



PRINTER'S PLAN

PRINT ESTIMATING AND MANAGEMENT SOFTWARE

NEW v.2018

What's New & Improved

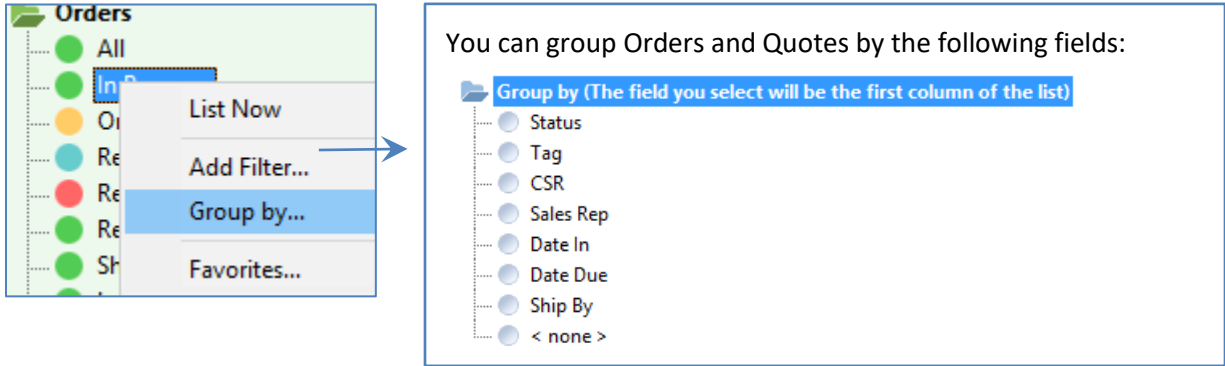
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JOBS SECTION

New "Group By" option

In the List Manager, right-click on an item of Orders or Quotes and select "Group by..."



New "Orders with Tags" and "Quotes with Tags" lists

Tags for Orders and Quotes are new in this version.

Orders	JobTag	Status	JobNo	Title
All	Job Redo	In Progress	2428	Stationery
In Progress	Job Redo	In Progress	2380	Employee Manuals
On Hold	Firm Due Date	In Progress	2434	Brochures
Ready to Ship	Firm Due Date	In Progress	2377	Letterhead
Ready to Post	Firm Due Date	Ready to Post	2411	Form
Received Today	Proofing	In Progress	2418	Business Cards
Shipped Today	Proofing	In Progress	2406	Booklet
Late	Proofing	In Progress	2379	Annual Report
Late	Brokered	In Progress	2432	Envelopes - Pike Street
Due Today	Brokered	In Progress	2429	Letterhead
Due Tomorrow	Brokered	In Progress	2376	Direct Mail Envelopes
Due This Week	Brokered	In Progress	2373	Application Forms
Due Next Week	Behind Schedule	In Progress	2430	abc-news
With Discrepancies	Behind Schedule	In Progress	2375	Form
With Reminders Todo	Behind Schedule	Ready to Post	2359	Business Cards
With Tags				
Quotes				

See page 15 to learn more about Tags.

New "Change Tag" function

1. Select one or more Orders or Quotes.
2. Right-click on one and select Change Tag...
3. Select a Tag from the list and click OK.
4. The list will be refreshed to reflect the change.

2434	Apex Realtors	81	Brochures	04/27/2017
2432	ABC Company	41	Envelopes - Pike Str	
2430	ABC Company	41	abc-news	
2429	Ascot Inc.	40	Letterhead	
2428	Allied Building Su...	35	Stationery	
2426	Ascot Inc.	40	Application Forms	
2418	Action Business Sy...	37	Business Cards	
2415	Action Business Sy...	37	Application Forms	
2406	ABC Company	41	Booklet	
2405	ABC Company	41	Staff Manuals	
2380	ABC Company	41	Employee Manuals	
2379	ABC Company	41	Annual Report	
2377	Ascot Inc.	40	Letterhead	
2376	ABC Company	41	Direct Mail Envelopes	
2375	Attman & Associa...	43	Form	
2374	Allied Building Su...	35	Stationery	

Order Tags

- <No Tag>
- First Order
- Job Redo
- Firm Due Date
- Proofing
- Brokered
- Behind Schedule

Find window includes Job Tag

You can filter the Orders and Quotes by Job Tag.

Find Orders	By this field	If the field	Enter Number
Orders	Job Number	= equal	
Quotes	Job Title	<> not equal	
Templates	Customer's Name	< less than	Job Tag = equal
History Jobs	Customer's Number	> greater than	
Web Orders	Customer's ID	<= less or equal	
Web Quotes	Customer's City	>= greater or equal	
	Customer's State	is between	
	Customer's Zip		
	Ship To Company		
	Ship To City		
	Ship To State		
	Ship To Zip		
	Buyer's First Name		
	Buyer's Last Name		
	Buyer's Phone Number		
	Buyer's Phone2 Number		
	Buyer's Cell Number		
	Buyer's Email Address		
	CSR Number		
	SalesRep assigned to Job		
	SalesRep assigned to Customer		
	Date In		
	Date Proof		
	Date Due		
	Date Shipped		
	Date Payment Due		
	Date Paid		
	Date Reorder		
	Amount Paid		
	Balance		
	P.O.Number		
	Location Number (0 for Store1)		
	Posting Number		
	Posting Date		
	Job Tag		

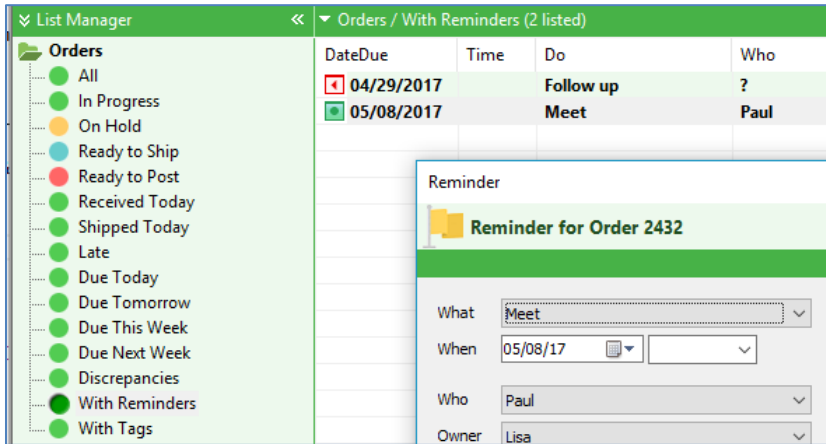
Or select from this list:

- First Order
- Job Redo
- Firm Due Date
- Proofing
- Brokered
- Behind Schedule

Advanced Find

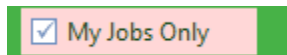
Open the Reminder window easily

1. List Orders or Quotes with Reminders.
2. Hold Ctrl down and double-click a reminder.
3. View /Edit the reminder.



My Jobs Only Button

If the **My Jobs Only** button is checked, it will blink a few times and remain light red.



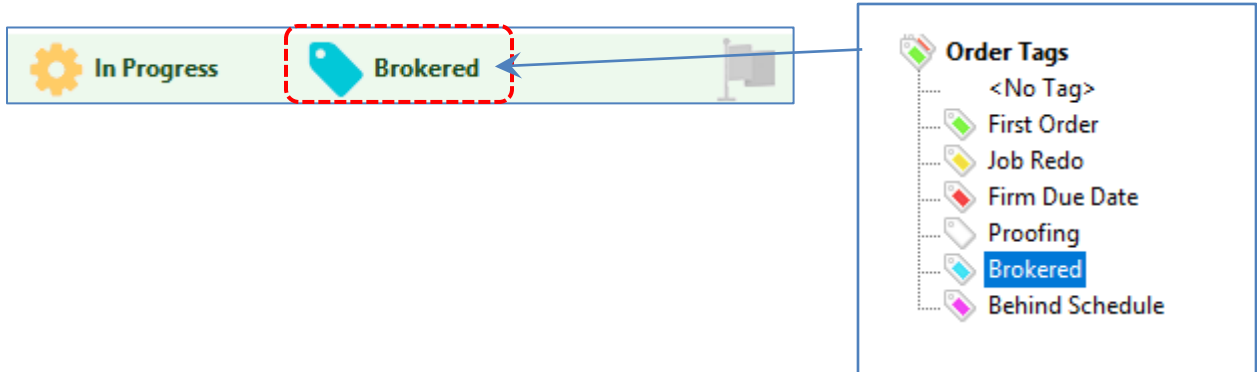
Status Column

Status column sort by issue fixed (now sorted by status text not status number).

JOB WINDOW

New Tag Field

You may attach tags Orders and Quotes. Click the "Tag" button:



New: Compare Customer's Default Settings with the Job

The image shows a dropdown menu for 'Bill to Customer No.41'. The menu is open, showing options: 'New...' (with a sun icon) and 'Paste as...' (with a clipboard icon). Below the menu, the customer's address is displayed: 'ABC Company, 800 Pike Street, Baltimore MD 21202'. A blue arrow points from the 'Bill to' box to the comparison table below.

Click the "Bill to" box and select "Customer's default settings vs this job".

- What would you like to do?
- Assign this job to an existing customer...
- Assign this job to a new customer...
- View Customer Info..
- View Customer Summary..
- View Credit Info...
- Customer's default settings vs this job...

Differences are marked with **Red Arrows**.

Field Name	Customer's Default		This Job
Ordered By	Michelle Greene (103)	=	Michelle Greene (103)
Ship To	ABC Company 9645 Saratoga Blvd. Baltimore MD 21207	=	ABC Company 9645 Saratoga Blvd. Baltimore MD 21207
Ship By	Our Truck	→	UPS
Location	Store 1	=	Store 1
Terms	Net 30 Days	=	Net 30 Days
SRep	Pat	→	Paul
Discount %	0%	→	0.5%
Tax	Maryland	=	Maryland

Job Note and Customer Memo

The lines that start with “~ ” (tilde and a space) will be removed after “Copy and Paste”.

The text between “<<” and “>>” will not be printed on Work Orders, Invoices and Quotes.

Job Note	Memo to Customer
~ 05/09/2017 15:21 Invoice printed (#1) The line above line will be removed after copy and paste. It starts with '~ ' and ends with a return key. << This line will not be printed on the work order >>	Payment \$-106.22 Check 05/09/2017 ~ This line will be removed after copy and paste Payment \$-182.78 Check 05/09/2017 << This line will not be printed on the invoice >>

Deposit / Payment window

More alert messages are added to verify the information entered is correct.

Data Boxes

The height the data boxes at the top (Bill To, Ship To, Ordered By, When) and the data boxes bottom (Job Note, Memo, Totals, Balance) of the Job window is slightly larger to handle 125% or 150% windows scaling.

Version 2017

Ordered By

Mr. Chris Hansen

chansen@alliedbuild.co
 Ph1: 410-539-4325
 Ph2:
 Cell:
 Fax: 410-538-6722

Version 2018

Ordered By

Mr. Chris Hansen

chansen@alliedbuild.co
 Ph1: 410-539-4325
 Ph2:
 Cell:
 Fax: 410-538-6722

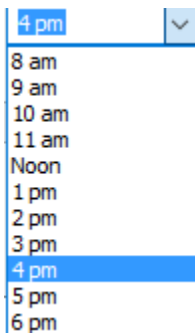
2017

Subtotal
Discount
Shipping
Postage
Taxable
Tax

2018

Subtotal
Discount
Shipping
Postage
Taxable
Tax

When window / Time List



In previous versions:

- You could **not** customize the time list.
- You could type up to **5** characters.

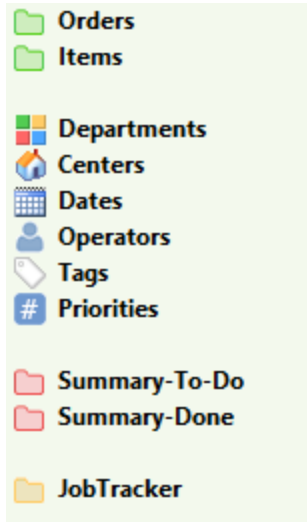
Now:

- You **can** customize the list in:
Settings > Frequently Used text > Hours
- You can type up to **10** characters.

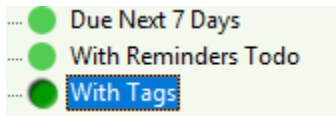
SCHEDULER SECTION

List Manager

Gray sub-headers are removed for a cleaner look.



New Filter: Orders with Tags

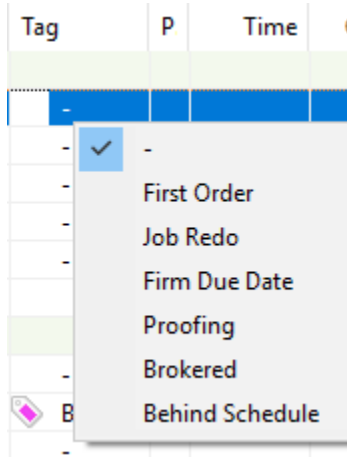


New Column in Orders List: Ship by

Ship By	TimeDue
Customer ...	1 pm
Our Truck	11 am

You can change Job Tags

List Orders; select one or more Orders from the list; right-click in a Tag cell:



Fixed

Items / All list was sorted by Service Department ID number. Now by Service Department Sort number.

TIME TRACKER SECTION

Fixed

Checking for to Start/End Day Password is fixed.

SERVICES SECTION

Exclude Button

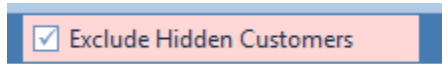
If the **Exclude** button is checked, it will blink a few times and remain light red.



CUSTOMERS SECTION

Exclude Button

If the **Exclude** button is checked, it will blink a few times and remain light red.



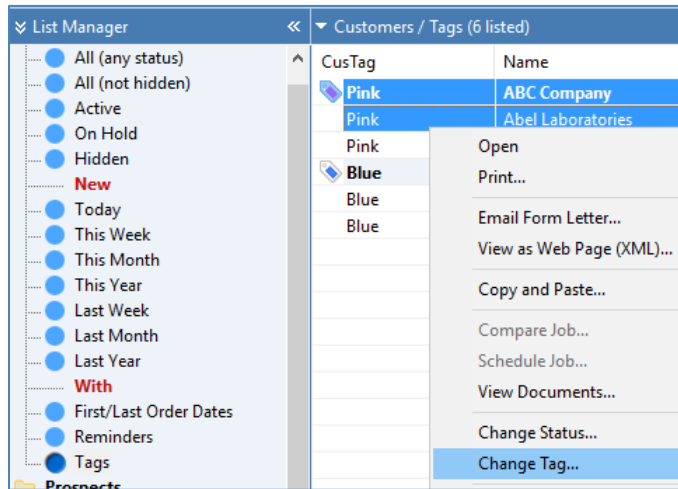
New List: Customers with Tags

List Manager		Customers / Tags (6 listed)		
Active		CusTag	Name	Type
On Hold		Pink	ABC Company	
Hidden		Pink	Abel Laboratories	
New		Pink	Action Business Systems	
Today		Blue	Albright Associates	
This Week		Blue	Alliance For The Bay	
This Month		Blue	Allied Building Supplies	
This Year				
Last Week				
Last Month				
Last Year				
With				
First/Last Order Dates				
Reminders				
Tags				

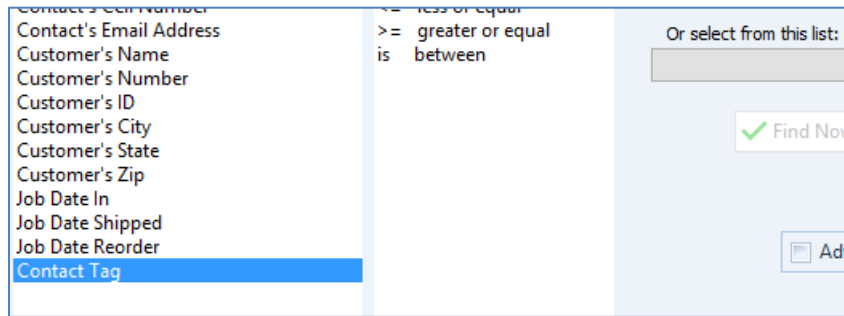
New List: Contacts with Tags

List Manager		Contacts / Tags (3 listed)		
Customers		ConTag	First	Last
Prospects		Purple	Ann M	Linz
Customers + Prospects		Olive	John	Smith
Top Customers		Olive	Michelle	Greene
Inactive Customers				
Contacts				
All (any status)				
All (not hidden)				
Active				
On Hold				
Hidden				
Default Buyers				
Default Payers				
With Orders				
Without Orders				
Of Prospects				
With				
Reminders				
Tags				

New Command: Change Tags

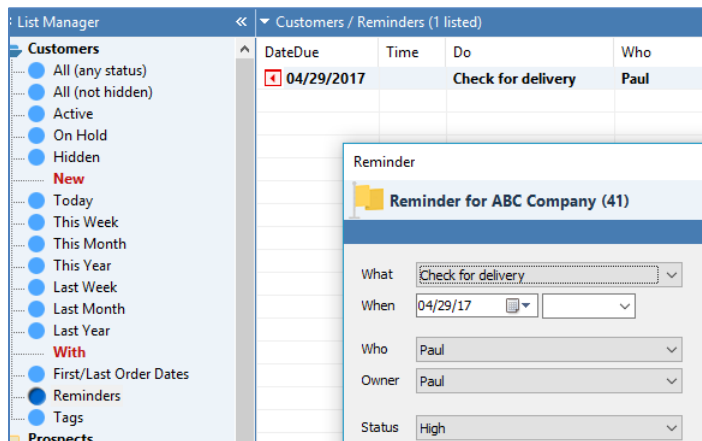


New: Find by Customer and Contact Tags



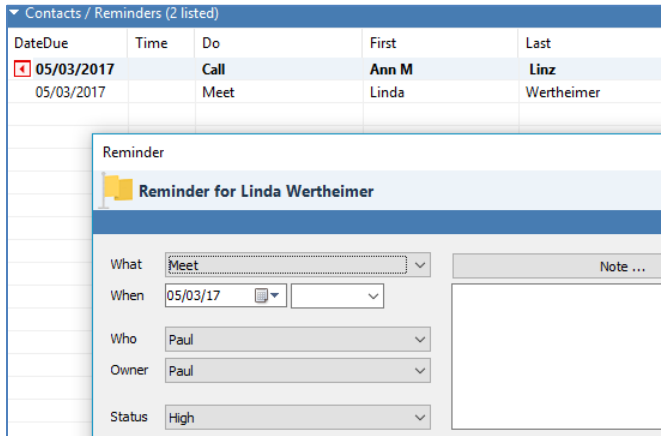
Open Reminder window from the Customers / Reminders list

Hold Ctrl down and double-click a reminder:



Open Reminder window from the Contacts / Reminders list

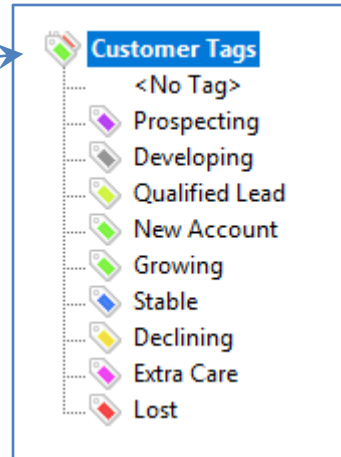
Hold Ctrl down and double-click a reminder:



CUSTOMER WINDOW

New Tag Field

You may attach tags to Customers. Click the "Tag" button:

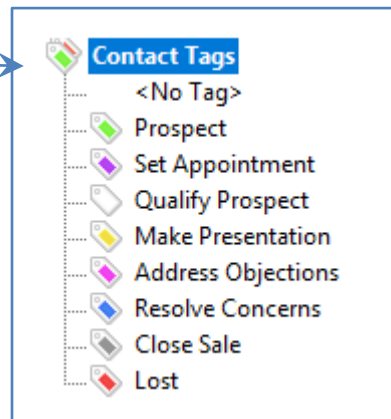


New Invoice Method Options

- Attn: Payer - Print
- Attn: Payer - Email
- Attn: Buyer - Print
- Attn: Buyer - Email
- Attn: None - Print
- Attn: None - Email

CONTACT WINDOW

New Tag Field:



A/R SECTION

Ready to Post List

if Terms is COD and balance > 0 Printer's Plan adds a remark: C.O.D. Balance Due.

SETTINGS SECTION

New Custom Tags


Now you can create custom tags and attach them to Orders, Quotes, Customers, and Contacts.


Jobs

- Job Options
- Product Types
- Shipping Methods
- Data to Require
- Data to Reset (after paste)
- How to Save Item Price
- How to Round Item Price
- Item Document Types
- **Order Tags**
- Quote Tags

Customers

- Sources
- Business Types
- Contact Departments
- Customer Properties
- Contact Properties
- **Customer Tags**
- Contact Tags





Custom Tags

For Orders, Quotes, Customers, and Contacts.

TagID	Tag Name	Tag Color	Sort
101	First Order	Green	1
102	Job Redo	Yellow	2
103	Firm Due Date	Red	3
104	Proofing	White	4
105	Brokered	Cyan	5
106	Behind Schedule	Pink	6

You can create up to 25 tags for each group.
Tags may help you:

- Track sales opportunities
- Track progress
- Group jobs, customers, contacts
- Analyze data

New Password Option

Goto MyPlan (line 18).

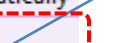
New Job Option: Default Colors for Sides

Select **Jobs > Job Options**.

In the Job window, alert (flash) if a Service has reminders or default

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

In the Paper Specs window, default colors for Side1/Side2



In the Paper Specs window, default colors for Side1/Side2:

- ? (ask me to select)
- Black/
- Black/Black
- Color/
- Color/Color

MYPLAN SECTION



MyPlan enables responsive customer service.

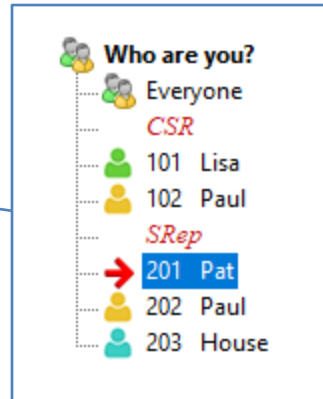
- **MyPlan** is designed to improve how you interact and do business with your customers.
- You can access all the data about your orders, quotes, history, prospects, customers, and contacts from one central location.
- In addition, you can send emails, add reminders, attach tags to selected jobs, customers and contacts.

MyPlan section requires the "Go to MyPlan" password. See Settings > Passwords > Line 18.

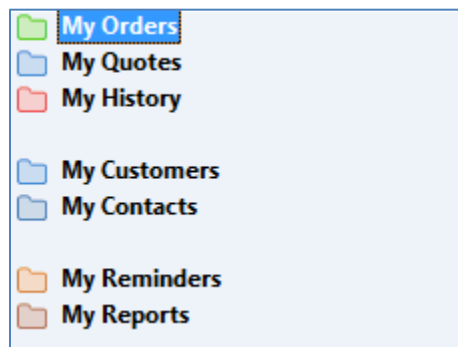
MyPlan List Manager

MyPlan List Manager asks you two questions:

1. **Who are you?**

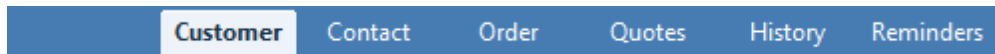


2. **What information do you want to see?**



Your answer will determine what type of information you will see.

- **Who Are You** option will list either your or everyone's jobs, customers or contacts.
- **My Orders/Quotes/History** options will list the type of jobs you selected. You will have additional drill-down information about the job by clicking one of these tabs.



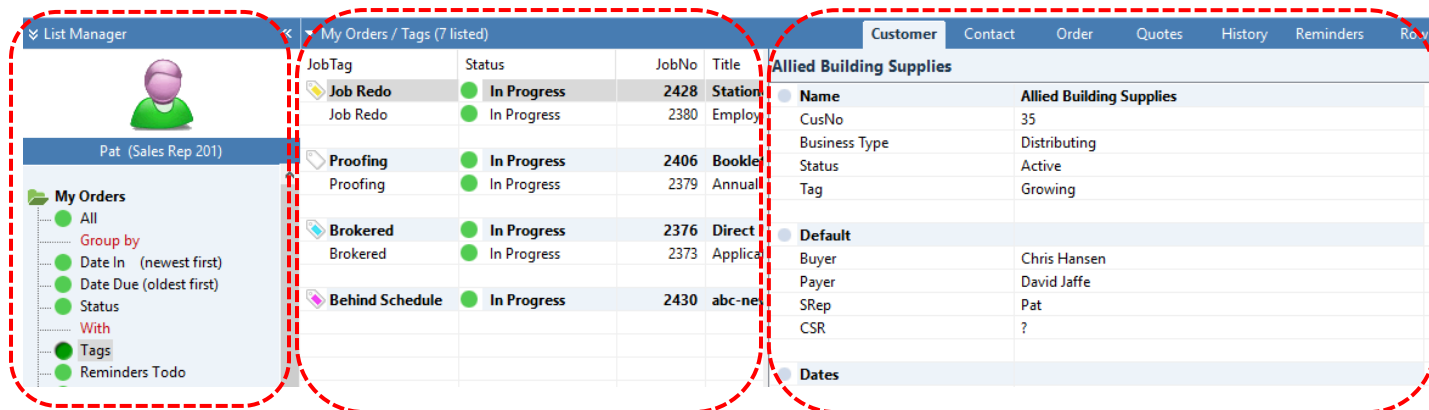
- **My Customers/Contacts** options will list the customers or contacts you selected. You will have additional drill-down information about them by clicking one of these tabs.



- **My Reports** options will simply show you a report (most will compare your last 12 months vs. previous 12 months). You will have no additional drill-down information.
- **My Reminders** options will open the Reminders List window. You will have more options.

MyPlan Window

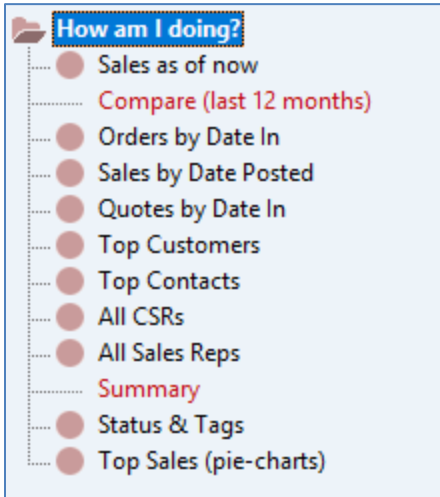
The MyPlan section has three parts:



List Manager	Main List	Detail List
<ul style="list-style-type: none"> • Select who you are. • Select what to list. 	<ul style="list-style-type: none"> • Select a job, customer or contact from the list. • Right-click to pop-up the following menu: <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> Preview Job Preview Schedule Select this Job (in Jobs Section) <hr/> <ul style="list-style-type: none"> Open Customer Select this Customer <hr/> <ul style="list-style-type: none"> Open Contact Select this Contact <hr/> <ul style="list-style-type: none"> Open Reminder New Reminder... List Reminders of... <hr/> <ul style="list-style-type: none"> Change Status... Change Tag... <hr/> <ul style="list-style-type: none"> Send Email... <hr/> <ul style="list-style-type: none"> Add to Favorites... Add Address Fields to List </div>	<ul style="list-style-type: none"> • Select a tab to see more information about the selected job, customer or contact. • Click the same tab to hide it. • Right-click to see the pop-up menu.

MyPlan Lists

List	Notes												
<div style="background-color: #e6f2ff; padding: 10px;"> <p>My Orders</p> <ul style="list-style-type: none"> ● All ● By Date In (newest first) ● By Date Due (oldest first) ● By Status ● With Tags ● With Reminders Todo ● Find... <p>My Quotes</p> <ul style="list-style-type: none"> ● All ● By Date In (last 90 days) ● By Date Due (last 90 days) ● By Status ● With Tags ● With Reminders Todo ● Find... <p>My History</p> <ul style="list-style-type: none"> ● All ● By Date Shipped (last 90 days) ● By Date Reorder (next 90 days) ● With Reminders Todo ● Find... <p>My Customers</p> <ul style="list-style-type: none"> ● All (not hidden) ● Top Sales (last 12 months) ● Prospects (no sales) ● Inactive (more than 90 days) ● With Tags ● With Reminders Todo ● Find... <p>My Contacts</p> <ul style="list-style-type: none"> ● All (not hidden) ● Top Sales (last 12 months) ● Prospects (no sales) ● Inactive (more than 90 days) ● With Tags ● With Reminders Todo ● Find... <p>My Reminders</p> <ul style="list-style-type: none"> ● Todo All ● Todo Today ● Done </div>	<ol style="list-style-type: none"> 1. Your selection from the List Manager will determine how Main Lists are sorted (grouped). <ul style="list-style-type: none"> ● Job Lists with All option are sorted by Job Number in decending order (9 to 1). ● Customer and Contact Lists with All option are sorted by Customer Name in acending order (A to Z). ● Other lists are sorted by date, status, tag, net sales, etc. 2. If the Main List includes data, you will the following tabs: <ul style="list-style-type: none"> ● Customer ● Contact or Contacts ● Order or Orders ● Quote or Quotes ● History ● Reminders ● Row: Shows the selected row data from the Main List. 3. Select a tab to see more information about the customer or buyer of the selected job from the Main List. Or it may be the list of Orders, Quotes, History Jobs of the selected customer or contact. <div style="border: 1px solid #ccc; margin: 10px 0; background-color: #e6f2ff;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="background-color: #4a7ebb; color: white; padding: 2px;">Customer</td> <td style="background-color: #4a7ebb; color: white; padding: 2px;">Contact</td> <td style="background-color: #4a7ebb; color: white; padding: 2px;">Order</td> <td style="background-color: #4a7ebb; color: white; padding: 2px;">Quotes</td> <td style="background-color: #4a7ebb; color: white; padding: 2px;">History</td> <td style="background-color: #4a7ebb; color: white; padding: 2px;">Reminders</td> </tr> <tr> <td colspan="6" style="padding: 2px;">ABC Company</td> </tr> </table> </div> 4. Click the same tab again to hide it. 	Customer	Contact	Order	Quotes	History	Reminders	ABC Company					
Customer	Contact	Order	Quotes	History	Reminders								
ABC Company													

- 
- Sales as of now
 - Compare (last 12 months)
 - Orders by Date In
 - Sales by Date Posted
 - Quotes by Date In
 - Top Customers
 - Top Contacts
 - All CSRs
 - All Sales Reps
 - Summary
 - Status & Tags
 - Top Sales (pie-charts)

Try each report.

This list requires the "Go to Reports" password.

DATABASE

Three New Tag Fields

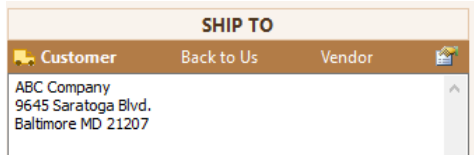
1. JobTag to Jobs table
2. CusTag to Customers table
3. ConTag to Contacts table

PRINTING

- Jobs: Print PDF of multiple invoices.
- AR: Print PDF of multiple statements.
- Work Order / Service Notes: << This text is not printed >>
- Printing Invoices: New "Attention" options. See customers.
- Printing long text on Work Orders and Invoices improved.
- Print Logo improved. Full page LogoPrint.bmp. For best result, create the bitmap using target printer resolution and save as 24-bit.
- Print Screen improved.
- Printing Barcodes improved.

PURCHASE ORDER

Two new options for Ship To address: None and Vendor



You can print PO for any job type

The earlier version allowed POs for Orders only. Now you can create a PO for any job type.

You can type special Item/Service note between "<<PO:" and ">>"

It will not be printed on work order but included in PO instructions.

[SHIPTO]

You can set default Ship To adress to none as follows:

[SHIPTO]<ShipToNone>[/]

You can set the document title (file name) in the template

The following line sets the document title to **Request**:

[TITLE]Request[/]

SHIPMENTS

New List: History of Shipments

