PRINTREACH

Printer's Plan
MIS for Printers

2021 Update Guide

What's New and Improved

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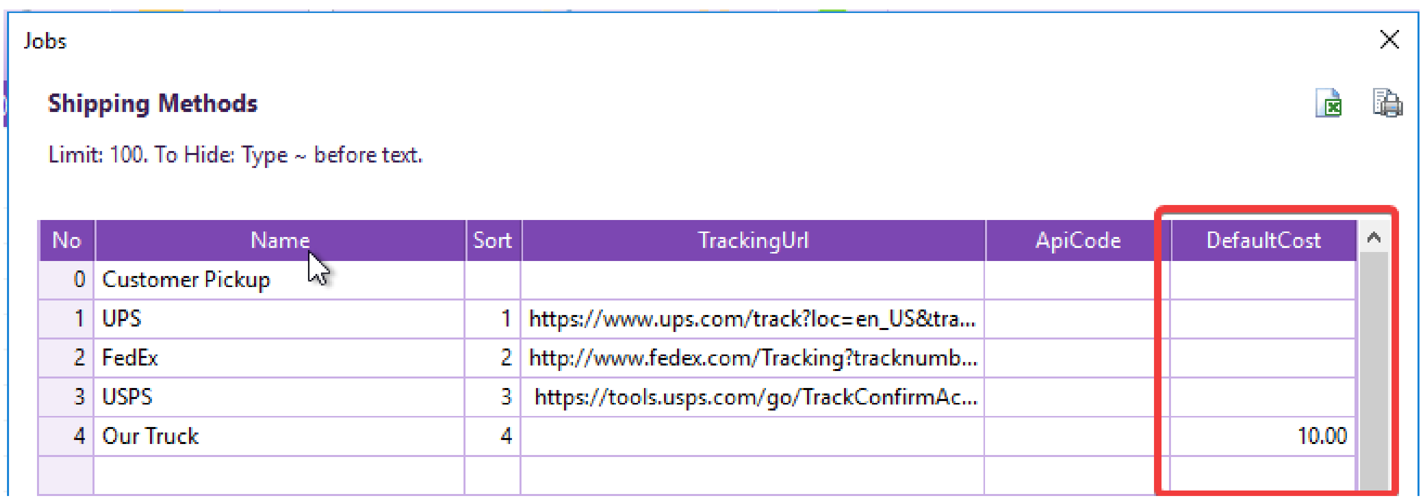
Shipping WorkFlow

As part of the 2021 update an emphasis was placed on improving and automating the shipping workflow in Printer's Plan. These enhancements include new tables and data fields that are designed to capture information relating to a shipment.

Default Shipping Charge

You can now set a default shipping charge for each shipping method. To enter the default charge go to the **Settings** section of the program, open the **Jobs** folder and select **Shipping Methods**. In the table that appears there is a new column labeled **Default Cost**. In this column, for each shipping method you can enter a default shipping cost.



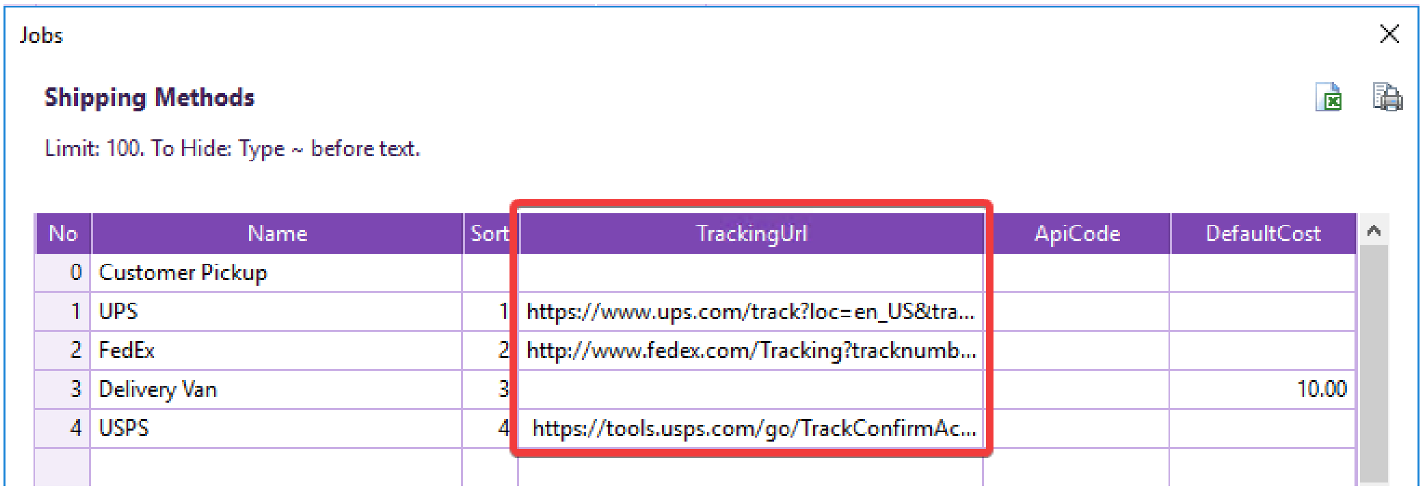
No	Name	Sort	TrackingUrl	ApiCode	DefaultCost
0	Customer Pickup				
1	UPS	1	https://www.ups.com/track?loc=en_US&tra...		
2	FedEx	2	http://www.fedex.com/Tracking?tracknumb...		
3	USPS	3	https://tools.usps.com/go/TrackConfirmAc...		
4	Our Truck	4			10.00

When selecting a shipping method on a job, the default cost will be applied to the job as long as the job does not have an existing shipping charge.

TIP: On a customer account you can assign a default shipping method, this default is applied to newly created jobs. By selecting a shipping method that includes a default cost all new jobs for that customer will automatically have a shipping charge.

Tracking URL

In the **Settings/Jobs/Shipping Methods** table there is a new field labeled **Tracking URL**:



Jobs

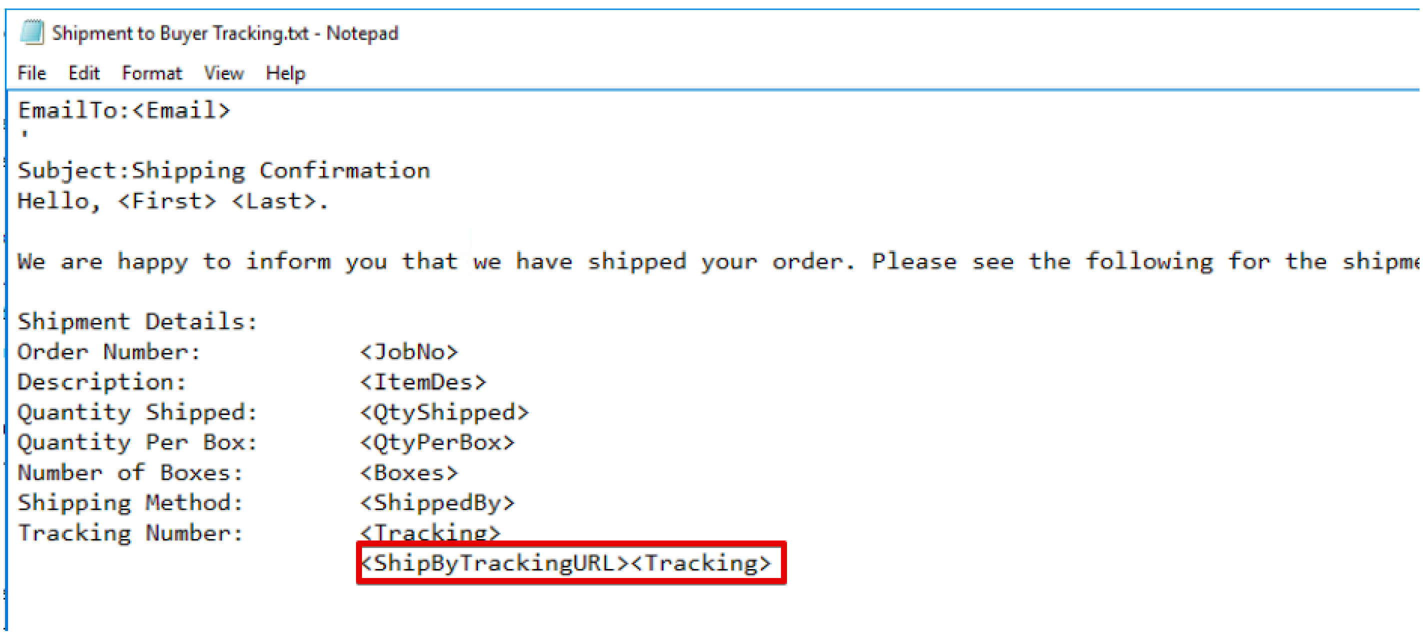
Shipping Methods

Limit: 100. To Hide: Type ~ before text.

No	Name	Sort	TrackingUrl	ApiCode	DefaultCost
0	Customer Pickup				
1	UPS	1	https://www.ups.com/track?loc=en_US&tra...		
2	FedEx	2	http://www.fedex.com/Tracking?tracknumb...		
3	Delivery Van	3			10.00
4	USPS	4	https://tools.usps.com/go/TrackConfirmAc...		

This field is designed to store the leading part of the tracking url for the shipping carrier. The data in the field will be used when printing, or generating email messages with a tracking number.

On the email template you can add the <**ShipByTrackingURL**> field along with the <**Tracking**> field:



Shipment to Buyer Tracking.txt - Notepad

File Edit Format View Help

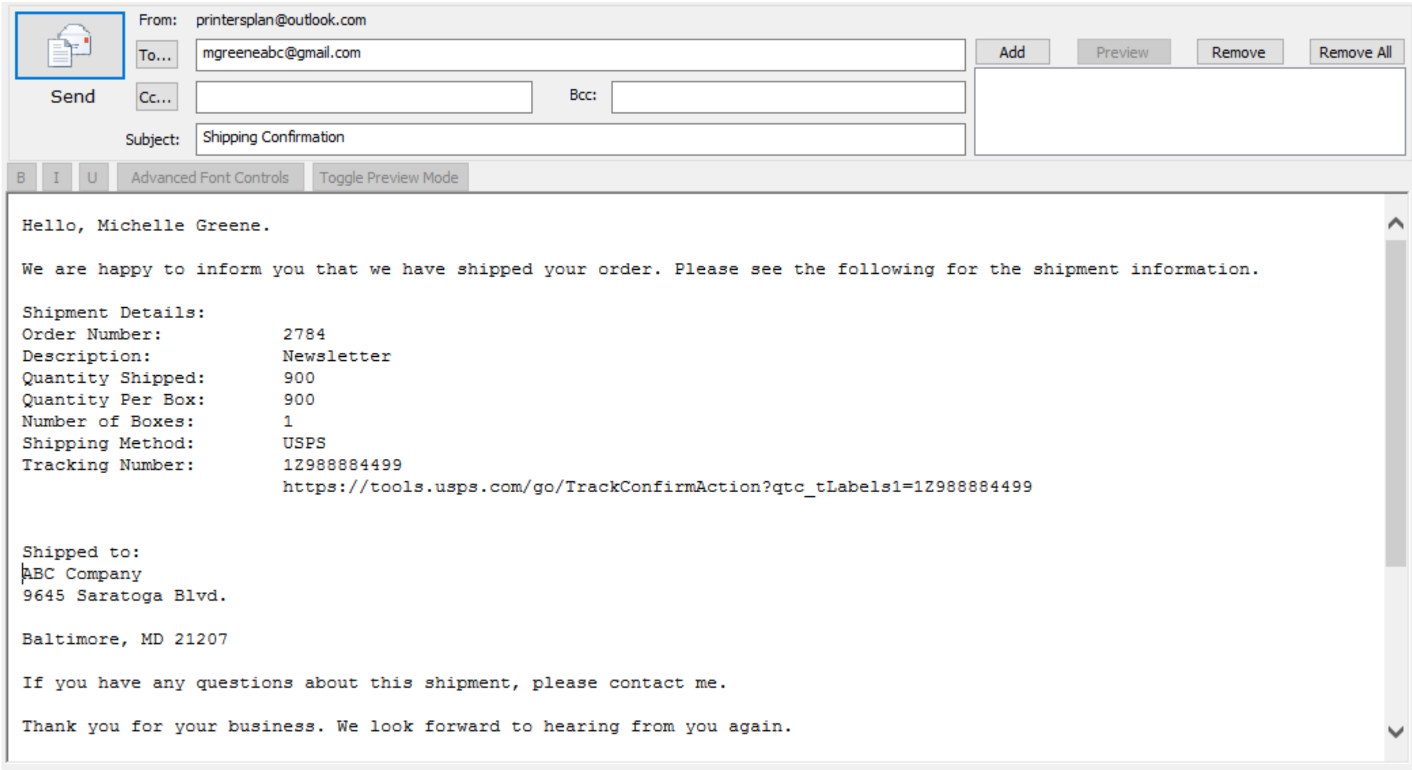
EmailTo:<Email>

Subject:Shipping Confirmation
Hello, <First> <Last>.

We are happy to inform you that we have shipped your order. Please see the following for the shipme

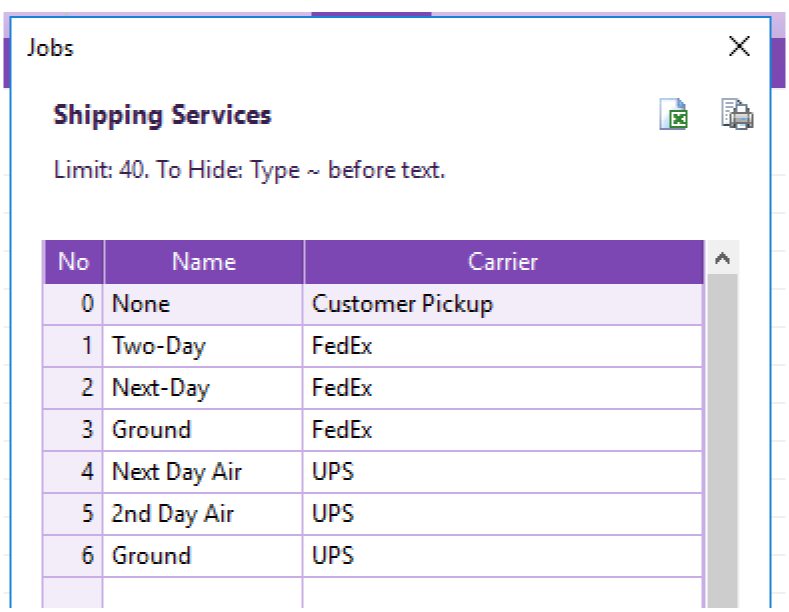
Shipment Details:
Order Number: <JobNo>
Description: <ItemDes>
Quantity Shipped: <QtyShipped>
Quantity Per Box: <QtyPerBox>
Number of Boxes: <Boxes>
Shipping Method: <ShippedBy>
Tracking Number: ~~<Tracking>~~
<ShipByTrackingURL><Tracking>

When generating an email message for a shipment, the body of the email will populate with a valid tracking url.



Shipping Service Table

In the **Settings** section of the program, under the **Jobs** folder there is a new **Shipping Services** table:

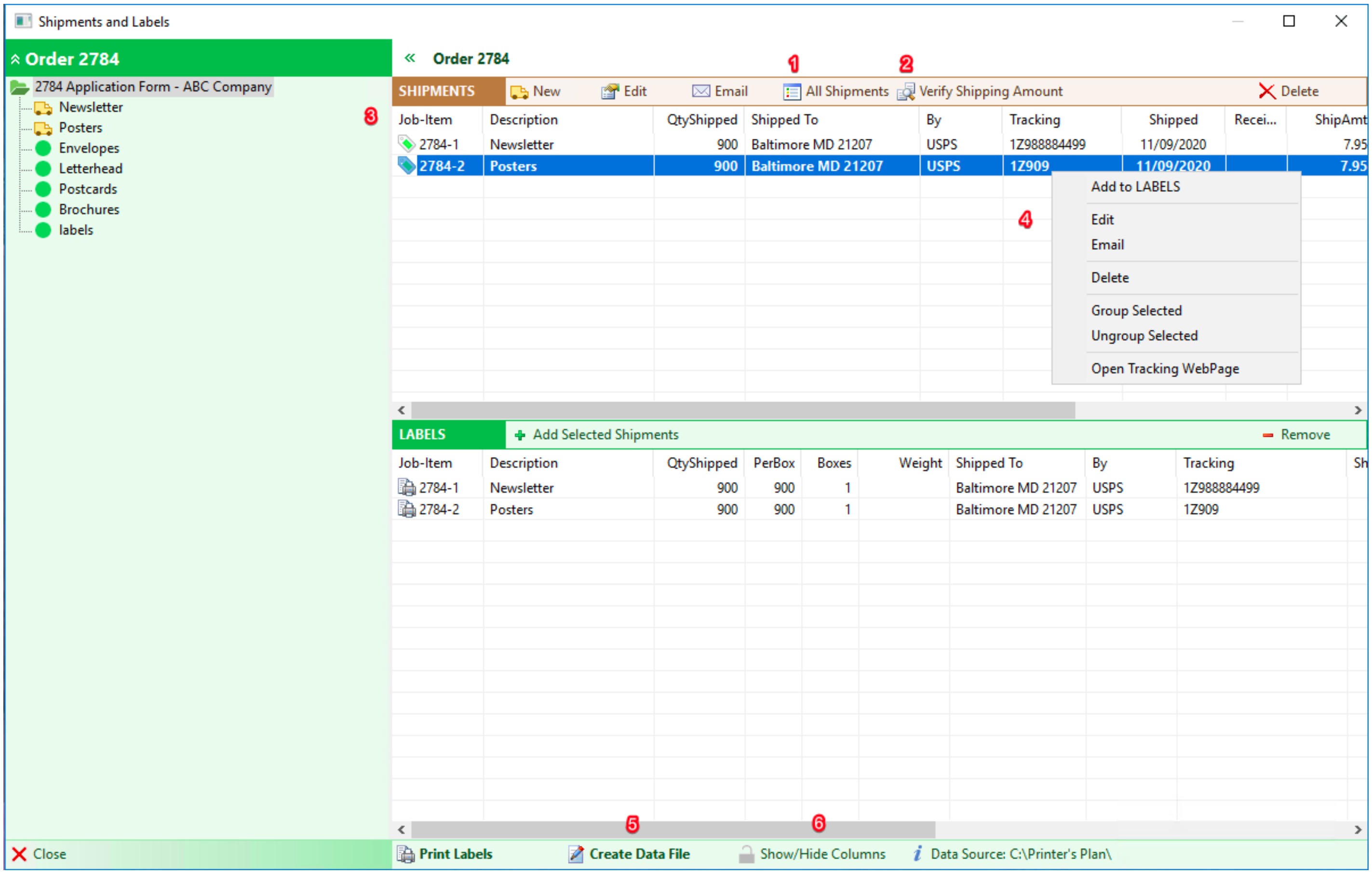


No	Name	Carrier
0	None	Customer Pickup
1	Two-Day	FedEx
2	Next-Day	FedEx
3	Ground	FedEx
4	Next Day Air	UPS
5	2nd Day Air	UPS
6	Ground	UPS

In this table you can enter the shipping services for each shipping carrier. The data in this table is used when creating a shipment record.

Updated Shipments and Labels Window

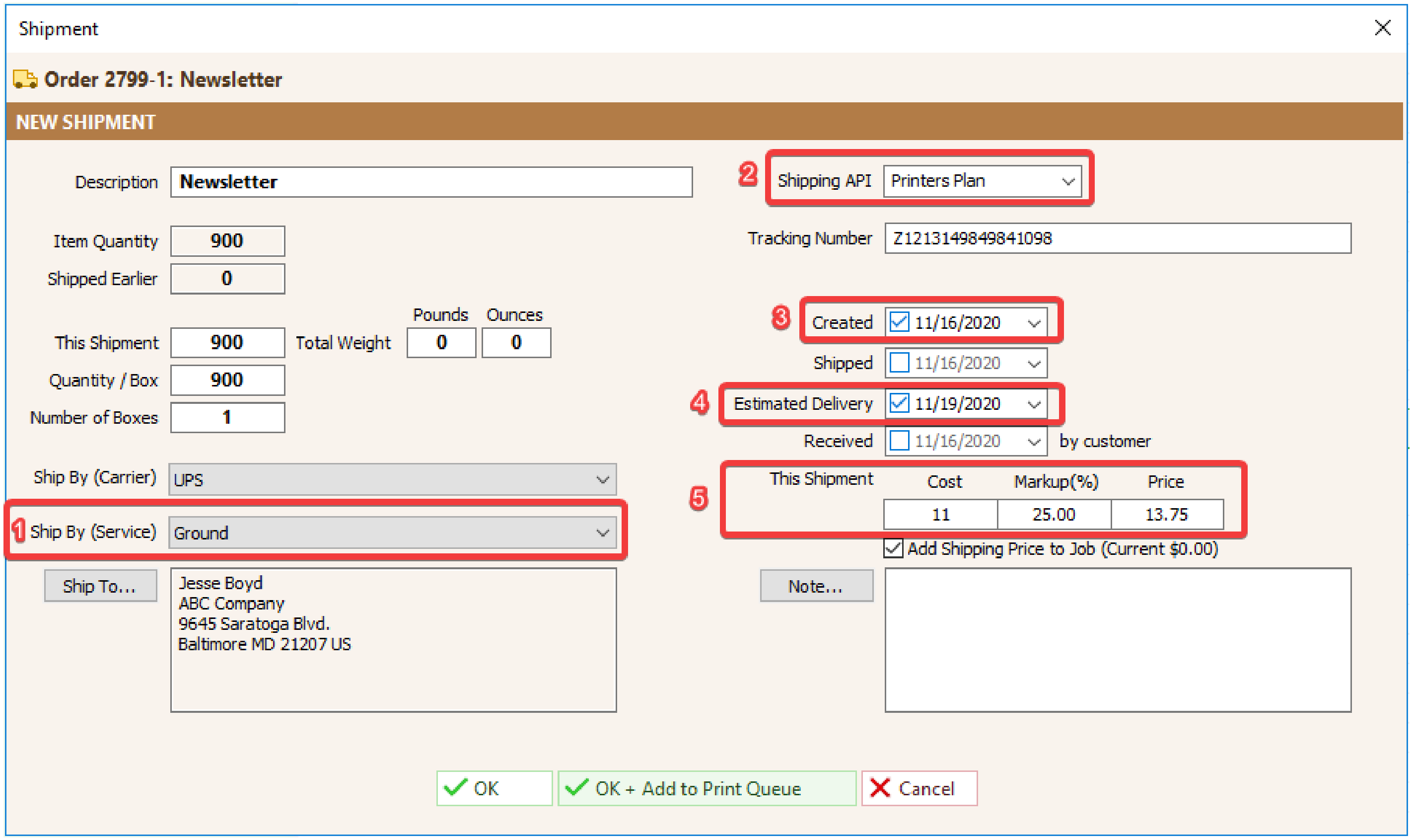
The following changes were made to the **Shipments and Labels** window.



1. **All Shipments** - Clicking on this button will list all the shipment records for the job.
2. **Verify Shipping Amount** - Clicking on this button will open the **Verify Shipping** amount window (see the Verify Shipment Amount section of this guide).
3. New columns added to provide additional information about a shipment.
4. Right clicking on a shipment record(s) will display a menu with the following new options:
    a. **Group Selected** - Clicking on this option will group the selected shipments as single shipment number. This grouping is primarily used when integrating with a third party shipping solution.
    b. **Ungroup Selected** - Clicking on this option will ungroup the selected shipments.
    c. **Open Tracking Webpage** - If the shipment has a valid tracking number, selecting this option will open a webpage displaying the tracking information of the shipment.
5. **Create Data File** - Clicking this button will create the data file for the shipping label template.
6. **Show/Hide Columns** - Clicking on this button allows you to select the columns that are visible in the **Shipments and Labels** window

Updated Shipment Window

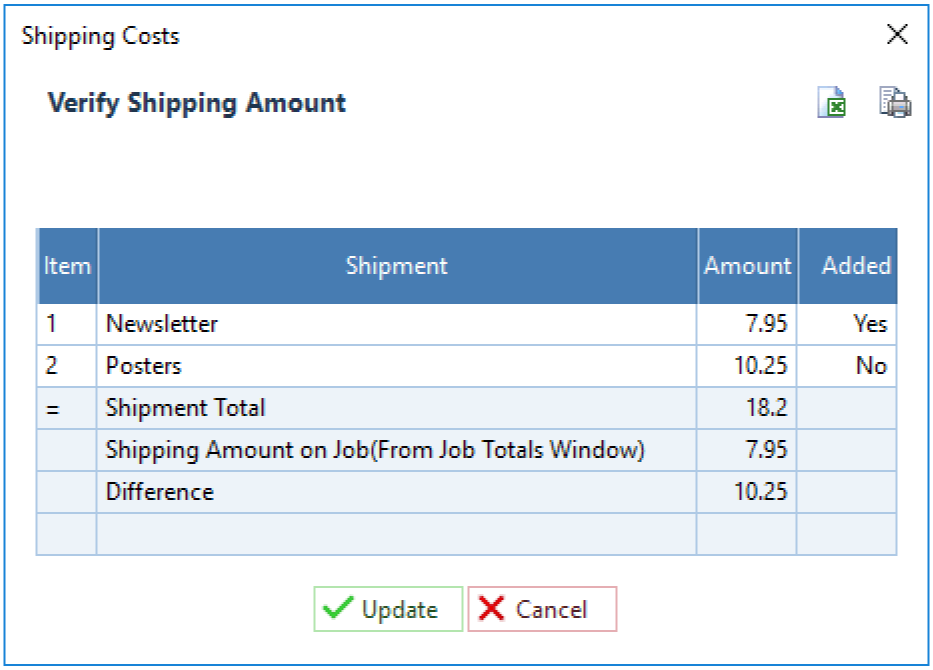
The following changes were made to the **Shipment** window.



1. **Ship By (Service)** - Clicking on this field allows you to select a shipping service for the selected shipping carrier.
2. **Shipping API** - Clicking on this field allows you to select the shipping integration partner for the shipment.
3. **Created** - This field stores the date the shipment was created.
4. **Estimated Delivery Date** - This field stores the date the shipment is expected to be delivered.
5. **Cost** - This field stores the cost of the shipment.
6. **Markup (%)** - This field stores the markup rate for the shipment.
7. **Price** - This field stores the Price of the shipment, the value in this field can automatically be applied to the job.

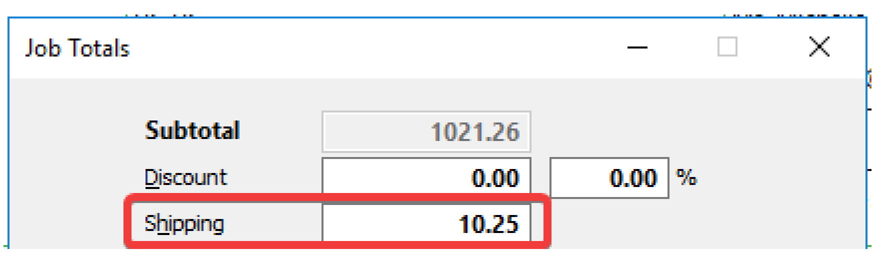
Verify Shipping Amounts

The **Verify Shipping Amounts** window is designed to compare the shipping charges on individual shipments with the overall shipping charge on the job. The sum of the individual shipments should equal the total shipping charge on the job. To verify the shipping amount, open the **Shipments and Labels** window and click the **Verify Shipping Amount** button. The following window will appear:



In this window each shipment record and its shipping amount will be displayed. This window has the following information and options:

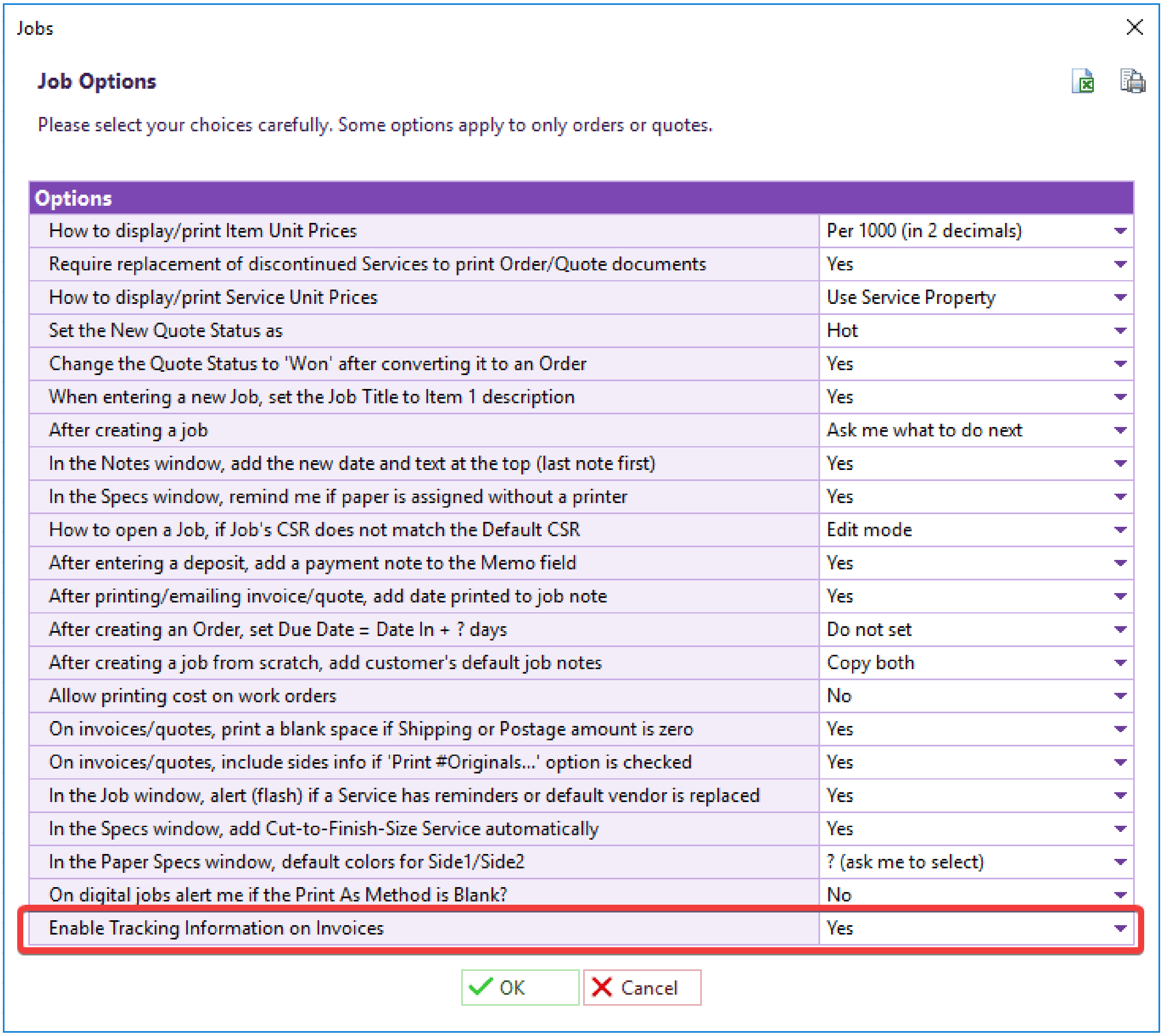
- The **Added** column will reflect if the shipping amount was previously added to the job.
- The **Shipment Total** row displays the sum of the shipping charges for each shipment.
- The **Shipping Amount on Job** row displays the shipping charge that is saved to the job. This amount comes from the **Shipping** field in the **Job Totals** window:



- The **Difference** row displays the difference between the shipping charge on the job vs. the shipment total from the individual shipment records.
- **Update** -- Clicking this button updates the shipping amount on the job and sets this amount equal to the sum of the individual shipment charges.
- **Cancel** -- Clicking this button closes the **Verify Shipping Amount** window and does not save any changes.

Print Tracking Information on Invoice Documents

When printing Invoice documents you can now include shipment tracking information. To enable this option go to the **Settings** section, open the **Jobs** folder and select **Job Options**. In the window that appears set the **Enable Tracking Information on Invoices** field to **Yes**:



Jobs

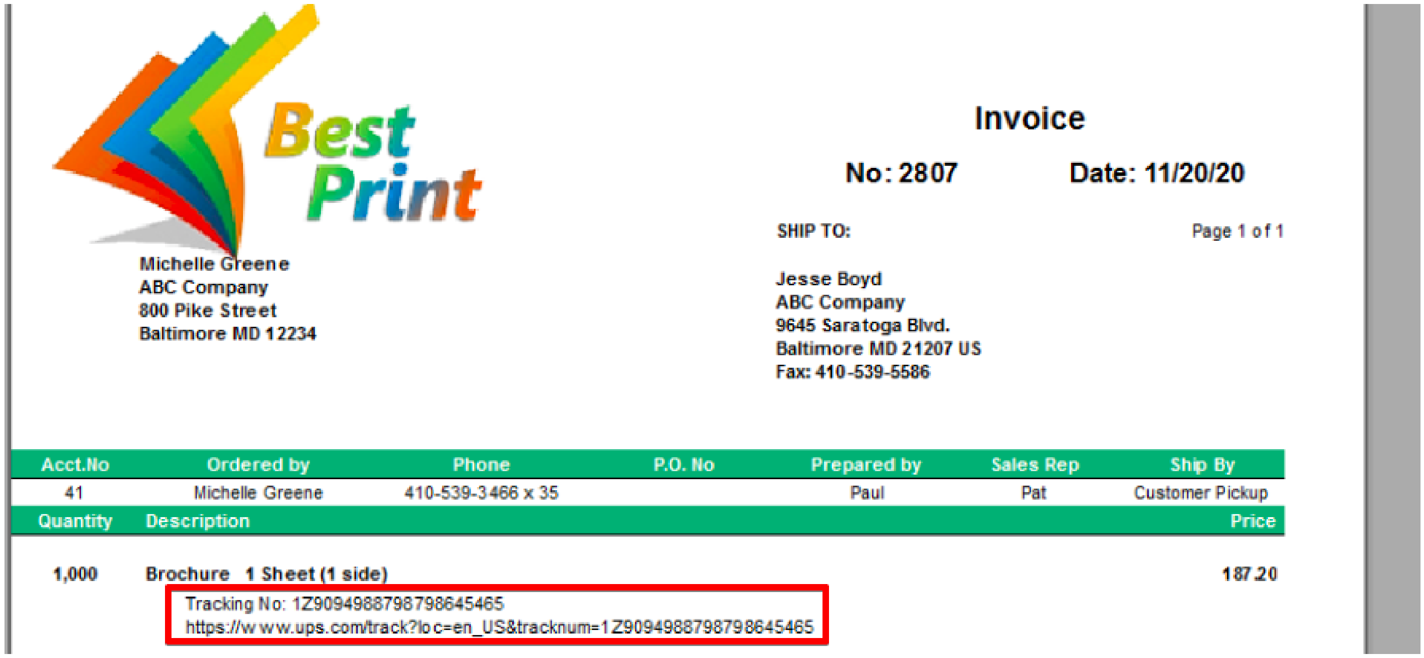
Job Options

Please select your choices carefully. Some options apply to only orders or quotes.

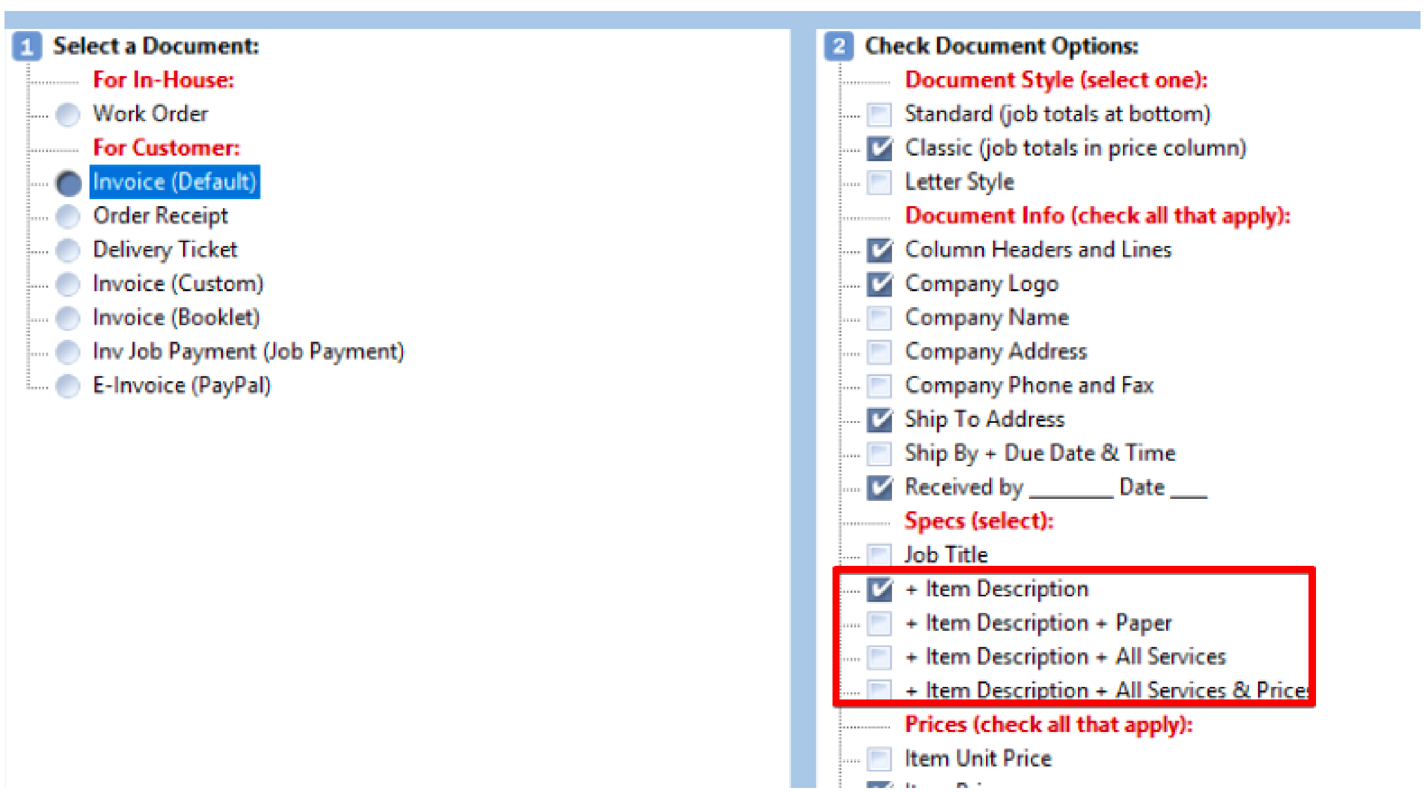
Options	
How to display/print Item Unit Prices	Per 1000 (in 2 decimals)
Require replacement of discontinued Services to print Order/Quote documents	Yes
How to display/print Service Unit Prices	Use Service Property
Set the New Quote Status as	Hot
Change the Quote Status to 'Won' after converting it to an Order	Yes
When entering a new Job, set the Job Title to Item 1 description	Yes
After creating a job	Ask me what to do next
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
How to open a Job, if Job's CSR does not match the Default CSR	Edit mode
After entering a deposit, add a payment note to the Memo field	Yes
After printing/emailing invoice/quote, add date printed to job note	Yes
After creating an Order, set Due Date = Date In + ? days	Do not set
After creating a job from scratch, add customer's default job notes	Copy both
Allow printing cost on work orders	No
On invoices/quotes, print a blank space if Shipping or Postage amount is zero	Yes
On invoices/quotes, include sides info if 'Print #Originals...' option is checked	Yes
In the Job window, alert (flash) if a Service has reminders or default vendor is replaced	Yes
In the Specs window, add Cut-to-Finish-Size Service automatically	Yes
In the Paper Specs window, default colors for Side1/Side2	? (ask me to select)
On digital jobs alert me if the Print As Method is Blank?	No
Enable Tracking Information on Invoices	Yes

OK Cancel

With this option enabled, when printing an Invoice document, each shipment record on the job that has a tracking number will print on the document.



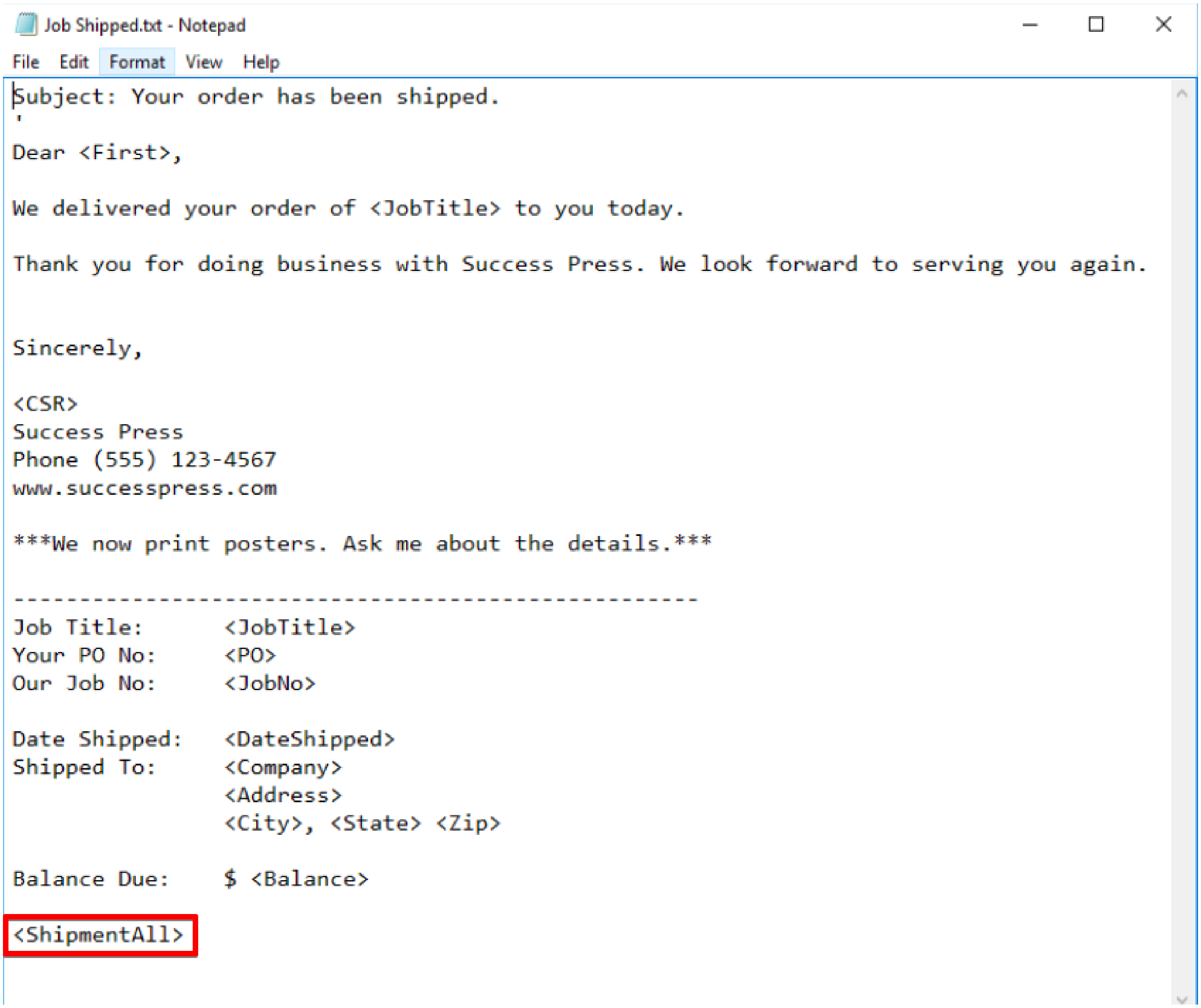
For this information to print, in the print dialog window one of the **Item Description** print options needs to be selected:



If an item has multiple shipments, each shipment with a tracking number will print on the document under the item description field.

Include Tracking Information on Email Templates

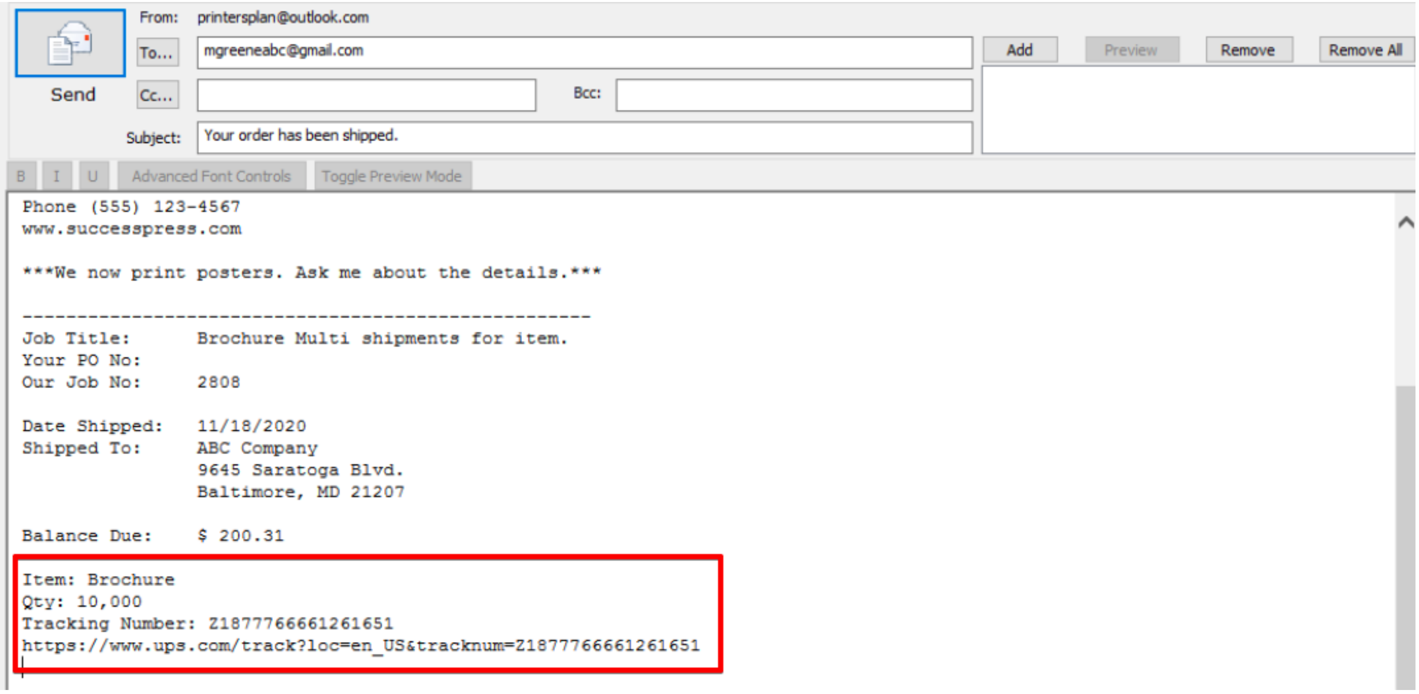
When sending a job related email message you can now include tracking information on the email template. To include this information add the following merge field to the email template file: **<ShipmentAll>**.



Job Shipped.txt - Notepad

File Edit Format View Help

```
Subject: Your order has been shipped.

Dear <First>,

We delivered your order of <JobTitle> to you today.

Thank you for doing business with Success Press. We look forward to serving you again.


Sincerely,

<CSR>
Success Press
Phone (555) 123-4567
www.successpress.com

***We now print posters. Ask me about the details.***

----------------------------------------------------
Job Title:       <JobTitle>
Your PO No:      <PO>
Our Job No:      <JobNo>

Date Shipped:    <DateShipped>
Shipped To:      <Company>
                 <Address>
                 <City>, <State> <Zip>

Balance Due:     $ <Balance>

<ShipmentAll>
```



The email template files are stored in the **Email** folder which is located in the Printer's Plan folder where the database is stored. If the shipment record has a tracking number then the **<ShipmentAll>** merge field will automatically include the following details of a shipment record:

- Description
- Quantity
- Tracking Number
- Tracking URL

If a job has multiple shipment records the data for each shipment record on the job will be included in the **<ShipmentAll>** merge field.

Shipping API Integrations

Printer's Plan is now able to integrate with third party shipping software solutions. This integration allows shipment data originating in Printer's Plan to be captured and sent to the shipping software solution. Likewise, shipment data generated from the shipping software, such as tracking numbers and shipping charges, can automatically be added to the Printer's Plan job.

The integration with third party shipping software solutions requires the latest version of the Printer's Plan API (Web2Plan).

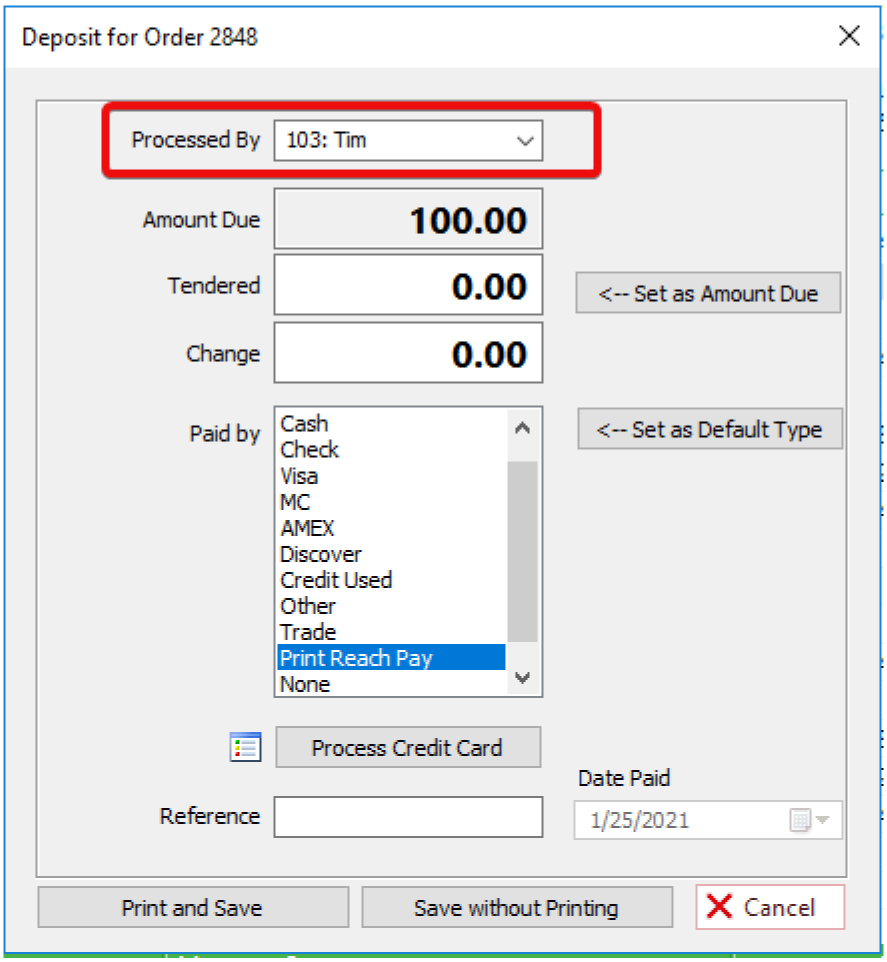
For a listing of shipping software solutions that currently integrate with Printer's Plan please contact the Print Reach servicing team at support@printreach.com or call us at 888-581-3100.

Payments

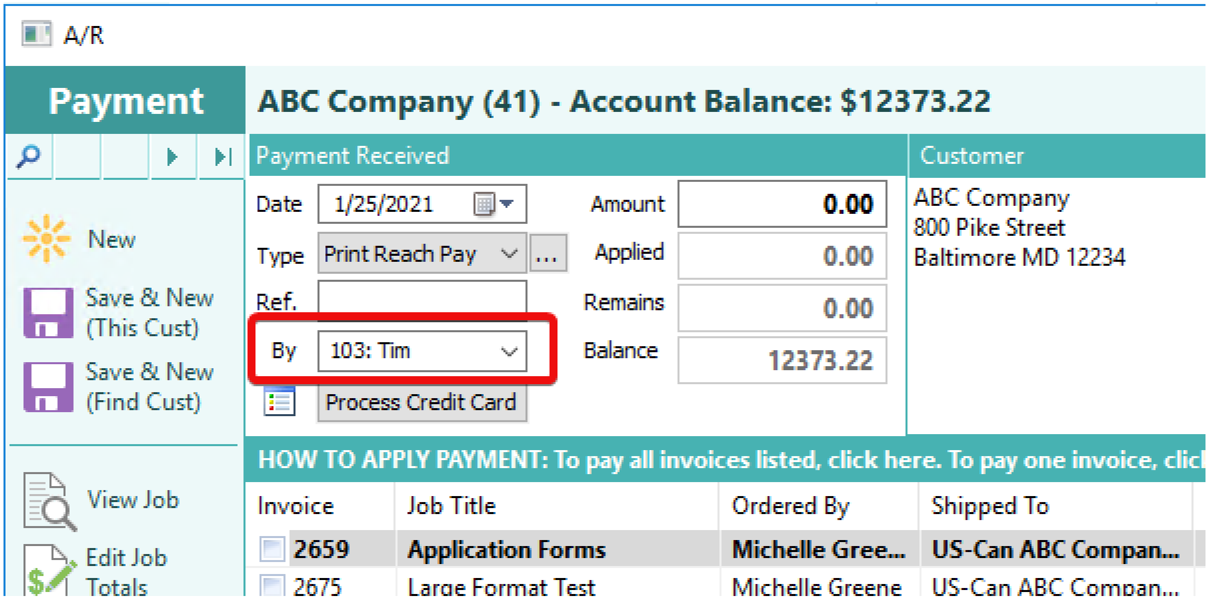
Processed By (New Field)

When entering a payment in Printer's Plan you can now capture the name of the employee that records the payment.

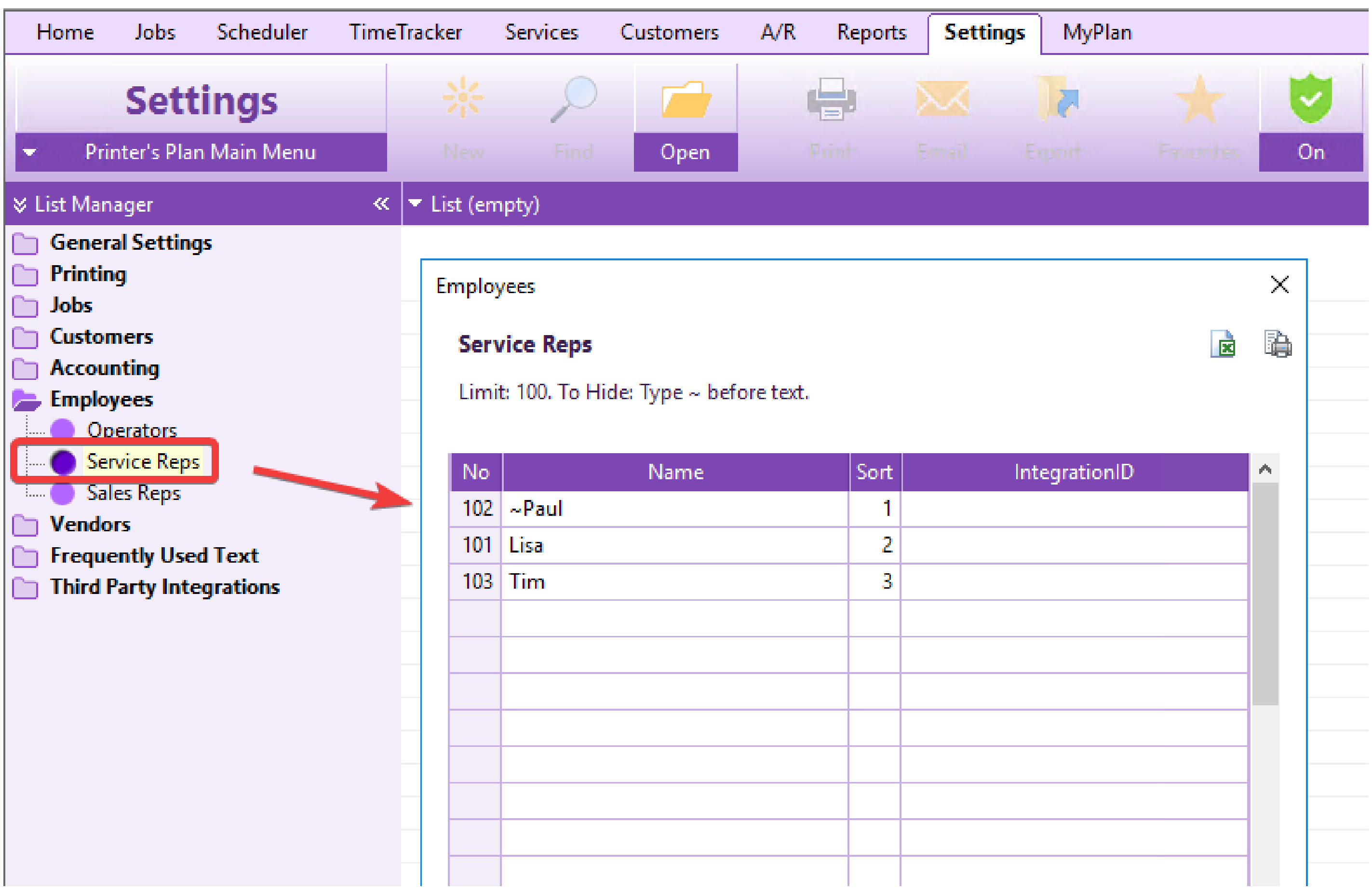
In the **Deposit** and **Quick Sale** payment windows, the **Processed By** field is located at the top of the screen:



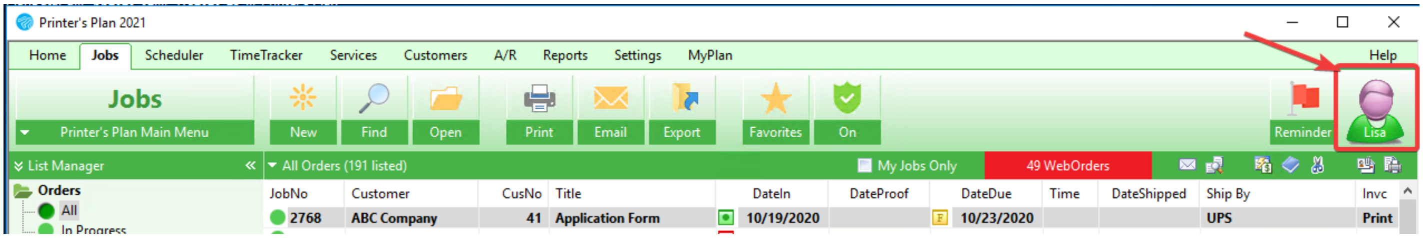
In the **A/R** payment window, the **Processed By** field is located under the **Ref.** field:



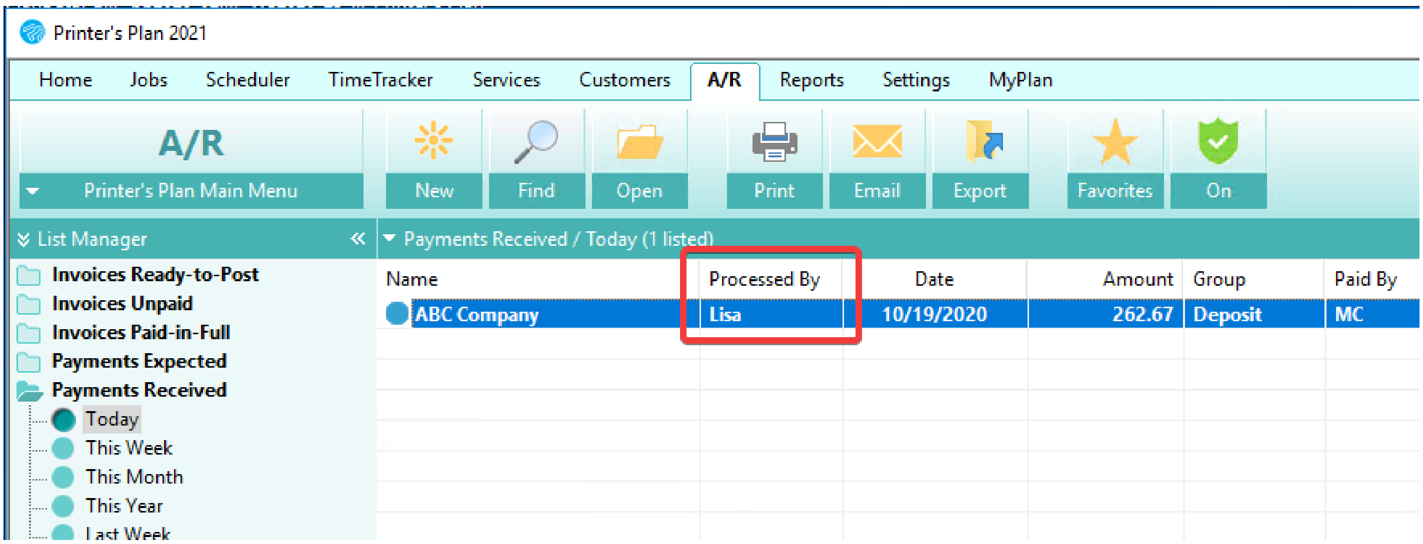
The list of employees available in the **Processed By** drop down menu is generated from the **Service Reps** table. This table can be found by going to the **Settings** section, opening the **Employees** table and clicking **Service Reps**.



When entering a payment, the **Processed By** field is initially set to the computer's default CSR:

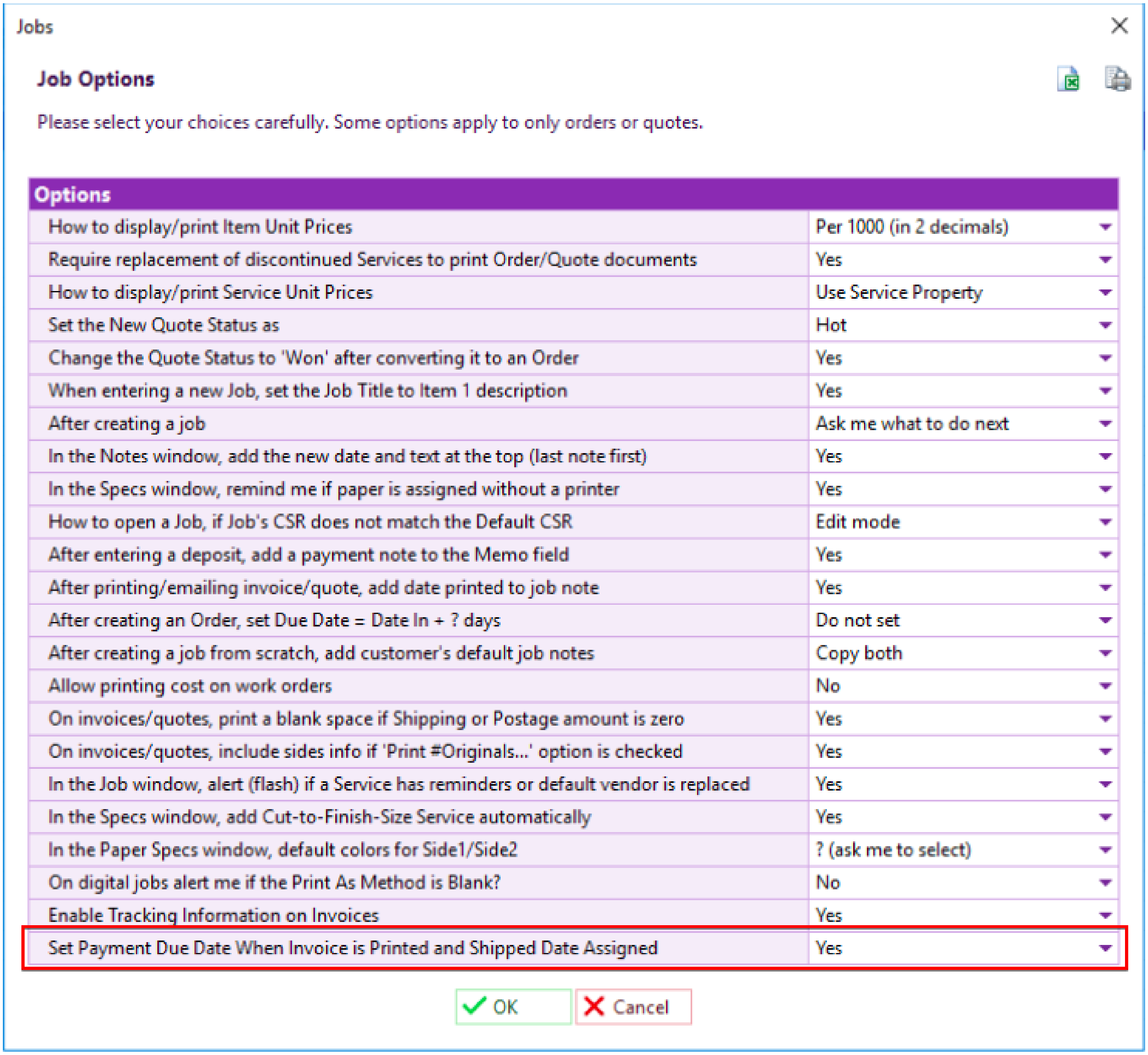


In the **A/R** section, when generating a list of payments, the program will now display the name of the employee that entered the payment:



Set Payment Due Date on Invoice Printed

In the **Settings/Jobs/Job Options** window there is a new option labeled, **Set Payment Due Date When Invoices is Printed and Shipped Date Assigned**. If this option is set to **Yes**, when printing an invoice (if the Shipped Date is assigned to the job) Printer's Plan will automatically set the job's payment due date. If this option is set to **No**, the payment due date is set when the job is posted.



Jobs

Job Options

Please select your choices carefully. Some options apply to only orders or quotes.

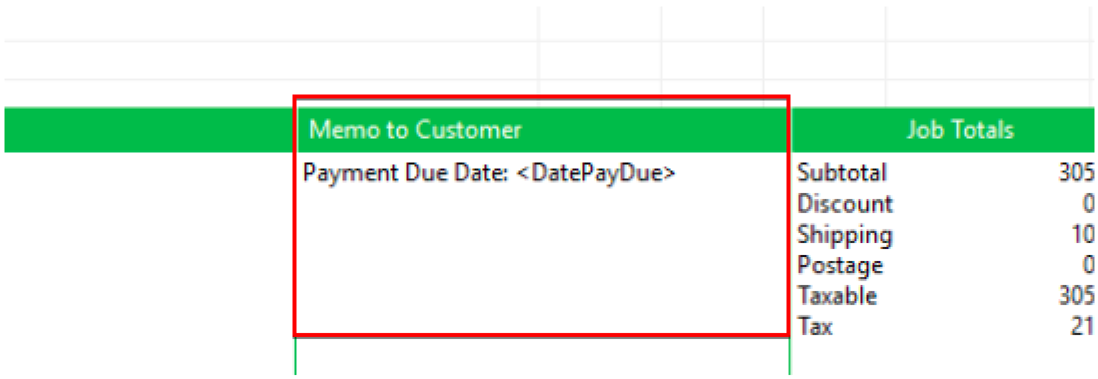
Options	
How to display/print Item Unit Prices	Per 1000 (in 2 decimals)
Require replacement of discontinued Services to print Order/Quote documents	Yes
How to display/print Service Unit Prices	Use Service Property
Set the New Quote Status as	Hot
Change the Quote Status to 'Won' after converting it to an Order	Yes
When entering a new Job, set the Job Title to Item 1 description	Yes
After creating a job	Ask me what to do next
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
How to open a Job, if Job's CSR does not match the Default CSR	Edit mode
After entering a deposit, add a payment note to the Memo field	Yes
After printing/emailing invoice/quote, add date printed to job note	Yes
After creating an Order, set Due Date = Date In + ? days	Do not set
After creating a job from scratch, add customer's default job notes	Copy both
Allow printing cost on work orders	No
On invoices/quotes, print a blank space if Shipping or Postage amount is zero	Yes
On invoices/quotes, include sides info if 'Print #Originals...' option is checked	Yes
In the Job window, alert (flash) if a Service has reminders or default vendor is replaced	Yes
In the Specs window, add Cut-to-Finish-Size Service automatically	Yes
In the Paper Specs window, default colors for Side1/Side2	? (ask me to select)
On digital jobs alert me if the Print As Method is Blank?	No
Enable Tracking Information on Invoices	Yes
Set Payment Due Date When Invoice is Printed and Shipped Date Assigned	Yes

OK Cancel

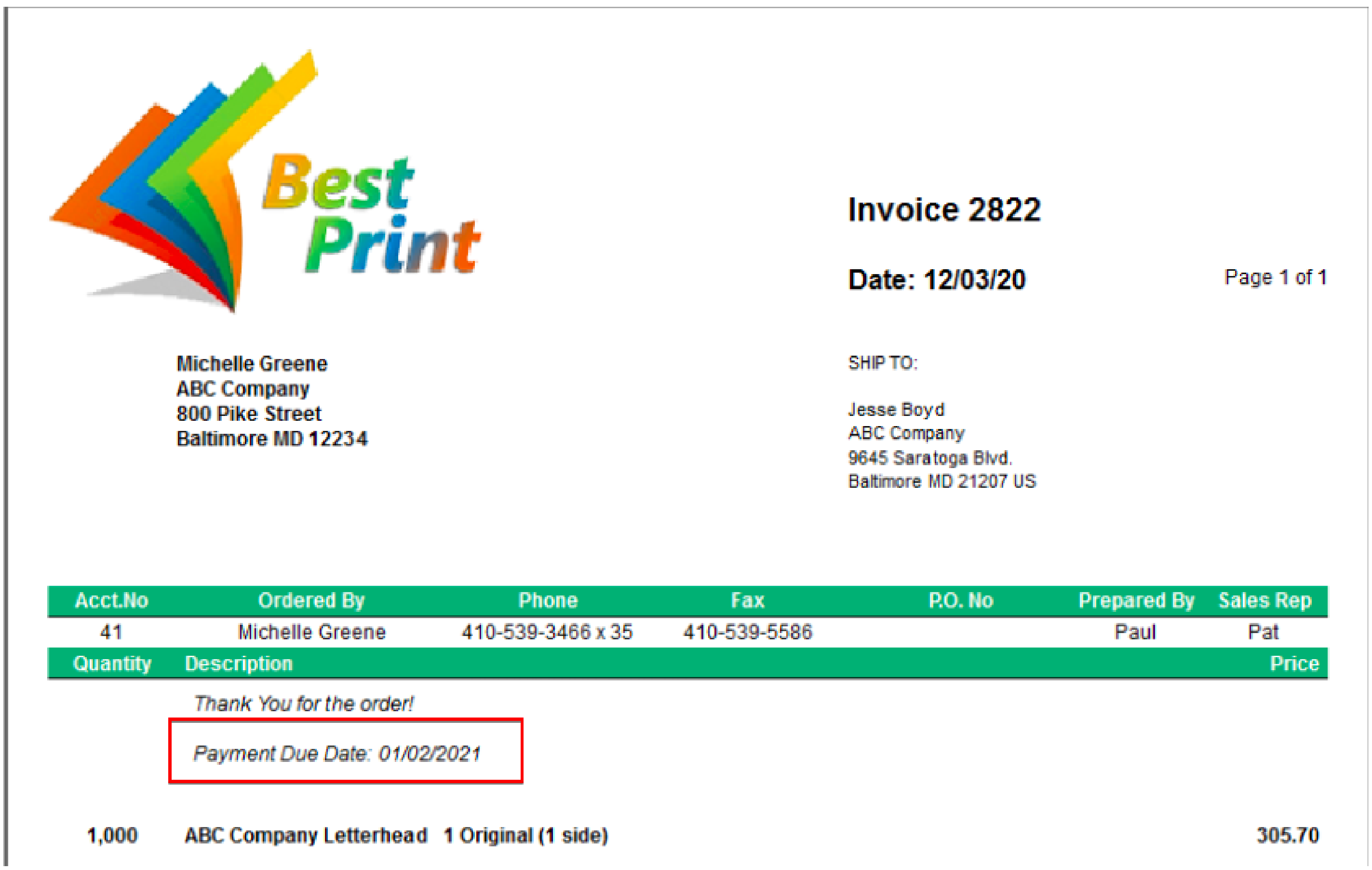
With this option enabled you can automatically have the payment due date appear on the invoice and in the body of the email message.

Include Payment Terms on Invoice Documents

To include the payment terms on the printed invoice, add the merge field **<DatePayDue>** in the **Memo To Customer** field of a job:



When printing an invoice, if the job has a payment due date assigned then this data field will be populated on the document:



Invoice 2822

Date: 12/03/20

Page 1 of 1

Michelle Greene
ABC Company
800 Pike Street
Baltimore MD 12234

SHIP TO:

Jesse Boyd
ABC Company
9645 Saratoga Blvd.
Baltimore MD 21207 US

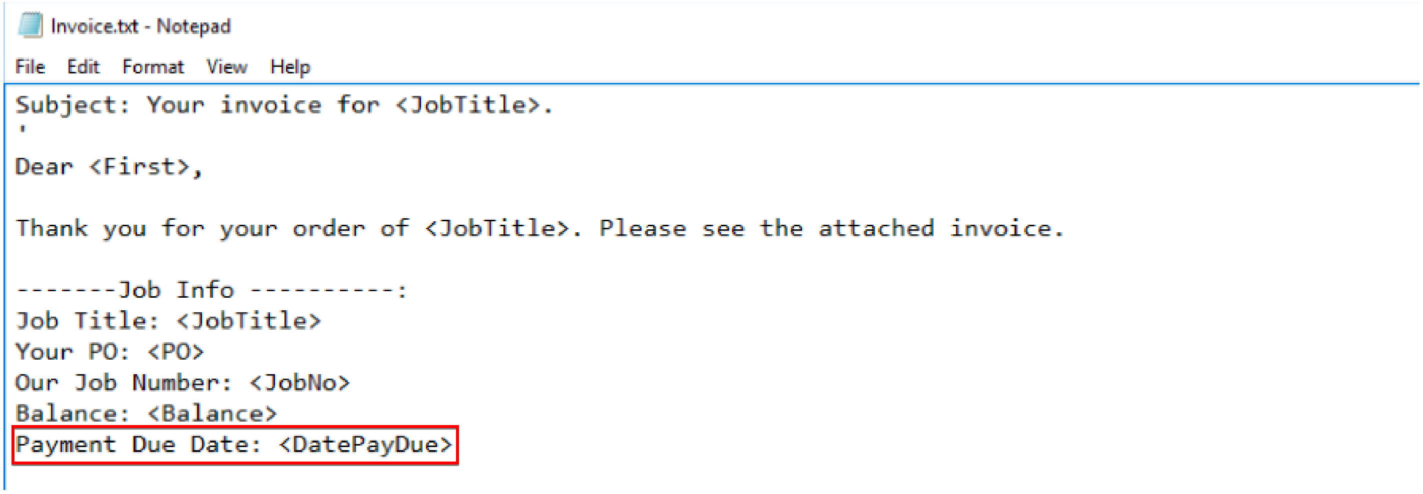
Acct.No	Ordered By	Phone	Fax	P.O. No	Prepared By	Sales Rep
41	Michelle Greene	410-539-3466 x 35	410-539-5586		Paul	Pat

Quantity	Description	Price
	Thank You for the order!	
	Payment Due Date: 01/02/2021	
1,000	**ABC Company Letterhead 1 Original (1 side)**	**305.70**

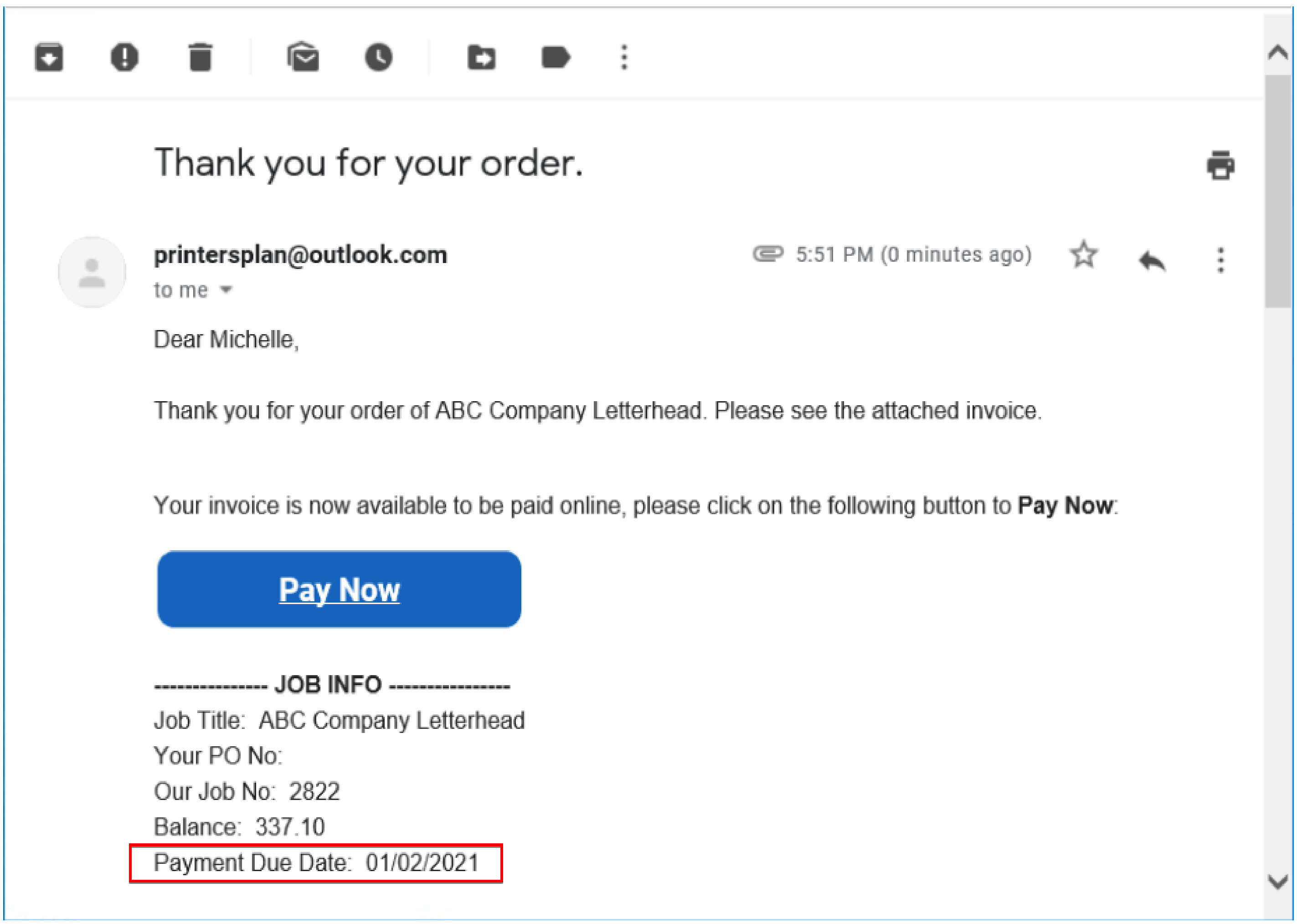
TIP: In the **Settings/Printing/Document Options** window you can add this merge field in the **Default Note or Memo** field for the invoice document. By including this field as a default note you would not need to include the merge field on individual invoices.

Include Payment Terms on the Body of an Email Message

To include the payment terms on the body of an email message, edit the email template for the invoice and add the merge field **<DatePayDue>**:



When this field is on the email template, if the job has a payment due date assigned then this data field will be populated in the body of the email sent to the customer:



Payment Processing Integration - Print Reach Pay

As part of the 2021 update we are introducing a new and enhanced payment processing integration solution called Print Reach Pay. By creating this solution under the Print Reach umbrella we are able to offer competitive transaction rates along with a robust feature set.

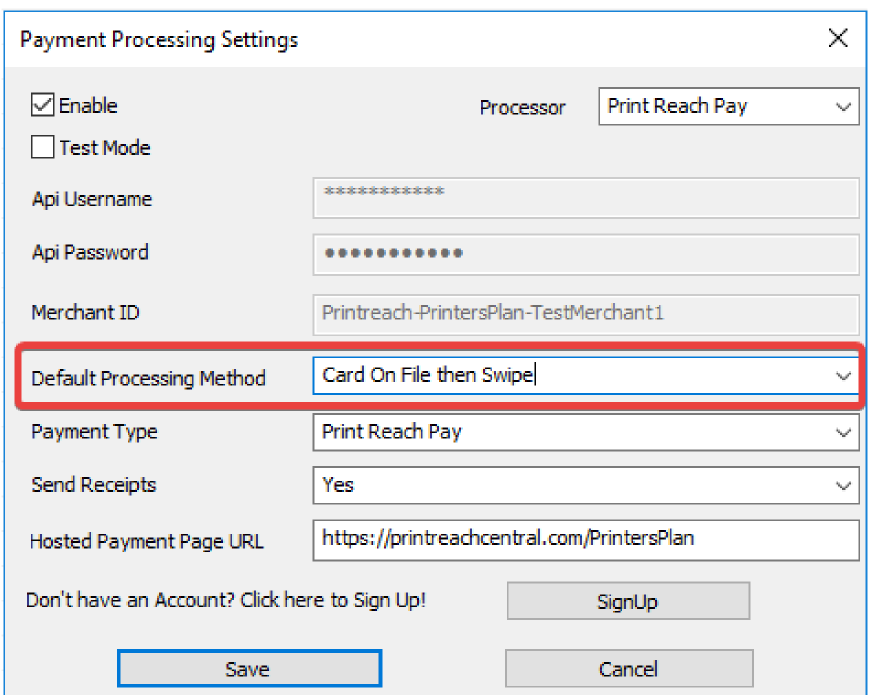
Once enabled, the Printer's Plan - Print Reach Pay integration allows you to enter credit card payments directly into Printer's Plan giving you a single point of data entry. Additionally, an email message with a payment link can be generated from Printer's Plan allowing the customer to pay for an invoice online. Transactions entered using this integration are PCI compliant because Printer's Plan does not store credit card data.

To use this feature you will need a Print Reach Pay merchant account. For information about obtaining this account please visit the following link: https://printreach.com/printersplan-printreachpay or contact us at (888) 581-3100.

The sections below outline recent enhancements to the payment processing solution included in the 2021 update as part of the integration with Print Reach Pay.

Default Payment Processing Method

When processing a payment, in the **Authorize Payment** window you can set a default processing method. To set this option, go to the **Settings** section, open the **Print Reach Pay** folder and select **Payment Processing**. In the window that appears there is a **Default Processing Method** field:

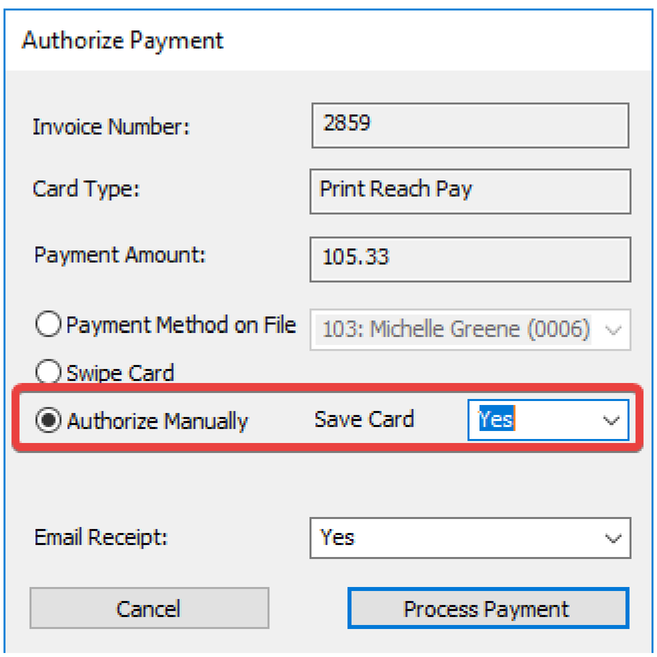


The selection in this field will be applied when processing a new payment, this menu includes the following options:

- **Card on File then Swipe** - With this option selected, in the **Authorize Payment** window if the contact has a card on file then this processing method will be selected by default. If the contact does not have a card on file, then the **Swipe** processing method will be selected by default.
- **Card on File then Authorize Manually** -- With this option selected, in the **Authorize Payment** window if the contact has a card on file then this processing method will be selected by default. If the contact does not have a card on file, then the **Authorize Manually** processing method will be selected by default.
- **Swipe** -- With this option selected, the **Authorize Payment** window will default to the **Swipe Card** processing method.
- **Authorize Manually** -- With this option selected, the **Authorize Payment** window will default to the **Authorize Manually** processing method.
- **ACH** -- Reserved for future use.

Save Card on File when Processing a Payment

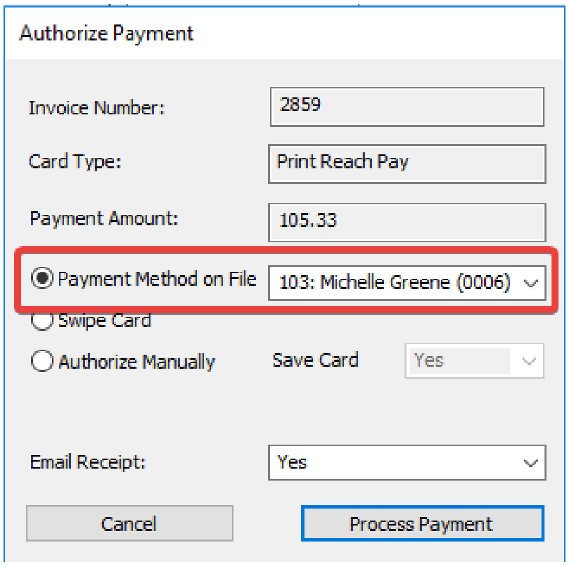
In the **Authorize Payment** window, when processing a credit card payment using the **Authorize Manually** method, you now have the option to save this card on file. To do this, in the **Authorize Payment** window select the **Authorize Manually** method and in the **Save Card** field select **Yes**:



When the payment is processed, a PCI compliant token that captures the credit card information will be saved to the contact. When entering a deposit this token is saved to the Job's buyer contact record, when entering an AR payment this token is saved to the Customer's default payer contact record.

Display Card Info

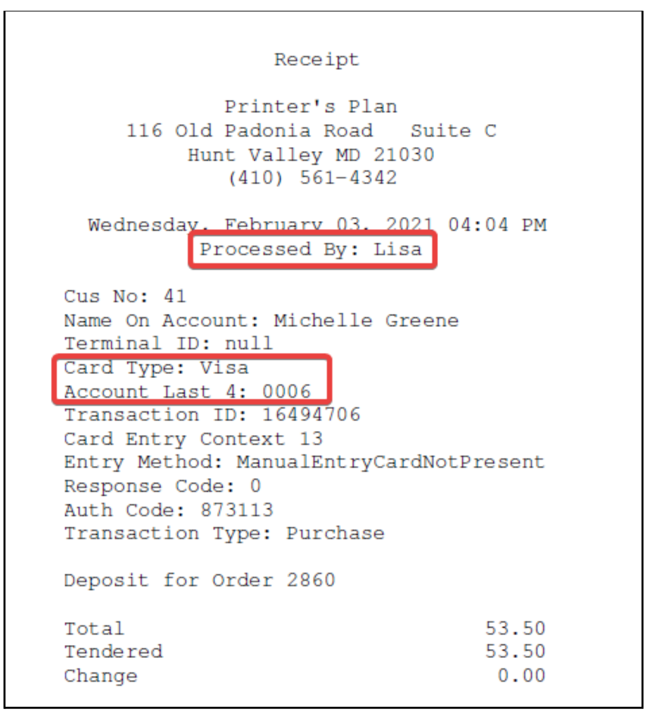
In the **Authorize Payment** window, if the contact has a card on file, the last four digits of the card will be displayed with the contact name.



Payment Receipt Fields

The payment receipt that is generated after processing a payment now includes the following data fields:

- Processed By
- Card Type
- Last four digits of the credit card.

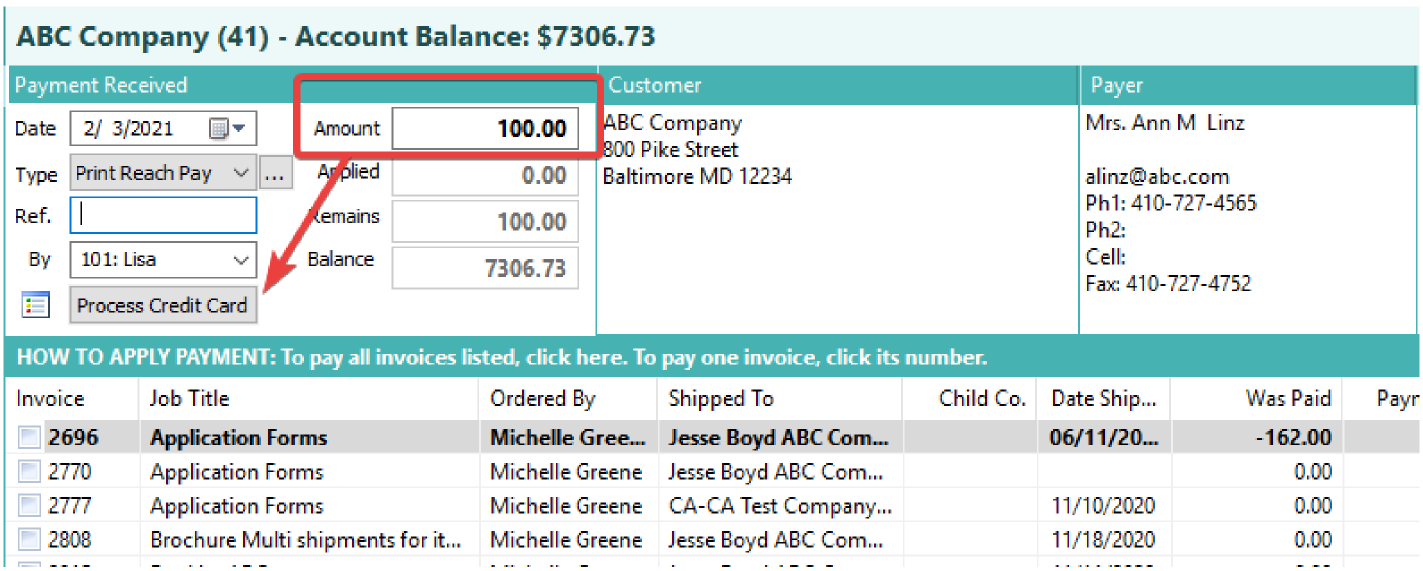


```
                  Receipt

              Printer's Plan
      116 Old Padonia Road   Suite C
           Hunt Valley MD 21030
              (410) 561-4342

  Wednesday, February 03, 2021 04:04 PM
            Processed By: Lisa

Cus No: 41
Name On Account: Michelle Greene
Terminal ID: null
Card Type: Visa
Account Last 4: 0006
Transaction ID: 16494706
Card Entry Context 13
Entry Method: ManualEntryCardNotPresent
Response Code: 0
Auth Code: 873113
Transaction Type: Purchase

Deposit for Order 2860

Total                                53.50
Tendered                             53.50
Change                                0.00
```

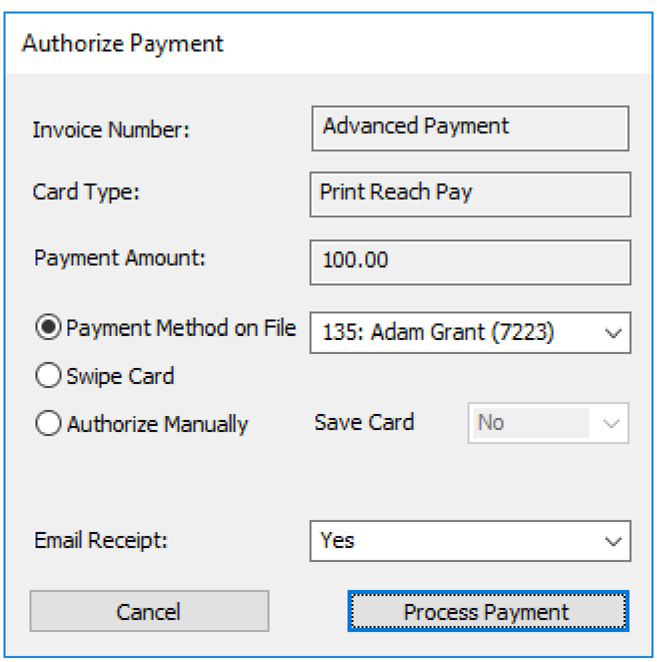
Advanced Payments

Printer's Plan can now process advanced payments using the integrated payment processing solution. This advanced payment will create a credit on the customer's account. To enter an advanced payment go to the A/R section and open the payment window for a customer account.

In the payment window enter an amount without selecting an invoice and click the **Process Credit Card** button.



An alert message will appear, click **Yes** to continue and in the **Authorize Payment** window process the payment.

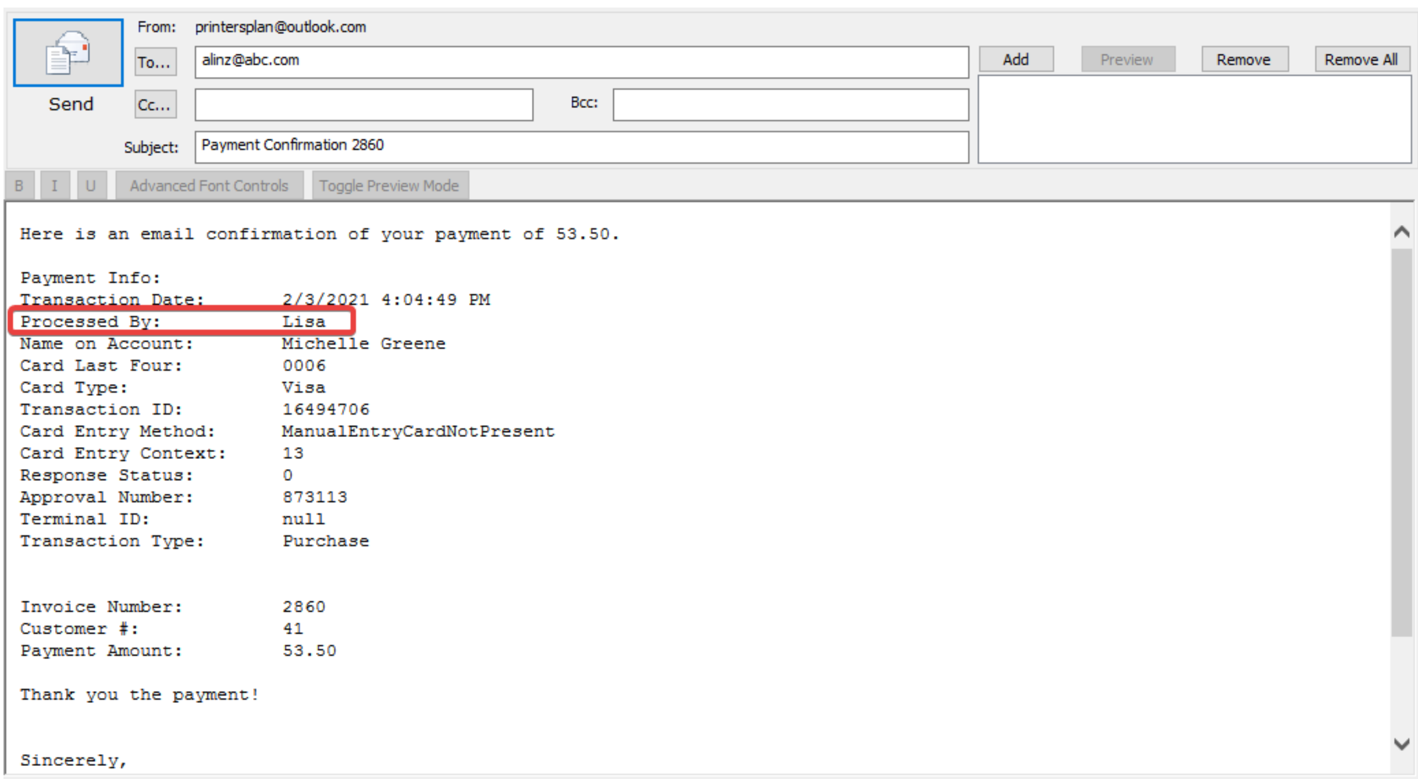


Once approved, this payment amount will be added as credit to the customer's account.

Email Fields

When generating an email message for a payment transaction you can now include the name of the employee that processed the payment. To include this information the following text needs to be added to the email template: **<ProcessedBy>**

```
Subject: Payment Confirmation <PayApplied>
'
Here is an email confirmation of your payment of <PayAmount>.

Payment Info:
Transaction Date:        <TransactionDate>
Processed By:            <ProcessedBy>
Name on Account:         <NameOnAccount>
Card Last Four:          <CardLastFour>
Card Type:               <CardType>
Transaction ID:          <TransactionId>
Card Entry Method:       <EntryMethod>
Card Entry Context:      <CardEntryContext>
Response Status:         <ResponseStatus>
```




```
Here is an email confirmation of your payment of 53.50.

Payment Info:
Transaction Date:        2/3/2021 4:04:49 PM
Processed By:            Lisa
Name on Account:         Michelle Greene
Card Last Four:          0006
Card Type:               Visa
Transaction ID:          16494706
Card Entry Method:       ManualEntryCardNotPresent
Card Entry Context:      13
Response Status:         0
Approval Number:         873113
Terminal ID:             null
Transaction Type:        Purchase


Invoice Number:          2860
Customer #:              41
Payment Amount:          53.50

Thank you the payment!


Sincerely,
```

Formula Fields on Email Templates

On email templates you can now create a formula field to perform calculations on an email message. To create a formula, on the email template use the following syntax:

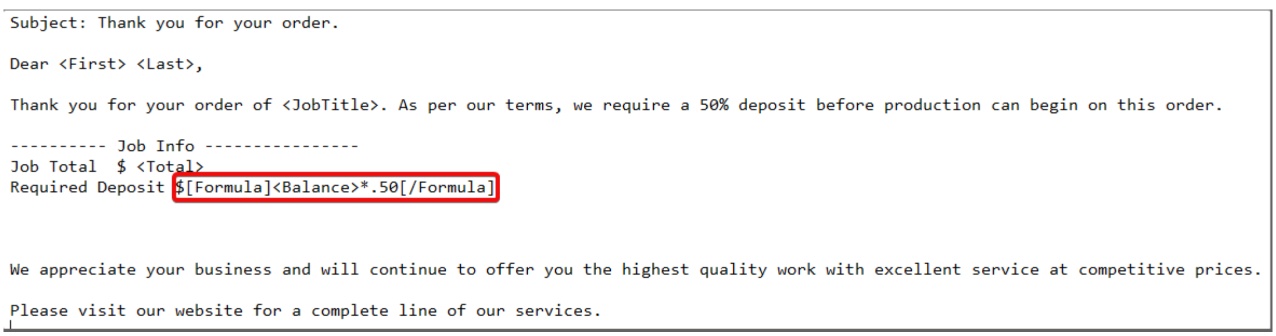
[Formula]*<Field1> operator <Field2>*[/Formula]

Here is a description of this syntax:

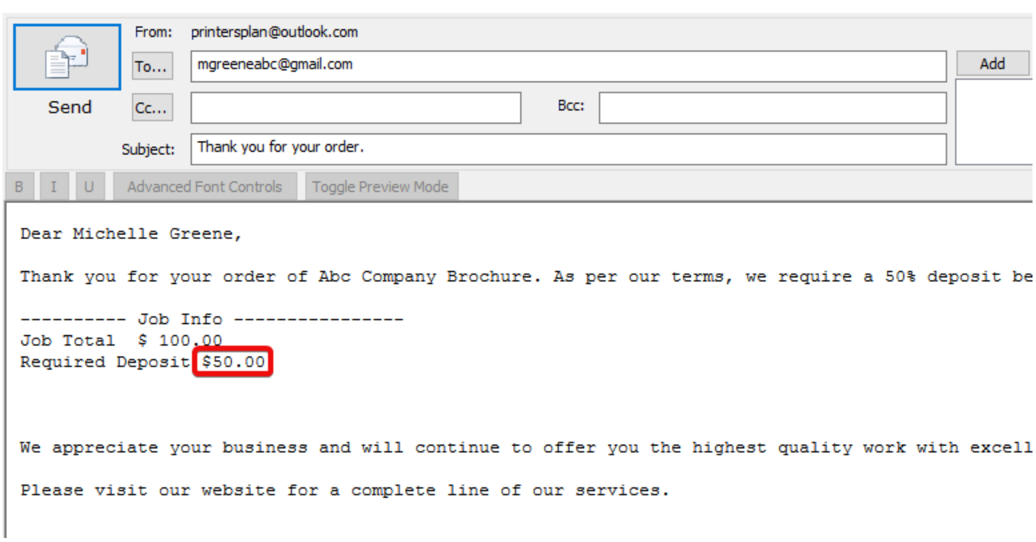
- **[Formula]** - This text block signals the start of the formula.
- **<Field1>** - This is the first field of the formula. This field can be a number, or a Printer’s Plan merge field. When using a Printer’s Plan merge field, the merge field has to be a numerical value.
- **Operator** - supported operators are + - * /
- **<Field2>** - Same requirements as Field1.
- **[/Formula]** - This text block signals the end of the formula.

Example: On an email message you would like to display %50 percent of the job balance. To achieve this result on the email template you would add the following formula:

[Formula]<Balance>*.50[/Formula]



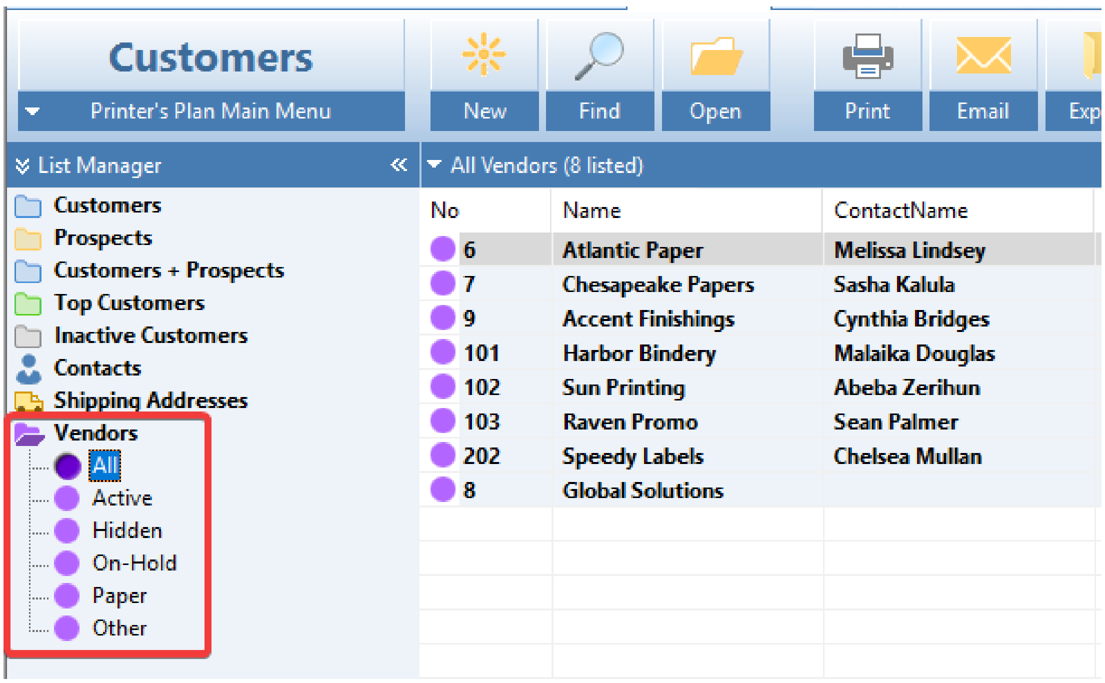
```
Subject: Thank you for your order.

Dear <First> <Last>,

Thank you for your order of <JobTitle>. As per our terms, we require a 50% deposit before production can begin on this order.

---------- Job Info ----------------
Job Total  $ <Total>
Required Deposit $[Formula]<Balance>*.50[/Formula]


We appreciate your business and will continue to offer you the highest quality work with excellent service at competitive prices.

Please visit our website for a complete line of our services.
```



Rules: You can use multiple formula blocks on an email template, however a formula block can only have a single equation. Additionally, formula blocks cannot be stacked, meaning you can't have a formula within another formula.

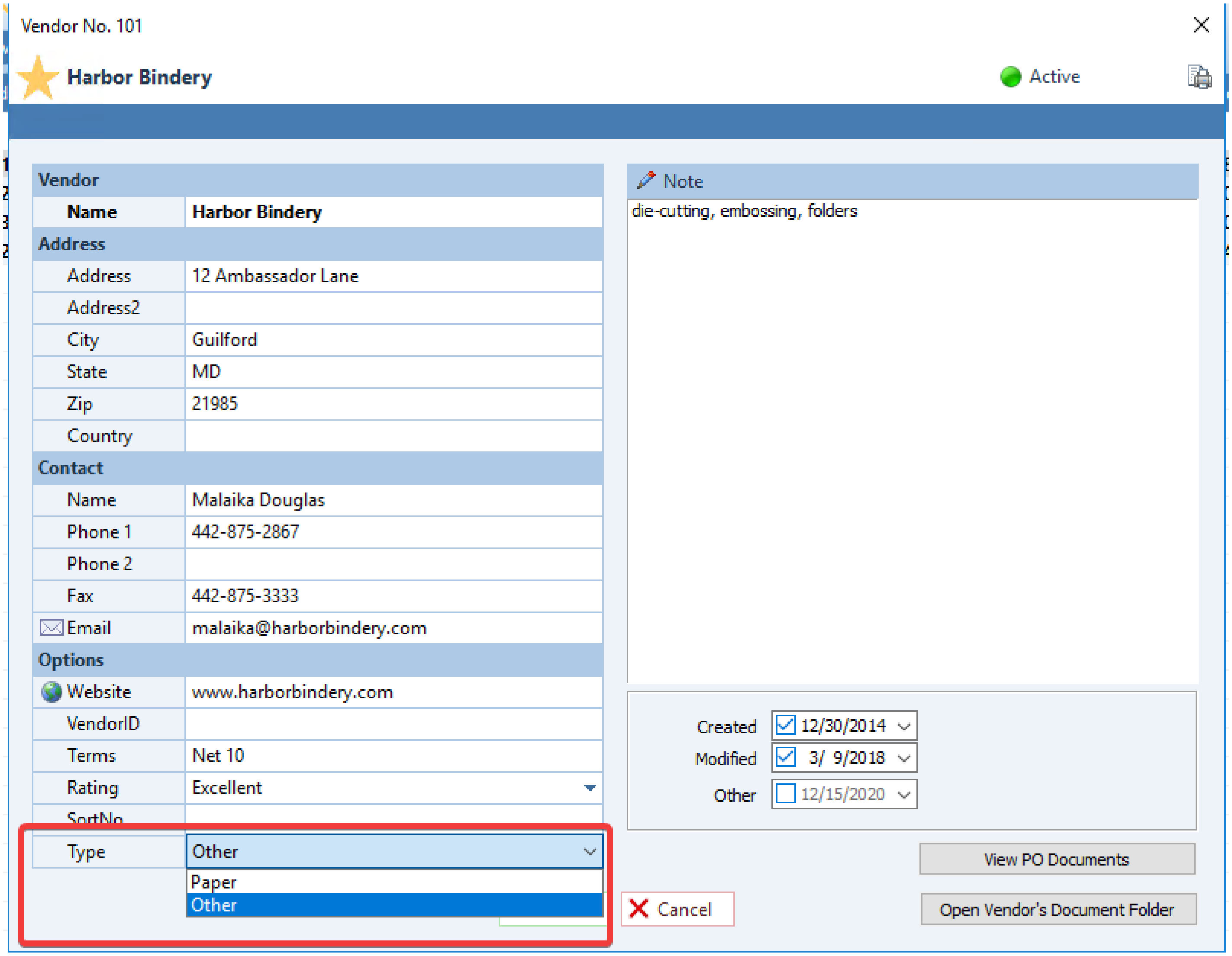
Vendors

In the 2021 update you can now create/edit **Vendors** in the **Customers** section of the program.

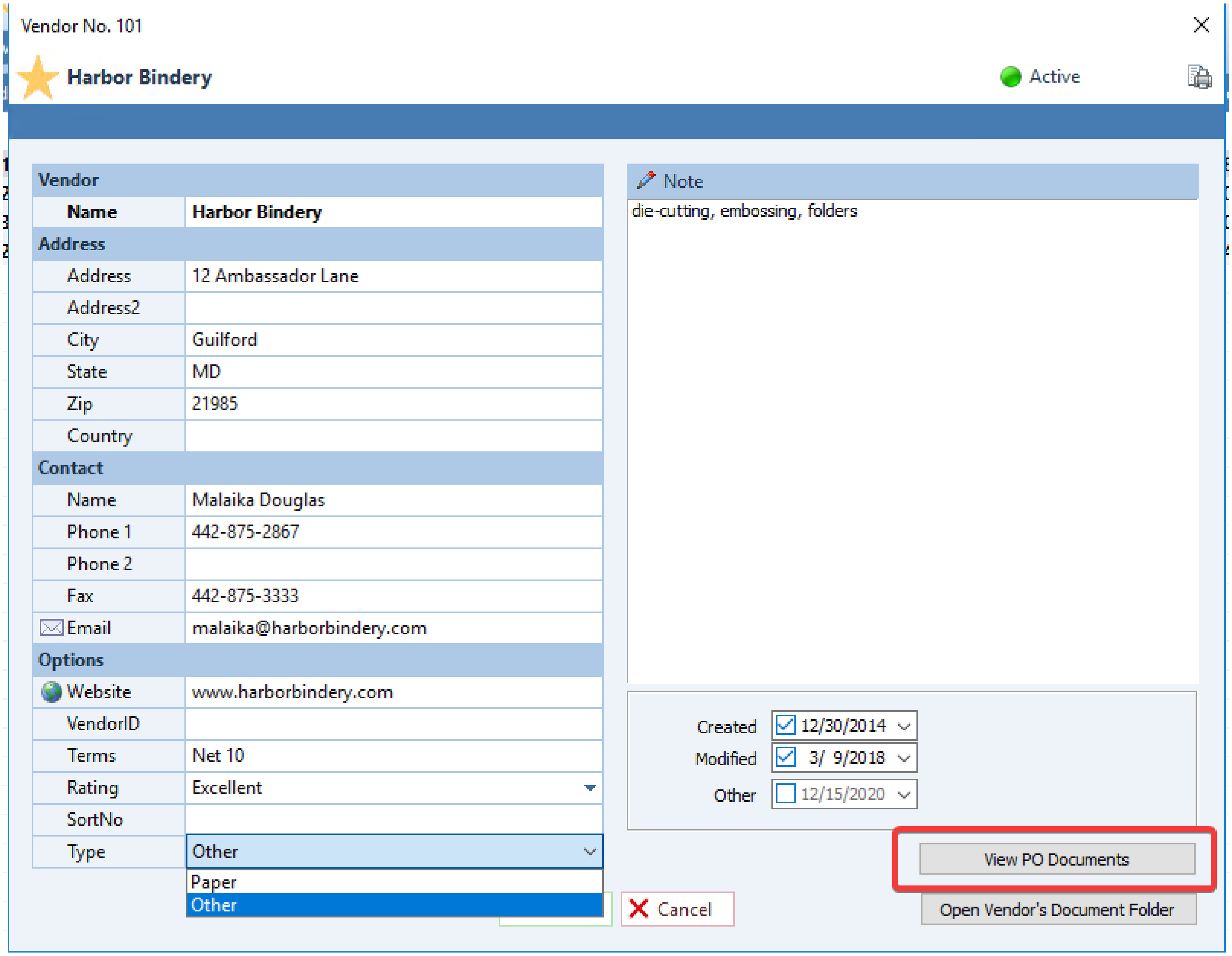


Previously vendors could only be accessed in the **Settings** section, which was often password protected at a high security level.

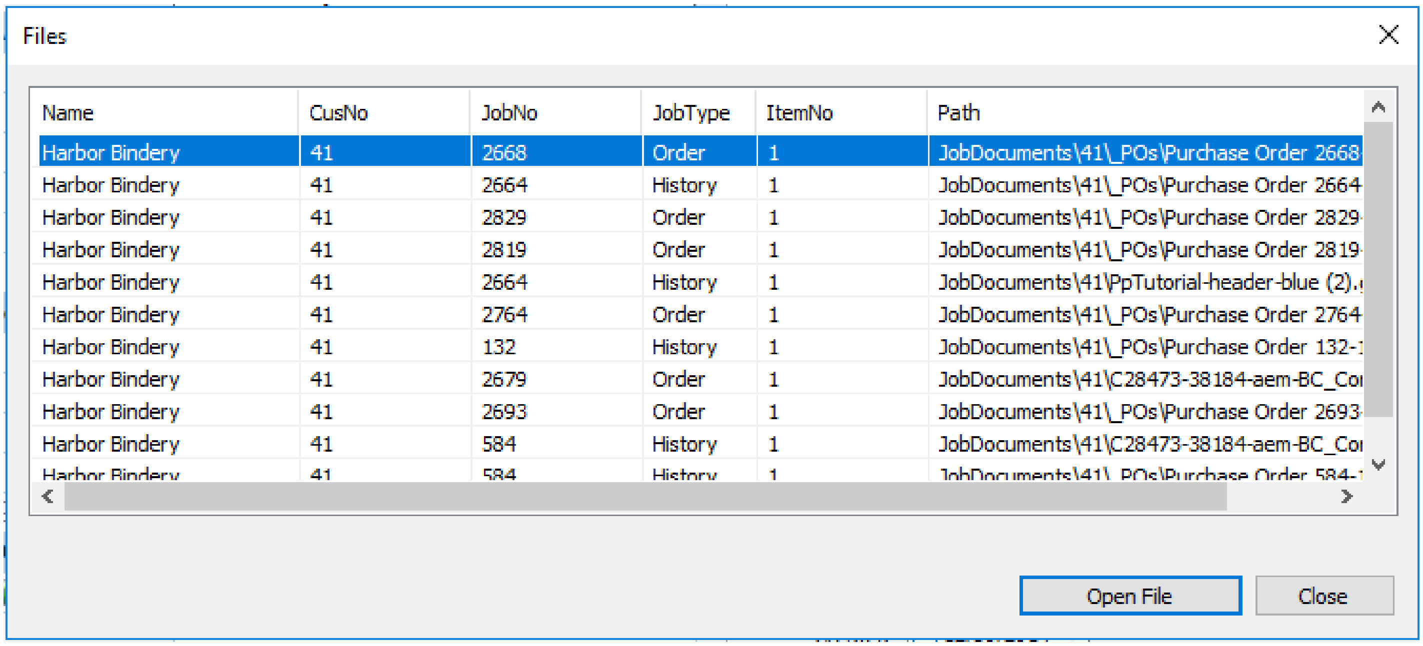
In the properties window of a vendor there is a new **Type** field -- this field allows you to set if the vendor is a **Paper** vendor, or an **Other** vendor:



There is also a new **View PO Documents** button.



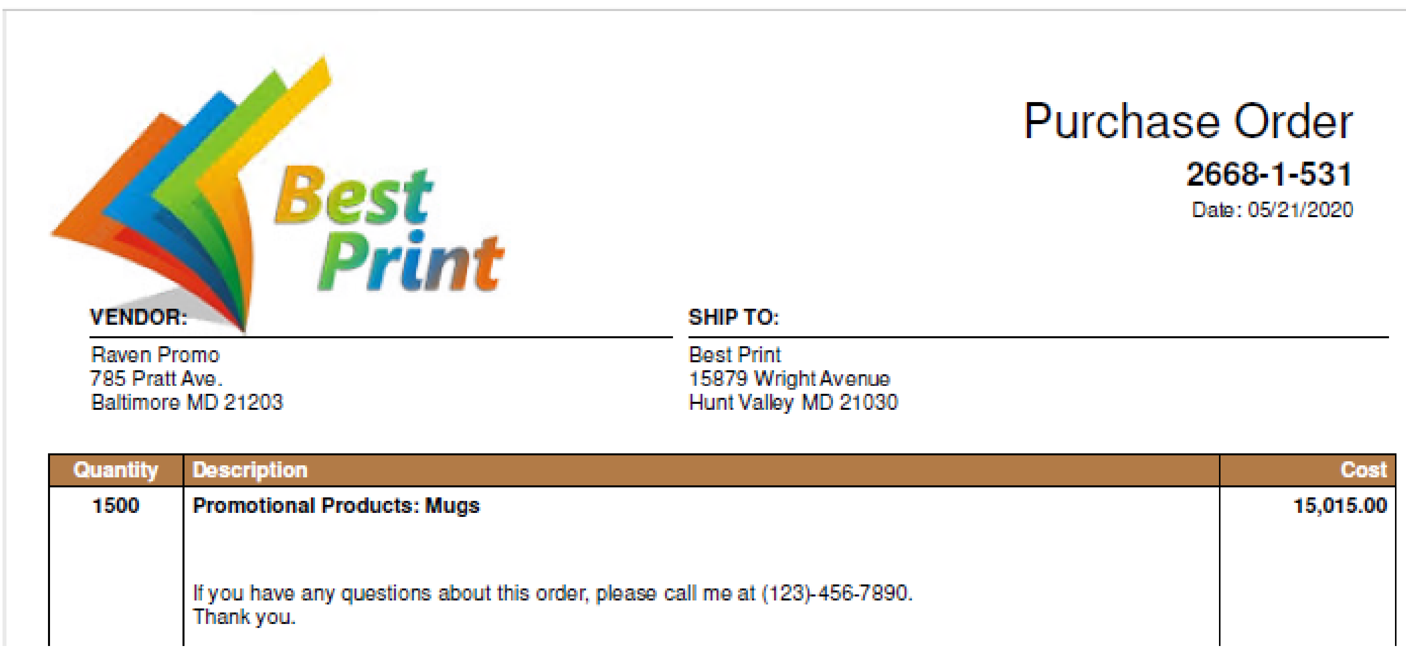
Clicking on this button will open a window displaying a list of all PO Documents linked to the vendor:


Files

Name	CusNo	JobNo	JobType	ItemNo	Path
Harbor Bindery	41	2668	Order	1	JobDocuments\41_POs\Purchase Order 2668
Harbor Bindery	41	2664	History	1	JobDocuments\41_POs\Purchase Order 2664
Harbor Bindery	41	2829	Order	1	JobDocuments\41_POs\Purchase Order 2829
Harbor Bindery	41	2819	Order	1	JobDocuments\41_POs\Purchase Order 2819
Harbor Bindery	41	2664	History	1	JobDocuments\41\PpTutorial-header-blue (2).
Harbor Bindery	41	2764	Order	1	JobDocuments\41_POs\Purchase Order 2764
Harbor Bindery	41	132	History	1	JobDocuments\41_POs\Purchase Order 132-
Harbor Bindery	41	2679	Order	1	JobDocuments\41\C28473-38184-aem-BC_Co
Harbor Bindery	41	2693	Order	1	JobDocuments\41_POs\Purchase Order 2693
Harbor Bindery	41	584	History	1	JobDocuments\41\C28473-38184-aem-BC_Co
Harbor Bindery	41	584	History	1	JobDocuments\41_POs\Purchase Order 584-

Open File Close

In this window, clicking on the **Open File** button will open the selected document:


Best Print

Purchase Order
2668-1-531
Date: 05/21/2020

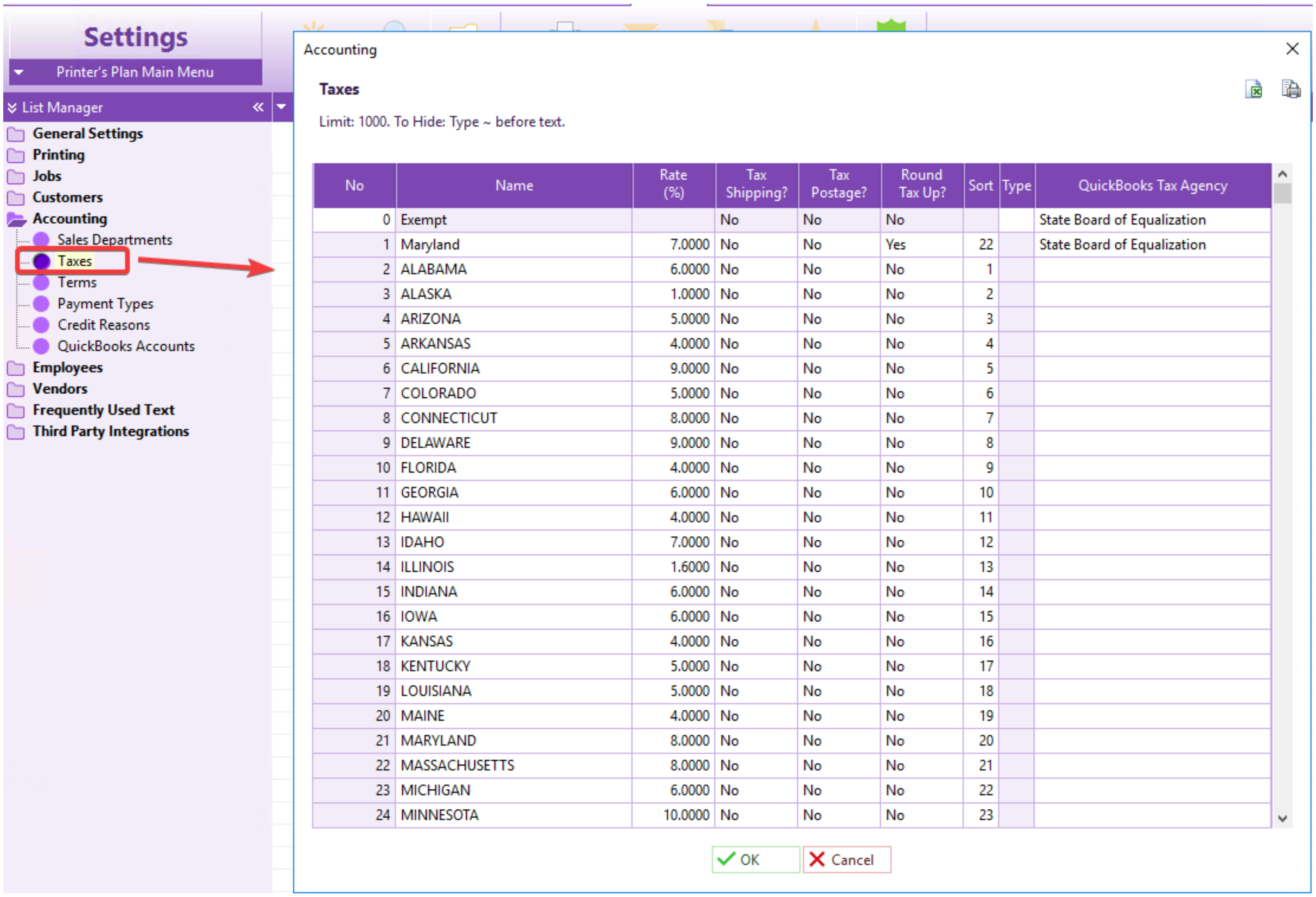
VENDOR:
Raven Promo
785 Pratt Ave.
Baltimore MD 21203

SHIP TO:
Best Print
15879 Wright Avenue
Hunt Valley MD 21030

Quantity	Description	Cost
1500	**Promotional Products: Mugs** If you have any questions about this order, please call me at (123)-456-7890. Thank you.	**15,015.00**

Tax Table

The **Tax** table was previously limited to 255 records, in the 2021 version of Printer’s Plan this limit has been increased. To access this table, navigate to the **Settings/Accounting/Taxes Table**:



No	Name	Rate (%)	Tax Shipping?	Tax Postage?	Round Tax Up?	Sort	Type	QuickBooks Tax Agency
0	Exempt		No	No	No			State Board of Equalization
1	Maryland	7.0000	No	No	Yes	22		State Board of Equalization
2	ALABAMA	6.0000	No	No	No	1		
3	ALASKA	1.0000	No	No	No	2		
4	ARIZONA	5.0000	No	No	No	3		
5	ARKANSAS	4.0000	No	No	No	4		
6	CALIFORNIA	9.0000	No	No	No	5		
7	COLORADO	5.0000	No	No	No	6		
8	CONNECTICUT	8.0000	No	No	No	7		
9	DELAWARE	9.0000	No	No	No	8		
10	FLORIDA	4.0000	No	No	No	9		
11	GEORGIA	6.0000	No	No	No	10		
12	HAWAII	4.0000	No	No	No	11		
13	IDAHO	7.0000	No	No	No	12		
14	ILLINOIS	1.6000	No	No	No	13		
15	INDIANA	6.0000	No	No	No	14		
16	IOWA	6.0000	No	No	No	15		
17	KANSAS	4.0000	No	No	No	16		
18	KENTUCKY	5.0000	No	No	No	17		
19	LOUISIANA	5.0000	No	No	No	18		
20	MAINE	4.0000	No	No	No	19		
21	MARYLAND	8.0000	No	No	No	20		
22	MASSACHUSETTS	8.0000	No	No	No	21		
23	MICHIGAN	6.0000	No	No	No	22		
24	MINNESOTA	10.0000	No	No	No	23		

QuickBooks Online Invoice Integration

The Printer’s Plan - QuickBooks Online integration allows you to send invoice data from Printer’s Plan to QuickBooks Online.

Because QuickBooks Online does not have a direct import utility, the use of a 3rd party tool, **Transaction Pro**, is required. For pricing information and licensing options relating to this software please contact Transaction Pro at https://www.transactionpro.com

The process for integrating Printer’s Plan with QuickBooks Online can be found in the following article:

QuickBooks Online Invoice Integration

New Reports

The following reports were added to Printer's Plan.

Services By Last Date Used

In the **Reports** section, under the **Production** folder there is a new report labeled **Services By Last Date Used**. This report will list all the services and the last time the service was used on a job:

Production / Services Last Date Used

Date Range: Year-to-Date: 1/1/2020 - 12/2/2020

Sevice Department	Category	Service Name	Service Count	SerNo	Last Date Used	Highest Jo...
Proof	Proof	Proof - Fedex	11	507	11/19/2020	2813
Prep Bindery	Cutting - prep	To RunSz	302	174	11/16/2020	2802
Paper	Cover Coated	10pt C2S 11 x 17	215	538	11/16/2020	2802
Paper	Text	70# Beckett Cambric 8.5 x 11	14	373	11/16/2020	2803
Paper	Text	70# Carnival Linen 11 x 17	8	513	11/11/2020	2790
Finishing	Collate	Auto	16	188	11/11/2020	2793
Large Format	Medium	Banner - Cost and Price by Mat'l Length 24	16	554	11/11/2020	2793
Paper	Text Coated	80# Gloss 11 x 17	63	65	11/11/2020	2794
Graphics	Design	Newsletter	18	114	11/11/2020	2793
Paper	Offset	60# Color 8.5 x 11	35	310	11/11/2020	2793
Finishing	Staple	Staple Flat 1	15	198	11/11/2020	2793
Large Format	Printer	Flatbed Printer	7	549	11/11/2020	2793
Graphics	Design	Revisions to Art 2	19	509	10/28/2020	2778
Graphics	Design	Revisions to Art 3	16	510	10/28/2020	2778
Graphics	Design	Revisions to Art 1	46	508	10/28/2020	2778
Brokered	Buyouts	Finishing	7	134	10/26/2020	2777
Graphics	Design	Brochure	39	522	10/23/2020	2776
Printing	Large Press	5 Color Press	26	70	10/23/2020	2776
Paper	Text Coated	80# Gloss 23 x 35	56	354	10/14/2020	2766
Apparel	Misc	Extra Quantity	6	611	10/14/2020	2544

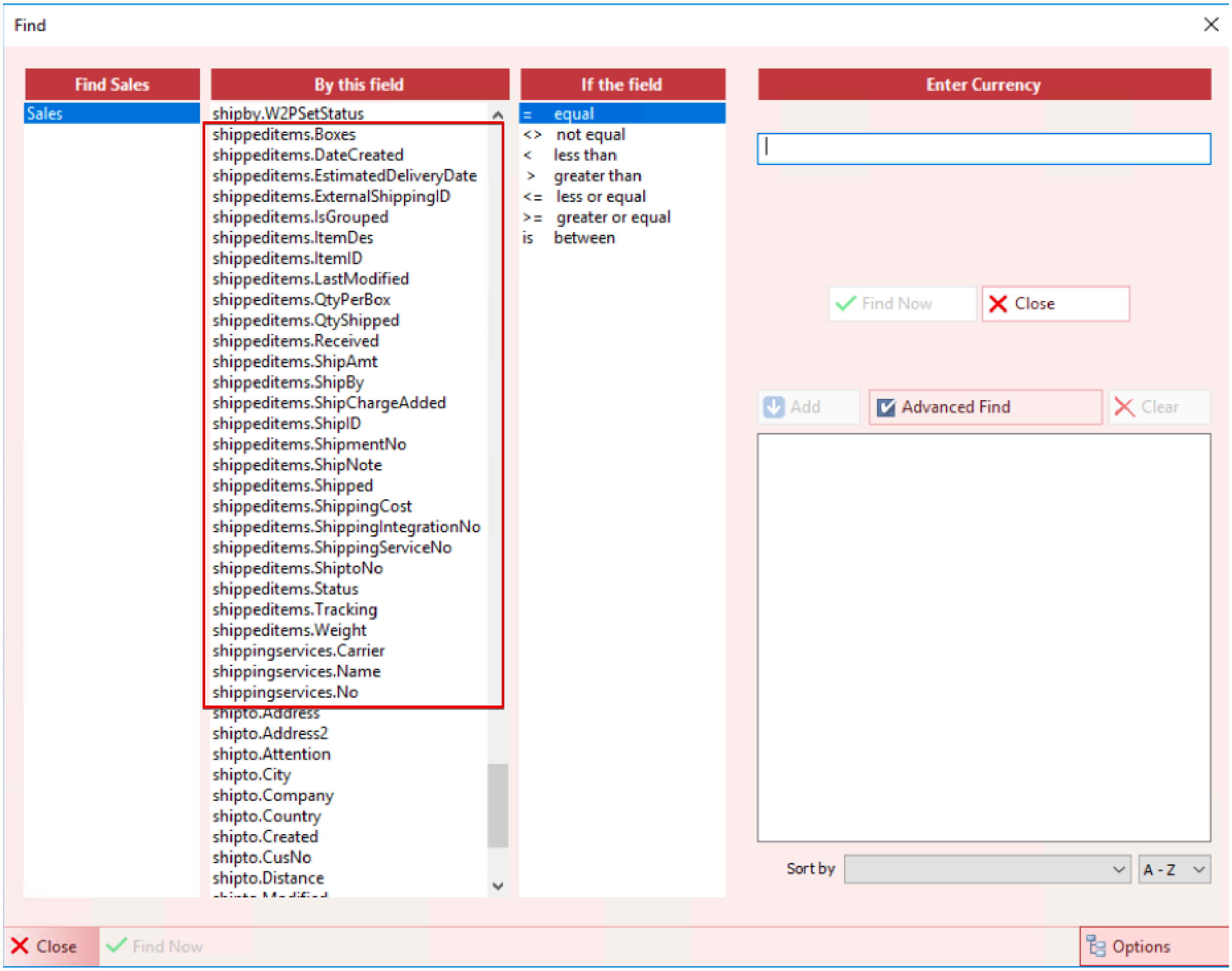
Shipment History

In the **Reports** section, under the **Sales By** folder there is a new report labeled **Shipment History**. This report will list details of the shipments created in the **Shipments and Labels** window:

Sales by / Shipment History: 59 (shippeditems.DateCreated between 1/1/2020 and 12/31/2020)

Job Num...	Ite...	Custom...	Shipment Description	Quantity ...	Boxes	Quantit...	Shipping Carrier	Shipping Service	Tracking	Weigl
2784	2	41	Posters	900	1	900	USPS	Priority Mail	1Z909	
2784	1	41	Newsletter	900	1	900	USPS	Priority Mail	1Z988884499	
2813	**3**	**39**	**Letterhead**	**1000**	**1**	**1000**	**UPS**	**2nd Day Air**	**1Z9094988798798645...**	
2811	1	39	Letterhead	1000	1	1000	UPS	2nd Day Air	1Z9094988798798645465	
2810	5	41	Postcards	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2810	4	41	Letterhead	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2810	3	41	Envelopes	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2810	2	41	Posters	900	1	900	UPS	2nd Day Air	1Z9094988798798645465	
2787	1	41	Application Forms	500	1	500	UPS	2nd Day Air	1Z9094988798798645465	
2798	7	41	labels	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2795	6	41	Brochures	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2795	5	41	Postcards	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2796	1	41	Newsletter	900	1	900	UPS	2nd Day Air	1Z9094988798798645465	
2797	1	41	Newsletter	900	1	900	UPS	2nd Day Air	1Z9094988798798645465	
2798	6	41	Brochures	1500	1	1500	UPS	2nd Day Air	1Z9094988798798645465	
2813	2	39	Letterhead	1000	1	1000	UPS	None		
2799	6	41	Brochures	1500	1	1500	UPS	None	7889	
2810	7	41	labels	1500	1	1500	UPS	None		
2813	3	39	Letterhead	0	1	0	UPS	None		
2813	1	39	Letterhead	1000	1	1000	UPS	None		

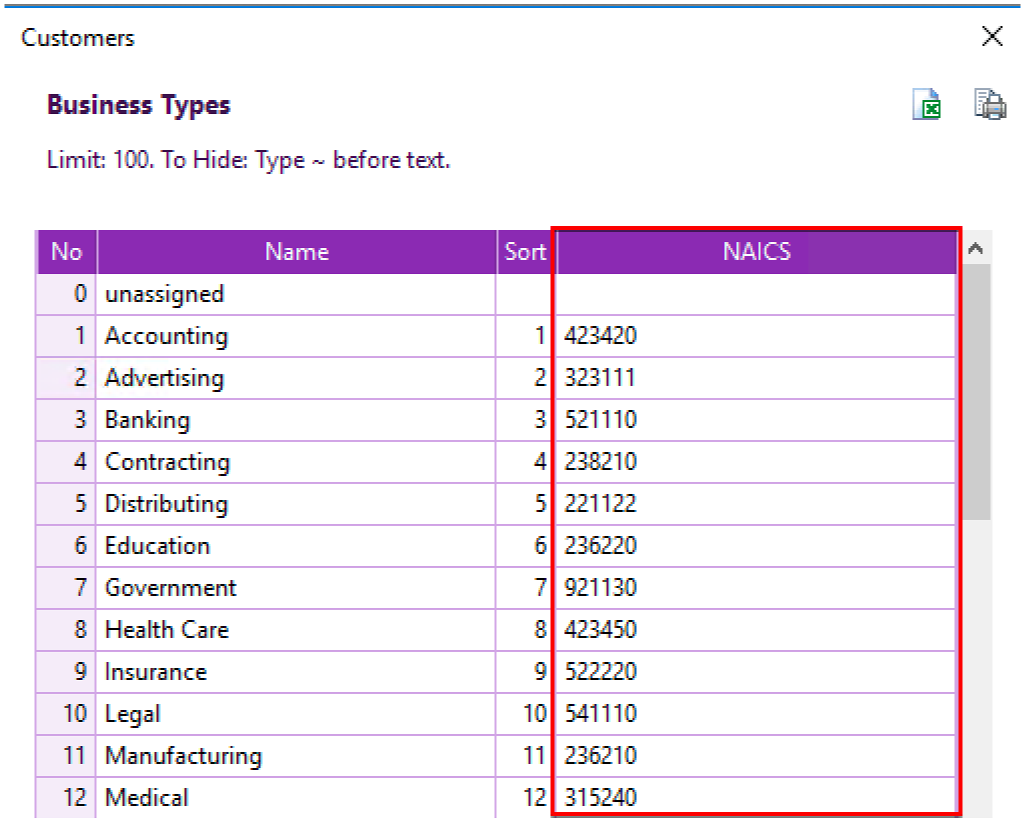
TIP: Because the data in this report is based on shipment data, to filter the report run an **Advanced Filter** to filter by the shipment data fields:



Improvements and Fixes

Business Types - New NAICS Column

In the **Settings/Customers/Business Types** table a new **NAICS** column has been added:



Customers

Business Types

Limit: 100. To Hide: Type ~ before text.

No	Name	Sort	NAICS
0	unassigned		
1	Accounting	1	423420
2	Advertising	2	323111
3	Banking	3	521110
4	Contracting	4	238210
5	Distributing	5	221122
6	Education	6	236220
7	Government	7	921130
8	Health Care	8	423450
9	Insurance	9	522220
10	Legal	10	541110
11	Manufacturing	11	236210
12	Medical	12	315240

In this column you can enter the North American Industry Classification System code for each business type. The following link provides detailed information on NAICS codes: [NAICS Codes]

API (Web2Pan) - Discount Field

On an order originating from a web2print site, such as My Order Desk, if the web order has a discount amount, this discount can now be included on the Printer's Plan job. In the Order Request Header of the cXML file generated from the web2print site, the discount amount has to be included as an **Extrinsic** data field and requires the following format:

<Extrinsic name="Discount">-10.0000</Extrinsic>

NCR Pricing

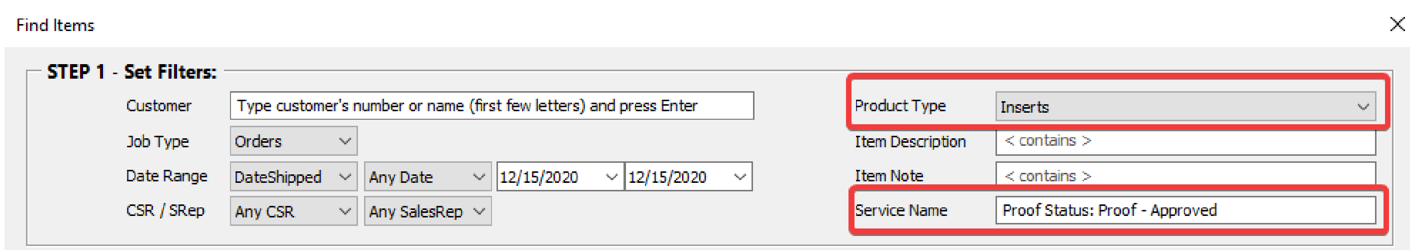
- In isolated scenarios, there was a pricing issue on multipart NCR jobs where the number of Up was greater than one. In these scenarios sheet count was rounded up by a single sheet -- this issue is now fixed.

Printer's Plan SMTP Client

- If you manually typed an email address in the **recipient**, **cc** or **bcc** fields and then added an attachment, the email addresses that were manually entered were removed. This is now fixed and the email addresses will no longer be removed in this scenario.
- When attaching multiple files, if the file name of the attached files exceeded a certain length the email failed to send, this is now fixed.

Find by Item

- In the **Find by Item** window, if you attempted a search filtering the data by both a **Product Type** and **Service Name** criteria the search failed, this is now fixed.



Barcodes

Scanning an Item Barcode while in a Job window failed to add the item to the job. This is now fixed.

Printer's Plan 2021

Upgrade Guide

(Revised February, 2021)

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