
	Back		
		Sheets/Pad	
Printer	Printer	🔵 Tabs/Set	
Pad 📃	NCR Pa	Sheets/Pack	

In the earlier versions, the names of Document Types were built-in. Now you can change some of them.

To edit a Document Type: Select Settings > Jobs > Item Document Types.



♦ **PRINTING**

→ Word Templates for the Shipments Tool Documents: New Fields

You can use the following additional fields in your Word templates for Delivery Tickets (or other documents) that you print from the Shipments tool.

CSRName	(Job CSR)
SRepName	(Job Sales Rep)
TaxName	
Terms.Name	
JobShipByName	(from When window Ship by field)
ShippedEarlier	(quantity)
ShippedTotal	(quantity)
ItemDocPath	

→ Red Close Button

This is another visual feedback to help you distinguish the buttons in the Print window.



SCHEDULER

→ New Report: Print/Progress Report by Item Location

This report lists the Items of **Orders-in-Progress** based on **Item Location**:

- Not in Production
 - In Production (the department of the next Service To-Do)
 - Done (all item Services are completed)

Department	Job/Item	Customer	Item Description	DateIn	DateProof	DateDue	Price
Not In Production	2406-1.3	ABC Company	Booklet Bindery	12/19/2016		12/29/2016	95.00
							95.00
Graphics	2373-1.0	ABC Company	Application Forms	12/18/2016		12/29/2016	583.69
	2429-1.0	Ascot Inc.	Letterhead 2 Color	12/21/2016		12/29/2016	1,704.61
	2376-1.0			امانام		12/29/2016	1,554.93
		To print this repo	ort: In the Scheduler section	on, click			3,843.23
Paper	2375-1.0	Print: then, selec	t Progress Report by Dep	artment		12/22/2016	647.40
	2428-2.0 2366-1.0					12/29/2016 12/29/2016	76.73 475.60
	2428-3.0					12/29/2016	475.00
	2428-3.0	🔘 - th	e list on the screen -			12/29/2016	314.74
	2377-1.0					12/29/2016	866.82
	2406-1.1	Ord	lers			12/29/2016	170.40
	2426-1.0	🔘 We	ekly Schedule by Job Due Date	e		12/30/2016	1.612.33
	2356-1.1					12/30/2016	0.00
	2379-1.1	lter	ns			12/30/2016	170.40
		Pro	gress Report by Job No				4,469.86
Digital	2372-1.0					12/21/2016	842.48
-	2374-3.0		gress Report by Job Due Date			12/22/2016	31.17
	2430-1.0	New Dro	gress Report by Department			12/28/2016	643.36
	2379-1.2					12/30/2016	288.80
							1,805.81
Printing	2432-1.0			12/13/2016		12/19/2016	2,015.26
	2374-2.0			12/18/2016		12/22/2016	76.73
							2,091.99
Finishing	2405-1.0	ABUUL	manuals	12/19/2016		12/26/2016	677.13
	2415-1.0	Action Business Systems	Application Forms	12/19/2016		12/28/2016	295.04
	2363-3.0 2380-1.0	Allied Building Supplies	Forms	12/20/2016		12/29/2016 12/29/2016	31.17
	2380-1.0 2379-1.3	ABC Company	Employee Manuals Annual Report Bindery	12/14/2016 12/14/2016		12/29/2016	305.24 95.00
	2019-1.0	ABC Company	Annual Report Bindery	12/14/2010		12/30/2010	1,403.58
Brokered	2370-1.0	Attman & Associates	Special Window Envelopes	12/18/2016		12/29/2016	568.75
2.0000	2418-1.0	Action Business Systems	Business Cards: Jones, Smith, Penn	12/19/2016		01/04/2017	64.00
4	2110 110						632.75
Done	2374-1.0	Allied Building Supplies	Business Cards	12/18/2016		12/22/2016	109.64
	2364-1.0	Abel Laboratories	Leterhead	12/20/2016		12/22/2016	842.48
	2406-1.2	ABC Company	Booklet Insid e Pages: 16	12/19/2016		12/29/2016	544.00
	2363-2.0	Allied Building Supplies	Envelopes	12/20/2016		12/29/2016	84.38
	2363-1.0	Allied Building Supplies	Business cards	12/20/2016		12/29/2016	175.14
	2356-1.3	ABC Company	Booklet folded 16 page Bindery	12/19/2016		12/30/2016	0.00
	2356-1.2	ABC Company	Booklet folded 16 page Inside Pages: 16	12/19/2016		12/30/2016	0.00
							1,755.64
							16,097.86

OTHER TOOLS AND FEATURES

➔ Inventory Tool

The size of the SKU field in the Setup/Adjust window is increased.

Reminder Tool

Reminders List includes Contact Phone Number.

XML Tool

XML export file includes additional fields to use in Web Page Templates (xslt files).

- SKU
- Caliper
- Sales Department Number
- Service Center Number

Remember the Last Size and Positions of Windows

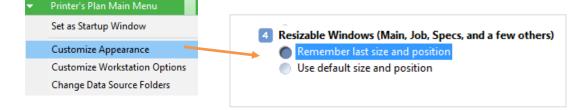
This version allows you to resize more windows. Here's a complete list of resizable windows:

A/R Payment, New Item, Item Specs, Job Compare, Job, Job Documents, New Job, Ship To List, Contact List, Note, Reminders List, Schedule Job, Shipment List, Other Common List Dialogs, Print What Dialog.

Depending on your selection for the **Remember the last size and position** option, Printer's Plan uses either the last or the default size and position of the resizable windows.

To set the Remember the last size and position option (computer specific):

- 1. Click Printer's Plan Main Menu
- 2. Select Customize Appearance
- 3. In the Customize window, select Remember or Use Default option:



→ Notes Window Option

12/28/16 Jol	b Note				
11/1 Date stamp 11/1 Date + Time 11/1	7/2016 11:01 Order Receipt er 6/2016 13:03 Delivery Ticket r 6/2016 13:23 Invoice emailed ver By 2 PM				•
 List Manager General Settings Printing Jobs Job Options Product Types 	Options How to display/ Require replacen How to display/	 In the S Find th Select N 	etting for the Notes window ettings section, open the Jo e "In the Notes window…" o Yes to set the default inserti existing text and No to the e	obs / Job Options v option. ion point to the be	
Shipping Methods	Set the New Quot	e Status as		Hot	
Data to Require		Status to 'Won' after	converting it to an Order	Yes	
		a new Job, set the Job Title to Item 1 description		Yes	
How to Save Item Price	After creating a	b		Ask r	me what t
How to Round Item Pr	In the Notes wind	ow, add the new date	and text at the top (last note first)	Yes	
Customers	In the Specs wind	ow, remind me if pap	er is assigned without a printer	Yes	-

→ Add Address Fields to Lists

If you want to add addresses and contact information to a list displayed on the screen, right-click on the list and then click **Add Address Fields to List**.

Customers	Name	CusNo	L					
 Prospects Customers + Prospects Top Customers 10 This Month 10 This Year 10 Last Year 25 This Month 25 This Year 100 This Month 100 This Month 100 This Year 	ABC Compar Action Busin Ascot Inc. By The Bay B Allstate Clean Albight Asso Abel Laborat Attman & As Annapolis Ge Atlantic Insu	Open Print Email Form Letter View as Web Page (XML) Copy and Paste Compare Job Schedule Job View Documents	Custom Country Contact	er: Name,	Address, st, Last, Ph	owing data Address2, (none, Phone	City, State	e, Zip,
100 Last Year This Month	 Allied Buildir Alliance For 	Change Status	CustomerName	Address	Address2	City	State	Zip
 This Year Last Year Other Inactive Customers Contacts Shipping Addresses 	Auer Inc.	Delete	ABC Company	800 Pike Stree	t	Baltimore	MD	21202
		Add to Favorites Favorites	Action Business Ascot Inc. By The Bay Boa	1950 S. Holly Str 4500 Lexington		Baltimore Baltimore Baltimore	MD MD MD	21218 21234 21205
	New	Refresh List Search List Select All Add Address Fields to Lis Export List (text file)	Allstate Cleanin	13 Vail Road Me This f	eature is a	woodlawn available in and A/R sec	the	21207

FIXES

- 1. **Specs window / Large Format**: If you add two media Services to an Item (one printable and the other not) and later remove the printable one, you could not change the Print field from No-Print to 1 or 2 Sides. Now you can.
- 2. Work Order: Number of good sheets was not rounded up. Now it is.
- 3. Work Order: Service Notes longer than a page caused error. Now it prints whatever fits on a page using a smaller font.
- 4. Shipment window / Shipment Amount:
 - a. **Order**: If you check the **Add to Job** check box, "This Shipment" amount was added to the Shipping charge of the Order but the tax amount was not updated. Now it is updated.

```
This Shipment $ 15.00 Add to Job (Current $0.00)
```

b. **History Job**: The **Add to Job** check box is disabled. The **Shipment Amount** will not be added to the Shipping charge of the Job.

This Shipment \$ 15.00 (this will not be added to the job)

- 5. **New item window**: The text of the Options button (in lower right corner of the window) was not visible. Now it is.
- 6. Item/Service Notes: Text within <<>> characters were printed. Now they are not.
- 7. **Find by Item window**: When you search for a Service that "contains" a certain text, the Services with the Category Number 1000 or greater were not listed. Now they are.

Item Description	< contains >
Item Note	< contains >
Service Name	pad

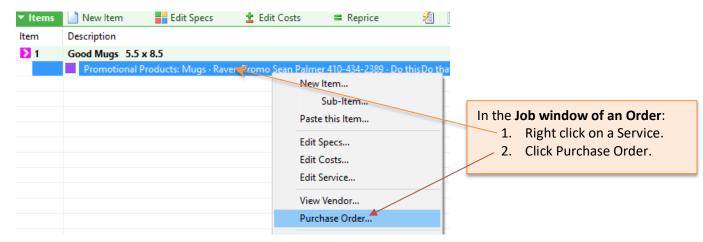
- 8. **Convert a Walk-in customer** to a Regular customer: The customer was converted but the Job window was not refreshed to show the updated customer data. Now it is.
- 9. **Services**: You could not drag a Service to one of the new Service Centers that were added in version 2016, Center #25 to Center #36. Now you can.
- 10. **Reports / At a Glance / Top Sales**: If Default Date range is set to a custom date using the "Between..." option, dates for this report were set to December 1899. Fixed.
- 11. **Reports / Profitability / Average Sales/Invoice**: The last version 2016.03 did not calculate the net sales and ranking in the last three years. Fixed.
- 12. **Reports / Production / Printer and Paper Summary**: If there is more than one paper on an item the impression count on the printer gets doubled. Fixed.
- 13. If pasting a **Credit and Revised invoice** and the invoice has a payment (partial or full), set DatePaid field = today (same as Credit Invoice).
- 14. **Scheduler / Search window**: The text in hidden or narrow columns (column width is less than 24 pixels) were not searched. Fixed.

NEW PURCHASE ORDER TOOL (INCLUDED IN THE BASIC PRINTER'S PLAN)

With this flexible tool, you can now print and email Purchase Orders easily and quickly.

11 Y Y Y	23 6565, Figs (556) 123 6666 Yobrish con Anydonain con		Purchase O 2437- Date: 12	
mer 410-434-2380 fone It Ava Floor In MD 21203		Seep Tol. Deanor Simon 410-361-4342 Premir Plan 116 Ole Padonie Road Sulte C Hunt Valley MD 21030 Deanor Simon 410-561-4342		
Dy Description	-	Ship Dete: 12/18/2016		
Special Ma		the second second		
ITEM SERVI Do that Do that and that SERVICE Be SEU: IOS - Ship By O - Ship Dyn - Ship Dyn - Ship Byn O - Ship Byn O - Ship Byn O - Ship Byn O	es LS + ES Sovers 1 2 ether Marge or Track VIDEorg Action Resident Systems	cal me at (12)-456-7880 or email me		60.
		Thanà Kou	TOTAL	60.0

→ How to Open the Purchase Order window



→ Purchase Order Window - Data Sections

The Purchase Order window has eight distinct **Data Sections**.

Vendor. P. Ship to Customer P. Ship to us? P.O. NUMBER Sean Palmer 410-434-2389 Baterie Shim 410-561-4342 Bearing Shim 410-561-4342 Bearing Shim 410-561-4342 Second Floor Baterie Shim 410-561-4342 Bearing Shim 410-561-4342 Pole 2437-1-531 Second Floor Baterie Shim 410-561-4342 Bearing Shim 410-561-4342 Pole 212/19/16 POfff Outrity Description / Instructions Description Ship To Date 212/19/16 POfff Vendor Unit Cost Cost Ship Date 212/19/16 POfff Vendor Description Instructions Ship Date Ship Date Ship Date 12 Mags Description Cost Ship Date Ship Date Costs 12 Mags Instructions Ship Date Ship Date Ship Date Costs 10 tris Beatering Instructions Instructions Ship Date Ship Date	Purchase Order			×
12 Mugs 5.00 60.00 Shipping 0.00 Shipping 0.00 Do this Do that and that 0.00 Beatful Mugs - Ship by: Our Truck - Ship by: Our Truck - Ship by: Our Truck - Ship bate: 12/19/16 - Customer: Action Business Systems - Instructions - Sales Rep: Jim Instructions - Ship by: Our Truck - Subset Rep: Jim If you have any questions about this order, please call me at (123)-456-7890 or email me Lisa@successpress.com. Options Lisa Options - Options Unix Cost - Unix Cost	Sean Palmer 410-434-2389	Eleanor Simon 410-561-4342 Printer's Plan 116 Old Padonia Road Suite C Hunt Valley MD 21030	^	2437-1-531 PO Date 212/19/16 ■▼
If you have any questions about this order, please call me at (123)-456-7890 or email me Lisa@successpress.com. Thank you. Lisa Options Options Options Unit Cost Unit Cost	12 Mugs Desi Beatru Mugs 12 Good Mugs 5.5 x 8.5 Sheets: 1 Do this Do that and that Beatiful Mugs - Ship by: Our Truck - Ship Date: 12/19/16			5.00 60.00 Shipping 0.00 Tax 0.00
Print / Email PDF	If you have any questions about this order, please of Thank you. Lisa		Ĵ	Print: Company Logo print if amount is no Options Unit Cost

When you open the window, Printer's Plan initializes the **Data Sections** based on a Purchase Order Template. Here's how Printer's Plan selects a template:

- 1. Printer's Plan selects the **Vendor's Template** if a vendor is assigned to the selected Service and the Vendor's Template exists, such as PO Vendor103.txt.
- 2. Printer's Plan selects the **Default Template** (PO Default.txt) if no vendor is assigned to the selected Service or the Vendor's Template does not exist.
- 3. If both steps fail, Printer's Plan initializes the data as explained on the next page.

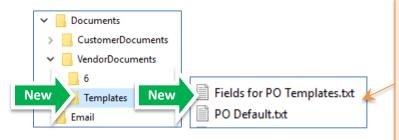
→ Data Sections: How Printer's Plan Initializes Data

Section	Description
▲ Vendor ▲ Sean Palmer 410-434-2389 ∧ Raven Promo 783 Pratt Ave. Second Floor Baltimore MD 21203	 Initial Data: The address of the vendor assigned to the selected Service. Click the Vendor button to change the vendor. Changing the vendor in this window does not change the vendor assigned to the Service in the Specs window; however, the data will be re-initialized. Click I to open the setup window of the selected vendor.
Leanor Simon 410-561-4342 Leanor Simon 410-561-4342 Printer's Plan 116 Old Padonia Road Suite C Hunt Valley MD 21030	 Initial Data: The Ship To address assigned to the Order. Click Ship to Customer button to select a different address of the customer. Click Ship to us to change it to your address (from <u>Customer# 1</u> in Customers/Customers+Prospects/Special Customers). You can change this default to your address in the template. Click Image the Ship To setup window.
P.O. NUMBER 2437-1-531 PO Date Shin Date V 01/03/17	Initial Data: The Default PO Number is formatted as Job#-Item#-Service# . (You can find the Service number in the setup window of the Service in the Services section. The number is to the left of the title bar at the top.)
Description Quantity Description / Instructions 11 Mugs	Initial Data: The quantity and name of the selected Service. The "Invoice Name" assigned to the Service is used if there is one. Service Name Mugs Special Invoice Name Mugs
- Stop by: Cur Truck - Stop by: Cur Truck - Output: CU(2):7 - Curtour: A CU(2):7 - Curtour: A Curb Answess Tystem - Stop Stop Stop - Stop Stop - Stop Stop Stop - Stop Stop - Stop Stop - Stop Stop Stop - Stop Stop - Stop Stop Stop - Stop - Stop Stop - Stop	Initial Data: The note assigned to the selected Service.
Unit CostCost5.0055.00Shipping0.00Tax0.00TOTAL55.00	Initial Data: The cost of the selected Service. Unit Cost is calculated from this cost and quantity.
Options Print: Company Logo print if amount is not zero: Unit Cost Cost/Ship/Tax/TOTAL	Initial Data: Your Default Purchase Order option that you can set in the Settings section > Printing > Document Options > Purchase Order: General Settings Printing Document Options Bancode Options Favorite Posting Reports Other Documents Purchase Order Receipt All Reports Other Documents Company Logo print if amount is not zero: Unit Cost Cost/Ship/Tax/TOTAL
Print Now Print To Email PDF Template Select	

→ Purchase Order Template

The Purchase Order layout is built-in to Printer's Plan and cannot be customized. However, you can customize the data that goes into the document.

Printer's Plan Initializes the Data Sections based on a Purchase Order Template.



The upgrade program copied two files to the **VendorDocuments / Templates** folder, which is in the Printer's Plan directory of your server.

- Fields for PO Templates.txt lists data fields you can use in PO templates.
- **PO Default.txt** is the default template that you can modify or copy and paste to create others.

→ You Can Create Vendor Specific Templates:

- 1. Copy and paste the **PO Default.txt** file.
- 2. Rename it as "PO Vendor" + Vendor's Number + ".txt". Example: PO Vendor103.txt.
- 3. Open the template in Windows Notepad.
- 4. Add plain text and/or Data Fields to the Template Sections. See the **Fields for PO Templates.txt** file for the data fields you can use.

→ Template Sections: How You Can Customize the Initialization

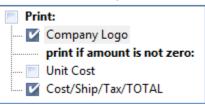
A Purchase Order Template has six sections.

SECTION	INITIAL DATA: What Printer's Plan assigns to a section if no template is found or a template section does not exist or template section has no data fields (empty). DATA FIELDS: What you can add to template sections.
[PO.NO]	Job#-Item#-Service#.
[/]	To exclude the Service#, add: <jobs.jobno>-<items.itemno></items.itemno></jobs.jobno>
[VENDOR] [/]	The address of the vendor assigned to the Service.
[SHIPTO]	The Ship To address assigned to the Order.
[/]	To change it to your company address (Customer #1), add: <shiptous></shiptous>
[DESCRIPTION]	The name of the selected Service.
[/]	To change it to the Item Description, add: <item.description> <item.size></item.size></item.description>
[INSTRUCTIONS] [/]	(none)
[EMAIL]	(none)
[/]	Printer's Plan will add data from the Purchase Order window to the email body (text).

For a complete list of **DATA FIELDS**, see **Fields for PO Templates.txt** file in the **VendorDocuments/Templates** folder in the Printer's Plan directory of your server.

→ How to Print Your Logo on Purchase Orders

- On your Printer's Plan server computer, where PlanData.mdb is located, create a bitmap image. Add your company logo, address, phone to the image. Name the image as LogoPO.bmp. TIP: Copy and paste your LogoPrint.bmp and rename it.
- 2. Check the **Company Logo** option. If unchecked or LogoPO.bmp does not exist, your company name and address will be printed.



NOTE: You can set the default options in the Settings section > Printing > Document Options > Purchase Order.

Printer's Plan 2017 Upgrade Guide (Revised February 7, 2017)

Printersplan.com - support@printersplan.com - 800-638-7526 ext. 1