PRINTER'S PLAN

NEW VERSION

PRINTER'S PLAN
2019

What's New & Improved

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NEW PAYPAL INTEGRATION

Paypal Integration

When emailing invoices, optionally include a "Click Here to Pay" link and allow customers to securely pay their invoices online with their credit card (a PayPal account is **not** required). In the Print window of an order there is a new invoice option, **E-Invoice (PayPal)**

When you select this option the invoice will be generated online:

Notify the customer via Printer's Plan (recommended)

An email notification can be customized and sent from Printer's Plan:
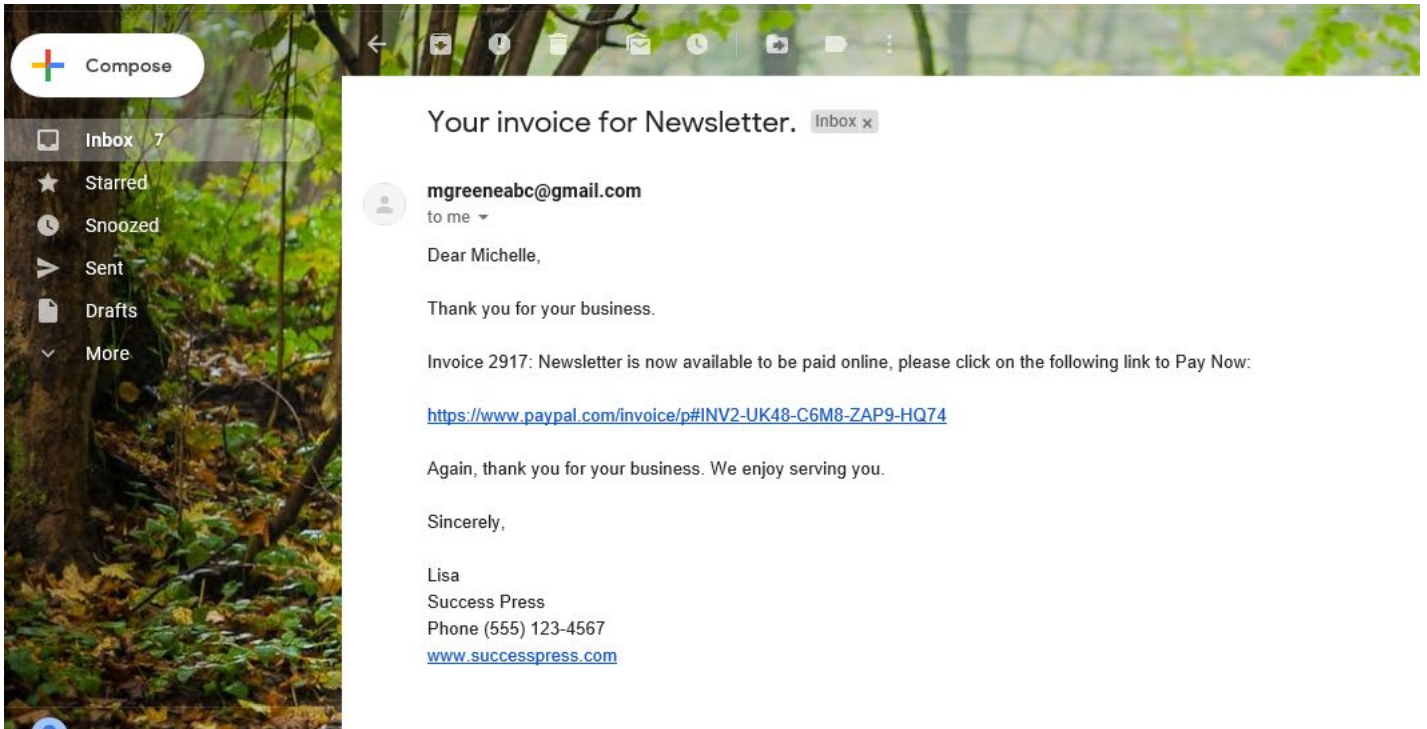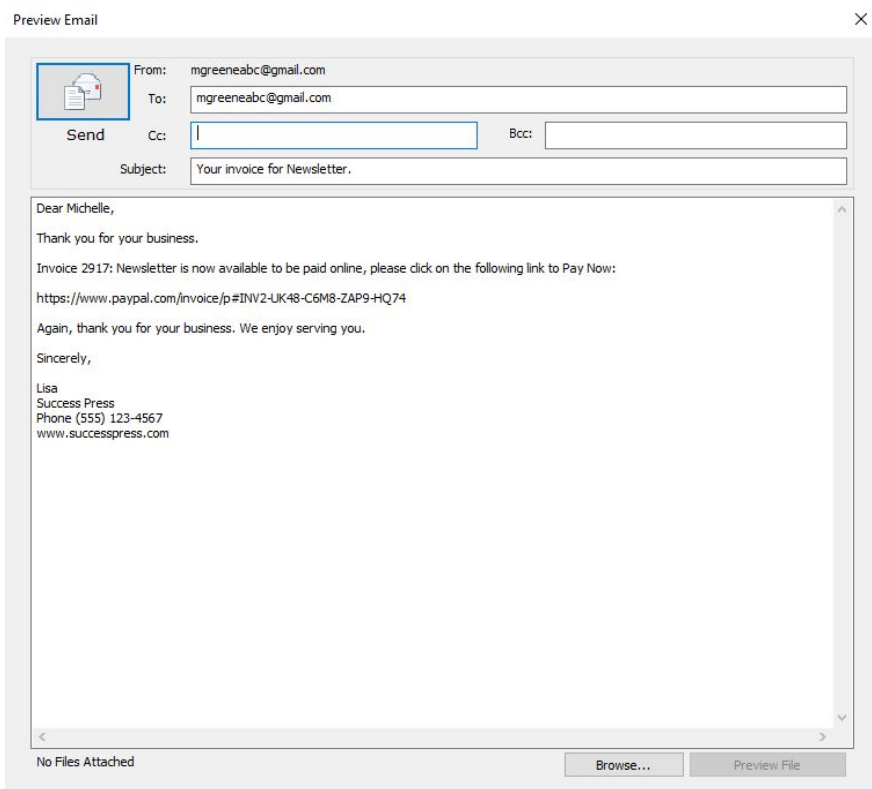
Notify the customer via PayPal

Alternatively, an email with a link to pay can be sent directly from PayPal:
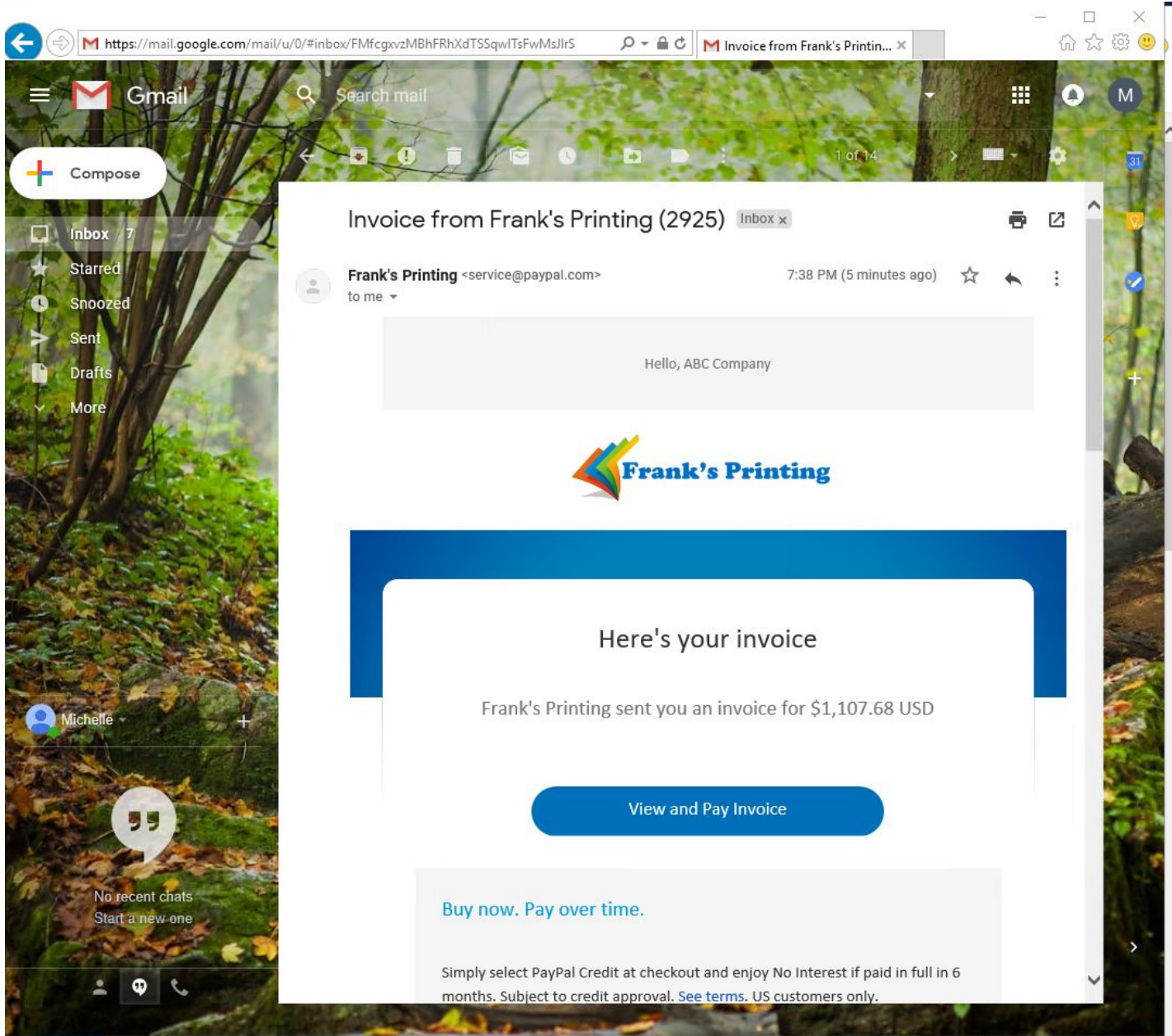
Receiving Payment

When the client pays the invoice you will be sent an email notification, and if you are running the Printer's Plan API (Web2Plan) or Customer Facing Website (PlanWeb) solution, the payment will automatically be recorded in Printer's Plan.

Name	Date	Amount	Group	Paid By	Reference	Appliedto	CusNo
ABC Company	12/06/2018	174.17	AR	Paypal	Paid From PayPal	2620	41

▼ Payments Received / Today (1 listed) — *Reverse Payment...*

To enable the PayPal integration follow the instructions in the following guide: PayPal Integration Guide

NEW SMTP CLIENT

SMTP Client

Printer's Plan will no longer require you to use Microsoft Outlook (or other email programs) to send emails. Instead, you can now send emails directly from Printer's Plan using the Printer's Plan SMTP client.

To enable the Printer's Plan SMTP client go to the **Settings** tab, open the **General Settings** folder and select **SMTP Settings.**
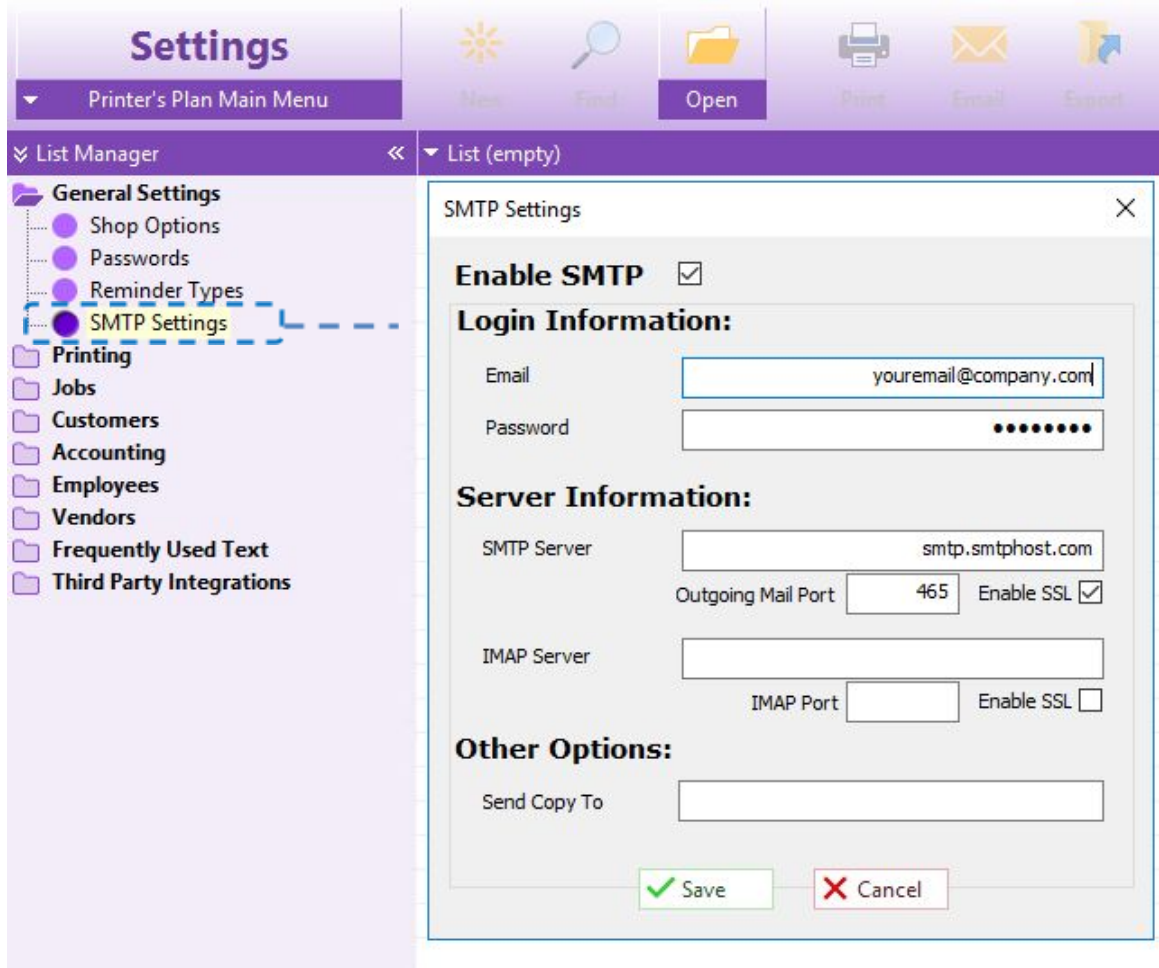
In the SMTP settings window enter your email account information and check-in the **Enable SMTP** option. This option has to be enabled to use the Printer's Plan SMTP client. If this option is not checked, Printer's Plan will use the computer's default email client.

Once this is enabled, when you generate an email message the following **Preview Email** will open allowing you to send email messages.

For a detailed explanation that outlines how to configure the SMTP client please refer to the following guide: SMTP Client Guide

DEEPER QUICKBOOKS INTEGRATION

New: Direct Connect to QuickBooks

Instead of creating an Export/Import (.iff) file you can directly connect Printer's Plan data to QuickBooks. Using this method you can transfer **Sales data**, or **Individual Invoices** to QuickBooks in a few clicks.

To enable this option go to the **Settings** tab, open the **Third Party Integrations** folder and select **QuickBooks**. The **QuickBooks Settings** window will appear. In this window, set the **Export Method** field to **Direct Connect.**
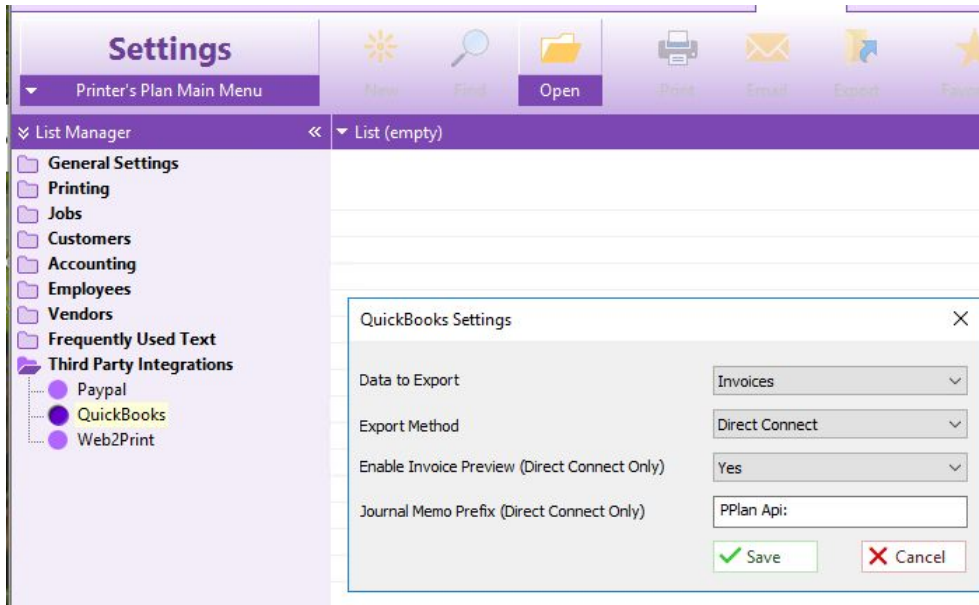
To send the data, go to the **Reports** section, open the **Posting Journal** folder and click **Regular Sales** (click the Date Range menu at the top of the screen to narrow the list of postings).

Highlight the posting (or postings) and click the Export button.
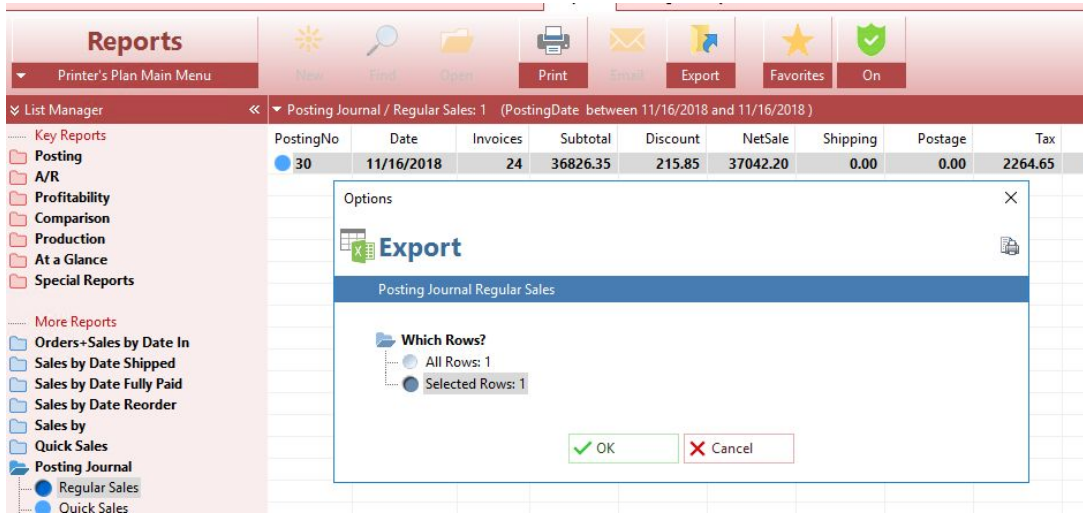
Make sure that QuickBooks is open on the computer that is exporting the data and click OK. This will automatically send the data to Quickbooks. Once the import is complete, a confirmation message will appear in Printer's Plan.

New: QuickBooks Class Tracking

When exporting data to QuickBooks you now have the option to include QuickBooks Class information.

For **Sales Data** exports, to enable this option go to the **Settings** tab open the **Accounting** folder and select **Sales Departments**. In the table that appears enter the exact QuickBooks Class name in the **QuickBooks Class** column.

For **Invoice Data** exports, to enable this option go to the **Settings** tab open the **Jobs** folder and select **Product Types**. In the table that appears enter the exact QuickBooks Class name in the **QuickBooks Class** column.

After exporting the Printer's Plan data you can run reports in Quickbooks to analyze the sales by class:

	Print	Signs	Unclassified	TOTAL
Income				
4000 · Sales				
4300 · Color Digital Sales				
4310 · Color Digital	416.02	0.00	0.00	416.02
Total 4300 · Color Digital Sales	416.02	0.00	0.00	416.02
4400 · Pre-Press Sales				
4410 · General Graphics	69.36	0.00	0.00	69.36
Total 4400 · Pre-Press Sales	69.36	0.00	0.00	69.36
4700 · Miscellaneous Sales				
4710 · QuickSales	0.00	0.00	0.00	0.00
4700 · Miscellaneous Sales - O...	94.60	0.00	0.00	94.60
Total 4700 · Miscellaneous Sales	94.60	0.00	0.00	94.60
4800 · Discounts on Sales	0.00	0.00	0.00	0.00
4901 · Center Produced Sales				
4905 · Ink & Digital Sales	0.00	3,295.45	0.00	3,295.45
4910 · Banner/Textile Sales	0.00	5,774.59	0.00	5,774.59
Total 4901 · Center Produced Sales	0.00	9,070.04	0.00	9,070.04
4000 · Sales - Other	0.00	0.00	0.00	0.00
Total 4000 · Sales	579.98	9,070.04	0.00	9,650.02
Total Income	579.98	9,070.04	0.00	9,650.02
Expense				
8310 · Shipping	0.00	0.00	0.00	0.00
8320 · Postage	0.00	0.00	0.00	0.00
Total Expense	0.00	0.00	0.00	0.00
Net Income	579.98	9,070.04	0.00	9,650.02

New: Export Printer's Plan Invoices to QuickBooks

You can now export all posted invoices to QuickBooks. To enable this option go to the **Settings** tab, open the **Third Party Integrations** folder and select **QuickBooks**. The **QuickBooks Settings** window will appear. In this window, set the **Data to Export** field to **Invoices.**
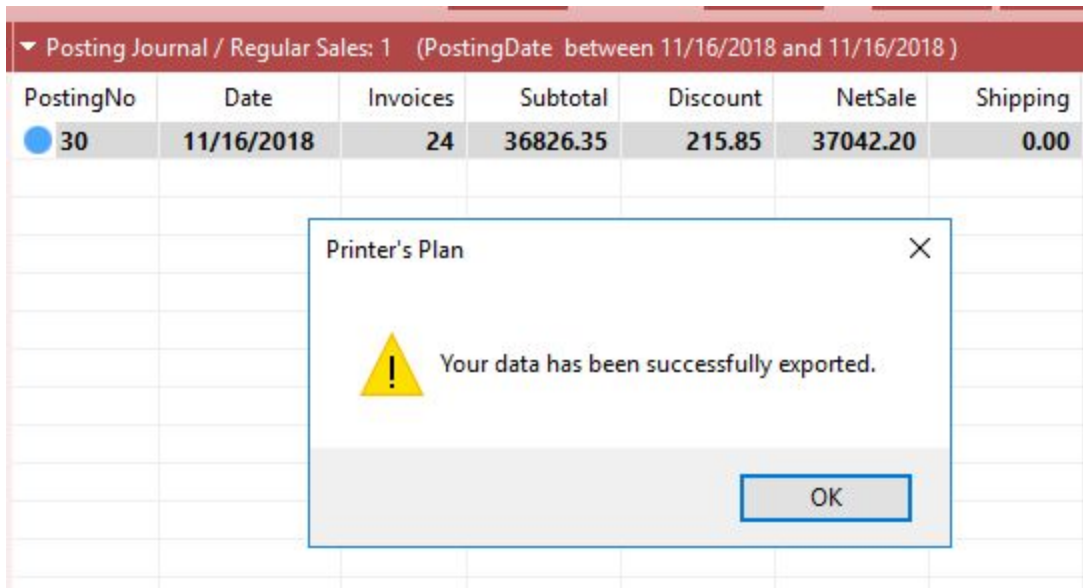
QuickBooks Settings

Data to Export	Invoices
Export Method	Direct Connect
Enable Invoice Preview (Direct Connect Only)	Yes
Journal Memo Prefix (Direct Connect Only)	PPlan Api:

✓ Save   ✗ Cancel

To export the invoices, after each posting go to the **Reports** section, open the **Posting Journal** folder and click **Regular Sales**. Highlight the posting and click the Export button.
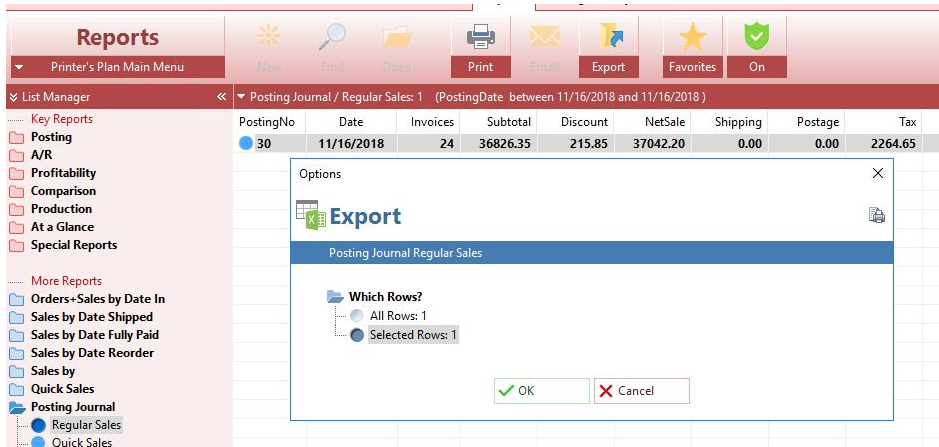
In the Export window click **OK.** Either through the .IIF Export/Import, or via a direct connect, the Printer's Plan invoice will be sent to QuickBooks:
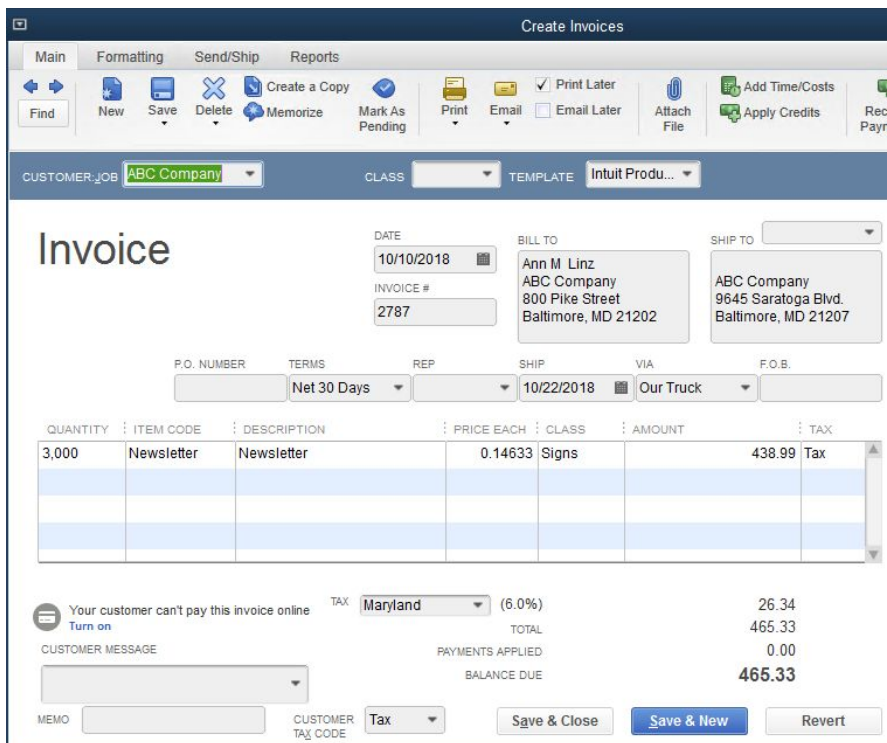
For detailed instructions on how to integrate Printer's Plan with QuickBooks please refer to the following guide: QuickBooks Integration Guide

Important Note: The Printer's Plan integration with QuickBooks is only available for the desktop version of QuickBooks.

JOBS

New Price Level Option

New Option: **Keep Unit Price**

When you select this option in the Price Level field, and then save the item, Printer's Plan will ask you to enter the unit price:

If you later make changes to the specs, including Item Quantity, Printer's Plan will price the Item using that unit price without asking you to confirm it. So, the Item Price will always be equal to Item Quantity X Unit Price. This feature is helpful on multi-item (booklet) jobs where you would like to manually set the unit price. Then, if you update the quantity you can maintain the established unit price without responding to numerous prompts.

New Jobs Ready to Post Option

Easily change the status of an order, or a group of orders to **Ready to Post** without printing an invoice. In the Jobs section, under the Orders folder bring up a list of jobs that you want to mark as Ready to Post. Highlight the group of jobs and then right-click on one of the invoices. From the menu that appears select **Make Job Ready To Post**
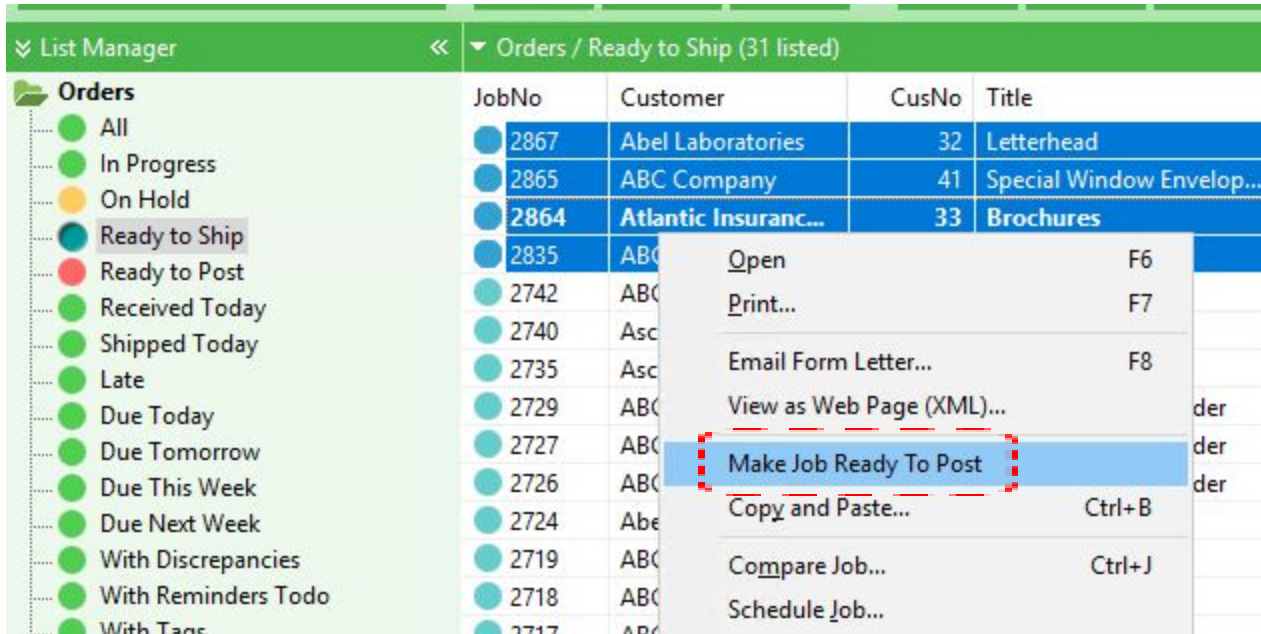
This will mark the selected job(s) as having an invoice printed, and if a shipped date has not been assigned, it will set today's date in the **Date Shipped** field. The status of the selected orders will be updated to **Ready to Post**.

New Digital Printing Options

Previously, on digital jobs, Printer's Plan would calculate the number of clicks and the sheet count by maximizing the number of originals on a run size sheet. In the 2019 version of Printer's Plan you can make a selection in the **Print As** field of a paper service to adjust these calculations.

On a digital job, if the **Print As** field is blank, or set to **Signature** the program will operate identically to previous versions -- maximizing the number of originals on a run size sheet.
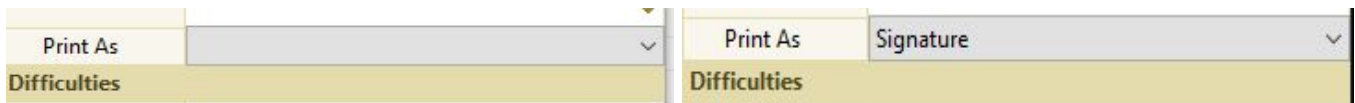
New: If the **Print As** field is set to **Regular** the program will calculate the job using the same original on a run size sheet.
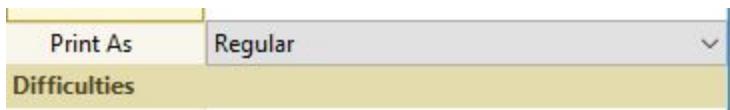
Example: 6 Names of 250 Business Cards run 24 up on a 12 x 18 sheet.

Option 1: Set the **Print As** to **Signature (or blank).**

Paper Specs for Digital Printing		×
Text Coated: 100# Gloss 12 x 18		Replace
Modified	*08/19/2014*	
Inventory	*In Stock: 1,738 · On Order: 0*	
Reminder		
How many?		
Names	6	
Paper Color	White-Warm	▼
Vendor	Atlantic Paper	▼
Sizes (1 Out x 24 Up = 24)		
Parent Size	12 x 18	
Run Size	12 x 18	▼
Finish Size	3.5 x 2	▼
1 Side		
Front	Color	▼
		▼
Back		▼
		▼
Print As	Signature	⌄

In this scenario the program would calculate 63 (12 x 18) sheets and 63 clicks.

Option 2: Set the **Print As** field to **Regular**

Paper Specs for Digital Printing		×
Text Coated: 100# Gloss 12 x 18		Replace
Modified	*08/19/2014*	
Inventory	*In Stock: 1,738 · On Order: 0*	
Reminder		
How many?		
Names	6	
Paper Color	White-Warm	▼
Vendor	Atlantic Paper	▼
Sizes (1 Out x 24 Up = 24)		
Parent Size	12 x 18	
Run Size	12 x 18	▼
Finish Size	3.5 x 2	▼
1 Side		
Front	Color	▼
		▼
Back		▼
		▼
Print As	Regular	⌄

In this scenario the program would calculate 66 (12 x 18) sheets and 66 clicks.

PRINT OPTIONS

Improved Print Options: Work Order / Vendor Info

On the Work Order, you now have the option to print, or suppress the vendor information (name + contact + phone). To print this data, check the new print option:
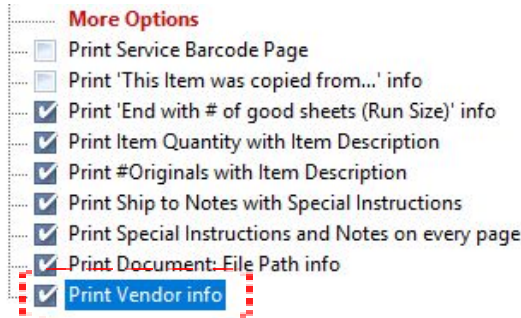
Improved Print Options: Work Order / Page Header / Item Description

If the **Page break between Items** option is checked, the Item Description is printed at the top of the page. This feature was added in version 2018 and caused a new problem: Item Description was printed over other text when the description was too long and/or had line breaks. Now only the first 50 characters of the Item Description is printed at the top of the page.

Improved Print Options: Work Order / "End With" Quantity

If the **Print As** option is set to **Regular** and **#Originals (Sheets)** is 2 or more, the **End with** quantity printed on the work order is per original, otherwise, it is for the whole Item.
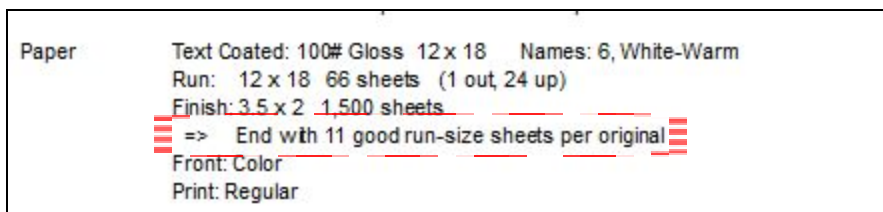
Improved Print Options: Work Order / Bold Note

On the Work Order, If the **Notes (bold font)** option is checked, the service name was also printed bold. Now it does not.

Improved Print Options: Shipping Labels

If a field data, such as Item Note, included a special character ellipsis (…), the remaining fields were not exported. This is now fixed.

WEB2PLAN

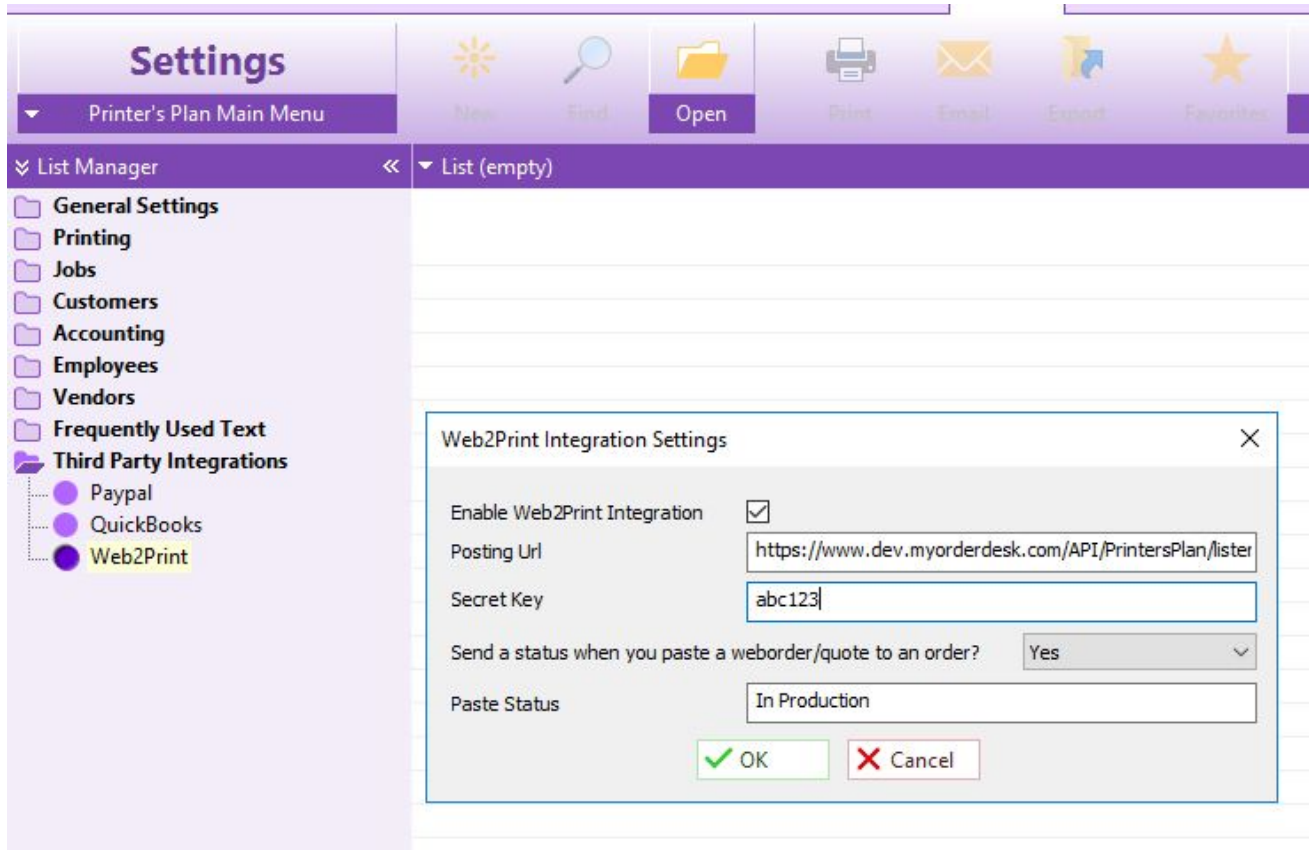## Send Status Updates

When a Web Order is converted to a new Order a status update can be sent back to the website. To enable this option go to the **Settings** tab, open the **Third Party Integrations** and select **Web2Print.**

In this window check in the **Enable Web2Print Integration** option.

In the **Posting URL** field, enter the posting address of the web2print website, this is the address where Printer's Plan will send that status update data. You must contact your web2print provider to obtain this address.

In the **Secret Key** field enter the secret key text, the text in this field is case sensitive. The web2print site should have the same secret key information -- this ensures the security of the communications between Printer's Plan and the web2print site.

Set the **Send status when you paste a weborder/quote to an order?** field to **Yes.**

In the **Paste Status** field enter the status text that you want to send back to the web2print site.

Your web2print site will also need to be configured to receive status updates. Please check with your web2print provider to obtain this information. If you are connecting Printer's Plan to My Order Desk the configuration page on the website would look something like this:

Printer's Plan Integration (Web2Plan)

Web2Plan is a "Web Service". It provides a communication method between MyOrderDesk and Printer's Plan.

☑ **Enable Printer's Plan Web2Plan for Shopping Cart Orders.**

Shared Secret	abc123	(required for status updates)
Order Submission URL	https://**********/PlanWeb/XmlListener.aspx	
Pricing Request URL	https://**********/PlanWeb/Listener.aspx	

Create extended profile field name `PrintersPlanCustomerNo` to assign users to a specific Printer's Plan customer.

For Purchase Order numbers to transfer over, the caption of the MyOrderDesk Payment Method must be exactly, "Purchase Order Number:"

To receive Status Updates, enter this Url inside of your Printers Plan Settings:

  https://www.dev.MyOrderDesk.com/API/PrintersPlan/listener/

Save

Here is an example of this workflow, an order is placed online and the status of the order is set to Waiting for Approval:

Job 34307

✔ 🖨 ✉ 🔒

1 Files **1** Proofs N/A APVL

Paul DiAngelo's Cart (28159) - Dec 7 2018 12:0
Hide Items...

N/A Reorder (Janet Brison Business Cards)

Waiting for Approval

In Printer's Plan the Web Order is converted to a new Order:

▼ All WebOrders (2 listed)

JobNo	Customer	CusNo	Title	DateIn	First
🟢 43	**ABC Company**	41	**Janet Brison Business Cards**	12/07/2018	Paul
😊 42	ABC Company				

Options

Copy and Paste the Selected Job

📁 Paste as a new:
⚪ Order
⚪ Quote

✔ OK   ✖ Cancel

After the new order is created a status update is automatically sent back to the website:


Depending on the settings of your web2print site this status update can be automatically sent to the purchaser.

New field on a Job: WebID

If you are integrating a front end web2print site with Printer's Plan via the Printer's Plan API (Web2Plan), jobs placed online automatically flow into Printer's Plan as Web Orders. In this scenario the front end website creates its own job number that is not connected to Printer's Plan.   The 2019 version of Printer's Plan will now save (and display) the external job number that is created on the website.

Example: Order is placed online and the website creates a job number (34306):
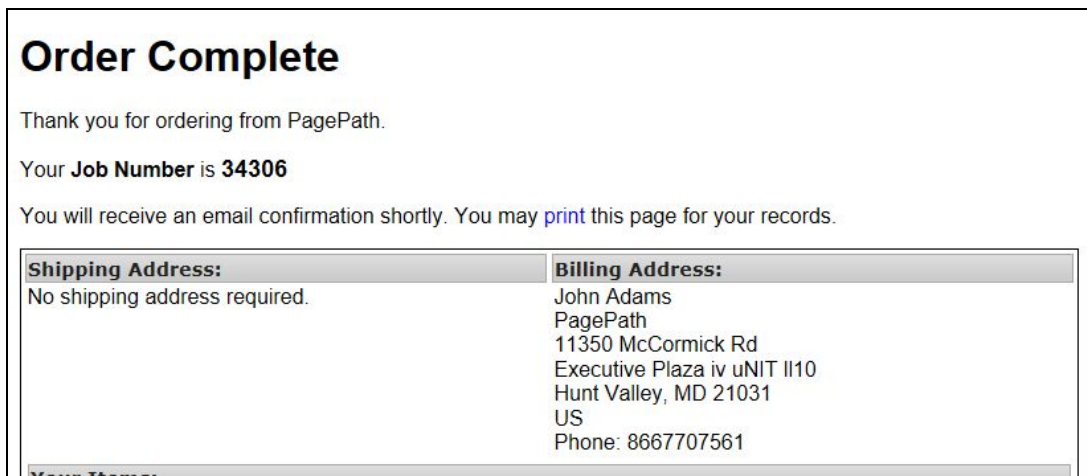
The job arrives in Printer's Plan as a Web Order, the website job number is captured and saved in the WebID field:
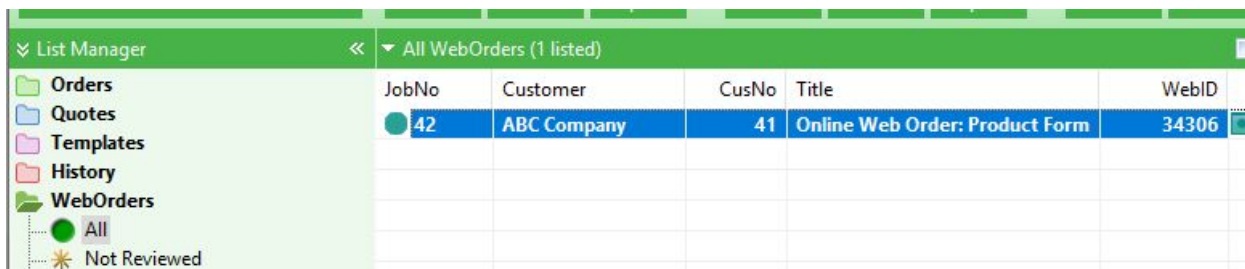

By storing this information the Printer's Plan can establish a link to the job on the front end site. This allows Printer's Plan to send status updates back to the front end website.
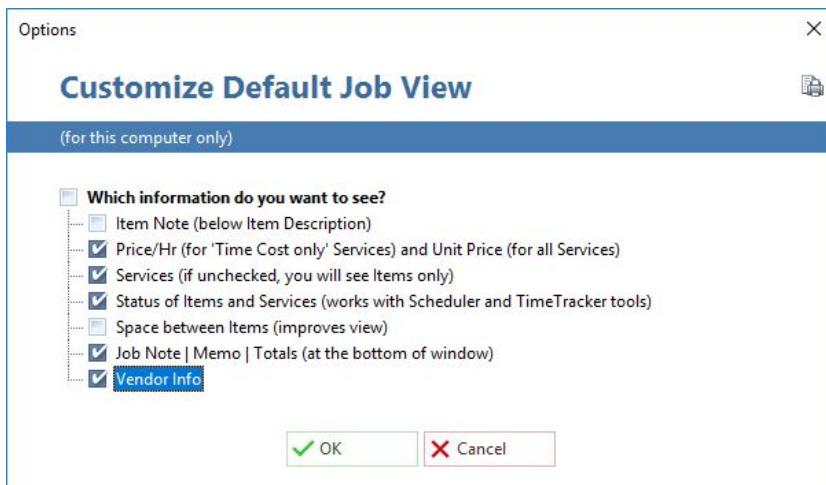
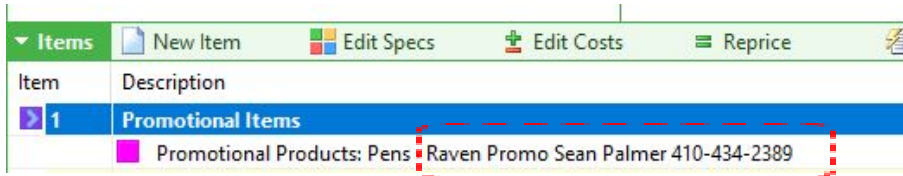## OTHER CHANGES AND IMPROVEMENTS

Job Window / Vendor Info

To display the vendor information in a job, in the **Job** window click on the **Items** button. From the menu that appears select **Customize Job View…**
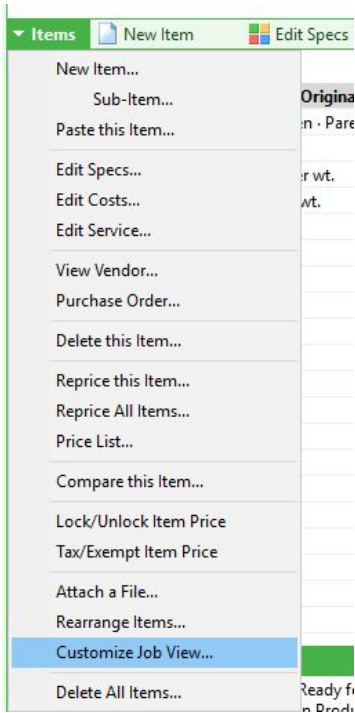
In the **Options** window, check the **Vendor Info** option

Emailing / Form Letters

If you are sending emails from a job list, Printer's Plan will ask you select whom to send the email: Ordered by, Default Buyer or Default Payer.

Pricing / #Originals: 2 or more and #Ups 2 or more

If the **Print As** option is **Regular**, and Item Quantity is not evenly divisible by #Ups, #Run Size sheets was not rounded up per each original.

Example: Quantity of 10, 2 Originals, printed 4 up. Previously this job calculated as 5 run size sheets (10 x 2 /4). Now it is calculated as 2 x (10/4 round up) = 2 x 3 = 6 sheets.

Payment Note Reset

If you copied a History job to a new Quote, and this History job had a payment note, the payment note was not cleared. In this version the payment note will be cleared. Previously this note only cleared if the History job was copied to a new Order.

~ character in the Note field not clearing on new jobs

If you copied a History job to a new Quote (or Order), any line in the note or memo field that started with the ~ character would be cleared on the new job. Previously if the last character of the line containing the ~ character did not contain a return the note would not clear. This is now fixed.

Copy and Paste Web Orders/Quotes

Previously Web Orders could only be copied as a new Order, and Web Quotes as a new Quote. Now you can copy Web Orders (and Web Quotes) as a new Order or new Quote.

If Printer's Plan was set to automatically assign a due date to a new job (x number of days after the date in), this functionality did not work if a Web Order was copied to a new Order. This is now fixed.

Emailing PDF attachments using Thunderbird

Sending emails with PDF attachments using the Thunderbird email client caused the attached PDF file to become corrupted. This is now fixed.

Scheduler / JobTracker

In the Services section if you altered the sort order of the Service Departments these changes were not properly reflected in Job Tracker. The Service Department icons in Job Tracker were not displayed in the correct order. This is now fixed.

Settings / Printing / Barcodes window

The "Save" icon was not visible if the scale of the display was set to more than 100%, this is now fixed.

Printer's Plan 2019

Upgrade Guide

(Revised December 13, 2018)

Printersplan.com - support@pagepath.com - 866-770-7561