You can now have default service(s), such as “Preflight”, automatically added to a new Item. This is accomplished by customizing each product type with its own service(s).

To implement this feature, do the following:
1. Create a new Template Job for the Walk-in customer (customer #31).
2. Change the number of the Template to 888. *(See below to learn how to change the Template number.)*
3. Add to the Template one Item for each of the Product Types to which you want to add a default service.
4. Add to an Item the desired default service(s), change any other specs (quantity, size, etc.), and save.
5. If the Item is priced, set the Item price to zero in the Costs window.

When Product Type “Brochure” is selected in a new Item of an Order/Quote, the service “Preflight” is automatically added.

If you do not use Product Types, this feature will still work with Product Type “?” (number 0).
Business card Items: If the Document type is “Names”, the unit price is shown as dollar amount (two decimal places) “per Name” instead of per Each or M.

Price per Pad, Price per Set: This feature is similar to the Business Card feature above. If the Document Type is “Sheets/Pad” or “Tabs/Set”, the Unit Price is per Pad and per Set respectively.

Now you can have an Item Description print on a Quote/Invoice for information only - without Quantity or price as “No Charge”. This feature is especially helpful when the customer prepays for the postage of a mailing job and you want to send him a paid invoice where the postage and paid amounts show at the bottom of the invoice (postage entered in the Postage field of the Job Totals window). To enable this feature, you must type a tilde (~) in front of the Item Description.
“Ship To” address now includes the “Ship To phone number” on the Job window and on work orders and invoices.

New shortcut: To open the Detail window (instead of the list window) of a “Ship To” address or of a “Buyer”, hold the [Ctrl] key down and click Ship To (or Buyer).

All Note windows (Job, Item, Service, Customer, Contact, Reminder, and other) include the default CSR name. When the name is clicked, it will be inserted at the cursor location.
New Document type: “Tabs/Set” for tab jobs where all tabs are printed on one sheet and then paper is die-cut.

<table>
<thead>
<tr>
<th>Description</th>
<th>Tabs</th>
</tr>
</thead>
<tbody>
<tr>
<td>#Sets</td>
<td>500</td>
</tr>
<tr>
<td>Tabs/Set</td>
<td>6</td>
</tr>
<tr>
<td>Sides</td>
<td>1</td>
</tr>
</tbody>
</table>

**Services**

- **Category**: 110# White, 8.5 x 11, 6 Tabs/Set, Atlantic
- **Run**: 8.5 x 11, Finish: 8.5 x 11, (1 cut 1 up)
- **Front**: 1 Color, PMS 623
- **Back**: 
- **Plate**: CTP Plate: 1
- **Small Press**: Press, Wash: 1, Mix: 1

- **List Manager filters**

This feature will work only when the Job list is selected from one of the filters in the List Manager. If you use the “Add Filter...” feature or the “Find” window to create the Job list, “My Jobs Only” feature will be ignored.

New option: You can now have the Job list to display only the “default CRS’s” Jobs by default.

Click to open the “Include My Jobs Only” window.

Click here to assign a default CSR to this computer.
Orders list views include columns for “Customer Number” and “Job Time Due”.

Item Specs window | Paper Specs window | Bleed field: If the selection in the Bleed field is changed, a pop-up window asks if the Cutting Diagram window should be opened.

“Job Dates” report includes Proof Due Time.
Item Price List has new options.

Options to show unit price as "Per Each" and "Auto" in addition to "Per 1000". ("Auto": ‘Per Each’ for quantities less than 1,000, ‘Per 1000’ for quantities 1,000 or higher)

Export the Price List to an XML file (available with the XML tool).

New

Click to open the “How to Set Quantity Breaks” window. 

New

How to Set Quantity Breaks:

Select a pre-defined interval from the list: 100, 250, 500, 1000 or type another interval. Examples: If you select 250, you will see prices at every 250, starting at 250. Limit 30 quantities.

Select ‘Varies’ to list prices at pre-defined quantities of 500, 1M, 5M, and 10M. This list is useful to review prices.

Select ‘Price List’ to list prices from quantity 25 to 19,000 at varying intervals. Limit 120 quantities. Suggestion: Use this list when you generate a Price Book.

Type the starting and ending quantities separated by hyphen (-). Examples: If you type 20-100, you will see prices between 20 and 100 at every 20. Limit 1000 quantities.

New

Type the starting and ending quantities and the interval. Example: If you type 20-100 @5, you will see prices between 20 and 100 at every 5. Limit 1000 quantities.

New

Unit Price Options:
• Blank: Do not show unit prices
• Per Each: Show price/ea for each quantity
• Per 1000: Show price/M for each quantity
• Auto: Show price/ea if quantity is less than 1000, otherwise price/M.
The “Find” window (Jobs and Customers sections) includes additional criteria.

- “Find” window
  - Jobs section
  - New fields are yellow highlighted.

- “Find” window
  - Customers section
  - New fields are yellow highlighted.

- “Contact” replaces “Buyer” and “Payer”

Invoice/Quote printing: New option is added.

- If checked: Buyer’s or Default Payer’s names will not be printed with the “Bill To” address.
- If not checked: Default Payer’s name or, if there’s no Default Payer, Buyer’s name will be printed (the same as in versions 2011 and earlier).
Work Order printing: New options are added; some existing ones are improved.

- Printing "Cost" disabled in Settings | Jobs | Job Options
- New options (See below for explanation.)
- "Ship To" Note copied to work order.
- Special Instructions and Notes will print on every page if this is a multi-page work order.
- Item Quantity before Item Description
- Printing #Originals on Work Order is now an option.

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
New Job options are added to the “Job Options” table in Settings | Jobs.

1. Status of new Quote is set to “Warm”.
2. Date invoice printed is added to Job Note.
3. Due Date = Date In + 4 days
4. Both Customer’s “Work Order Note” and “Invoice Memo” from customer setup window are copied to Order.
5. “Cost” option is hidden.

Explanation of the New Options
The Default Note or Memo of the Quotations/Invoices may include any one or more of all the fields of the Job, Customer, and Contact. (In previous versions, this selection was limited to just a few fields.)

To see a list of the field names available, click the Find button in the Jobs section and then click Show Advanced Find. The field names are listed in the By this field column.

You may use all the Contacts, Customers, and Jobs field names in this column.

Be sure to insert the field names within brackets when you use them. Example: <Jobs.SRepNo>
Difficulty Table for Digital Printers/Copiers: Now you can adjust the time and waste for digital printers according to the paper used in the job and the difficulties of the job.

### Services section

#### Paper Difficulty Table
Enter the setup time, speed, and waste adjustments for papers. This table is linked to a paper by the waste table row assigned to the paper.

<table>
<thead>
<tr>
<th>Paper Difficulty Table</th>
<th>Job Difficulty Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the setup time, speed, and waste adjustments for papers. This table is linked to a paper by the waste table row assigned to the paper.</td>
<td>Enter the setup time, speed, and waste adjustments for job difficulties.</td>
</tr>
</tbody>
</table>
You can now assign to a service a setup price that will be added to the Price Table prices.

More columns are added to the Services List View.
Now you can assign Cost per Click to Digital Printers/Copiers set up as “Color/Black”.

Setup price (new feature) will always be used – whether you enter costs for columns or not.

Col/Blk cost = Average Cost/Click = (Cost Side1 + Cost Side2) / 2

You must still enter a cost in “Run Table” although the costs in “Price Table” will override it. If this field is zero or blank, Printer’s Plan will ask for material cost in the job.
Ask for Total Cost: If a service is set up as:

- **Quantity** = (any selection from the list)
- **Cost** = Material Cost only or Time Cost + Material Cost
- Mat. Cost is blank
- Mat. Costs and Run Prices are = Total

then Printer’s Plan asks for the total cost of the service regardless of the selection in the “Quantity” field.

When the service above is used in an Item, the following window will appear:

Enter the total cost. If there is a setup cost, it will be added to the Total cost you enter.
Customers section

When a customer window is opened in non-edit mode, such as when it is opened from the Job window, typing in the Note field will cause a warning window to open to let the user know that the notes will not be saved.

Window color is gray to indicate that the window is in non-edit mode.

Customer Note field

Warning window

See Settings | General Settings | Passwords to set permissions for opening the Customer window: New tasks: #66 through #68
You can now add filters to “Profitability” and “Comparison” reports for Customer, Customer Ship To and Buyer, CSR, Sales Rep (assigned to Job), and Location No.

Right-click the report and then click “Add Filter…” to open the Find window.

“Ship To” and “Buyer” numbers can be found on their Edit windows. (See the following.)
New report showing Quotes won and lost and their ratio is added to Special Reports.

Tax reports are revised: If the tax amount of a Job is zero, the net sale amount for the Job is reported under Tax Exempt sales.

Reports by “Date (In, Shipped, Paid, Reorder)” and some of “Sales By” reports now include Shipping, Postage, and Tax totals.
New report: “Activities of Customer No...”, added to “Special Reports”, shows the major transactions of a customer for a specified period of time.

### Special Reports / Activities of Customer No: 41 - ABC Company

**Data Range:** April 1, 2012 - April 30, 2012

#### Orders Received (14)

<table>
<thead>
<tr>
<th>Order Date</th>
<th>Job</th>
<th>Title</th>
<th>Ordered By</th>
<th>Status</th>
<th>Prepared</th>
<th>Subtotal</th>
<th>Discount</th>
<th>Job Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/01/2012</td>
<td>2398</td>
<td>Newsletter</td>
<td>Sharon Jones</td>
<td>In History</td>
<td>Paul</td>
<td>4,304.00</td>
<td>-212.20</td>
<td>4,091.80</td>
</tr>
<tr>
<td>04/01/2012</td>
<td>2263</td>
<td>Brochure</td>
<td>Ann M. Linz</td>
<td>In History</td>
<td>Brad</td>
<td>2,517.00</td>
<td>-393.45</td>
<td>2,123.55</td>
</tr>
<tr>
<td>04/06/2012</td>
<td>2346</td>
<td>Direct Mail Envelopes</td>
<td>Ann M. Linz</td>
<td>In History</td>
<td>Lisa</td>
<td>1,785.88</td>
<td>-88.64</td>
<td>1,697.24</td>
</tr>
<tr>
<td>04/06/2012</td>
<td>2345</td>
<td>Welcome Brochures</td>
<td>Sharon Jones</td>
<td>In History</td>
<td>Paul</td>
<td>2,630.00</td>
<td>-141.50</td>
<td>2,488.50</td>
</tr>
<tr>
<td>04/07/2012</td>
<td>2344</td>
<td>Flyers</td>
<td>John Smith</td>
<td>In History</td>
<td>Lisa</td>
<td>78.42</td>
<td>-27.74</td>
<td>50.68</td>
</tr>
<tr>
<td>04/07/2012</td>
<td>2343</td>
<td>Newsletter</td>
<td>John Smith</td>
<td>In History</td>
<td>Lisa</td>
<td>105.00</td>
<td>-110.25</td>
<td>4.75</td>
</tr>
<tr>
<td>04/09/2012</td>
<td>2342</td>
<td>BUSINESS CARDS THERMAL FOIL</td>
<td>John Smith</td>
<td>In History</td>
<td>Brad</td>
<td>4,895.94</td>
<td>-240.35</td>
<td>4,655.59</td>
</tr>
<tr>
<td>04/09/2012</td>
<td>2341</td>
<td>Newsletter</td>
<td>Sharon Jones</td>
<td>In History</td>
<td>Paul</td>
<td>650.00</td>
<td>-237.74</td>
<td>412.26</td>
</tr>
<tr>
<td>04/09/2012</td>
<td>2340</td>
<td>Newsletter</td>
<td>Sharon Jones</td>
<td>In History</td>
<td>Paul</td>
<td>1,120.94</td>
<td>-124.00</td>
<td>996.94</td>
</tr>
<tr>
<td>04/09/2012</td>
<td>2339</td>
<td>Envelopes</td>
<td>Sharon Jones</td>
<td>In History</td>
<td>Lisa</td>
<td>740.78</td>
<td>-37.04</td>
<td>703.74</td>
</tr>
<tr>
<td>04/09/2012</td>
<td>2338</td>
<td>Employee Manuals</td>
<td>Sharon Jones</td>
<td>In Progress</td>
<td>Lisa</td>
<td>251.40</td>
<td>-12.57</td>
<td>238.83</td>
</tr>
</tbody>
</table>

**Total:**

Orders Received (14) 25,098.80 - Discounts 458.30 = 24,640.52

#### Payments Received

<table>
<thead>
<tr>
<th>Payment Date</th>
<th>Applied To</th>
<th>Paid By</th>
<th>Reference</th>
<th>Group</th>
<th>PayAmount</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/12/2012</td>
<td>2357</td>
<td>Check</td>
<td>123054</td>
<td>AR</td>
<td>171.94</td>
</tr>
<tr>
<td>04/19/2012</td>
<td>1932</td>
<td>Visa</td>
<td>AR</td>
<td></td>
<td>407.53</td>
</tr>
<tr>
<td>04/22/2012</td>
<td>1933</td>
<td>Visa</td>
<td>AR</td>
<td></td>
<td>34.77</td>
</tr>
<tr>
<td>04/25/2012</td>
<td>1934</td>
<td>Visa</td>
<td>AR</td>
<td></td>
<td>444.04</td>
</tr>
<tr>
<td>04/20/2012</td>
<td>2235 2251 2280</td>
<td>Check</td>
<td>AR</td>
<td></td>
<td>674.70</td>
</tr>
</tbody>
</table>

**Total Payments Received:** 7,815.14

#### Payments Expensed (6)

<table>
<thead>
<tr>
<th>Invoice No</th>
<th>Title</th>
<th>Data Shipped</th>
<th>Invoice Total</th>
<th>Paid</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/01/2012</td>
<td>1950 Newsletter</td>
<td>2/17/2012</td>
<td>423.80</td>
<td>-161.19</td>
<td>262.61</td>
</tr>
<tr>
<td>04/02/2012</td>
<td>1951</td>
<td>3/29/2012</td>
<td>962.72</td>
<td>-207.03</td>
<td>755.69</td>
</tr>
<tr>
<td>05/01/2012</td>
<td>2100 Letterhead</td>
<td>4/7/2012</td>
<td>211.50</td>
<td></td>
<td>211.50</td>
</tr>
<tr>
<td>05/05/2012</td>
<td>2435 Newsletter</td>
<td>4/20/2012</td>
<td>1,087.23</td>
<td></td>
<td>1,087.23</td>
</tr>
<tr>
<td>06/12/2012</td>
<td>2300 Welcome Brochures</td>
<td>4/13/2012</td>
<td>2,832.02</td>
<td>-1,190.49</td>
<td>1,641.53</td>
</tr>
<tr>
<td>05/24/2012</td>
<td>2304 Flyers</td>
<td>4/18/2012</td>
<td>27.74</td>
<td>-4.15</td>
<td>23.59</td>
</tr>
<tr>
<td>05/17/2012</td>
<td>2301 Newsletter</td>
<td>4/16/2012</td>
<td>437.80</td>
<td></td>
<td>437.80</td>
</tr>
<tr>
<td>05/25/2012</td>
<td>2430 Envelopes</td>
<td>4/26/2012</td>
<td>1,612.98</td>
<td></td>
<td>1,612.98</td>
</tr>
</tbody>
</table>

**Total Payments Expensed:** 7,698.58 - Discounts 2,812.98 = 4,885.60

#### Credit Transactions

<table>
<thead>
<tr>
<th>Credit Date</th>
<th>Job</th>
<th>Reason</th>
<th>Transaction Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/01/2012</td>
<td>0</td>
<td>Preprint error</td>
<td>75.00</td>
</tr>
</tbody>
</table>

**Total Credit Transactions:** 75.00

#### Write Off Transactions (2)

<table>
<thead>
<tr>
<th>Write Off Date</th>
<th>Job</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/12/2012</td>
<td>1951</td>
<td>-177.71</td>
</tr>
<tr>
<td>04/20/2012</td>
<td>2304</td>
<td>-46.97</td>
</tr>
</tbody>
</table>

**Total Write Off Transactions:** -41.68

#### Late Fee Transactions (1)

<table>
<thead>
<tr>
<th>Late Fee Date</th>
<th>Job</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/28/2012</td>
<td>1550</td>
<td>3.53</td>
</tr>
</tbody>
</table>

**Total Late Fee Transactions:** 3.53

Questions? Call 800-638-7526 Option One or email support@printersplan.com.
A/R section

- You can now set a payment type as default. This feature is computer-specific.

The word “Aging” is removed from the list names under “Invoices Unpaid”. No changes are made to these lists.

Now you can send to a Parent Company a statement, which includes the children’s invoices, even though the Parent Company does not have open invoices. To enable this feature, assign the customer number of the Parent Company to its “Parent No...” field.
Settings section

- More functions are added to the “Passwords” table.

<table>
<thead>
<tr>
<th>ID</th>
<th>Tasks and Required Password Levels</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>58</td>
<td>Print List and Labels in Customers section</td>
<td>2</td>
</tr>
<tr>
<td>59</td>
<td></td>
<td></td>
</tr>
<tr>
<td>60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>61</td>
<td>Enter Quick Sales</td>
<td>3</td>
</tr>
<tr>
<td>62</td>
<td>Enter Deposit</td>
<td>2</td>
</tr>
<tr>
<td>63</td>
<td>Reverse Payment</td>
<td>2</td>
</tr>
<tr>
<td>64</td>
<td>View/Edit Commission</td>
<td>2</td>
</tr>
<tr>
<td>65</td>
<td>View Customer from Job window</td>
<td>2</td>
</tr>
<tr>
<td>66</td>
<td>Edit Customer from Jod window</td>
<td>2</td>
</tr>
<tr>
<td>67</td>
<td>Edit Customer from Customers section</td>
<td>2</td>
</tr>
</tbody>
</table>

New areas that can be password-protected

Misc

- Now Printer’s Plan remembers the location where you backed up the database the last time using the “Back up” feature in the “Home” section.

- The window color for the second copy of Printer’s Plan opened on the same computer is now dull for easy identification between the two copies.
Fixes

- Fix in Contact, Ship to, and Reminder list windows: After selecting a row, if you clicked “New”, then “Cancel”, and then “Edit”, the “New” window was displayed instead of the “Edit” window of the selected row. This error is fixed.

- Invoice/Quote printing: When print “All Services & prices” option was selected, all services, including the ones marked with tilde (~), were printed. Now, “No Charge” services marked with tilde are not printed.

- Work Order printing: When only a portion of the Paper information could fit at the bottom of a Work Order page, the rest of the information did not print on the next page. Now, the complete Paper information is printed on the next page.

- The default selection in the Customer’s “Price Rounding” field was ignored. Fixed.

- If a Plate is hidden, it no longer shows in the Default Plate list for a Press.

- Finishing services setup waste now factors in the number of parts of a paper (example: carbonless papers) when the setup waste is calculated.
QuickSale tool

- Now a service selection is required on the QuickSale window.

![QuickSale tool](image)

- Unused fields in the QuickSale setup window are now hidden.

ShippingLabels tool

- Now you can also include Contact’s Email, Phone2, all cell (Mobile) fields, and Ship To Phone in Shipping Labels templates.

Reminder tool

- New option allows you to combine or separate A/R and Customer reminders.
Scheduler tool

- The “Favorites” feature is now added to Scheduler.

Right-click on a list and select “Add to Favorites...”. Later click “Favorites...” to display the report. This feature is especially helpful and saves time when a salesperson wants to see his/her jobs regularly.

- Summary-To-Do by Category/Service view now also displays category totals.
Now a “View Schedule” window is available in the History Job window. It displays, along with other information, the operators who completed the tasks when the history job was an Order.

 Fixes in the Scheduler tool

• Printing an Inventory list: Each page added more blank lines. Fixed.
• Option “Clear Service Date” in the “New Item Options” did not work. Now it does.
• The When window of the Schedule window allowed changing the Job status to “Ready-to-Post” even if the Job was not priced, invoice was not printed, or Shipped date was not assigned. Now the program checks the Job if the above conditions are fulfilled before changing the status.
• “Order No” column was not sorted correctly. Now it is.

 XML tool

• Printing Work Orders and Invoices: If the selected template (.xslt file) name starts with “WorkOrder” or “Invoice”, the Shipped date, #printed, and status of the order are updated just like the way they are updated when the forms are printed from the regular Print window.
• You can now export the Price Book to an XML file.
• You can now export any list in Printer’s Plan to an XML file.
Inventory tool

- Inventory window is now larger.
- Now you can view the Inventory detail of a service in the Item specs window.

![Inventory window](image)

Right-click on service and select “View Service Inventory”.

![Inventory list](image)

When the Inventory options are set so that the Inventory window is not available in the Job window when the “Inventory” button is clicked, you can still view the window in non-edit mode.

Fixes in the Inventory tool

- Printing an Inventory list: Each page added more blank lines. Fixed.