What’s New and Improved

Jobs

Viewing Book Items

In the Job window, the **Book Title** and **Total Book Price** are displayed in one line in extra-bold font.

Sub-Item Descriptions and Prices are displayed in bold font.

Printing Book Items

To print the finished **Book Size** next to the Book Title:
- You must enter the size in the **Specs of the first Sub-Item**.

To print the paper specs of each sub-Item:
- You must check the “Sub-Items” option in the Print window.

To print multiple prices for Book Items on Quotes:
- You must assign the multiple quantities in the **first Sub-Item**. Multiple quantities assigned to the other sub-items will be ignored.
- You must check “Prices for more quantities”.

Questions? Call 800-638-7526 Option One or email support@printersplan.com
Showing Ink Colors in Job Window

Ink colors are now displayed in the Job window.

Applying Customer’s Credit to Customer’s Order

In addition to applying customer’s credit to Invoices in A/R, now you can apply them to Orders.

1. Click the Credit Due button in the Job window.
2. Click Yes when asked:
3. Enter the amount and click OK.
4. Verify the Payment and Balance Due amounts.

Depending on your options, Printer’s Plan may add this information.
Printing Item Specs and Service Specs with or without Prices

Click Print in the Jobs section and then select Item or Service Specs.

<table>
<thead>
<tr>
<th>Select a Document:</th>
<th>Print:</th>
</tr>
</thead>
<tbody>
<tr>
<td>For In-House:</td>
<td>Prices</td>
</tr>
<tr>
<td>Work Order</td>
<td></td>
</tr>
<tr>
<td>For Customer:</td>
<td></td>
</tr>
<tr>
<td>Invoice (Default)</td>
<td></td>
</tr>
<tr>
<td>Order Confirmation</td>
<td></td>
</tr>
<tr>
<td>Delivery Ticket</td>
<td></td>
</tr>
<tr>
<td>Invoice (Custom)</td>
<td></td>
</tr>
<tr>
<td>Invoice (Booklet)</td>
<td></td>
</tr>
<tr>
<td>Invoice (Letter Style)</td>
<td></td>
</tr>
<tr>
<td>List:</td>
<td></td>
</tr>
<tr>
<td>- the list on the screen -</td>
<td></td>
</tr>
<tr>
<td>Jobs:</td>
<td></td>
</tr>
<tr>
<td>Job Dates</td>
<td></td>
</tr>
<tr>
<td>Job Amounts</td>
<td></td>
</tr>
<tr>
<td>Items:</td>
<td></td>
</tr>
<tr>
<td>Item Specs</td>
<td></td>
</tr>
<tr>
<td>Item Amounts</td>
<td></td>
</tr>
<tr>
<td>Services:</td>
<td></td>
</tr>
<tr>
<td>Service Specs</td>
<td></td>
</tr>
<tr>
<td>Service Amounts</td>
<td></td>
</tr>
</tbody>
</table>

Check this box to print prices in the report.

Printing the Quantity of “Good Run Size Sheets” on Work Orders

This information is especially helpful when finishing services need additional “good” sheets due to waste.

Check the following option in the Print window.

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
Viewing Cost, Price, and Margin of a Job

Now you can see the Costs, Prices, and Margins of all the Items and sub-items of a Job in one view.

Comparing Items of Jobs in History

New ‘Compare This Item...’ hot key-click is added.

Note: This feature has been available from the right-click menu of Items. In History jobs, you can access the right-click menu after clicking the Edit button, which may be password-protected. This new feature lets you compare Items easily without a password.
**Asking for the Shipping Method for New Orders**

This feature is useful when a customer needs varying shipping methods for different Orders and each Order must have a shipping method assigned in the ‘Ship Via’ field. To use this feature, do the following:

1. In Settings/Jobs, click Shipping Methods.
2. In Shipping Methods window, select the next available row (empty row #), type a question mark (?), assign a sorting number and click OK.
3. In the Customer’s setup window, assign the question mark item to the ‘Ship Via’ field.

Printer’s Plan will remind you to select a Shipping Method when you add a new Order for this customer. However, it will not require you to enter that information to print a work order and an invoice.

**How Sheets/Set and Pages/Set are calculated for Padding Jobs**

If a padding job includes a Service, which is set up as Quantity = Sheets/Set or Quantity = Pages/Set, Printer’s Plan will calculate the service quantity based on the following two rules:

- The number of Sheets/Set is always 1, even if the pads include more than one paper type.
- The number of Pages/Set is always 1 or 2, depending on how they are printed.
Other Changes in Jobs Section

- Job window shows Price Level assigned in Item Specs window.

- Ship to window has a new ‘Paste’ button:

- Ordered by window has a new ‘Paste’ button:

- The ‘Send Email...’ button on the left side of the Job window is changed to read ‘e-Letter’ for better definition of the feature that it opens.

- Printer’s Plan does not add plates for papers that are blank (no printing on either side).

- In version 2010, when a paper, which had no Parent Size (‘Other’ paper), was selected in an Item and the Finish size was equal to the Run size, the size information was lost after closing the Specs window. Now it is not.

- The Locations table is increased to 32 locations from 16.

- Specs window: ‘Work & Turn’ suggestion would pop up even though ‘Work & Other’ was already selected. Now it does not.

- Specs window: Now every Service has a ‘Vendor’ field, which was available only for Brokered and Paper services. When a Service is added to a job, its default vendor is automatically assigned.

- Cutting Diagram: Was reformatting paper Run and Finish Sizes assigned in the job as Small Side X Large Side. Now it maintains the assigned size.

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
Job window: You may not edit “special customers” when you select “View Customer Info” from the Job window:

There’s no Edit button to edit special customers: #1 - #31.
Go to the Customers section to edit special customers.

Click the Edit button to edit regular customers: #32 and up.
You still need a password to edit regular customers.
Jobs / Printing Documents

- Work Orders: Ink colors are printed in bold.

![Work Order Example]

- Invoices: The format and the font size of the SHIP TO address are adjusted so the address fits in the space.

![Invoice Example]

- Invoices/Quotes: If ‘Print All Services & Prices’ option is checked, Services with (~) in ‘Invoice Name’ field will not be skipped. If they are skipped, as they were in version 2010, the Item price may not equal to the sum of prices of the Services shown. To skip, select the ‘All Services’ option.

- Printing emails with pdf attachments of Quotes/Invoices: If the pdf copy of the same Quote/Invoice was previously created, Printer’s Plan deletes that copy and then re-creates a new one before attaching it to the Quote/Invoice.

- Job Amounts Report: The total Discount amount is changed from red font color to black for better legibility.

![Job Amounts Report Example]
Services

- New ‘No Paper Price’ option for Digital jobs: If the price assigned to a Copier, say Copier A, already includes the price of a certain Paper, assign (-1) in the ‘Digital Markup’ field of the Paper’s setup window. When you use this Paper with the Copier A in a job, Printer’s Plan will add the cost of this paper to the job but will not add a price for it.

- Price Table has a new option in the ‘Multiply the price by’ field: ‘Service Quantity’. This option allows Printer’s Plan to multiply the cell price by the Service Quantity even if ‘Item quantity’ is selected in ‘Select a row based on’ field (#2).

- ‘Divide By’ EXCEPTION: If a Service is set up as ‘Quantity = Item Quantity’, Printer’s Plan divides the ‘Divide by Value’ by ‘# Sheets per Set’, instead of dividing the Item Quantity by the ‘Divide by Value’.

  **Example:** You want to trim 1,000 books after they are assembled. Assume each book has 75 sheets and your cutter can handle up to 500 sheets. How many books can you trim per lift?

  **Answer:** 
  
  \[
  \text{Books per Lift} = \frac{500}{75} = 6.
  \]  
  \[
  \text{Service Quantity} = \frac{1000}{6} = 167 \text{ lifts}.
  \]

  Now, you can turn off this behavior by typing ‘/’ in the < ask > field.

**Note:** Services, such as Cutting, Padding, Wrapping sheets, are usually set up as Quantity = Finish Size sheets or Quantity = Run Size sheets. For this reason, these services are not affected by this exception.

- You must enter a value (zero or greater) into the ‘Cost/Hour’, ‘Min. Price’, and ‘Wage/Hour’ fields. You may not leave them blank.
Customers

- Exporting customers and printing labels improved:
  - Customers without default Buyers or Payers are also included.
  - This new option may be useful for mail merging.

- ‘Ship To’ and ‘Contacts’ windows have a new ‘Paste’ button. See the Jobs section for more information.
A/R

- Additional cautionary features are added to the ‘Invoices Read-to-Post/List’ view:

  This new column will show you if there are any issues with the jobs listed, such as Over Payment and Pricing Discrepancy. If there are issues, Post Now will be displayed in red. Fixing the issues before posting is highly recommended but not required (you may still post the jobs with issues).

- If you open the job from this view and uncheck its Date Shipped field, the list will be automatically refreshed. The refreshed list will not include the edited job, thus preventing it from being posted.

- While in this view, if the status of one of the Jobs is changed from Ready-to-Post, Printer’s Plan does not post that Job. (Changing of a Job status in this manner usually occurs when someone at another computer removes the Shipped Date of the Job.)
Reports

- Posting/Summary and AR/Summary: Both reports now include a new row to show information about invoices without Payment Due dates. In earlier versions, it was possible to post invoices without Payment Due dates. Now it is not. However, it is still possible to remove the Payment Due dates in the A/R section.
Settings

- New Password option allows Printer’s Plan to ask for a password when creating an Order for a customer that is Past-Due/Over-Credit Limit. To use this feature:

  - Enter a Password Level at row 28.
  - In the Customer setup window, assign an Alert Level for the customers you are concerned.

- New Password option to open the new ‘View Cost’ window.
  See the Jobs section for more information about the new View Cost window.

- Table size is increased to 100 for Product Types, Shipping Methods, Customer Sources, Customer Business Types, Contact Departments, and Sales Departments.
Security Level

- You can change Security Level temporarily. Click the Security button to open Security Level window, which available from all sections.

The above selection allows the user to turn off the selected password level for the duration of the current session. This feature is computer-specific; i.e., it will turn off the password(s) only on the computer on which you’re working at the time.

- You do not need any password to select the **Highest** Security Level.
- You need the **top** level password to select the **Lowest** Security Level, which turns off all the passwords for this computer.
- To select a Level 2-5, you need the password assigned to the selected level.

**Example:** You have password-protected the following sections with the password levels as shown:

- Jobs section Level 5 password
- Home section Level 4 password
- Customers section Level 3 password
- Reports Level 2 password
- Services Level 1 password

If you select **Level 3**, Printer’s Plan will turn off passwords for level 3, 4, and 5.
- No password will be asked when you go to Customers (3), Home (4), and Jobs (5) sections.
- A password is required for the Reports (2) and Services (1) sections.
Scheduler

New Options

Select **List Options** from the Scheduler Settings menu.

**Old Options**

**New Options:**

You **must** re-set your options on each workstation.

**New Sort options**

If this new option is checked and the status of an Item is Hold, Wait or Proof, Scheduler will alert you if you try to mark one of its Services as ‘Done’.

Options for New Items Changed

The ‘New Item’ options are revised. Now, when you copy and paste an Item, Printer’s Plan can assign to Services their Default Operators and Default Tags. Option to assign the same operators and tags as the ones in the original Item is removed. Select **New Item Options** from Scheduler Settings.

**Old Options**

**Revised Options**

If this new option is checked, the status of new Items will be ‘In Production’, otherwise, ‘Schedule’.

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
- If the Service Due Date is outside the date limit (earlier than the Date In or later than Date Due of the job), Scheduler asks if you want to set the service date to the limit (later than the Date In or earlier than the Date Due respectively).

- Schedule Job window: If you change the Date In or Date Due of a job, Scheduler asks if you want to Auto-Schedule.

- Printing with Page Breaks sometimes did not work in previous versions. Now it does.

- If an Order is ‘On Hold’, its status will not change as its services are marked Done/Undone. To change the status, right-click on it and select ‘Update Status...’ or just right-click on its number.
TimeTracker

- New options: Select Options for All Computers...

- New features: View Schedule and View Service Inventory. Right-click on a task to see the menu.

- If you have the Scheduler tool, you can open the Schedule Job window: Right-click on a task and select View Schedule.
- If you have the Inventory tool, you can open the Inventory window: Right-click on a task and select View Service Inventory.

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
If an operator finishes a task when there is another unfinished task for the same service, TimeTracker alerts the operator.

![Image showing a pop-up message from TimeTracker](image)

Task lists include Task Notes.

![Image of a task list with Task Notes](image)

**Note:** Task Notes are entered in the ‘Task Details’ window:

![Image of the 'Task Details' window](image)

If multiple staff members have worked on the same task, the ‘History/Update Job Services’ and ‘Tracked vs. Charged’ reports for this task show the Time for each person.

When all services are finished in TimeTracker, the status of the Item in Scheduler is updated to Done.
Reminder

- Unassigned reminders appear on everyone’s list.

<table>
<thead>
<tr>
<th>What</th>
<th>When</th>
<th>Time</th>
<th>Who</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call</td>
<td>03/07/2011</td>
<td>10 am</td>
<td>Lisa</td>
<td>Jobs</td>
</tr>
<tr>
<td>Call</td>
<td>03/08/2011</td>
<td></td>
<td>unassigned</td>
<td>Jobs</td>
</tr>
<tr>
<td>Meet</td>
<td>03/09/2011</td>
<td></td>
<td>Lisa</td>
<td>Customers</td>
</tr>
</tbody>
</table>

PriceWiz

- The free PriceWiz tool is available from any Service setup window.

- After opening the PriceWiz window in a Service setup window, if you change any properties of the Service, click ‘Save’ on the Service window to refresh the prices in PriceWiz.
New Inventory Tool

This optional tool is designed to help you track and manage stock and other selected Services.

Please call SoftUSE to learn more about this new tool.

New XML Tool

This tool is designed to create, email, and print special job-documents that you can customize.

Please call SoftUSE to learn more about this new tool.