PRINTER'S PLAN
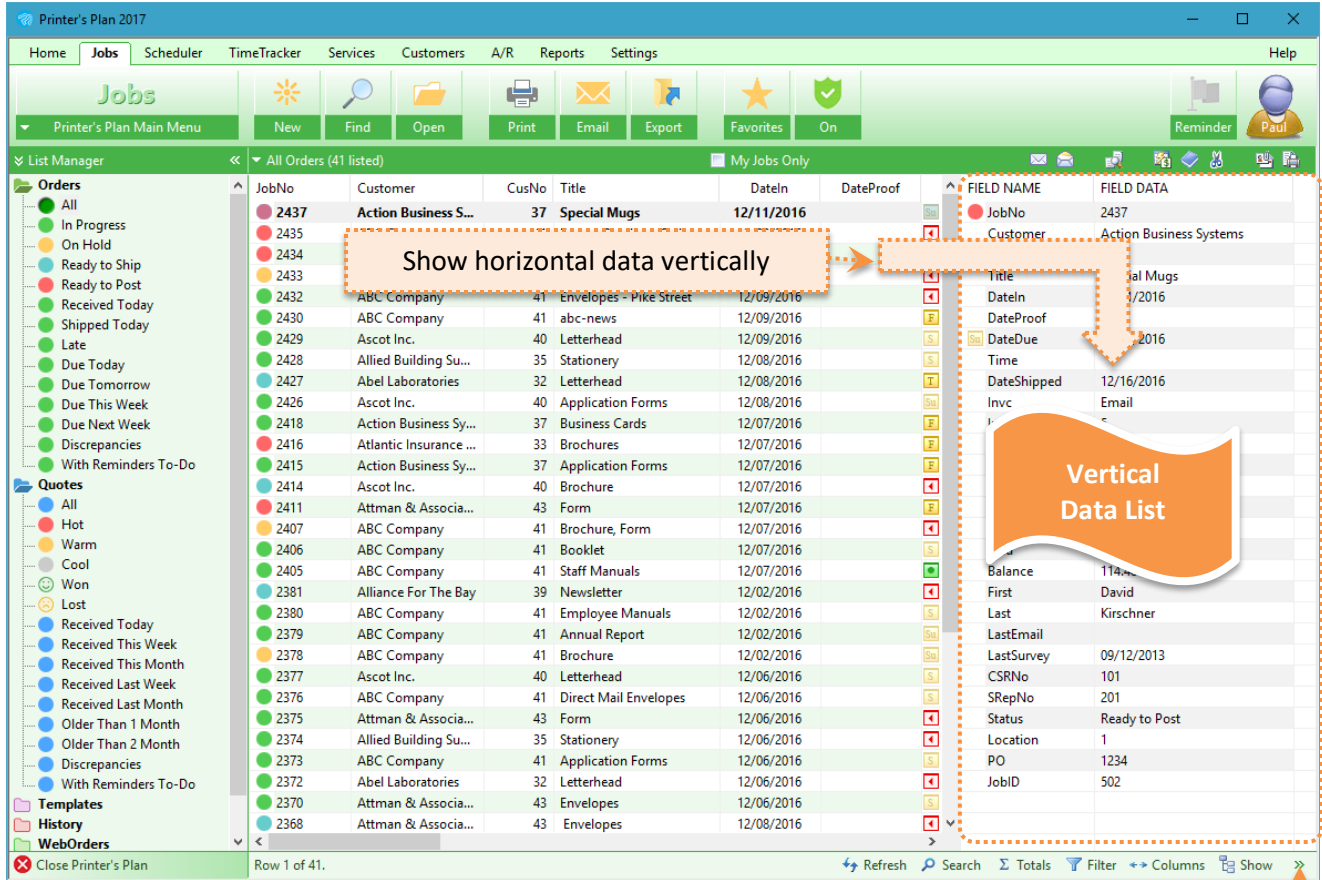
PRINTER'S PLAN
2017

What's New & Improved

JOBS

➜ Vertical Data List

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

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

New "Date Due" icons will help you easily identify "Late" Orders.

Orders	JobNo	Customer	CusNo	Title	DateIn	DateDue
● All	● 2437	Action Business Sy...	37	Special Mugs	12/21/2016	M 12/26/2016
● In Progress	● 2435	ABC Company	41	Form - Purchase Order	12/21/2016	F 12/23/2016
● On Hold	● 2434	Apex Realtors	81	Brochures	12/21/2016	W 12/28/2016
● Ready to Ship	● 2433	ABC Company	41	World Traveler Brochures	12/21/2016	F 12/23/2016
● Ready to Post	● 2432	ABC Company	41	Envelopes - Pike Street	12/13/2016	◄ 12/19/2016
● Received Today	● 2430	ABC Company	41	abc-news	12/21/2016	W 12/28/2016
● Shipped Today						

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

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

Quotes				
● All	● 506	ABC Company	41	Yard Signs
● Hot	● 504	Atlantic Insurance ...	33	Brochures
● Warm	● 502	ABC Company	41	Information Books
● Cool	☺ 501	ABC Company	41	Employee Manuals
☺ Won	☺ 500	Atlantic Insurance ...	33	Business cards
☹ Lost	● 499	Annapolis General ...	38	Forms
● Received Today	● 498	Ascot Inc.	40	Registration Forms
● Received This Week	☹ 496	Ascot Inc.	40	Brochure
● Received This Month	☹ 495	Atlantic Insurance ...	33	Brochure

➔ Jobs / Summary

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

Printer's Plan Main Menu
Set as Startup Window

Select **Summary** from the **Printer's Plan Main Menu.**

Turn Security On/Off
Send Email to Support
Visit Printer's Plan Website
About Printer's Plan
Summary

See the Job Count by Status**.**

Job Type	Status	Job Count
Order	● In Progress	25
	● On Hold	3
	● Ready to Ship	7
	● Ready to Post	5
		40
Quote	● Hot	4
	● Warm	6
	● Cool	5
	☺ Won	3
	☹ Lost	2
		20
Template	Offset Printing	1
	Digital Printing	1
	● Web Ordering	12
		14
History	● All	260
		260
		334

JOB WINDOW

➔ Job / Purchase Order

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

➜ 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.

	Earlier Versions simply asked you a Yes or No question	This Version gives you more options
Rearrange Items Schedule Documents Check 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 **or use:** ○ 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.

Item	Description	Quantity	New Quantity	
1	Business cards	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
>
> Ms. Michelle Greene
> Director
> mgreene@abc.com
> Ph1: 410-539-3466 x 35
> Ph2:
> Cell: 443-567-4398
> Fax: 410-539-5586

New

> When
>
> In   12/
> Due   12/
> Ship by Ou
> Ship'd
> CSR   Lis
> SRep   Jim
> From   Or

➔ **Job / Totals window: Payment Information**

Subtotal	809.40	
Discount	0.00	0.00
Shipping		
Postage		
Tax		
Total		

Click the new Payment Info button to see a list of previous payment(s) applied to the job.

Job Totals	
	809.40
	0.00
	0.00
	0.00

Late Fee	0.00	
Paid		Payment Info
Write Off	0.00	Terms:
Balance	857.97	Net 30

New

➔ **Job / Specs / Price level: Ask Unit Price**

Unit Price   [x]

Enter Unit Price: Default 0.0440/Ea. Last 0.0500/Ea

`0.0440`

Default Item Price   = 110.09   (2500 x 0.0440/Ea)
Last Item Price was   = 100.00   (2000 x 0.0500/Ea)
Using the Last Unit Price = 125.00   (2500 x 0.0500/Ea)

To enter price per 1000: Type m after the price.

→ Set Item Price = 100.00   ✓ OK   ✗ Cancel

| 🔲 Price Level	Ask Unit Price ▼
Price Rounding	On ▼
Format Unit Price	▼
🖨 Size (W x H)	▼

You can make more informed decision with this additional data.

➔ Job / Service / Vendor / Email Templates

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.
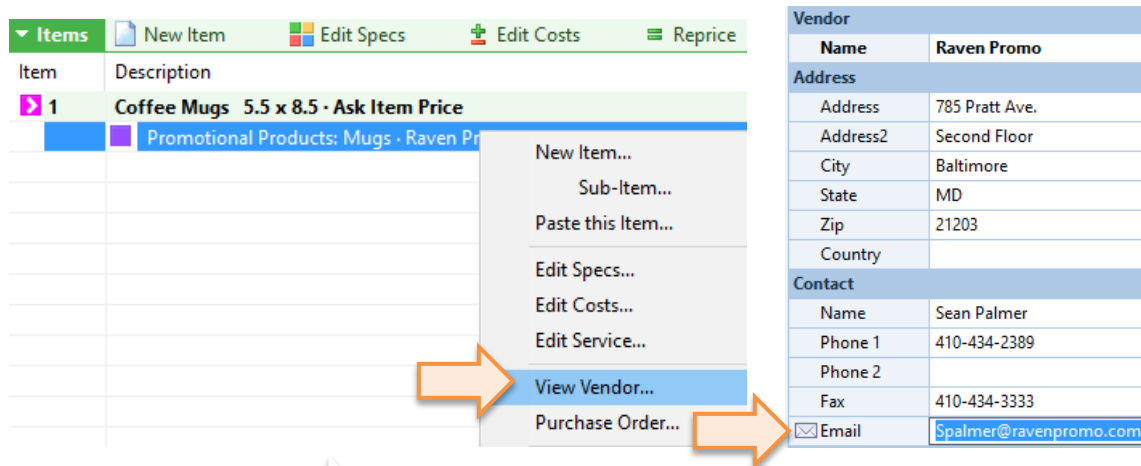
	Vendor Email Templates
New	

- **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.
- **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>	<JobNo>	<CatName>
<Vendors.Name>	<Title>	<Services.Name>
<ContactName>	<ItemNo>	<Name2>
<Phone>	<ActualQty>	<Size>
<Phone2>	<ChargeQty>	<SKU>
<Fax>	<TimeCost>	<UPC>
<Notes>	<MatCost>	<FSC>
	<Cost>	<UnitCost>
	<ServiceNote>	<Unit>

➜ Job / Specs window: Item Document Types

You can customize the names of these Document Types, except for "Names".

See Page 17.

➜ 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   No

➜ Job / Costs window: Wider Service Column

SERVICE

Category: Name

Promotional Products: Mugs - Red with Black and White logo

Promotional Products: Mugs - White with Blue and Yellow logo

Service names now include the Service Notes to help you differantiate the Services when an Item includes the same Service more than once.

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

Finish Size 6 x 4

Swap Sides

☑ Cut mixed-grain   2
☐ Cut multiple-pieces

☑ Center Horizontal
☑ Center Vertical

☑ Trim Inside Horizontal   2.5
☑ Trim Inside Vertical

Trim Inside Horizontal and Vertical widths list now also includes 2.5, 3.0, 3.5 and 4.0 inches.

➔ **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.
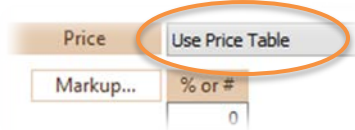
SERVICE

➔ Service / Increase Price Table Prices by a Percentage

This feature is available for Services with the **Use Price Table** option.

Price	Use Price Table
Markup...	% or #
	0

How to increase Price Table prices by a percentage

| 1	In the Service window, click the **Price Table** button.	▢ Diff. Table ▢ Markup Table ➤ ▢ Price Table
2	In the Price List window, click the **Increase Prices by...** button.	See table below
3	Enter a **percentage.**	**Type a percentage, such as 5 or 5.5.** [ ] (type a minus percentage to decrease)
4	Select a **Round-up** option.	📁 **Round-up the updated prices to:** ○ $0.0001 ○ $0.0010 ○ $0.0100 ○ $0.1000 ○ $1.0000 ● Don't round
5	Check the results.	See results table below
6	Click **Save**.	

Step 2 table:

Sides ->		Black/	Blk/Blk	Color/	Col/Blk	Col/Col				
Cost/Click ->		0.0200	0.0200	0.1000	0.0600	0.1000				
Row #	Service Qty	Price	Price	Price	Price	Price				
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   ✗ Cancel

Step 5 results table:

Row #	Service Qty	Price	Price	Price	Price	Price
1	10	0.0880	0.0880	0.4620	0.2750	0.4620
2	100	0.0660	0.0660	0.3520	0.2090	0.3520
3	500	0.0440	0.0440	0.2640	0.1540	0.2640
4	1000	0.0440	0.0440	0.2200	0.1320	0.2200

➜ Services / Summary

The new Summary shows the count of the Services in each Category. The count includes discontinued Services.
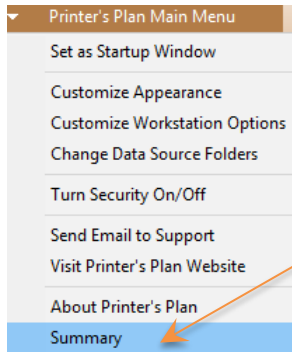
Select **Summary** from the **Printer's Plan Main Menu.**

Department Name	Category Name	Service Count
📂 Graphics	🟢 Design	10
	🟢 Preflight	1
		11
📂 Proof	🟠 Proof	5
		5
📂 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 / Summary

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

Select **Summary** from the **Printer's Plan Main Menu.**

This list includes ALL CUSTOMERS (any status).						
Name	Contacts	Shipto	Orders	Quotes	Templates	History
<Your Company Name>						
ABC Company	4	3	16	7	6	43
Abel Laboratories	2	1	4	2		20
Action Business Systems	2		3			22
Albright Associates	2	1				25
Alliance For The Bay	2		2	1		16
Allied Building Supplies	2	1	3	1		14
Allstate Cleaning Services	2					14
Annapolis General Hospital	2			1		19
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.

➜ Customer / Summary window / Average Days Paid Info

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 / Ship to List window

Company Name column is wider.

♦ A/R

➔ Reverse Payment Function

1. List **Payments Received**   2. Select a **payment**   3. Click the **Reverse Payment** button

Name	Date	Amount	Group	Paid By	Reference	Appliedto	CusNo	PayNo
ABC Company	12/03/2016	58612.57	AR	Check		2383 2384 2385 ...	41	27
ABC Company	12/08/2016	26787.08	AR	Check		2286 2346 2357 239...	41	28
ABC Company	12/14/2016	21000.00	AR	Check		2422	41	30
Abel Laboratories	12/07/2016	50.00	Deposit	Check		2409	32	44
Action Business Systems	12/07/2016	200.00	Deposit	Check		2415	37	42
Action Business Systems	12/08/2016	9285.86	AR	Check		2230 2327	37	29
Alliance For The Bay	12/04/2016	200.00	Deposit	Check		2367	39	32
Alliance For The Bay	12/07/2016	-200.00	Deposit	Check		2367	39	39
Allied Building Supplies	12/04/2016	100.00	Deposit	Check		2369	35	33
Allied Building Supplies	12/07/2016	50.00	Deposit	Check		2413	35	43

List Manager:
- Invoices Ready-to-Post
- Invoices Unpaid
- Invoices Paid-in-Full
- Payments Expected
- Payments Received
  - Today
  - This Week
  - This Month
  - This Year
  - Last Week
  - Last Month
  - Last Year

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 Ready-to-Post / List (8 listed)   Post Now...

JobNo	Remark	CusNo	Customer	First	Last	DateIn	DateShipped	Subtotal
2354							12/11/2016	164.31
2355							12/11/2016	3543.96
2359							12/11/2016	61.25
2411							12/11/2016	94.01

After you click the **Post Now…** button, the next window you will see depends on the number of Orders selected (highlighted) from the Invoices-Ready-to-Post list.

If you select **ALL** Orders, you'll be asked a Yes or No question.	If you select **only ONE** Order, **All listed orders** will be selected.	If you select **TWO or more** Orders, **Highlighted orders only** will be selected
? Do you want to start posting? (have you backed-up the database?)	Which orders do you want to post? — All listed orders: 8 — Highlighted orders only: 1	Which orders do you want to post? — All listed orders: 8 — Highlighted orders only: 2

➜ **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**.

a) **Check** to sort Invoices by **Date Shipped**.
b) **Uncheck** to sort **by Invoice Number.**

➜ **AR / Email Payment Information to Payer**

1. Select payment(s) from the **Payments Received** list.
2. Right click and select **Email Form Letter**.
3. Select an AR template.

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

Select **Summary** from the **Printer's Plan Main Menu.**

Turn Security On/Off
Send Email to Support
Visit Printer's Plan Website
About Printer's Plan
Summary

This list includes ALL CUSTOMERS (any status).

Name	CreditL...	CreditD...	Balance	LateFee	Disc%	Tax%	Tax	Terms
ABC Company	**10000...**	**0.00**	**8303.04**	**Charge**		**6%**	**Maryland**	**Net 30**
Abel Laboratories	6000.00	0.00	3216.72	Charge		6%	Maryland	Net 30 D
Action Business Sys...	20000.00	0.00	16446.00	Charge		6%	Maryland	Net 30 D
Albright Associates	4000.00	0.00	4104.88	Charge		6%	Maryland	Net 30 D
Alliance For The Bay	5000.00	0.00	4151.51	Charge		6%	Maryland	Net 30 D
Allied Building Sup...	3500.00	0.00	3775.68	Charge		6%	Maryland	Net 30 D
Allstate Cleaning Se...	1000.00	0.00	11343.57	Charge		6%	Maryland	Net 30 D
Annapolis General ...	20000.00	0.00	4585.27	Charge		6%	Maryland	Net 30 D

REPORTS

➔ **New Report: Profitability / Business Type and Customer**

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

➔ **New Report: Compare / Business Type and Customer**

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

◆ SETTINGS

➔ Customize Item Document Types

In the Specs window, you assign a Document Type to an Item.

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					12/29/2016	1,554.93
							3,843.23
Paper	2375-1.0					12/22/2016	647.40
	2428-2.0					12/29/2016	76.73
	2366-1.0					12/29/2016	475.60
	2428-3.0					12/29/2016	135.44
	2428-1.0					12/29/2016	314.74
	2377-1.0					12/29/2016	866.82
	2406-1.1					12/29/2016	170.40
	2426-1.0					12/30/2016	1,612.33
	2356-1.1					12/30/2016	0.00
	2379-1.1					12/30/2016	170.40
							4,469.86
Digital	2372-1.0					12/21/2016	842.48
	2374-3.0					12/22/2016	31.17
	2430-1.0					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	ABC Co...	...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	Allied Building Supplies	Forms	12/20/2016		12/29/2016	31.17
	2380-1.0	ABC Company	Employee Manuals	12/14/2016		12/29/2016	305.24
	2379-1.3	ABC Company	Annual Report | Bindery	12/14/2016		12/30/2016	95.00
							1,403.58
Brokered	2370-1.0	Attman & Associates	Special Window Envelopes	12/18/2016		12/29/2016	568.75
	2418-1.0	Action Business Systems	Business Cards: Jones, Smith, Penn	12/19/2016		01/04/2017	64.00
							632.75
Done	2374-1.0	Allied Building Supplies	Business Cards	12/18/2016		12/22/2016	109.64
	2364-1.0	Abel Laboratories	Letterhead	12/20/2016		12/22/2016	842.48
	2406-1.2	ABC Company	Booklet | Inside 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

Callout:

To print this report: In the Scheduler section, click **Print**; then, select **Progress Report by Department**.

- the list on the screen -
Orders
Weekly Schedule by Job Due Date
Items
Progress Report by Job No
Progress Report by Job Due Date
New ➔ Progress Report by Department

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:
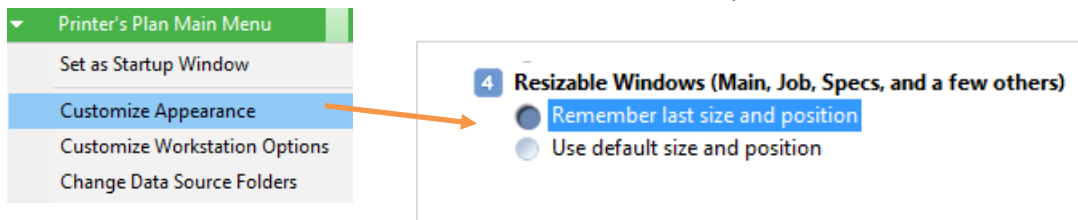
➜ Notes Window Option

When you open a Notes window, the insertion point (cursor) will be either at the beginning or end of the existing text. This behavior depends on your setting for the Notes window.

To change the setting for the Notes window:

1. In the Settings section, open the Jobs / Job Options window.
2. Find the "In the Notes window…" option.
3. Select **Yes** to set the default insertion point to the beginning of the existing text and **No** to the end.

Options	
How to display/p	
Require replacen	
How to display/p	
Set the New Quote Status as	Hot
Change the Quote Status to 'Won' after converting it to an Order	Yes
When entering a new Job, set the Job Title to Item 1 description	Yes
After creating a job	Ask me what t
In the Notes window, add the new date and text at the top (last note first)	Yes
In the Specs window, remind me if paper is assigned without a printer	Yes

➜ 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**.

Printer's Plan will add the following data to the list.
- Customer: Name, Address, Address2, City, State, Zip, Country
- Contact: Title, First, Last, Phone, Phone2, Cell, Fax, Email

CustomerName	Address	Address2	City	State	Zip
ABC Company	800 Pike Street		Baltimore	MD	21202
Action Business...	1950 S. Holly Str...		Baltimore	MD	21218
Ascot Inc.	4500 Lexington ...		Baltimore	MD	21234
By The Bay Boa...	1 Southernmost...		Baltimore	MD	21205
Allstate Cleanin...	13 Vail Road Me...		Woodlawn	MD	21207

This feature is available in the Jobs, Customers, and A/R sections.

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.
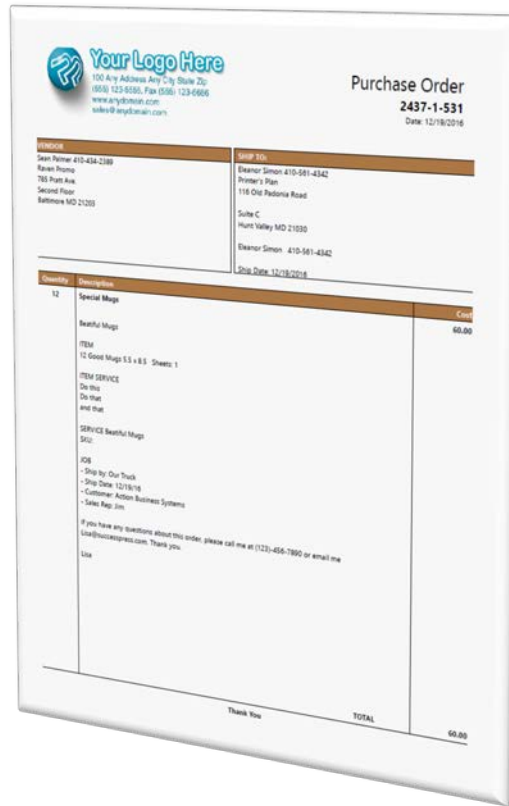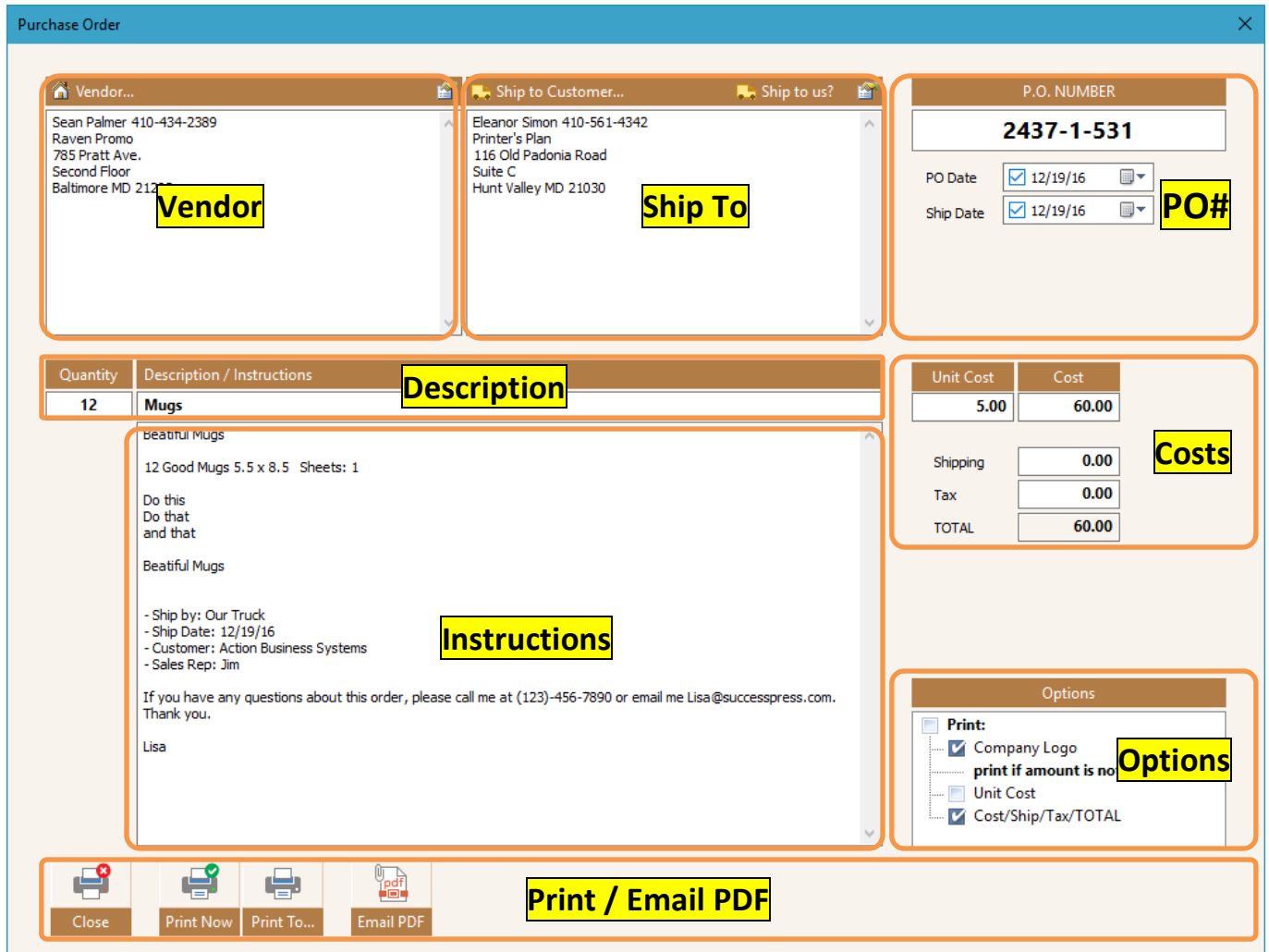

➔ **How to Open the Purchase Order window**
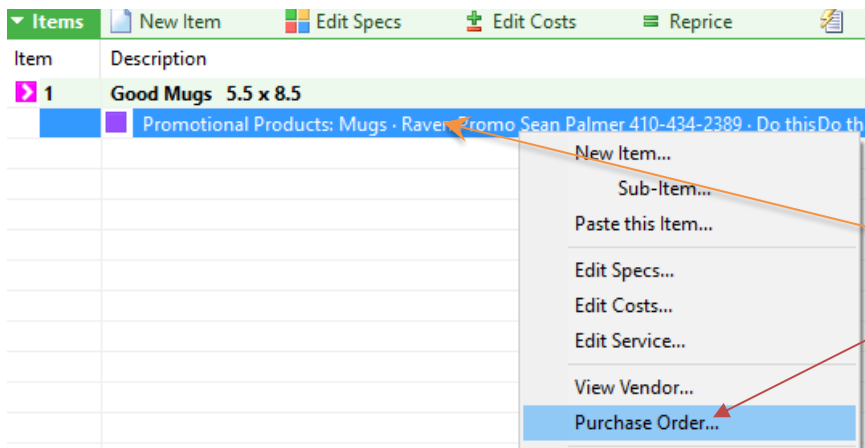
In the **Job window of an Order**:
1. Right click on a Service.
2. Click Purchase Order.
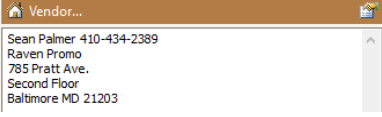
➔ **Purchase Order Window - Data Sections**

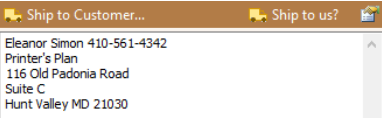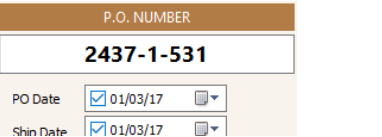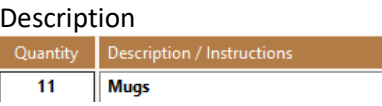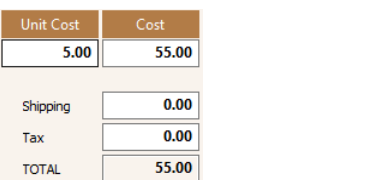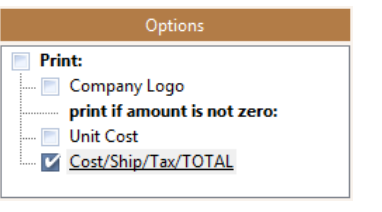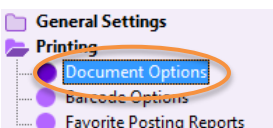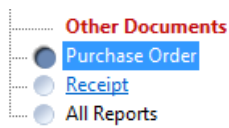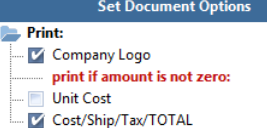The Purchase Order window has eight distinct **Data Sections**.

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
Sean Palmer 410-434-2389 Raven Promo 785 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 🖼 to open the setup window of the selected vendor.
Eleanor 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 Customer# 1 in Customers/Customers+Prospects/Special Customers). You can change this default to your address in the template. • Click 🖼 to open the Ship To setup window.
P.O. NUMBER **2437-1-531** PO Date ☑ 01/03/17 Ship Date ☑ 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
- Ship by: Our Truck - Ship Date: 01/03/17 - Customer: Acton Business Systems - Sales Rep: Jim If you have any questions about this order, please call me at (123)-456-7890 or email me Lisa@successpress.com. Thank you. Lisa	**Initial Data:** The note assigned to the selected Service.
Unit Cost / Cost 5.00 / 55.00 Shipping / 0.00 Tax / 0.00 TOTAL / 55.00	**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 ● Barcode Options ● Favorite Posting Reports **Other Documents** ● Purchase Order ○ Receipt ○ All Reports **Set Document Options** 📂 Print: ☑ 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.
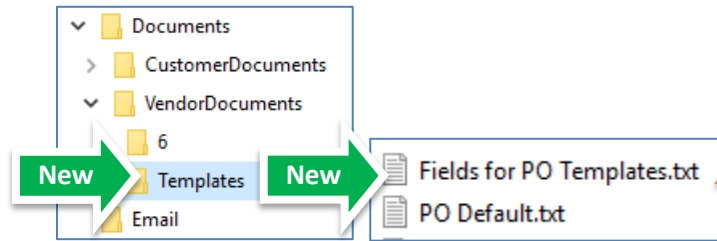
The upgrade program copied two files to the **VendorDocuments / Templates** folder, which is in the Printer's Plan directory of your server.

- **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>
[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>
[DESCRIPTION] [/]	**The name of the selected Service**. To change it to the Item Description, add: <Item.Description> <Item.Size>
[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

1. 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.

```
☐ Print:
   ☑ Company Logo
      print if amount is not zero:
   ☐ Unit Cost
   ☑ Cost/Ship/Tax/TOTAL
```
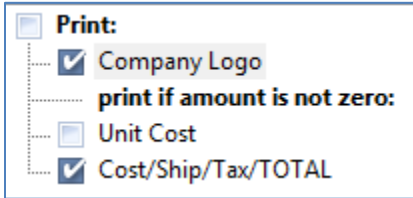
NOTE: You can set the default options in the Settings section > Printing > Document Options > Purchase Order.

Printer's Plan 2017

Upgrade Guide

(Revised February 7, 2017)

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