



PRINTER'S PLAN

NEW VERSION

# PRINTER'S PLAN 2020

*What's New & Improved*

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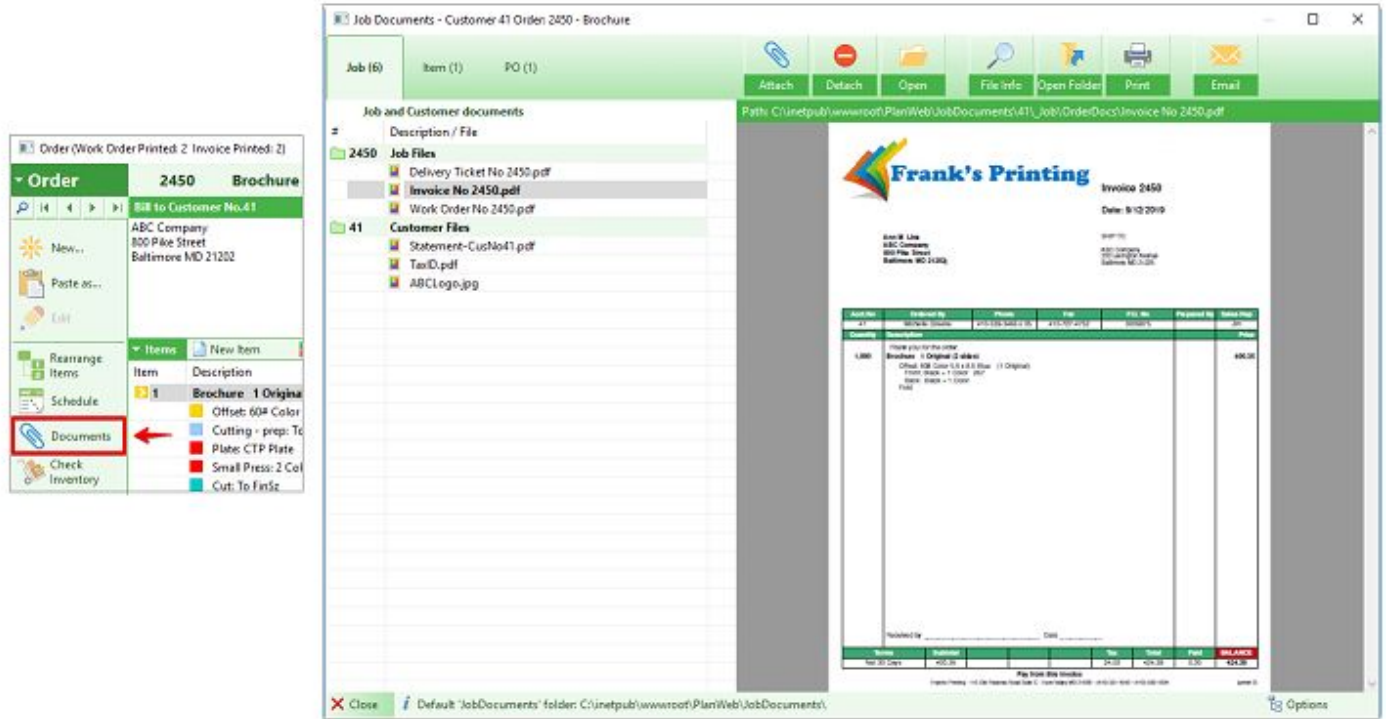
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# NEW INTELLIGENT DOCUMENTS

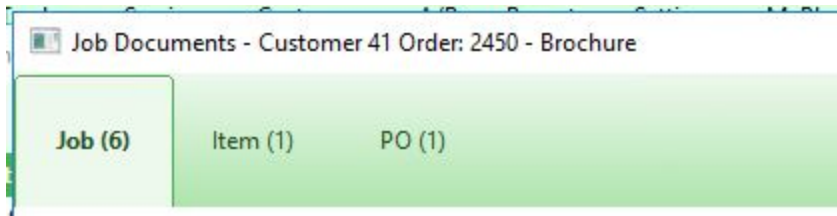
## Intelligent Documents Overview

The intelligent documents feature allows you to easily organize and find documents relating to a job, customer or vendor.

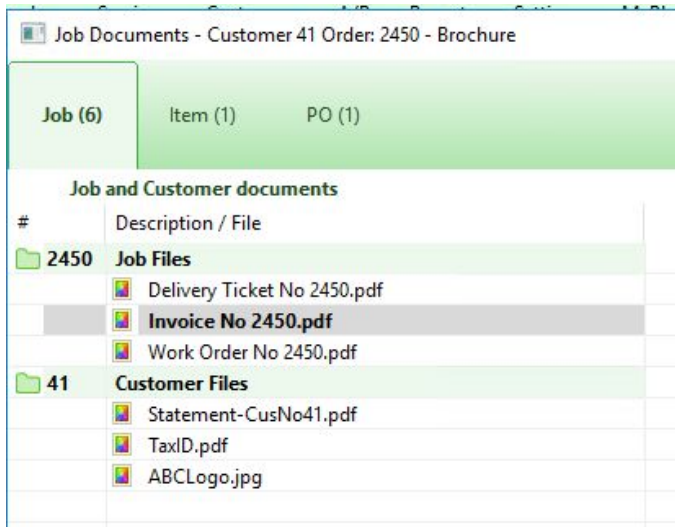
When you are in a Job, click the **Documents** button to open the Job Documents window:



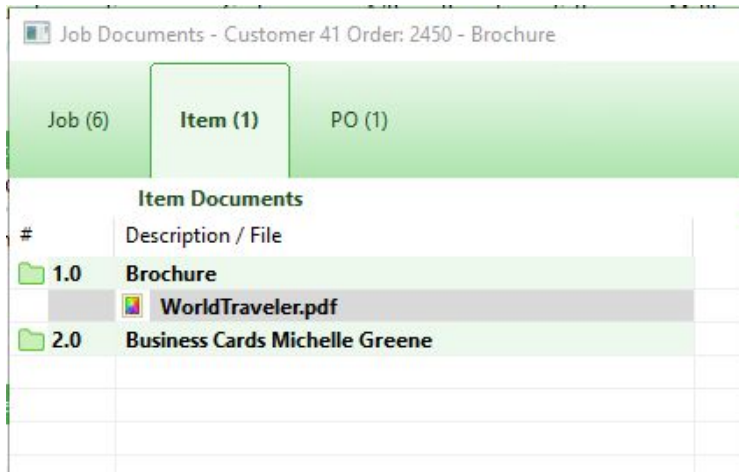
In the Job Documents window you can view and access all documents connected to the job and customer. At the top left corner of the Job Documents window there are three tabs - **Job**, **Item** and **PO**. In parenthesis for each tab Printer's Plan will indicate the number of documents attached:



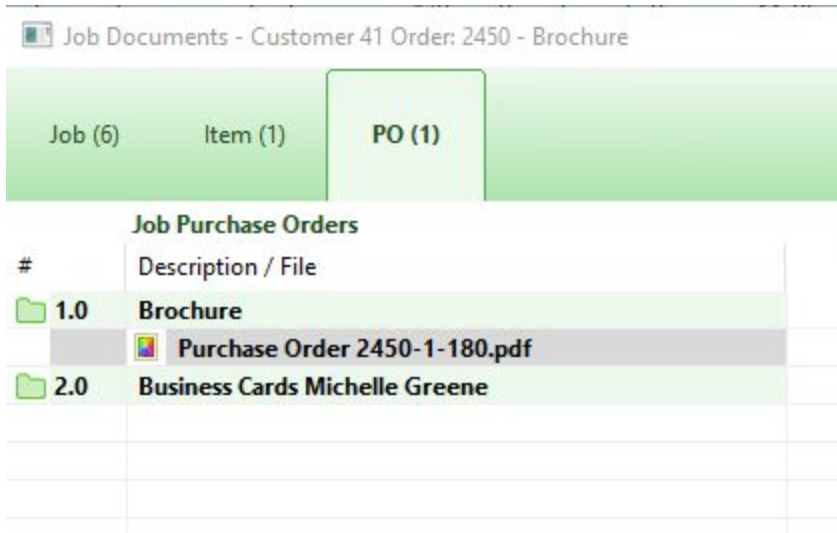
When you select the **Job** tab all documents relating to the job and customer will be listed:



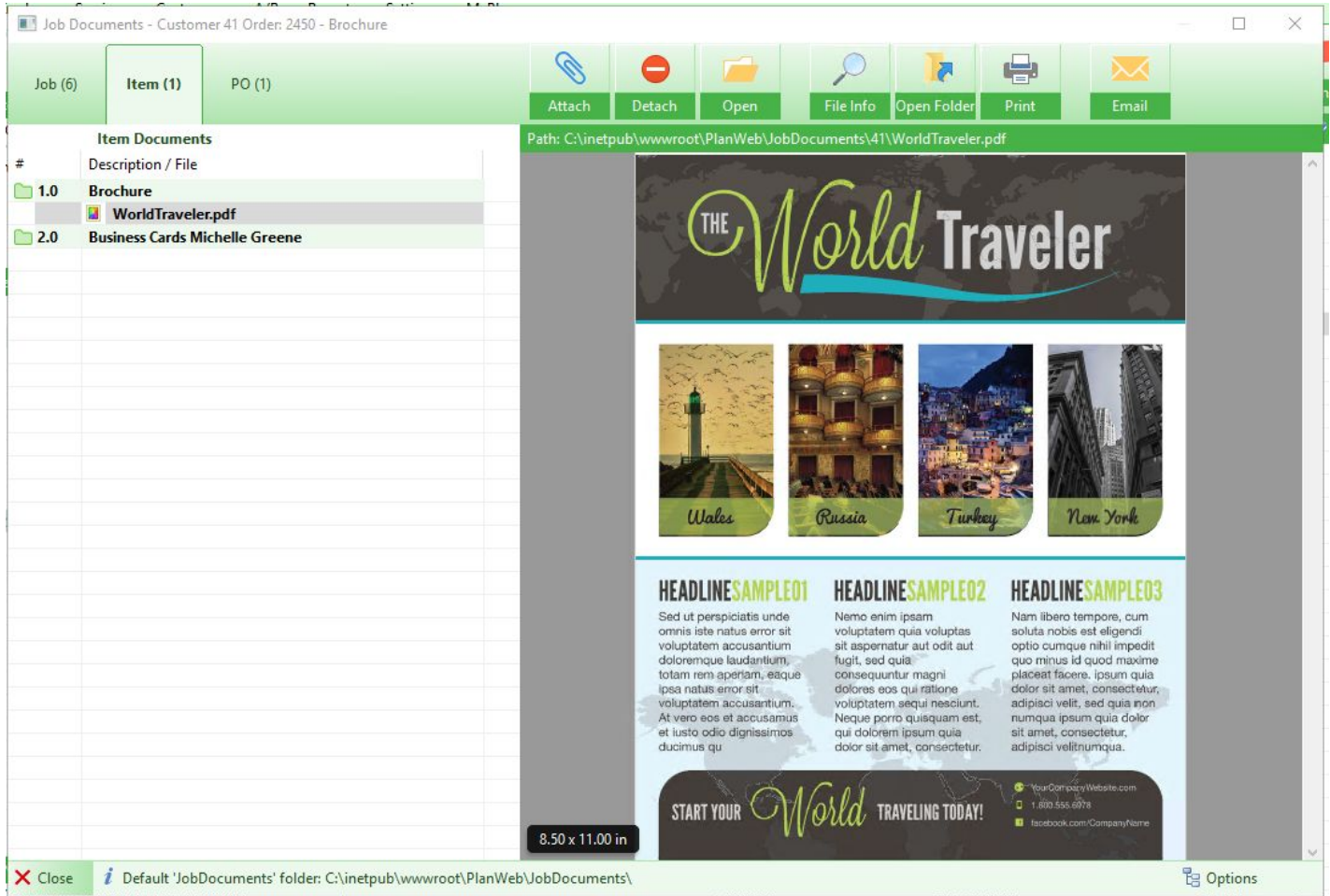
When you select the **Item** tab all documents linked to an item will be listed:



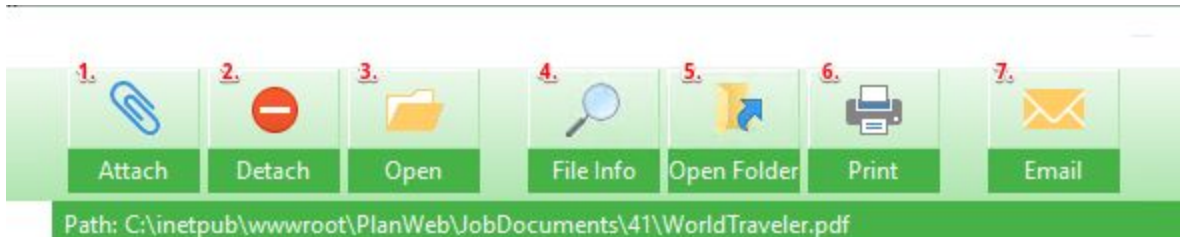
When you select the **PO** tab all purchase order documents linked to the job will be listed:



When a file is selected in the Job Documents window a preview of that file will be displayed. You can perform different actions by clicking on one of the buttons on the ribbon bar at the top of the screen.



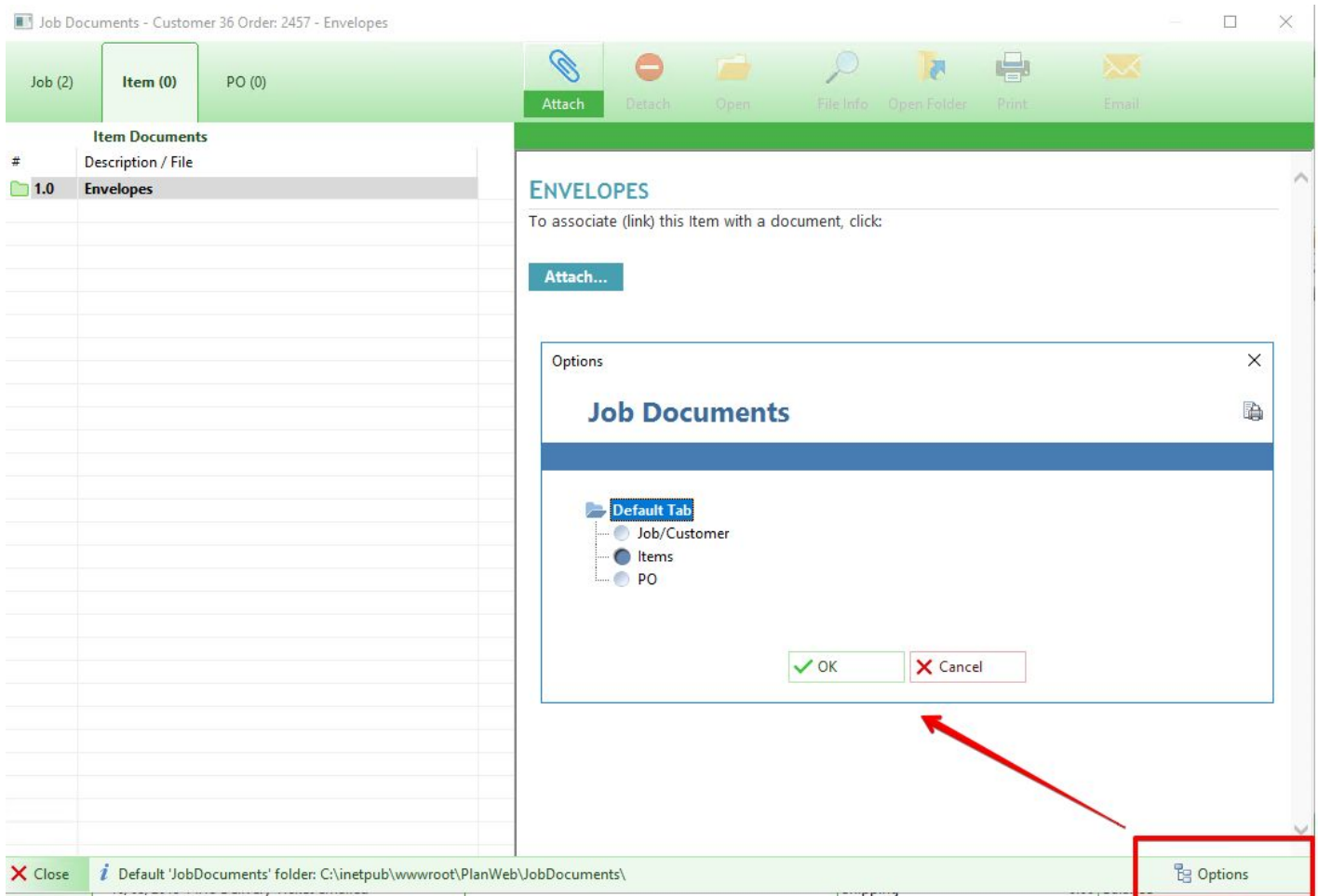
The Ribbon bar at the top of the window has been updated with the following icons and actions:



1. The **Attach** button allows you to manually attach a document to the job, item or customer.
2. The **Detach** button will remove an attached document.
3. The **Open** button will open the attached document in its native application.
4. The **File Info** button will display information about the attached file.
5. The **Open Folder** button will open the folder that stores the attached document and display the folder contents.
6. The **Print** button will print a screen image. It is important to note this print button is not printing the actual file, instead it is printing what is displayed on the screen. To print the file click the **Open** button to open the file in its native application and print from that application.

- The **Email** button allows you to select an email template, this template generates an email message that can be sent to different recipients such as the buyer, the designer or to the vendor. Email templates can be customized and are stored in the Email folder on the server computer. The name of the template files have to begin with the letters **Doc**. For a list of data fields that can be populated in the email message please refer to the **Document Email Fields.txt** file. This help file resides in the **Email** folder which is located in the directory where the Printer's Plan database is stored.

To set the default tab that is active when you open the Documents window click on the **Options** button in the lower right corner. This will open the **Options** window, in this window you can select the default tab:

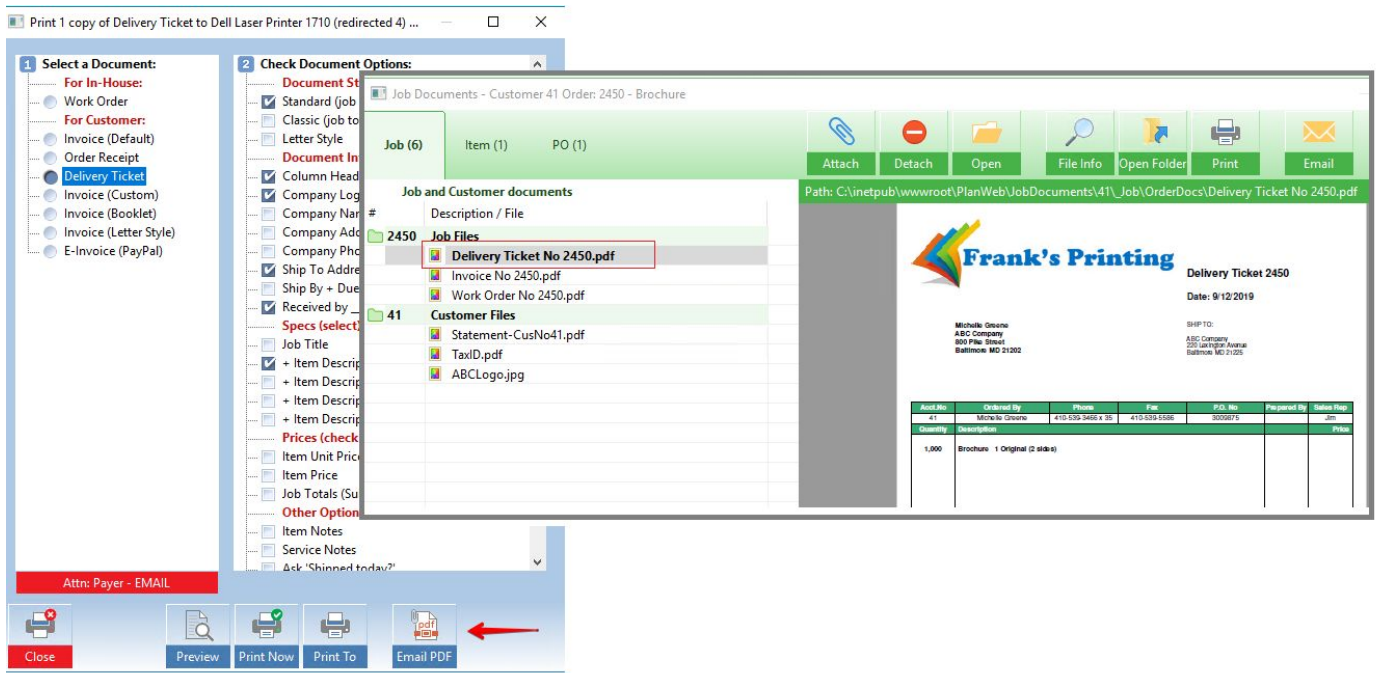


## Attaching Job Documents

Documents relating to a job can be attached automatically or manually.

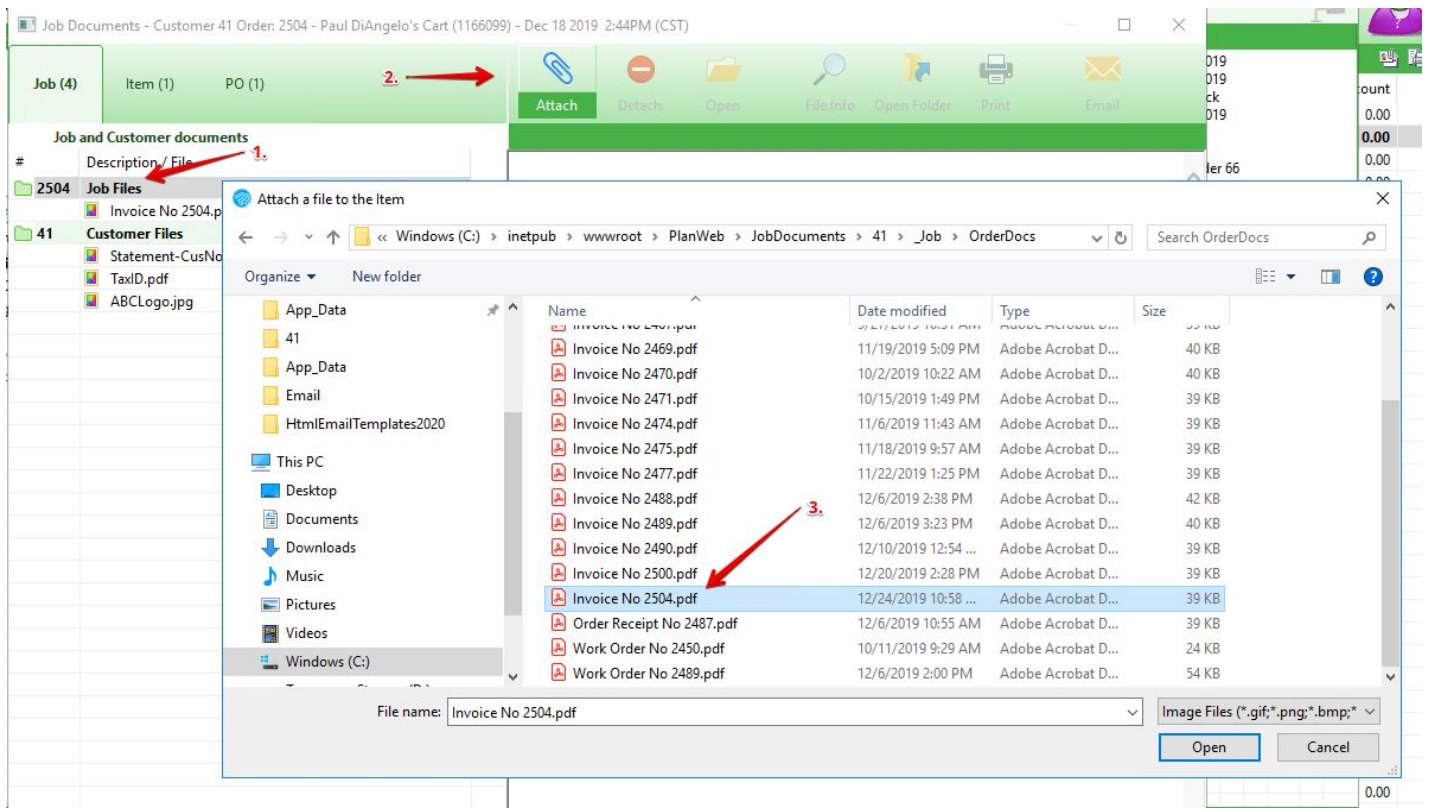
### Automatically Attaching Job Documents:

In the **Print** window of a job if you click the **Email PDF** button a PDF copy of the document will automatically be attached to the job.



### Manually Attaching Job Documents:

To manually attach a job file, open the Job Document window, select the **Job** tab and highlight **Job Files**. Click the **Attach** button and in the **Attach a file** window select the file you wish to attach.



Attached job files will be sorted chronologically with the most recent file appearing at the top of the list. When a job is copied as a new job, the attached job files are not copied to the new job.

### Attaching Item Documents

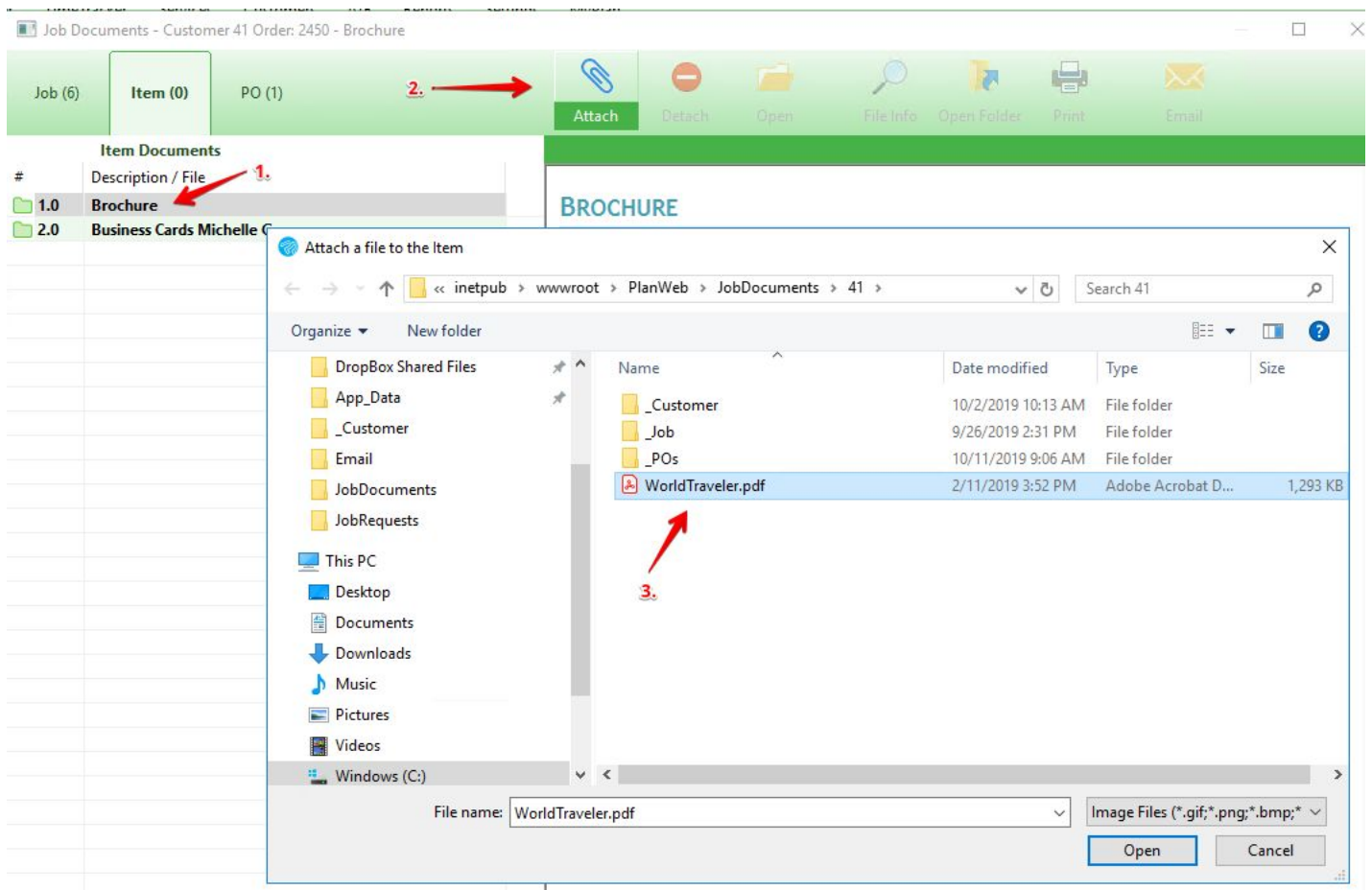
Documents relating to an item can be attached automatically or manually.

#### Automatically Attaching Item Documents (applies to Web2Print integrations):

When a job is received from from a Web2Print site, artwork associated with that order will be automatically attached to the item on the Printer's Plan job.

#### Manually Attaching Item Documents:

To manually attach an item file, open the Job Documents window, select the **Item** tab and highlight the item description. Click the **Attach** button and in the **Attach a file** window select the file you wish to attach.



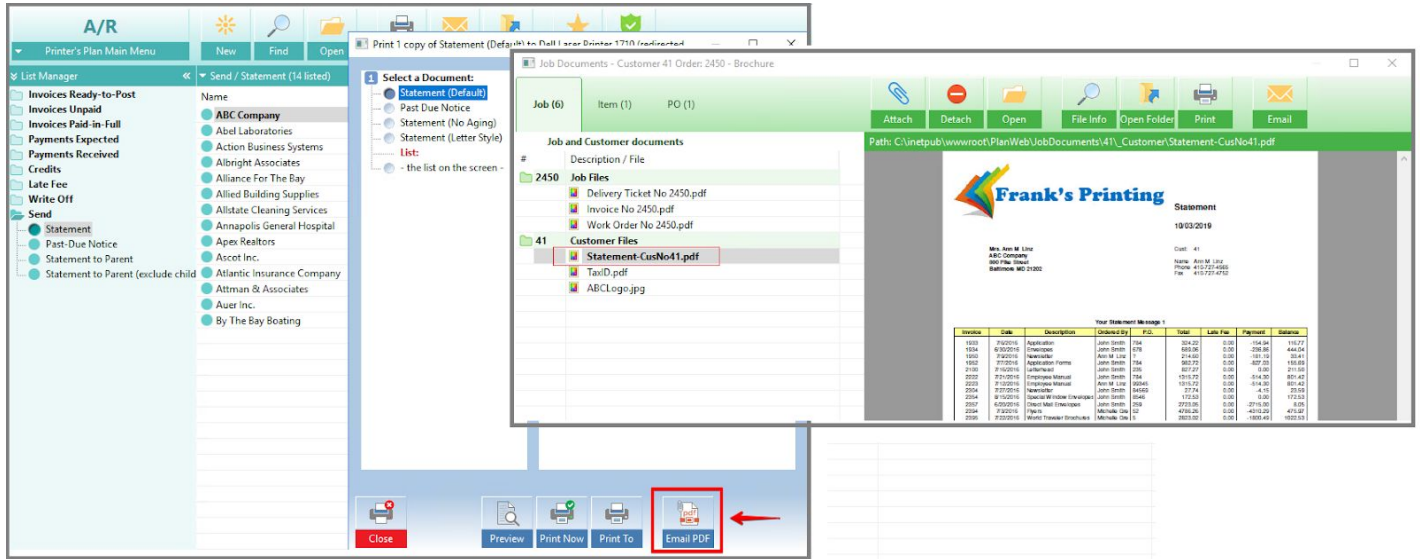
You can attach multiple files to each item. When an item is copied to a new job the attached item files are copied to the new item.

### Attaching Customer Documents

Documents relating to a customer can be attached automatically or manually.

**Automatically Attaching Customer Documents:**

In the A/R section of Printer's Plan open the **Send** folder and select **Statement**. In the **Print** window click the **Email PDF** button and a PDF copy of the document will automatically be attached to the customer files.

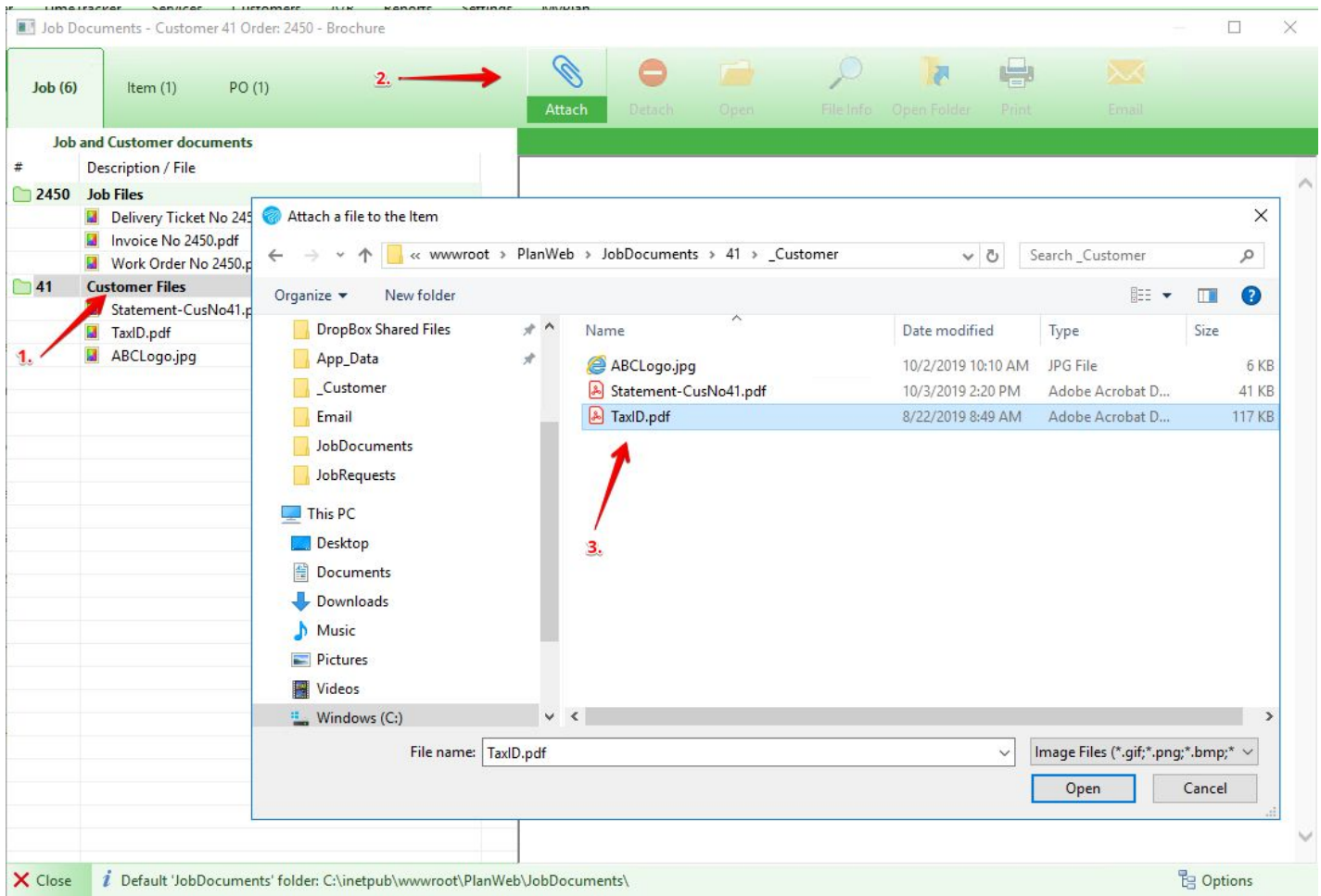


**Manually Attaching Customer Documents:**

To manually attach a customer file, open the Job Documents window, select the **Job** tab and highlight **Customer Files**. Click the **Attach** button and in the **Attach a file** window select the file you wish to attach.

Your Statement Message 1

Invoice	Date	Description	Ordered By	P.O.	Total	Line Fee	Payment	Balance
1852	9/20/2016	Application	John Smith	1842	500.00	0.00	154.00	1145.00
1854	9/30/2016	Transaction	John Smith	1778	800.00	0.00	338.00	444.00
1820	9/20/2016	Hardware	Ann M. Lind	1	214.00	0.00	132.00	35.00
1852	9/20/2016	Application Forms	John Smith	754	800.00	0.00	407.00	155.00
2108	9/20/2016	Letterhead	John Smith	208	811.00	0.00	0.00	21.00
2020	9/21/2016	Employee Manual	John Smith	784	151.75	0.00	0.00	80.00
2220	2/10/2016	Employee Manual	Ann M. Lind	1284	1311.72	0.00	514.00	801.42
2054	9/21/2016	Hardware	John Smith	2460	27.74	0.00	4.00	72.00
2264	9/16/2016	Discount Window Installation	John Smith	8046	172.50	0.00	0.00	172.50
2267	6/20/2016	Client ABC Transaction	John Smith	258	2720.00	0.00	2716.00	4.00
2268	9/20/2016	Print	Michael Cole	127	4700.00	0.00	-4700.00	470.00
2268	9/20/2016	Mount Trussler Struts/Ch...	Michael Cole	127	2800.00	0.00	-2800.00	1020.00



Attached customer files will be sorted chronologically with the most recent file appearing at the top of the list. Because the customer files are linked to the customer account these files will appear in any job created for that customer.

### Attaching PO Documents

Documents relating to a Purchase Order can be attached automatically or manually.

#### Automatically Attaching Purchase Order Documents:

In the Job window right click on a service and from the menu that appears select **Purchase Order...**

Item	Description	Quantity	Time	Price/Hr
<b>1</b>	<b>Brochure 1 Original (2 sides)</b>	<b>1,000</b>		
	Offset: 60# Color · Parent 11 x 17 · 2 out 2 up Blue · Black + 1 Color 267/ Black + 1 Color ...	394		
	Cutting - prep: To RunSz 1 Cuts/Sheet	1	0:02	60.00
	Plate: CTP Plate	2		
	Small Press: 2 Color Press - Using Paper Properties · Wash: 1 Mix: 1	1,574	1:59	125.01
	Cut: To FinSz 1 Cuts/Sheet	2	0:03	96.00
	<b>Fold: Auto 1 Fold - Text wt. · Harbor Bindery Malaika Douglas 442-875-2867</b>	<b>1,000</b>	<b>0:13</b>	<b>60.00</b>
<b>2</b>	<b>Business Cards Michelle Greene 1 Name (1 side) · Use Price Table</b>			
	Cover Coated: 10pt C2S · Parent 11 x 17 · 2 out 12 up White-Warm · Color / Name			
	Cutting - prep: To RunSz 1 Cuts/Sheet			
	Printer: Printer - Color			
	Cut: To FinSz 15 Cuts/Sheet			

- New Item...
- Sub-Item...
- Paste this Item...
- Edit Specs...
- Edit Costs...
- Edit Service...
- View Vendor...
- Purchase Order...**

In the Purchase Order window click the **Email PDF** button and a PDF copy of the purchase order will automatically be attached to the PO files for that item.

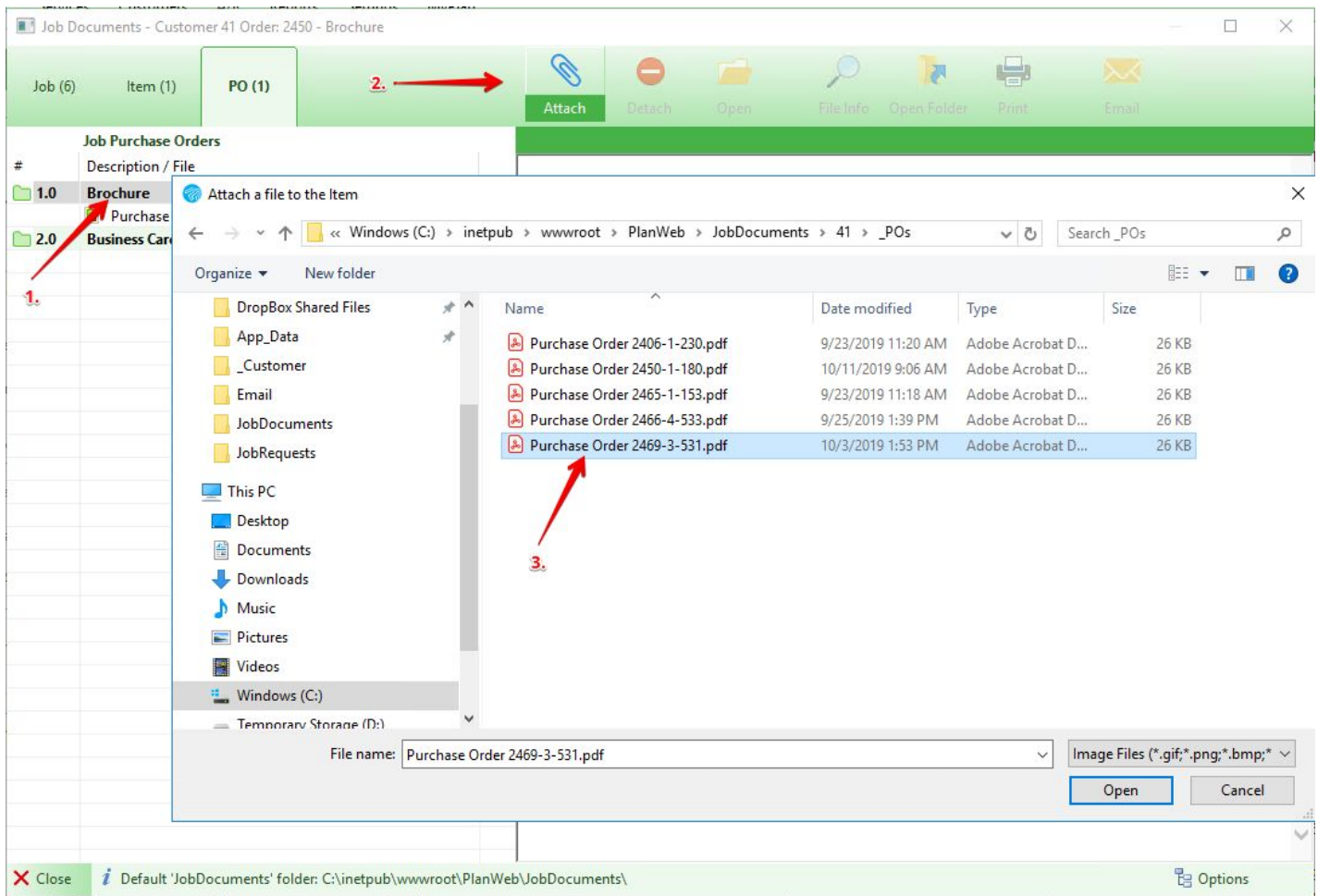
The screenshot shows the 'Purchase Order' window with several components:

- SEND TO:** Harbor Bindery, 12 Ambassador Lane, Guilford MD 21985.
- SHIP TO:** Customer Back to Us.
- DOCUMENT:** Purchase Order.
- Job Documents:** Customer 41 Order: 2450 - Brochure. A list shows 'Purchase Order 2450-1-180.pdf' highlighted.
- Table:**

Quantity	Description / Instructions	Cost
1000	Fold	10.40
- Options:**
  - Print:
    - Company Logo
    - print if amount is not zero:**
    - Unit Cost
    - Cost/Ship/Tax/TOTAL
- Bottom Bar:** Close, Print Now, Print To..., **Email PDF** (highlighted with a red box and arrow), Email Text, Select..., View.

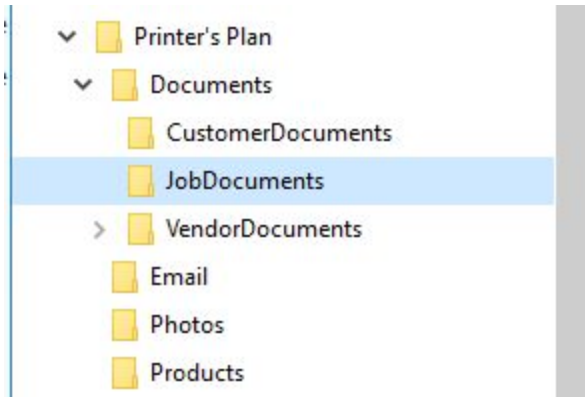
**Manually Attaching PO Documents:**

To manually attach a purchase order file, open the Job Documents window, select the **PO** tab and highlight the item description. Click the **Attach** button and in the **Attach a file** window select the file you wish to attach.

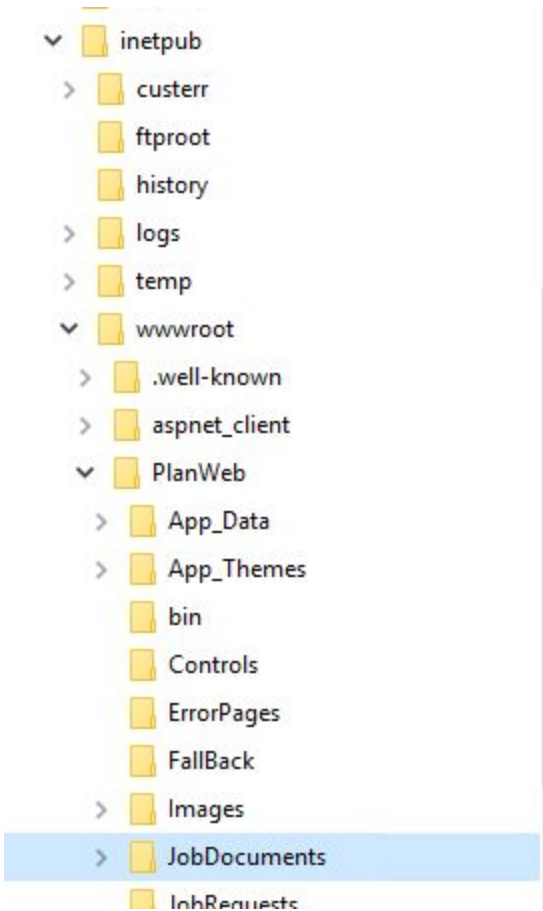


**Set the Location of the JobDocuments Folder**

To utilize the full benefits of the intelligent document feature there needs to be a central location on your network where the documents are stored. By default, on your server computer, in the directory where your Printer's Plan database is located there is a **Documents** folder. Inside this folder there is a **JobDocuments** subfolder -- this is the parent folder that is designed to store all the documents:

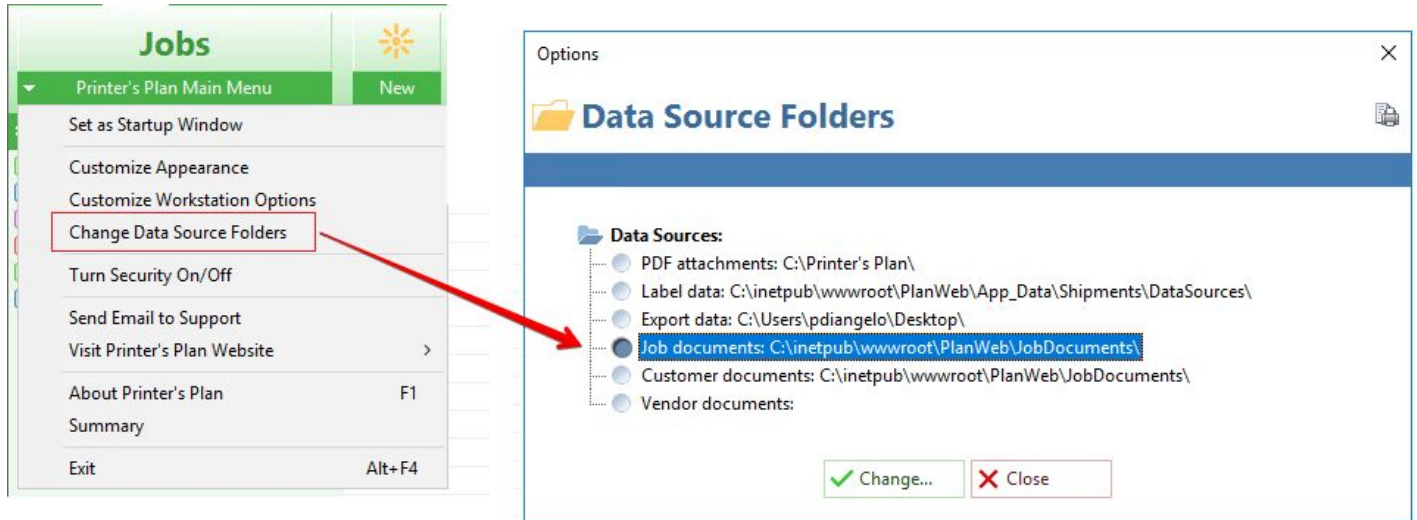


If you are running the Cloud Hosted version of Printer's Plan, or one of our web integration solutions, the JobDocuments folder is located in the **C:\inetpub\wwwroot\PlanWeb\JobDocements folder:**



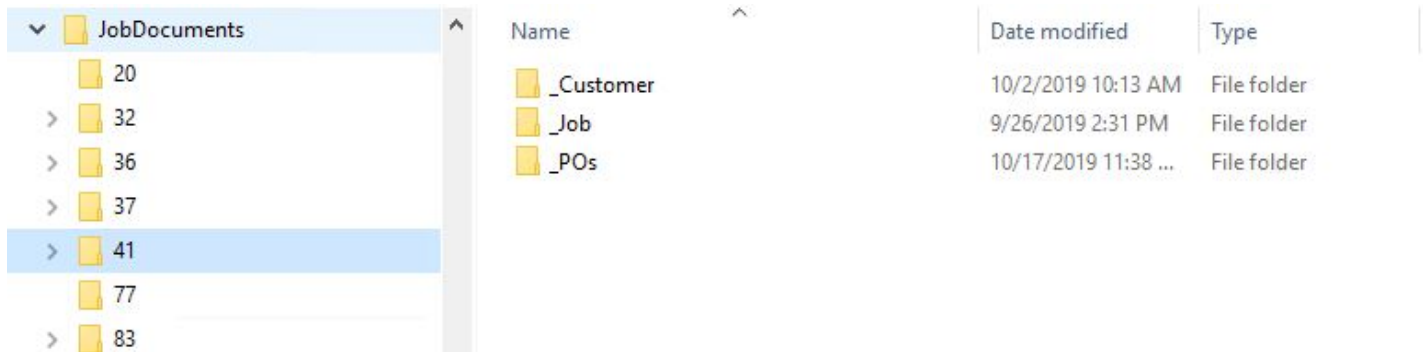
On each workstation computer that runs Printer's Plan you will want to make sure that the path of the JobDocuments folder is set to the correct location. This allows the attached documents to be viewed from each workstation. To set this path do the following on each workstation computer:

1. From the **Printer's Plan Main Menu** select **Change Data Source Folders** (as shown below).
2. In the **Data Source Folders** window, click the **Job documents** option.
3. In the **Browse** window, find and select the **JobDocuments** folder.



### Folder Structure

Inside the JobDocuments directory there should be a sub folder for each customer, the name of the folder for each customer is their Printer's Plan customer number:



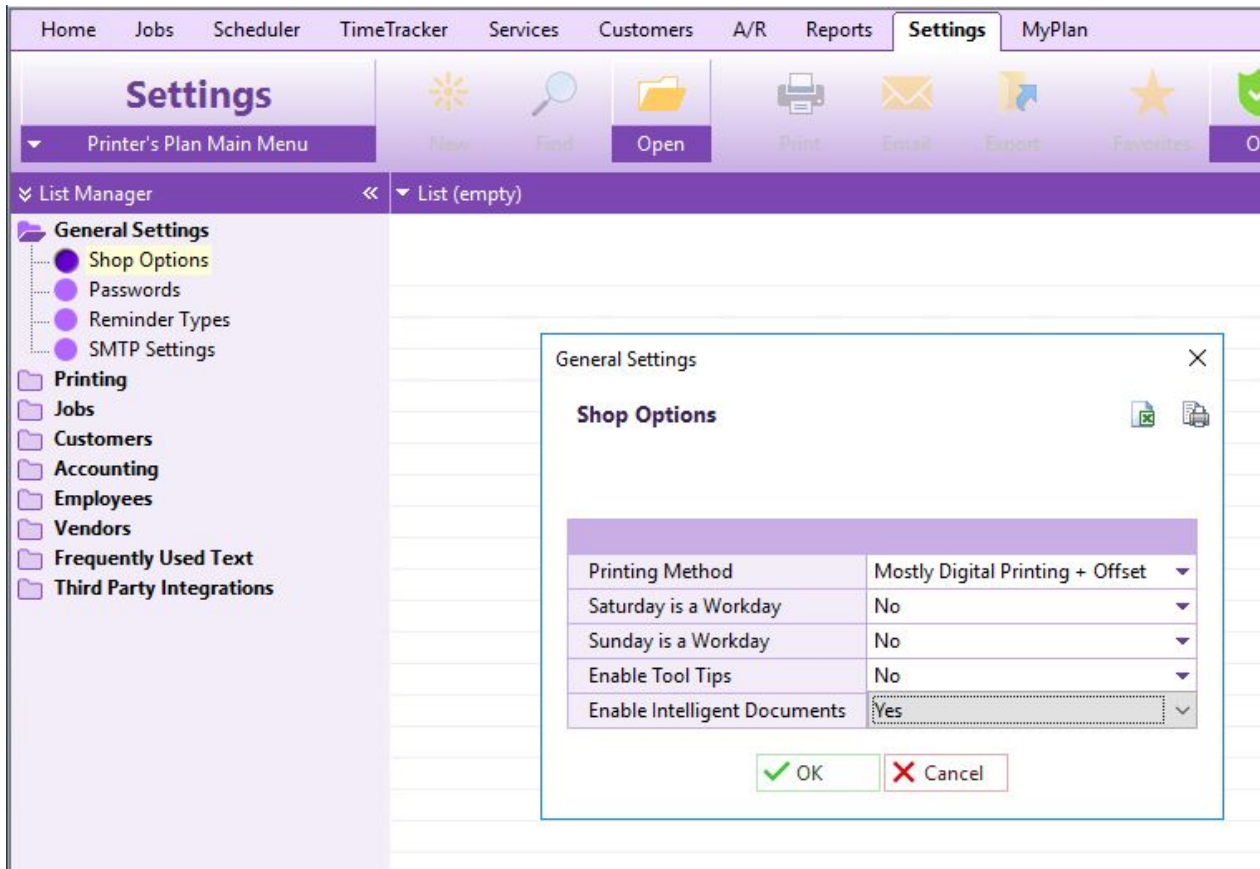
Inside the customer's folder there are subfolders to store the Printer's Plan documents:

- The **\_Customer** folder is designed to store customer related documents.
- The **\_Job** folder is designed to store job related documents such as Quotes and Invoices.
- The **\_POs** folder is designed to store purchase order documents.

These folders are created automatically when you attach a document using an **Automatic** file attachment method.

### Enable Intelligent Documents

To enable the Intelligent Documents feature go to the **Settings Tab**, open the **General Settings** folder and select **Shop Options**. In the menu that appears, in the **Enable Intelligent Documents** field select **Yes**.



## LARGE FORMAT PRINTING IMPROVEMENTS

### Overview

In the 2020 version of Printer's Plan the large format layout window has been redesigned. New fields have been added to this window to assist with cost and price calculations for large format print jobs. There is also a new field called **Multiple Parts**, this field is designed to enable the calculations for large format paneling jobs. A paneling job would consist of an item where the final document size exceeds the dimensions of the printable material.

### New Fields of the Large Format Layout Window

When creating a large format job, after selecting a large format material, the large format layout window will appear. This window has been updated with the following changes:

Large Format
✕

Medium: Adhesive Vinyl - \$3 per sq. ft.		Layout	
<i>Modified</i>	08/15/2016	Available Width	52
<i>Inventory</i>	Not tracked	Yield	10 (2 ups x 5 rows)
<i>Reminder</i>		Mat'l Area	10,530 (54 Width x 195 Length)
Medium		Print Area	8,640 (10 Out x 24 x 36) No-Print: 1890 (1.
Size	Roll 54		
↔ Doc.Size	24 x 36		
1. Multiple Parts	No		
2. Panels	0		
#Ups...	2		
3. Print...	1 Side		
🏠 Vendor			
Note			
Margins (in inches)			
4. Machine Margin	1		
5. Lead Margin	8		
6. Trailing Margin	4		
Spacing (Gutter in inches)			
Horizontal	1.50		
Vertical	0		
Bleeds			
7. Top	.25		
Bottom	.25		
Left	.25		
Right	.25		
Difficulties			
Coverage	Normal		
Resolution	Normal		

✓ OK
✕ Cancel

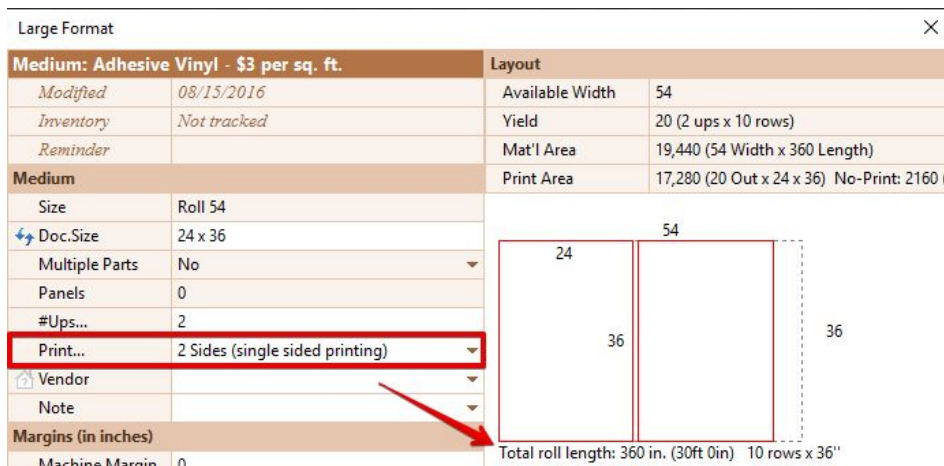
8. Save Default Options...

1. **Multiple Parts:** This field is used to enable paneling jobs and will automatically be set **Yes** if the document size of the item exceeds the available dimensions of the material.
2. **Panels:** On Multiple Part items this field will be enabled and display the number of required panels.
3. **Print...:** This field has been updated to include the following options:
  - **No-Print:** This option should be selected if you are not printing on the material.
  - **1 Side:** This option should be selected if you are printing a single sided document.
  - **2 Sides (double sided printing):** This option should be selected if you are printing a two sided document and you are printing on both sides of the material.
  - **2 Sides (single sided printing):** This option should be selected if you are printing a two sided document and only printing on one side of the material (An example of this selection can be seen in the next section: [Example of Printing 2 Sides \(single sided printing\)](#)).

4. **Machine Margin:** This field is used to calculate the available printable width. For example, on a roll material that is 54 inches wide, if the **Machine Margin** field is set to 1 inch Printer's Plan will adjust the available width from 54 to 52 inches.
5. **Lead Margin:** This field captures the amount of material required at the beginning of the job before the initial print.
6. **Trailing Margin:** This field captures the amount of material required at the end of the job after the final print.
7. **Bleeds (Top, Bottom, Left, Right):** The values in these fields will extend the amount of area that needs to be printed for each document.
8. **Save Default Options...:** This button allows you to set the default values for the Margin, Spacing and Bleed fields. To set the defaults, create a large format job and navigate to the layout window. Enter default values in the **Margin, Spacing** and **Bleed** fields then click the **Save Default Options...** button. The default values are automatically applied to new large format jobs.

**Example of Printing 2 Sides (Single Sided Printing):** Item Quantity = 10, Sides = 2, Document size = 24 x 36. This document is printed on a roll material and mounted to foam board. In previous versions of Printer's Plan, to accurately calculate this type of job two items needed to be created — one for the roll material, the other for the foam board. In the 2020 version this type of job can be created in a single item using the 2 Sides (single sided print) option.

When selecting the roll material, in the **Print...** field of the layout window select the **2 Sides (single sided printing)** option. This selection will increase the amount of material required on the job to account for both sides of the final document being printed on a single side of the material.



The foam board material calculations are still based on the item quantity and document size:

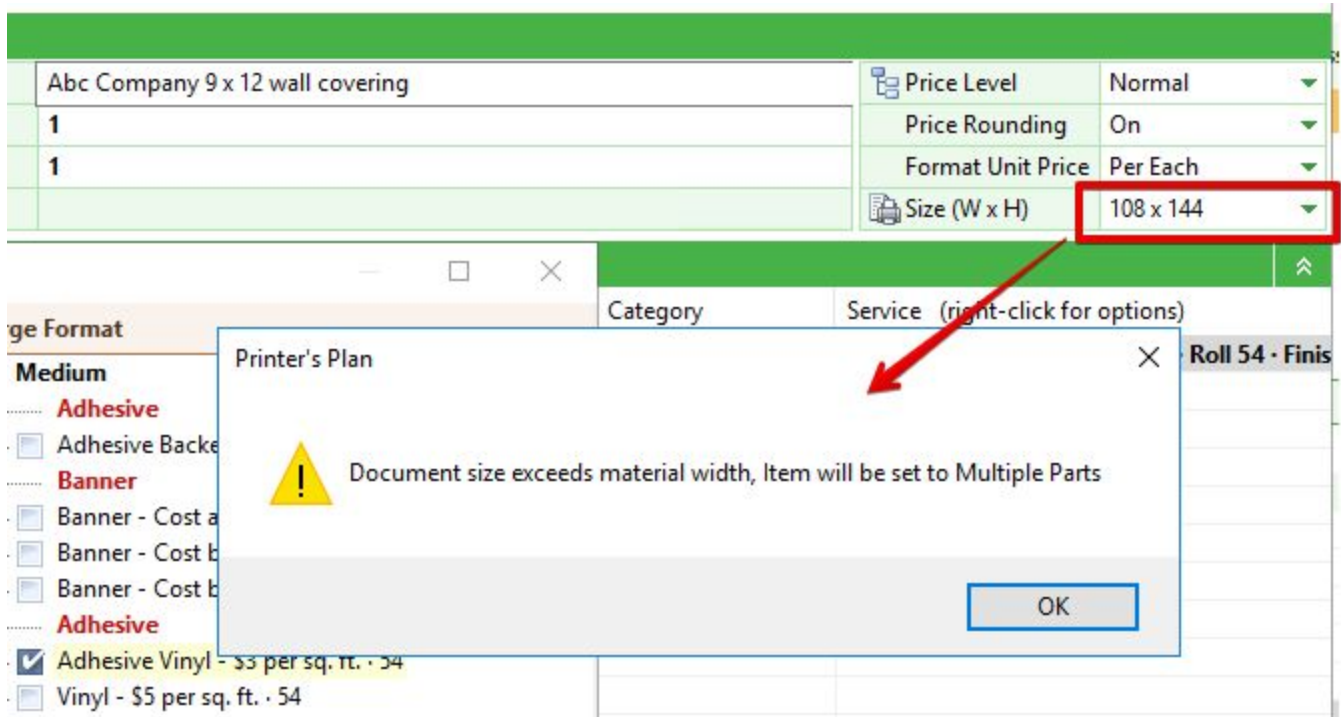
When we price the item, Printer's Plan will reflect the correct amount of materials required to produce the document:

Item	Description	Quantity	Time
1	<b>ABC Company Signs 1 Original 24 x 36</b>	10	
	Medium: Adhesive Vinyl - \$3 per sq. ft. · Roll 54 · Finish 24 x 36 (2 up) 2 Sides Horz.Space: 1.00	30	
	Substrate: Foam Board - 3/16" · Flat 48 x 96 · Finish 24 x 36 (5 up) No-Print	2	
	Printer: Roll-Fed Printer (Price Table)	120	1:03

### New Paneling Job Option

When the document size exceeds the dimensions of the large format material Printer's Plan will set the **Multiple Parts** field in the layout window to **Yes**. When the Multiple Parts field is set to **Yes**, the **Panels** field in the layout window is enabled and the program will calculate the optimal number of panels. The width of the document will be distributed equally between each of the panels.

**Example of Paneling Job on Roll Material:** Item Quantity = 1, Document Size = 108" x144" printed on a 54" roll material. When we select the material, Printer's Plan will display an alert indicating the document size is larger than the material width and the **Multiple Part** field will be set to **Yes**.



In the Large Format Layout window Printer's Plan will calculate the minimum number of panels. The width of the document will be distributed equally between the panels. In this example, since there are two panels, each panel has a width of 54".

Medium: Adhesive Vinyl - \$3 per sq. ft.		Layout	
<i>Modified</i>	08/15/2016	Available Width	54
<i>Inventory</i>	Not tracked	Yield	1 No-Print: 1
<i>Reminder</i>		Mat'l Area	15,552 (54 Width x 144 Length)
<b>Medium</b>		Print Area	15,552 (1 Out x 108 x 144) No-Print: 0 (0%)
Size	Roll 54		
Doc.Size	108 x 144		
Multiple Parts	Yes		
Panels	2		
#Ups...	2		
Print...	1 Side		
Vendor			
Note			
<b>Margins (in inches)</b>			
Machine Margin	0		
Lead Margin	0		

Total roll length: 144 in. (12ft 0in) 1 row x 144"

Adjustments made to the **Margin** and **Bleed** fields can impact the calculation of the number of panels. If the job is set to 2 panels, and a **Machine Margin** of 1" is applied to the job, Printer's Plan calculates that the item can no longer fit on two panels. The panel count is increased to 3 and each panel has a width of 36"

The image displays two screenshots of the 'Large Format' software interface, illustrating how a change in the Machine Margin field affects the number of panels.

**Top Screenshot (Machine Margin = 0):**

- Material:** Medium: Adhesive Vinyl - \$3 per sq. ft.
- Layout:** Available Width: 54, Yield: 1 No-Print: 1, Mat'l Area: 15,552 (54 Width x 144 Length), Print Area: 15,552 (1 Out x 108 x 144) No-Print: 0 (0%)
- Medium:** Size: Roll 54, Doc.Size: 108 x 144, Multiple Parts: Yes, Panels: 2, #Ups...: 2, Print...: 1 Side
- Margins (in inches):** Machine Margin: 0, Lead Margin: 0, Trailing Margin: 0
- Spacing (Gutter in inches):** Horizontal: 0, Vertical: 0
- Bleeds:** Top: 0, Bottom: 0, Left: 0, Right: 0
- Diagram:** A 108x144 inch document is shown divided into 2 panels, each 54 inches wide and 144 inches high.

**Bottom Screenshot (Machine Margin = 1):**

- Material:** Medium: Adhesive Vinyl - \$3 per sq. ft.
- Layout:** Available Width: 52, Yield: 1 No-Print: 2, Mat'l Area: 15,552 (54 Width x 144 Length), Print Area: 15,552 (1 Out x 108 x 144) No-Print: 0 (0%)
- Medium:** Size: Roll 54, Doc.Size: 108 x 144, Multiple Parts: Yes, Panels: 3, #Ups...: 3, Print...: 1 Side
- Margins (in inches):** Machine Margin: 1, Lead Margin: 0, Trailing Margin: 0
- Spacing (Gutter in inches):** Horizontal: 0, Vertical: 0
- Bleeds:** Top: 0, Bottom: 0, Left: .5, Right: .5
- Diagram:** A 108x144 inch document is shown divided into 3 panels, each 36 inches wide and 144 inches high. The total roll length is 144 in. (12ft 0in) 1 row x 144".

Red arrows in the image point from the Machine Margin field in the bottom screenshot to the 'Panels' field and the layout diagram, showing the transition from 2 panels to 3 panels.

Please note, changes to the **Bleed** and **Margin** fields are not diagrammed in the Large Format Layout window on panel jobs. The program currently will only display the final document layout. Additionally, **Lead** and **Trail** values are applied to each panel.

Based on the number of panels, and the size of the document, Printer's Plan will calculate the total amount of printed area and materials used.

Item	Description	Quantity	Time	Price/Hr	Unit Price	Price	±	L	E*	S
1	Abc Company 9 x 12 wall covering 1 Original 108 x 144	1			496.4800/Ea	496.48				
	Medium: Adhesive Vinyl - \$3 per sq. ft. · Roll 54 · Finish 108 x 144 (3 up) 1 Side	36			9.0000/Ea	324.00				
	Printer: Roll-Fed Printer (Cost+)	108	0:59		1.5970/Ea	172.48				

The detailed information relating to the number of panels and the panel size is printed Work Order document.

Specs - This job has 1 Item		From
ITEM 1	1 Abc Company 9 x 12 wall covering 1 Original 108 x 144	Time
Large Format	Medium: Adhesive Vinyl - \$3 per sq. ft. - Roll 54 - Finish 108 x 144 (3 up) 1 Side	
	<b>Panel Size: 36.000 x 144.000</b>	
	<b>Panel Size w/ Bleed: 37.000 x 144.000</b>	
	<b>Panels Per Document: 3</b>	
	<b>Total Panels: 3</b>	
	<b>Margins: Machine: 1</b>	
	<b>Bleeds: Left: .5, Right: .5</b>	
	Printer: Roll-Fed Printer (Cost+)	0:59

**Example of Paneling Job on Flat Material:** Item Quantity = 1, Document Size = 108" x 144" printed on a 48" x 96" substrate using a flatbed printer. When using a flat material Printer's Plan will calculate the number of panels by distributing the printed size of the final document equally among each of the panels:

Large Format ✕

Substrate: Corrugated Plastic White		Layout	
<i>Modified</i>		Available Width	48
<i>Inventory</i>	Not tracked	Yield	1 Out (6 Panels Each)
<i>Reminder</i>		Mat'l Area	27,648 (Panels 6 x 48 x 96)
Medium		Print Area	15,552 (1 Out x 108 x 144)
Size	Flat 48 x 96		
Doc.Size	108 x 144		
Multiple Parts	Yes		
Panels	6		
#Ups...	1		
Print...	1 Side		
Vendor	None		
Note			
Margins (in inches)			
Machine Margin	0		
Lead Margin	0		
Trailing Margin	0		
Spacing (Gutter in inches)			
Horizontal	0		
Vertical	0		
Bleeds			
Top	0		

Total Panels: 6

Adjustments made to the **Margin** and **Bleed** fields can impact the calculation of the number of panels. Please note, changes to the **Bleed** and **Margin** fields are not diagrammed in the Large Format Layout window on panel jobs. The program currently will only display the final document layout.

Based on the number of panels, and the size of the document, Printer's Plan will calculate the total amount of printed area and materials used.

Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
1	Abc Company 9 x 12 wall covering 1 Original 108 x 144	1			312.7700/Ea	312.77
	Substrate: Corrugated Plastic White - Flat 48 x 96 - Finish 108 x 144 (1 up) 1 Side	6			32.0000/Ea	192.00
	Printer: Flatbed Printer	108	0:33		1.1182/Ea	120.77

The detailed information relating to the number of panels and the panel size is printed Work Order document.

Specs - This job has 1 Item		Time
<b>ITEM 1</b>	<b>1 Abc Company 9 x 12 wall covering 1 Original 108 x 144</b>	
Large Format	Substrate: Corrugated Plastic White - Flat 48 x 96 - Finish 108 x 144 (1 up) 1 Side	
	<b>Panel Size: 36.000 x 72.000</b>	
	<b>Panels Per Document: 6</b>	
	<b>Total Panels: 6</b>	
	Printer: Flatbed Printer	0:33

### New Pricing Formulas

To accommodate the new fields in the Large Format layout window the following pricing formulas have been added to the properties window of a service:

Pricing Properties	
Quantity	Run Size Sheets (no waste)
	--- not used ---
	Item Quantity
	Pages per Set (total sides printed)
	Sheets per Set
	Parent Size Sheets
	Run Size Sheets (with waste)
	Run Size Sheets (no waste)
	Finish Size Sheets (no waste)
	Impressions
	Plates
	Washups
	Ink Mixes
	1 (lot)
	---
	Document Width
	Document Length
	Document Perimeter
	Document Area
Cost	Total Document Width
	Total Document Length
	Total Document Perimeter
	Total Document Area
	---
Price	Total Material Length Used (includes vertical spacing)
	Total Material Area Used (includes spacings)
	Total Printed Length (Total Document Length x Sides)
	Total Printed Area (Total Document Area x Sides)
Markup...	<b>Total Printed Area with Bleeds (Total Document Area Including Bleeds)</b>
	<b>Total Printed Perimeter</b>

**Total Printed Area with Bleeds** -- This value is equal to the (Document Width +Bleeds) x (Document Length+Bleeds) x Item Quantity x Sheets x Sides

Example: Document Width = 12, Document Length = 18, Quantity = 10, Sides = 1, Sheets = 1, Bleeds = .5 (all four sides).

Calculation = (12 + 1) x (18 +1) x 10 x 1 x 1

Total Printed Area with Bleeds = 2470

**Total Printed Perimeter** -- This value is equal to the (Document Width + Document Height) x 2 x Item Quantity x Sheets x 2 (if the document is 2 sided and printed on a single side of the material).

Example: Document Width = 12, Document Length = 18, Quantity = 10, Sides = 1, Sheets = 1, Printed 2 sides using the single sided print option.

Calculation = (12 + 18) x2 x 10 x 1 x 2

Total Printed Perimeter = 1200

### New Display and Print options

When a large format job is set to print on two sides, the **Sides** field of the **Item Specs** page will now reflect this information:

SPECS: Order 2472 - ITEM 5

ITEM 5		Item Properties	
 Large Format	Description	ABC Company Signs	
	Quantity	10	
	Originals	1	
	Sides	2 Sides	
SERVICES		Service Specs	
Add Services From:		Category	Service (right-click for options)
<input type="checkbox"/> All Departments <input checked="" type="checkbox"/> Graphics <input type="checkbox"/> Proof <input type="checkbox"/> Paper		Medium	Adhesive Vinyl - \$3 per sq. ft. - Roll 54 - Finish
		Substrate	Foam Board - 3/16" - Flat 48 x 96 - Finish 24 x 36
		Printer	Roll-Fed Printer (Price Table)

Large Format	
<b>Medium: Adhesive Vinyl - \$3 per sq. ft.</b>	
Modified	08/15/2016
Inventory	Not tracked
Reminder	
Medium	
Size	Roll 54
Doc.Size	24 x 36
Multiple Parts	No
Panels	0
#Ups...	2
Print...	2 Sides (single sided printing)

On the **Specs** window of a large format item, Printer's Plan will display the margin and bleed values for large format material services.

Service Specs	
Category	Service (right-click for options)
Medium	Adhesive Vinyl - \$3 per sq. ft. - Roll 54 - Finish 12 x 18 (3 up) 1 Side Vert.Space: 1.00 Horz.Space: 1.00
	Margins: Machine: 1, Leading: 8, Trailing: 4
	Bleeds: Top: .25, Bottom: .25, Left: .25, Right: .25
Printer	Roll-Fed Printer (Cost+)
Test Services Co...	Total_Printed Perimeter

On the Work Order document, additional information relating to the large format material is now printed:

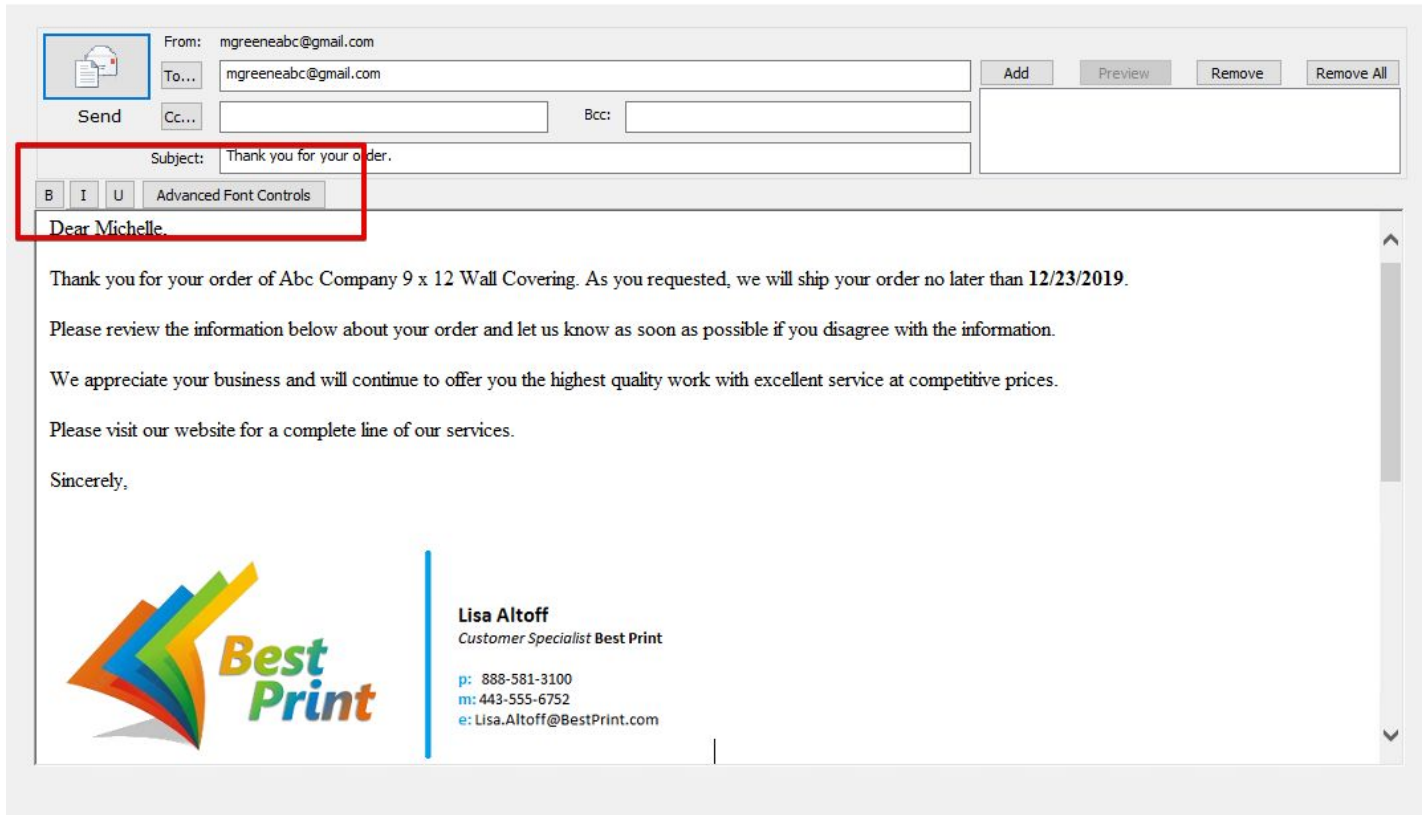
Specs - This job has 2 Items		Time	ActualT	Quantity
ITEM 1	2 Abc Company 9 x 12 wall covering 1 Original 108 x 144			2
Large Format	Substrate: Corrugated Plastic White - Flat 48 x 96 - Finish 108 x 144 (1 up) 1 Side Panel Size: 36.000 x 72.000 Panel Size w/ Bleed: 36.500 x 72.500 Panels Per Document: 6 Total Panels: 12 Margins: Machine: 1 Bleeds: Top: .25, Bottom: .25, Left: .25, Right: .25			12
	Printer: Flatbed Printer	0:50		216

On the Invoice and Quote documents, if the **Print...** field on a large format material is set to **No Print** this text is no longer printed. Previous versions of Printer's Plan always printed this text.

## HTML EMAILS

### Overview

Using the Printer's Plan SMTP client you can now create and send email messages in the HTML format. When an HTML template is selected, the HTML controls in the email window will be enabled.



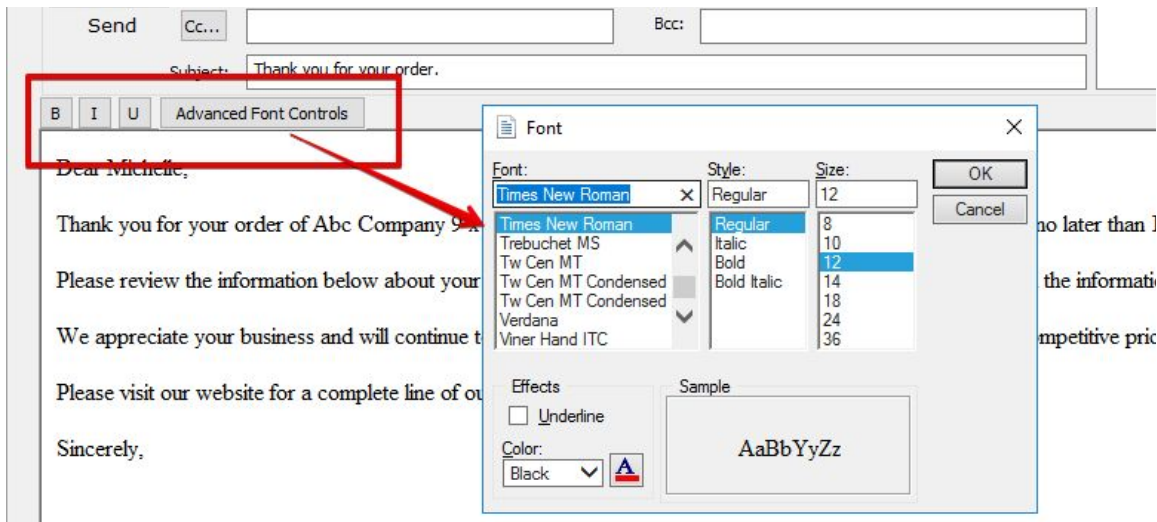
The HTML controls include the following options:

Clicking the **B** button will make the selected text appear in **Bold**.

Clicking the **I** button will make the selected text *italicized*.

Clicking the **U** button will underline the selected text.

Clicking the **Advanced Font Controls** button open a **Font** window allowing you to make additional changes to the selected text:

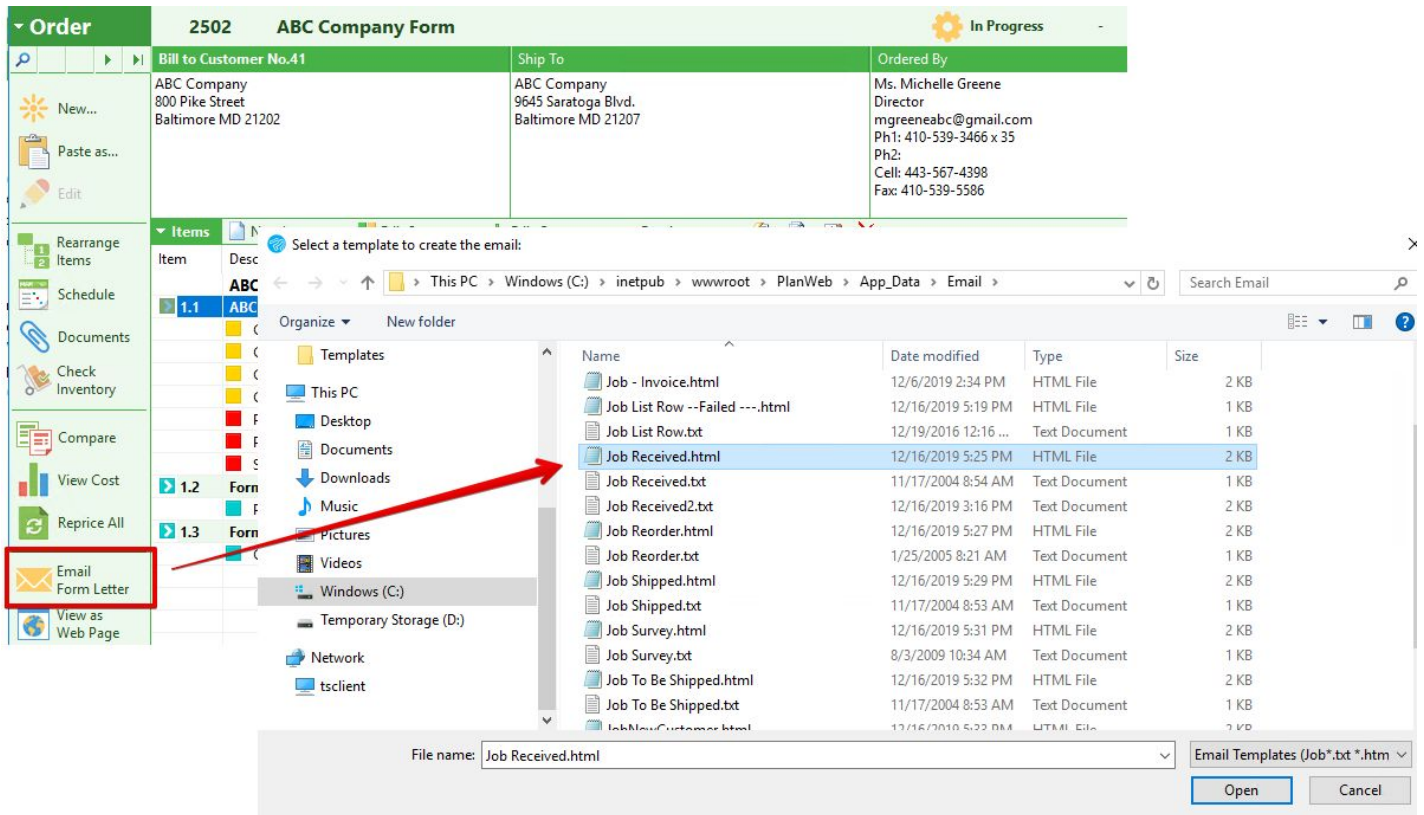


To enable the HTML controls you will need to select an HTML template when generating an email message. In Printer's Plan there are two primary methods of creating an email message:

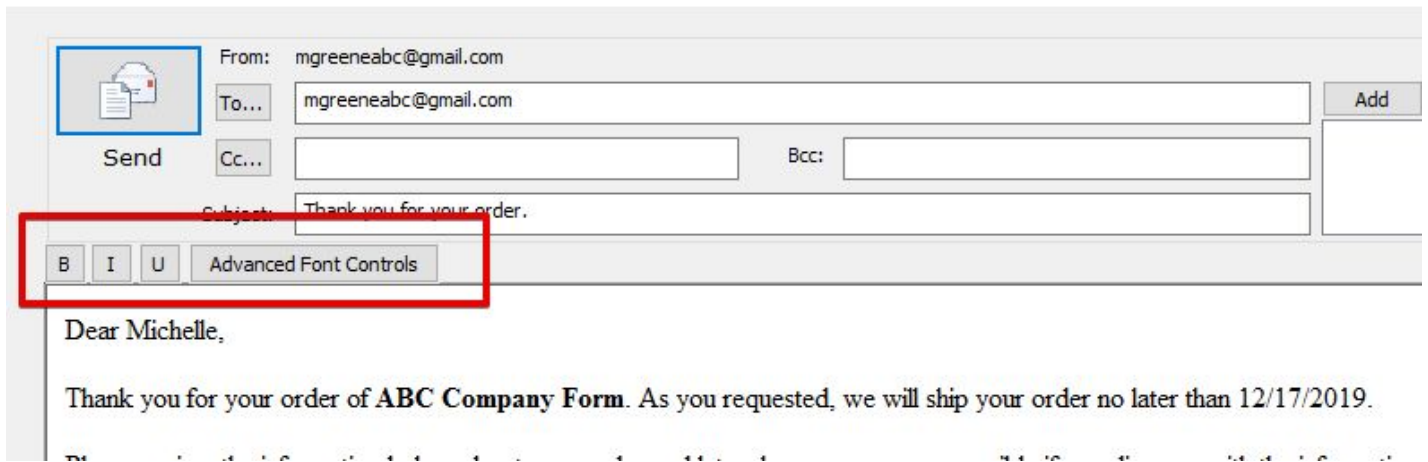
1. Via a form letter, with this process an email template is manually selected.
2. Using the Email PDF button in the Print dialog window. With this method an email template is automatically selected.

### HTML Emails Using a Form Letter

When sending an email message via a form letter Printer's Plan prompts you manually select a template:



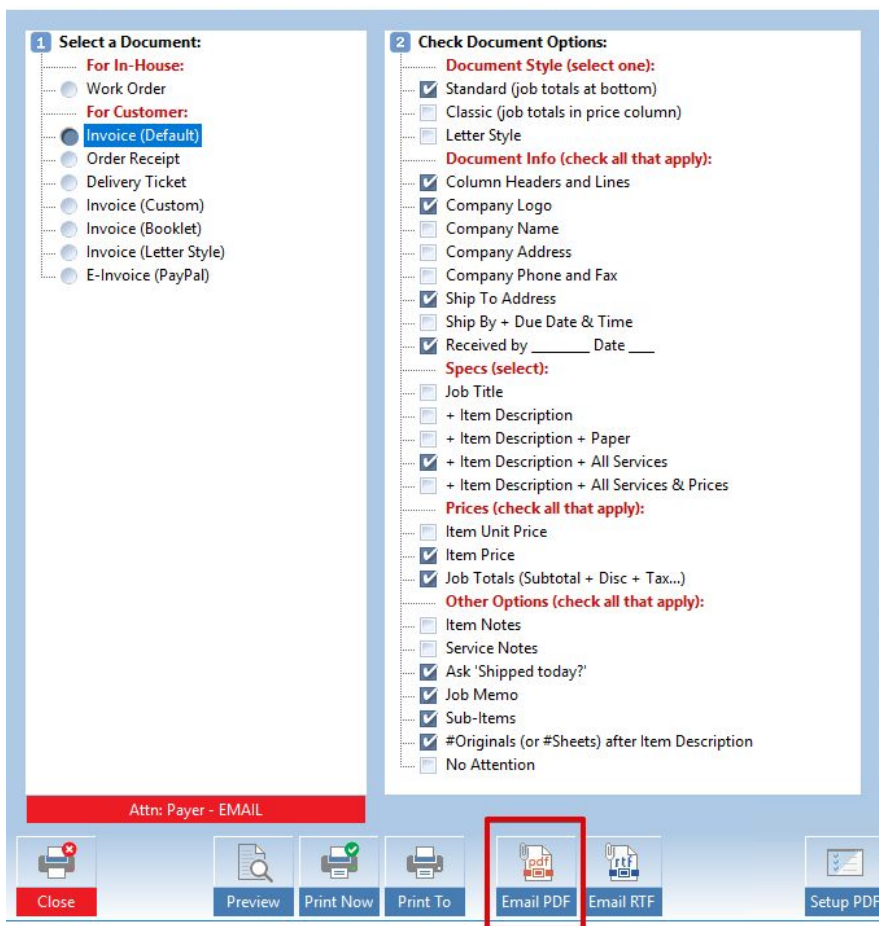
Selecting a template file with a .html file extension enables the HTML options in the Printer's Plan SMTP client window.



If you select a template with a .txt file extension then the email message will be in plain text and the HTML menu buttons will be disabled.

### HTML Emails Using the Email PDF option.

In the Print Dialog window click the Email PDF button:



When the **Email PDF** button is clicked Printer's Plan will automatically select the template file that populates the body of the email message. Printer's Plan uses the template file that has the exact file name as the document title.

In the example above, Printer's Plan will use the template with a file name of **Invoice**. The program first checks if there is an .html version of this file (**Invoice.html**), if the HTML version of the file does not exist then Printer's Plan will use the .txt version of the file (**Invoice.txt**). When the .txt template is selected the email message will appear in plain text and the HTML buttons will be disabled.

Template files that are designed to work with the Email PDF button must reside in the **Email** folder, this folder is located in the directory where the Printer's Plan database is stored.

### Creating HTML Templates.

HTML template files to be used with the email functions in Printer's Plan can be created and customized using a third party HTML editor. Please refer to the **Email Help.txt** file for further naming conventions and a list of Printer's Plan data fields that can be used to populate data in an email template. The **Email Help** file is located in the **Email** folder, this folder is located in the directory where the Printer's Plan database is stored.

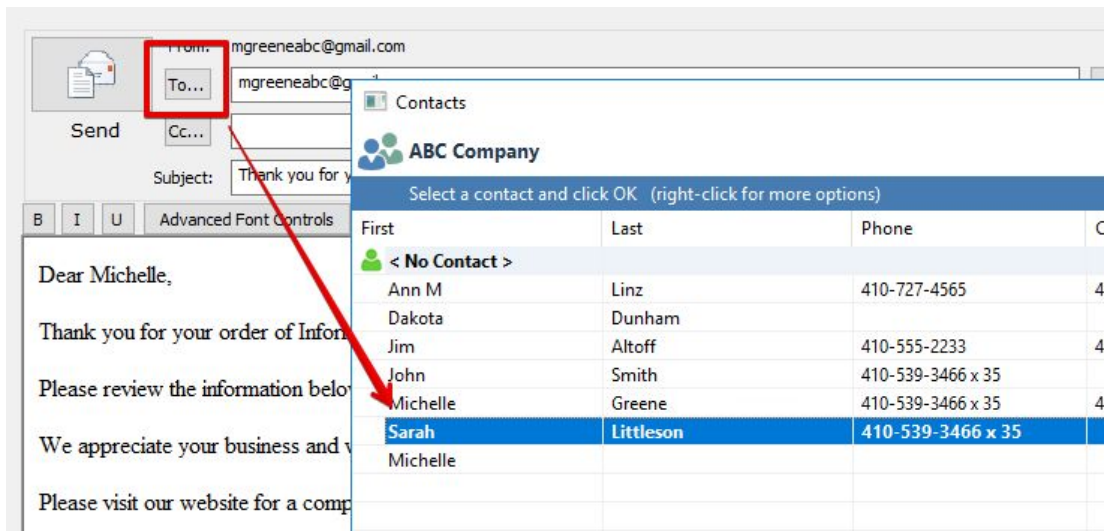
Additionally, HTML templates can be designed to include an image file. For this to work the image has to be located at a publicly available url address.

TIP: Make duplicate copies of the existing Printer's Plan email templates changing the extension of the file from .txt to .html. Using the third party HTML editor you can customize the appearance of the text in the email message.

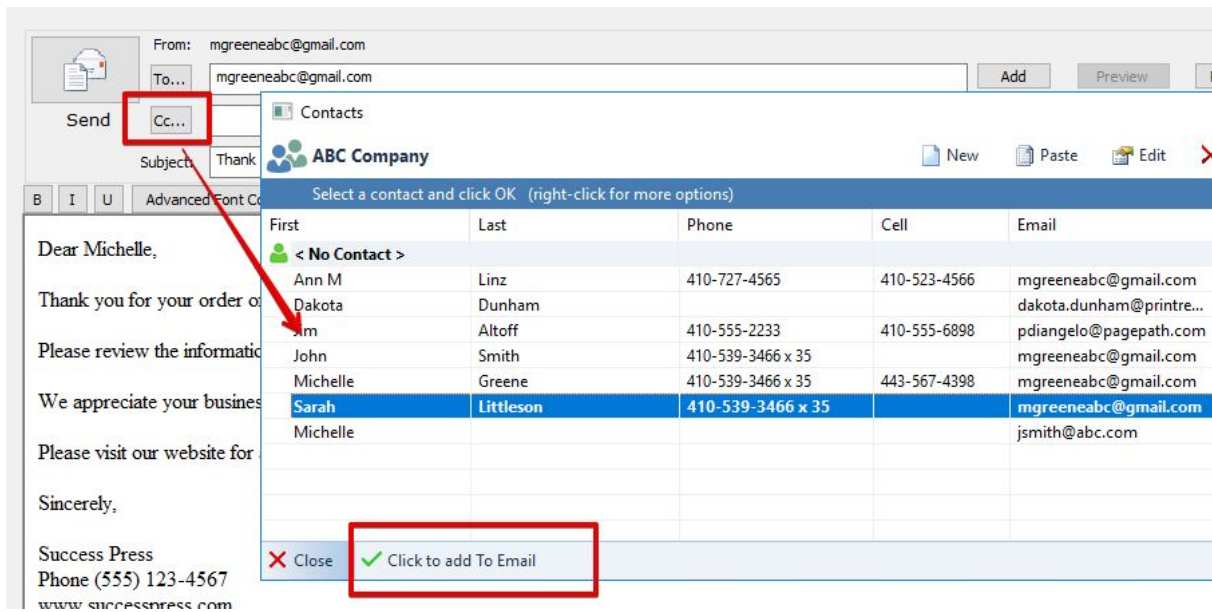
## SMTP CLIENT CHANGES

### Change/Add Email Addresses

In the Printer's Plan **SMTP window** when you click the **To...** button Printer's Plan will now open the **Contacts** window for that customer account. From the **Contacts** window you can select a different contact, this will update the email address in the **To...** field of the email message.

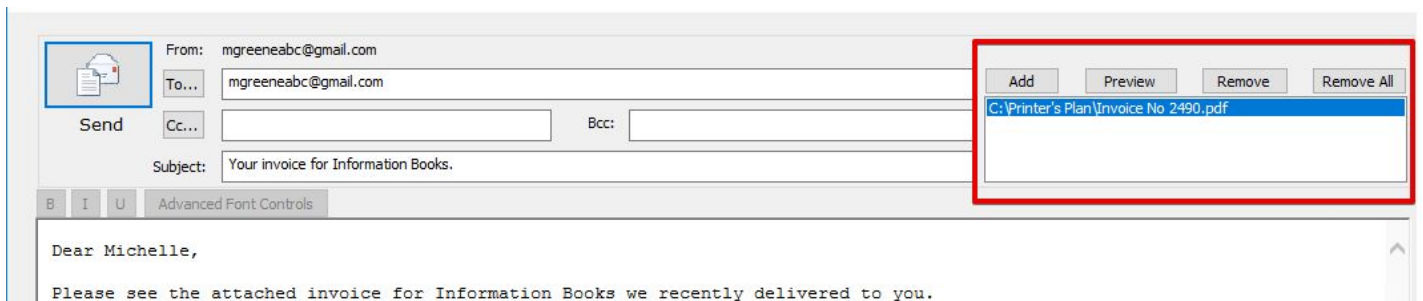


In the **SMTP window** when you click the **CC...** button Printer's Plan will now open the **Contacts** window for that customer account. From the **Contacts** window you can select a contact to add their email address to the **CC...** field of the email message. Repeat this step to add more than one email address to the **Cc...** field.



### Add/Remove Multiple Attachments

In the SMTP window you can now Add or Remove multiple file attachments. Click the **Add** button to add a file to the email. Click the **Remove** button to remove the selected file from the email. Click the **Remove All** button to remove all attached files from the email.

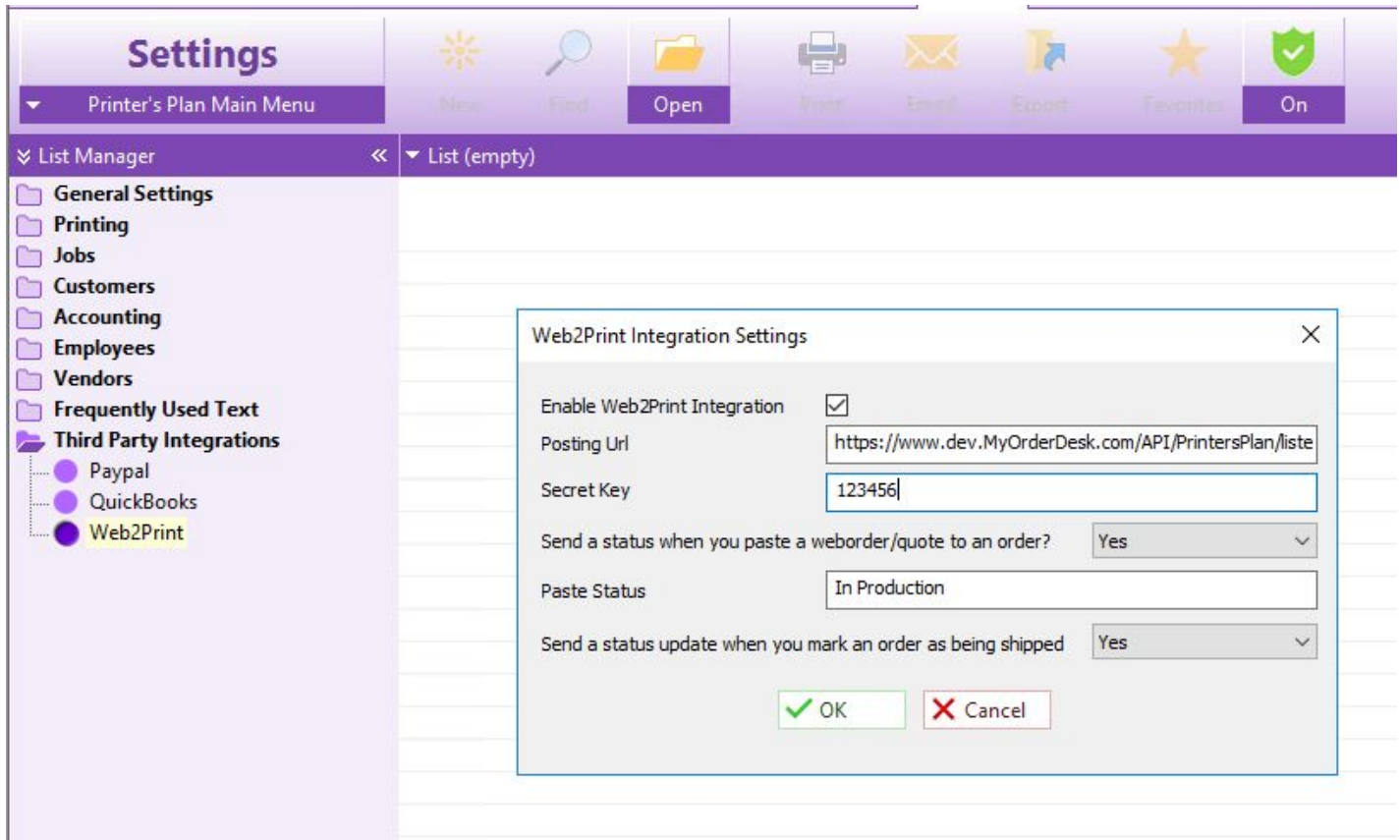


For a detailed explanation that outlines how to enable and configure the SMTP client please refer to the following guide: [SMTP Client Guide](#)

## WEB2PLAN (MY ORDER DESK INTEGRATION) STATUS UPDATES

### Send Status Updates

When an order that originated from a Web2Print site is assigned a **Shipped Date** in Printer's Plan, this status update can automatically be sent to the Web2Print site. 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 a status update when you mark an order as being shipped** field to **Yes** and click **OK**.

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:

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

Shared Secret	<input type="text" value="123456"/>	(required for status updates)
Order Submission URL	<input type="text" value="http://plandev.printvelocity.net/PlanWeb/XMLListener.aspx"/>	
Pricing Request URL	<input type="text" value="http://plandev.printvelocity.net/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 Printer's Plan Web2Plan settings page as your Posting URL:

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

Here is an example of this workflow, in Printer's Plan the Order is marked as being Shipped.

When

Job Title

 **Received**  12/16/2019

**Proof Due**  12/16/2019

**Job Due**  12/16/2019

**Ship By**

**Shipped**  12/16/2019

**Reorder**  12/16/2019

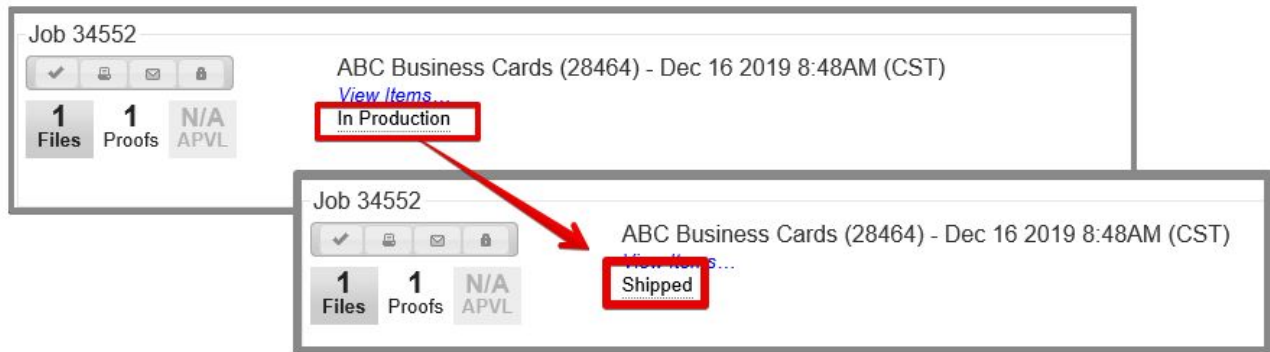
**P.O.**

**Location**

**C.S.R.**

**Job Status**

This status update is automatically sent to the Web2Print site and the status of the job is updated from **In Production** to **Shipped**:



The Web2Print site can be configured so that an email is automatically sent to the customer when the status of the job is changed.



## NEW REPORT

### Sales by Customer + Postage Details.

This report provides a detailed list of all the jobs during the selected time period that had a postage amount greater than zero:

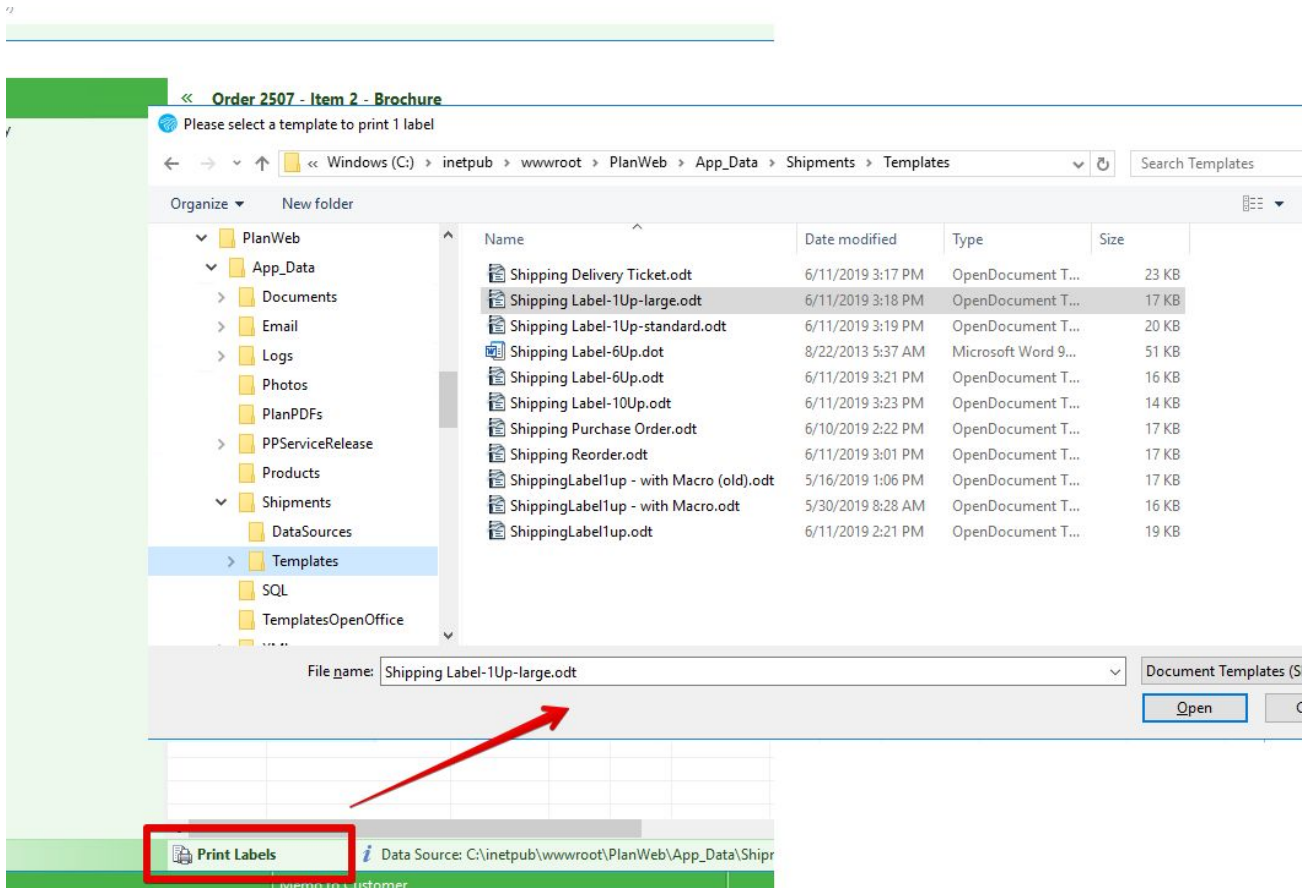
Customer Name	Customer Number	Job Number	Job Total	Postage Amount	Job Balance
5 Interesting Stores	6781	157073	947.19	341.77	0.00
5 Interesting Stores	6781	158200	10610.74	5387.63	0.00
5 Interesting Stores	6781	155350	10741.03	5293.62	0.00
5 Interesting Stores	6781	154251	12575.67	5292.16	0.00
5 Interesting Stores	6781	160962	3351.09	1462.81	0.00
5 Interesting Stores	6781	153757	12378.53	5167.98	0.00
5 Interesting Stores	6781	154893	12411.80	5293.91	0.00
Abel Labs	9608	157991	712.38	243.56	0.00
Abel Labs	9608	154849	2164.77	1242.14	0.00
Accent Botique	8069	159765	780.71	548.12	0.00
Accent Botique	8069	160375	773.88	542.65	0.00
Accent Botique	8069	157561	51.21	12.95	0.00
Agriculture Ventures	187	155666	1881.61	918.59	0.00
Agriculture Ventures	187	157007	1251.18	642.09	0.00
Agriculture Ventures	187	156301	1725.06	919.14	0.00
Agriculture Ventures	187	156370	189.48	90.75	0.00
Agriculture Ventures	187	156357	519.04	214.20	0.00
Agriculture Ventures	187	154458	293.63	77.32	0.00
Alternate Methods Productions	5901	157509	7339.79	5061.96	7339.79
Alternate Methods Productions	5901	158677	652.30	135.30	652.30
Alternate Methods Productions	5901	157480	147.16	16.50	0.00
Alternate Methods Productions	5901	160029	183.03	19.80	183.03
Assembly Part	259	158971	446.81	89.70	0.00
Basic Services	9255	156906	87.70	12.15	0.00
Bayside Boating	4361	155877	758.78	276.49	0.00
Bayside Boating	4361	155867	2132.08	171.99	0.00
Bayside Boating	4361	158051	2481.80	181.53	0.00
Bayside Boating	4361	160857	2624.43	197.46	0.00
Bayside Boating	4361	157747	947.67	365.21	0.00
Better Business Bureau	214	158509	697.73	275.64	0.00
Bill for All	9968	157832	798.08	598.85	0.00
Bill for All	9968	158174	2130.43	791.16	0.00

## SHIPMENTS AND LABELS

### Open Office Compatibility

The Shipments and Labels module is now compatible with Open Office. Previously this feature was only compatible with Microsoft Word.

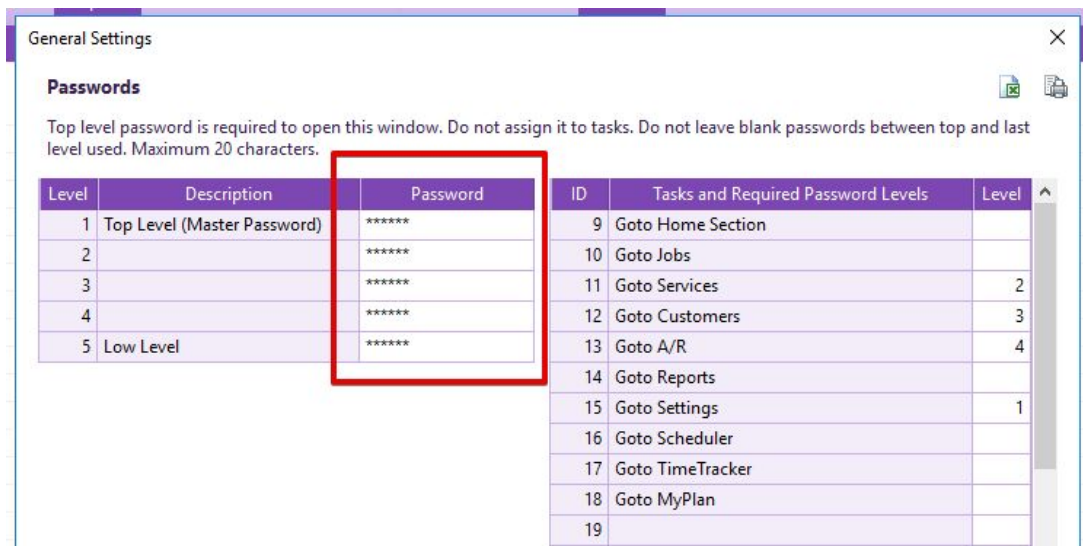
When generating a shipping label, after clicking the Print Labels button Printer's Plan opens a window allowing you to select a template. In this window you can now select template files with a file extension of **'*.odt*'** (Open Office Templates), or **'*.dot*'** (Microsoft Word Templates)



## PASSWORD MASKING

### Password Settings

In the Settings/General Settings/ Password table the password values are now masked.



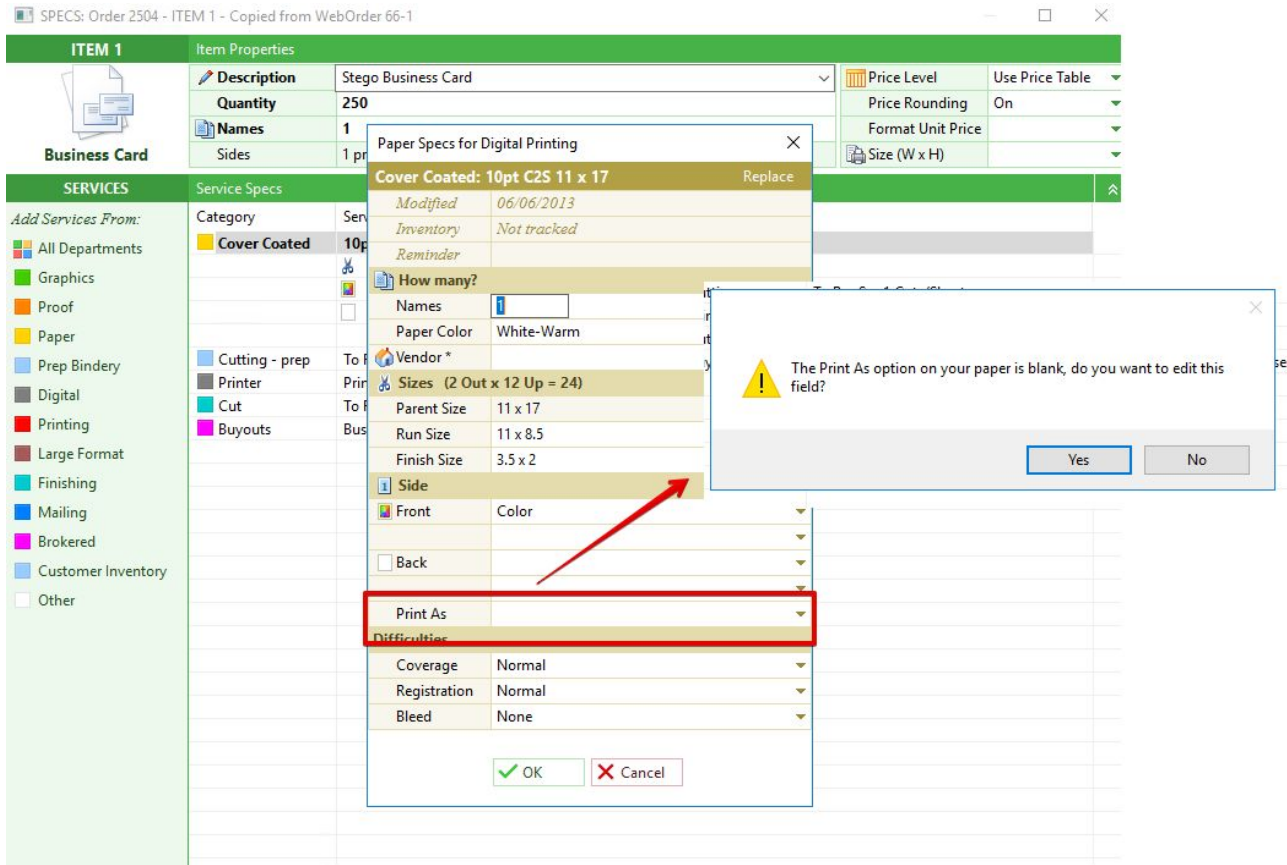
In the Settings/General Settings/ SMTP Settings window the text in the Passwords field is now masked.

The image shows a screenshot of the 'SMTP Settings' dialog box. At the top, there is a title bar with 'SMTP Settings' and a close button. Below the title bar, there is a section 'Enable SMTP' with a checked checkbox. Underneath, there is a section 'Login Information:' containing two fields: 'Email' with the value 'mgreeneabc@gmail.com' and 'Password' which is masked with dots and highlighted with a red rectangular box. Below this is a section 'Server Information:' with four fields: 'SMTP Server' (smtp.gmail.com), 'Outgoing Mail Port' (465), 'IMAP Server' (empty), and 'IMAP Port' (empty). At the bottom of the dialog is a section 'Other Options:' with two fields: 'Mail From' (empty) and 'Send Copy To' (empty). At the very bottom, there are two buttons: 'Save' with a green checkmark icon and 'Cancel' with a red X icon.

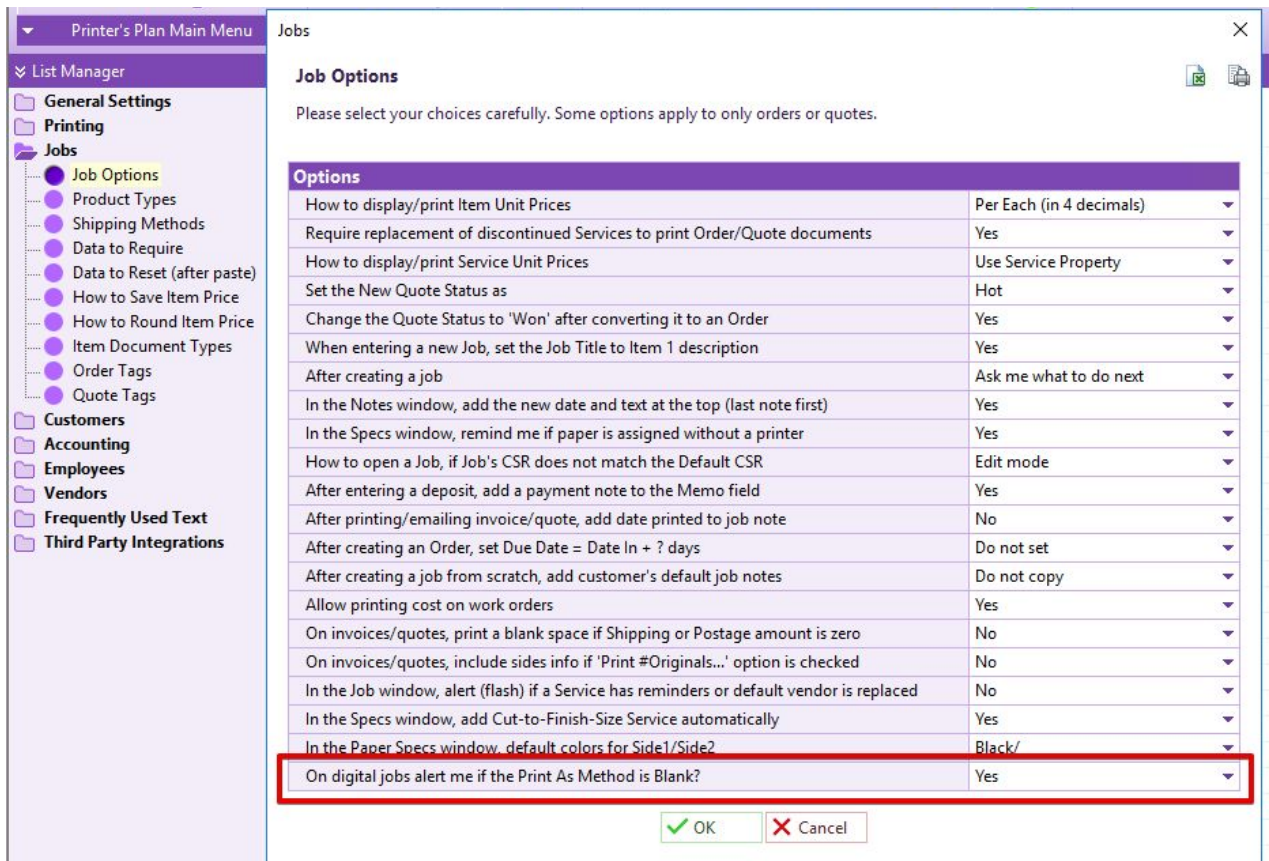
## OTHER CHANGES AND IMPROVEMENTS

### Jobs Section

Optional alert message. If the **Print As** field on a digital jobs is not set (blank value) Printer's Plan will alert you to set this field:



To enable this alert, go to **Settings/Jobs/Job Options** window. In this window set the option **'On digital jobs alert me if the Print As Method is Blank?'** to **Yes**.



## Database

The **Vendors** table was previously limited to 255 records, in the 2020 version of Printer's Plan there is no limit to the number of vendors that can be created.

The length of **Email** field in contact record was increased from 50 to 100 characters.

In the **Payment** window, the field length of the **Reference** field was increased from 16 to 50 characters.

In the **Products Types** window, the field length of the **Product Name** was increased from 20 to 30 characters.

The **WebOrderID** field now accepts text characters, previously this field only allowed numeric values.

## Printing and Display

When printing the cutting diagram the Job and Item number will now print on this document.

When printing a Delivery Ticket for a history job the company address no longer prints at the bottom of the document.

When printing an Invoice using the Letter Style, if the Item Price option is not selected the **Price** column header will no longer print. Previously this column header was always printed.

The job list for WebOrders and WebQuotes will now display the following data columns: Subtotal, Discount, Shipping, Postage and Tax.

## Other Fixes

When a vendor was added to a service there wasn't a way to remove the vendor -- you could only replace the vendor. Now you have the option to remove the vendor from the service.

In a History Job when you pressed **CTRL+B** the selected item was duplicated. This would occur even if the job was not in **Edit** mode. This is now fixed, the job has to be in edit mode to duplicate an item.

When sending an invoice to QuickBooks, the QuickBooks Invoice Due Date is now set to the Printer's Plan Payment Due Date. Previously this date was set to the Printer's Plan Job Due Date.

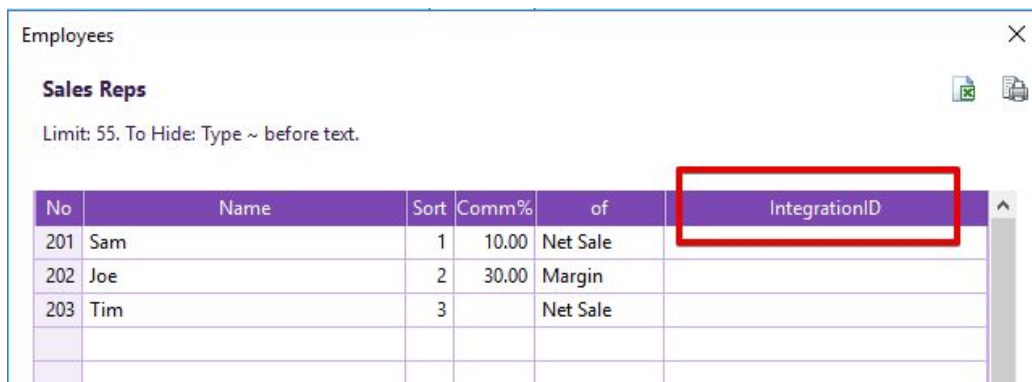
When marking a group of non consecutive jobs as ready to post only the first group of selected jobs was updated. Now all selected jobs will update.

### QuickBooks IIF Import Special Characters

When creating an IIF file for import to QuickBooks if the Printer's Plan data contained a ' character, or the ; character then the export file potentially failed. These characters are now captured and replaced to prevent a failure in the export file.

### QuickBooks Invoice Import - Sales Rep Field

In the Settings/Employees/ Sales Reps table there is a new column **Integration ID**.



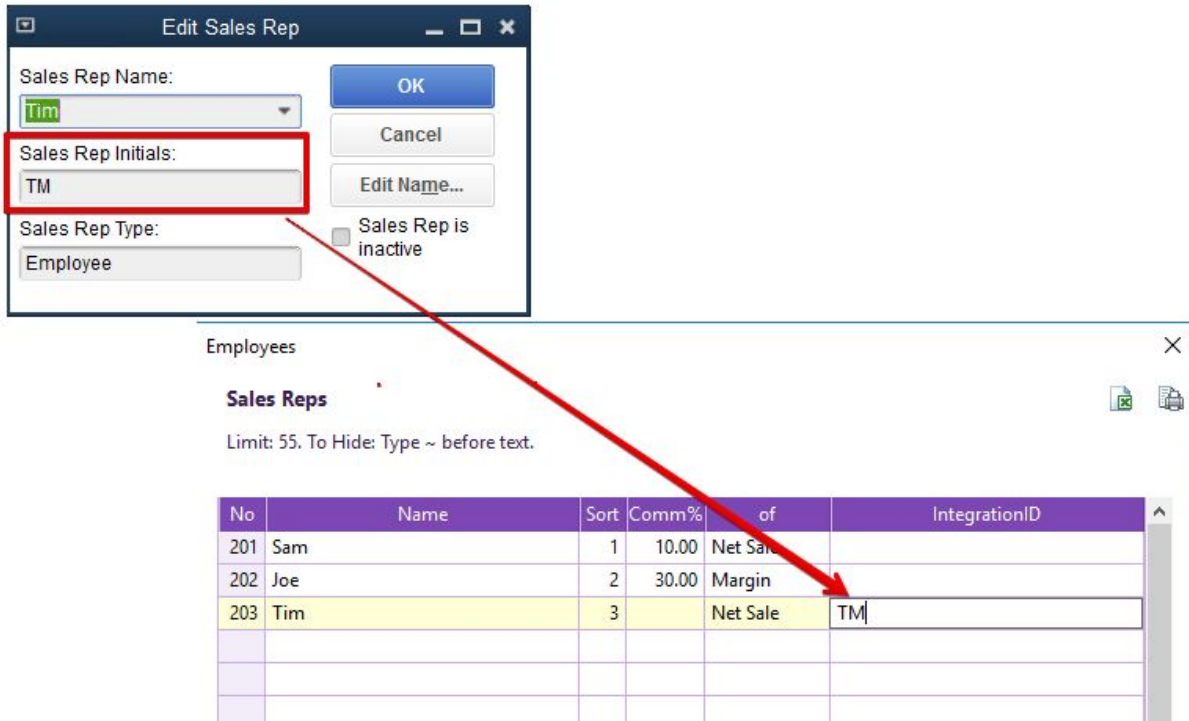
The screenshot shows a window titled 'Employees' with a sub-section 'Sales Reps'. Below the title bar, there are icons for Excel and Print, and a text label 'Limit: 55. To Hide: Type ~ before text.' Below this is a table with the following columns: No, Name, Sort, Comm%, of, and IntegrationID. The 'IntegrationID' column is highlighted with a red box. The table contains three rows of data:

No	Name	Sort	Comm%	of	IntegrationID
201	Sam	1	10.00	Net Sale	
202	Joe	2	30.00	Margin	
203	Tim	3		Net Sale	

The value in this field is used when importing invoice data from Printer's Plan to QuickBooks. There are two methods to import Printer's Plan invoices to Quickbooks -- Direct Connect method, or via an IIF file. These methods are outlined in the following guide: [https://printreach.com/printersplan/docs/UserGuide/QuickBooks\\_Integration.pdf](https://printreach.com/printersplan/docs/UserGuide/QuickBooks_Integration.pdf)

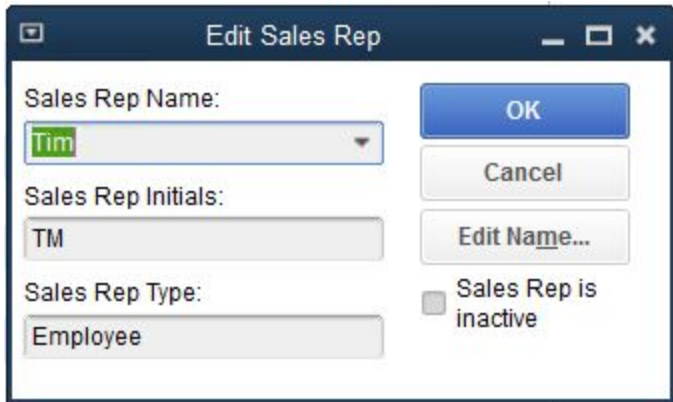
If you are using the Direct Connect method the IntegrationID field should be populated with the initials of the matching QuickBooks Sales Rep.

### QuickBooks Sales Rep



If the IntegrationID field is blank then the sale rep data will not be sent to QuickBooks.

If you are importing invoice data via the IIF method the IntegrationID field should be populated using the following format: **Employee Name: Employee:Employee Initials** In this format the Employee Name and Employee Initials are established in QuickBooks:



In this example the IntegrationID field in Printer's Plan would look like this:

Employees

Sales Reps

Limit: 55. To Hide: Type ~ before text.

No	Name	Sort	Comm%	of	IntegrationID
201	Sam	1	10.00	Net Sale	
202	Joe	2	30.00	Margin	
203	Tim	3		Net Sale	Tim:Employee:TM

If the IntegrationID is blank then the value in the Name field will be used in the IIF export file.

### Canadian Tax Option

In the Settings/General Settings/Shop Options there is a new Enable Canadian Tax Detail option:

General Settings

Shop Options

Printing Method	Mostly Digital Printing + Offset
Saturday is a Workday	No
Sunday is a Workday	No
Enable Tool Tips	No
Enable Intelligent Documents	Yes
Enable Canadian Tax Detail	No

OK Cancel

This setting applies if your Printer's Plan license is linked to an address in Canada. The value in this field should be set to Yes if the invoice needs to display both the GST and PST tax amounts.

## Printer's Plan 2020

### Upgrade Guide

(Revised February 12, 2020)

Printersplan.com - support@printreach.com - 888-581-3100