PrintPoint 5
Reference Manual

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Chapter 1
About This Manual

OVERVIEW

This manual is a users guide to help you install, setup, and use the PrintPoint Graphic Arts Management System. Although it does contain some tutorial information, it is not a tutorial with step-by-step lessons. The Step-By-Step sections of the manual are generic steps describing how to use the tools you will use to create estimates, quotes, job tickets, invoices, shipping documents, etc.

Cross-Platform and Client/Server Considerations

PrintPoint was designed to run on both Windows and Macintosh computers. Because the concepts and functionality of both version of PrintPoint are nearly identical, the manual addresses each platform as if it were the same and only focuses on the differences when necessary.

The screen shots are taken from both environments. Two version of the same screen are only presented if there are any major differences between them.

If you are using a client/server (multi-user) version of PrintPoint, you will need to pay attention to particular areas that only pertain to your configuration.

This manual assumes you are familiar with the basic Macintosh or Windows operations, such as selecting objects, choosing menu items, clicking, dragging, etc. Please Refer the users guide or the on-line help that came with your computer if you are not familiar with these operations.

Best Practice

The documentation is based on the principle of "best practice." This means that the actual step-by-step instructions for accomplishing a task are based on what we and most users consider to be the most commonly used technique for accomplishing that task. For example, although there are at least seven different was to create a new estimate, "best practice" dictates that we describe the most common way (and perhaps one alternative) that the average users will begin creating an estimate.

Example

1. New Menu ➤ Estimate ➤ WorkSheet

   A blank estimate WorkSheet will be displayed with a Choice List for customers in the upper right hand corner.
2. Select a customer from the Choice List
3. ....more instructions here

Now you could also open the Estimate List View and select WorkSheet from the New popup button or you could select an estimate from the list of options. Or, you could review jobs and choose to reprint a job, etc.

How the manual is setup

Each chapter in the manual is divided into the following sections:

Section	Description
Overview	General description of the chapters content.
Before You Begin	What information, setup, or steps you should already know or have taken before you use the Step-By-Step section that follows
Step-By-Step	This is the "How To..." section of each chapter.
Where Else Is This Information Used	Optional section that is used to describe how the information in this chapter is used by other areas of PrintPoint.
About The Screens	Contains the screen snapshots with explanations of the functions of each field, buttons and object on that screen.
Understanding The Calculations	Optional section only used when the information in the chapter refers to calculations that may need further explanation for those users who want to dig a little deeper into the theory of how PrintPoint is actually deriving its numbers.

Each of these sections is preceded by a right pointing triangle and appears like this graphic below:

Section Marker

What's Not In The Manual

We have worked very hard to embed as many on screen aids as possible inside of PrintPoint itself to help you learn and use the program. Whenever we feel that an area has been sufficiently covered by one of those aids, we will not duplicate the information in the manual.

An example of this is the use of Wizards or Tool Tips. The entire purpose of a wizard or tool tip is to help you as you are using the program. We will direct you toward the wizards and tool tips, but will not attempt to document the use of them. They are created using standard Windows and Macintosh techniques and are consistent with everyday use of your computers.

What do I do next?

To begin using PrintPoint, you should review the following chapters to get a good overview of the setup, basic configurations, and “core” tools that are specific to PrintPoint.

- Getting Started
- PrintPoint Basics
- Users & Passwords
- User Settings

The exact order in which you review these areas is not critical. One good read of these chapters before you begin using the program will make “jumping-in” on all the others areas much simpler.

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Setup

Chapter 2
Getting Started

OVERVIEW

This chapter helps you complete the installation by guiding you through the registration process, entering your company name and serial number and setting the appropriate language for your system.

To get you up and running as easily as possible, we introduce the use of the PrintPoint Wizards to assist you in data entry and explore some of the basic PrintPoint techniques through the use of the interactive Demo.

BEFORE YOU BEGIN

You should have...	Where this information is found...
Installed PrintPoint on your machine or on server and client machines	PrintPoint Installation instructions
Received a registration number	Printed Registration Form
Be familiar with the basic Macintosh or Windows operations, such as selecting objects, choosing menu items, clicking, dragging, etc.	Refer to the users guide or the on-line help that came with your computer.

STEP-BY-STEP

This section includes the following topics:

- Registering PrintPoint
- Using the Setup Wizard
- Using other Wizards
- Running the PrintPoint Demo

Registering PrintPoint

Registering for the First Time

If you've just purchased PrintPoint, the PrintPoint Registration dialog box will be displayed the first time you run the program. Depending on the version, number of users, and features you have requested, we have assigned a Registration Number to you that is directly connected to the exact registered name of your company as it appears on the Registration Form.

1 From the Language drop-down list in the Registration dialog, select the language you want to use.

TIP

At any future time, each user can set his/her own language to use the application by selecting File Menu ➤ User Setting ➤ Language Tab.

2 In the Company Name field, type the company name exactly as it appears on the Registration Form. Make sure to include all spaces, commas, periods, etc.

3 In the Registration Number field, type registration number exactly as it appears on the Registration Form. The registration number is composed of only the numbers 0-9 and the letters A-F

4 Click the Register button

A dialog window displays instructing you to restart PrintPoint.

5 Click OK.

Upgrading your PrintPoint Registration.

If at any future time, you purchase new options, additional users in a client/server environment or change the name of your company, you will receive a new Registration Number

1 Select File Menu ➤ Register

2 Follow the steps in the section above “Registering for the First Time”.

Using the Setup Wizard

Most software programs include a Preferences section to allow you to customize certain area of the program to your specific needs. PrintPoint has preferences for the following areas:

- Company Info
- Estimating
- Quotes
- SuperReports
- Logo
- List Views
- Global Markup or Discount
- Paper
- Sequence Numbering
- Shipping
- Number Out Defaults
- Invoices
- Accounting Links
- Customer Import & Export Defaults
- Authors Alterations
- Jobs
- Job Description
- Post-Press Defaults
- Press & Large Format Defaults
- Telecommunications
- ANZ Tax Settings
- Wizards
- Data Collection
- Chargeback
- Startup Options & Misc Defaults
- Localization

Attempting to set all these preferences before you are familiar with the actual day-to-day use of the program would be difficult and time consuming.

That's why we have provided you with a Setup Wizard. This wizard will take you through what we consider to be the most important preferences to get up and running and should take you about 1/2 hour to complete.

Each page of the wizard has full explanation of each of the preference options. If you still need further information about any of these options please refer to the Preferences chapter found later in this manual.

Using the Setup Wizard

1. Select File Menu ➤ Setup Wizard
2. Set the options on each page of the wizard.

3 Click the Next >or < Back buttons to navigate through the pages of the wizard.

TIP

Each page of the navigator has the page numbering in the upper right hand corner in the format “Page 1 of 26” to give you an indication of how far you are in the process.

CAUTION

You must complete the Setup Wizard by clicking the Finish button on the last page. If you decide to cancel (by clicking the Cancel button), you will not save any changes and must begin the process again.

4 Click the Finish button to end using the wizard.

Running the Other Wizards

NOTE

Before running any of the PrintPoint Wizards, we suggest you read the chapter “PrintPoint Basics” to familiarize yourself with the fundamental tools that are specific to PrintPoint.

PrintPoint has wizards for creating new entries for the following areas:

- Customer
- Paper
- Press
- Post-Press (which includes bindery, finishing, outside services, and other post-press activities).

Each of these wizards can be “test run” from the Setup Wizard or used on their own when you add a new entry.

TIP

You must turn on the “Use Wizard” option for each of these areas before the wizards will appear. See the two options below for turning on wizards.

Turning on Wizards from the Setup Wizard

You can turn on the wizard for Customer Entry, Paper Entry, Press Entry, or Post-Press Entry from the Setup Wizard:

1. File Menu ➤ Setup Wizard
2. Click the Next > button until you reach the Wizards page.
3. Place a mark in the checkbox for the particular wizard you choose to activate.

   TIP

   Beginner users should activate all wizards.

4. Click the Next > button till you reach the last page of the Setup Wizard and click the Finish button.

Turning on Wizards from Preferences

1. File Menu ➤ Preferences ➤ Wizards
2. Place a mark in the checkbox for the particular wizard you choose to activate.

   TIP

   Beginner users should activate all wizards.

3. Click OK to save your Preferences.

Running the Demo Version of PrintPoint

PrintPoint includes an interactive demo that will walk you though an on-screen series of tutorials for a variety of kinds of job.

The demo includes a Demo Wizard and small “Demo Director” floating palettes that includes Next > and < Previous buttons to walk you through the steps of each of the demos.

1. Extras Menu ➤ Demo.

   The Demo Wizard will be displayed.

2. Click on one of the Radio buttons to select the demo you choose to run.

3. Click the Next > buttons to read through the Demo Instruction.
4. Click Demo to begin the interactive demo.

   The Demo Director dialog will be displayed at the bottom of your screen.

TIP

Follow the step-by-step instruction carefully, reading each step fully before you perform the actions.

NOTE

For each of the demos you choose to explore, return to Step 1 above and begin the demo process again.

Chapter 3
PrintPoint Basics

OVERVIEW

PrintPoint uses a large variety of the most common Windows and Macintosh objects to perform its basic functions. PrintPoint uses folders, windows with zoom (Macintosh), maximize and minimize (Windows), close boxes, dialog boxes, menus, popup menus, drop-down lists, etc.

For ease of use, PrintPoint also provides a large number of keyboard shortcuts. Please see Appendix A: Keyboard Shortcuts for details.

There are certain objects or use of objects that are specific to PrintPoint that help you navigate the system to achieve your task.

This chapter reviews these “tools”:

- PrintPoint Navigator
- List Views
  - Selecting
  - Searching
  - Sorting
  - Importing
  - Exporting
  - Deleting
- Detail Views
- Estimating/Layout Concepts
- PrintPoint Menus
- Choice Lists
- On-The-Fly Database Management.
- QuickLinks
  - Standard Drawing Dialog
  - Booklets & Lots Dialog
  - Explanation of Calculation
  - Profit and Quantity Review
  - Paper Selector
  - Ink and Run Setup
  - Database Access
- Exiting from PrintPoint

STEP-BY-STEP

Navigator

The Navigator Palette is PrintPoint's primary navigation tool. It's buttons present 2 groups of information:

- Daily Tab
  - Estimates
  - Quotes
  - Jobs
  - Tracking and AA's
  - Shipping
  - Invoices
  - Purchase Orders
  - Customers
  - Contacts
  - To Do
  - Notes

- Database Maintenance
  - Suppliers
  - Paper
  - Pre-Press Table
  - Pre-Press
  - Press
  - Copier
  - Large Format
  - Post-Press
  - Templates
  - Layout
  - Graphic
  - AA's
  - Ink
  - Price Lists
  - Letters

Click on any function. In most cases, PrintPoint displays the List View for the selected function.

Click on the icon to the right in the Navigator header to maximize or minimize your view of the Navigator.

The number in brackets next to the word "Windows" in the Navigator header indicates how many windows are active.

Click on the downward arrow in the Navigator header to:

- Tile (neatly organize) all Windows
- Close all Windows
- View all Active Windows.
- PrintPoint displays a right-facing arrow to indicate there are multiple Windows open for any system function. Click on the right-facing arrow to see a list of all the active windows for that function.

Example There are multiple estimates active on this computer. Click on the arrow to see a list of all the active estimates.

List Views

PrintPoint uses List Views to display selected fields/column information about an item or a group of items. List Views are available for Estimates, Quotes, Jobs, Invoices, and for database items like Customers, Suppliers, Paper, Pre-Press and Post-Press items, Presses, Graphics, and Layouts.

Changing the Fields that are Displayed

PrintPoint allows you to specify which fields are displayed on your List Views and to develop your own List Views that display your own "views" of the data. (See the List View Editor Chapter for instructions)

Changing the Order of the Displayed Columns

PrintPoint allows you to change the order in which fields of information are displayed on your List Views.

1. Click on the Header of the field which you wish to move.
2. Drag it to the position in the header line to which you want to move it.

Ordering Items in List Views

PrintPoint allows you to specify the order (sequence) in which information is displayed on List Views.

1 Click on the Header of the field by which you want the List View to be sequenced.

NOTE

The field header changes color to signify that the List View is now being ordered by that specific field.

NOTE

Once a list is sorted by a field column, you can change the sort from ascending to descending by clicking on the field header. The way in which the column is sorted will be noted by "pyramid" icon in the field header.

Selecting Items in List Views

Individual Item:

1 Select the item from the List View.
2 Double-click on the item.

Contiguous Selection:

1 Select an item by clicking once to highlight it.
2 Select additional items by clicking them while holding down the Shift key.

NOTE

This will select all items between the first item and the last item.

Non-contiguous Selection:

1 Select an item by clicking once to highlight it.
2 Select additional items by clicking them while holding down the Command (Macintosh) or Control (Windows) key.

NOTE

This will select only the items that you have actually highlighted.

Button Bar

Each List View has a button bar so that many of PrintPoint's available functions are common to all List Views. You can choose to display the button bar in one of three locations:

- Left - with Small Icons and Text
- Bottom - with Large Icons and Text
- Top - with Small Icons and No Text

Select Button

The Select button includes the following options:

- **Shows All Records** - Displays all records for the table in the List View.
- **Show Default Selection** - Displays the original selection or records when the selected list view was displayed.
- **Select all Records** - Selects all records displayed in the List View.
- **Select Highlighted** - Selects all highlighted records displayed in the List View and hides all non-selected items.
- **Omit Selection** - Hides all highlighted records displayed in the List View.
- **No Selection** - Unhighlights any highlighted records in the List View.

Search Button

Lets you either search for a specific record or records that match input criteria or search using the Search Editor. All items in this menu display a dialog box into which you can either enter a number, text or choose from a Choice List. After doing the search, either a specific item (such as a quote or an estimate) or a list of items (such as invoices or jobs) will appear. If the result of the search is a standard list view, double-click the item you choose to review or perform an activity on all the items in the list.

Search Editor

1. Click and hold down the Search Button.
2. Select Search Editor.

   PrintPoint displays the Search Editor screen.
3. Select the desired field from the left scrollable area.
4. Click and drag it to the window on the upper part of the screen.
5. Select limiter from the center scrollable area.
6. Type search values in the right column.
7. Click “And,” “Or,” or “Except” to add additional conditions to the search.
8. Repeat these steps as necessary.
9. Click **OK** to perform the search.

   OPTIONS
10. Click **Save** to save a copy of the current search setup.
11. Click **Load** to load a pre-defined search setup.
12. Click **Delete** to remove a highlighted search selection.
13. Click **Clear** to completely clear the search setup area.

Sort Button

Provides several options for sorting the records in the current List View in specific sequences or for sorting using the Sort Editor. Most List Views have specialized sort options, such as “Sort by Weight,” “Sort by Size,” or “Sort by Grade” in the Paper List View.

Sort Editor

1. Click and hold down the Sort Button.
2. Select Sort Editor.

   PrintPoint displays the Sort Editor screen.
3. Select the Table to be used.

   PrintPoint displays all available fields.
4. Select the desired field.
5. Click and drag it to the window on the right side of the screen.
6. Click the arrow next to the field name to toggle it between ascending and descending.

> TIP
>
> An up arrow will sort in ascending order (A, B, C, etc. or 1, 2, 3, etc.); a down arrow will sort the list in descending order.

7. Click OK.

   PrintPoint returns you to the List View which is now sorted as requested.

Import/Export Button

Allows the user to import and export data from a List View. See the Import/ Export Chapter and specific chapters for importing and exporting to MYOB/ AccountEdge, QuickBooks for Windows and Peachtree for Windows.

Print

Click to display the drop-down list of the reports available for the current list as well as the Report Manager. See the chapters on SuperReports, QuickReports, Labels, and Charts for more information.

Delete

Create a subset of one or more records, then click the Delete button and confirm to delete the record(s) in the subset.

Detail Views

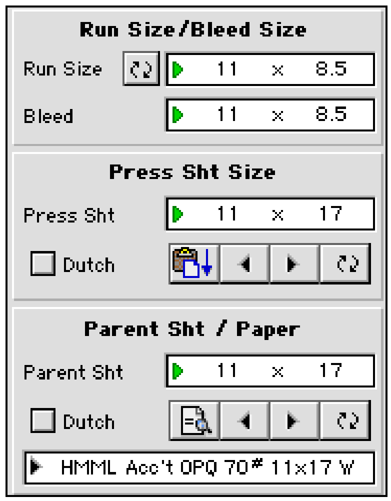
When you create a new record (Estimate, Job, Quote, Invoice, etc.) or double-click a record from a List View, PrintPoint displays that record in a Detail View. While List Views display a summary of each record in a row/column spreadsheet view, the Detail View shows all the info organized in easily accessible screens.

Often these screens are groups into sub-section tabbed views for clarity.

Estimating/Layout Concepts

PrintPoint uses a very "mathematical" calculation method when setting up the layout of your Run Size, Bleed Size, Press Sheet Size and Parent Sheet Size.

PrintPoint expects to see the dimensions for the width of each of these sizes "line up" in a vertical columns so that the math is accurate.



Example If you intend to take an 8.5 x 11 Run Size out of an 11 x 17 Press Sheet, you need to enter the Run Size as "11 x 8.5" so the 11 of the Run Size lines up with the 11 of the Press Sheet and the 8.5 lines up with the 17.

Furthermore, it is critical that you also make sure that the

Press Sheet aligns with the Parent Sheet as well.

PrintPoint Menus

Menu	Menu Item	Usage / Where to find Information
File	Rebuild Lists	Rebuild lists after many additions and/or changes have been made to database Example: Paper, Post-Press, Copier
File	Preferences	See Preferences chapter
File	User Settings	See User Settings chapter
File	Register	View, set, or change PrintPoint Registration Name and/or Number NOTE Demo users do not need a Registration Number
File	Users & Passwords	See Users & Passwords chapter
File	Setup Wizard	Provides help on setting up the general information required to use PrintPoint for the following areas: ■ Company Information ■ Password Preferences ■ Localization for your Country ■ Invoice Preferences and Accounting Links ■ New Estimate Post-Press Defaults ■ User Preferences vs. General Preferences ■ Using other Wizards
File	List Editor	See List Editor chapter
File	Custom Fields Editor	See Custom Fields Editor chapter
File	Language Editor	See Language Editor chapter
File	Structure Editor	See Structure Editor chapter
File	Quit	Close all Windows and exits PrintPoint
Edit	Undo, Copy, Cut, Paste, Clear, Select All	Standard Edit functions

Menu	Menu Item	Usage / Where to find Information
New	Estimate - ShortForm	Create a new ShortForm Estimate - see Estimating Tools - ShortForm chapter
New	Estimate - WorkSheet	Create a new WorkSheet Estimate - see Estimating Tools - WorkSheet chapter
New	Estimate - Copy - Digital	Create a new Copy - Digital Estimate - see Estimating Tools - Copy - Digital chapter
New	Estimate - Large Format	Create a new Large Format Estimate - see Estimating Tools - Large Format chapter
New	Estimate - Pre-Press Only	Create a new Pre-Press Only Estimate - see Estimating Tools - Pre-Press chapter
New	CombiQuote	Create a new CombiQuote - see Quotations chapter
New	LetterQuote	Create a new LetterQuote - see Quotations chapter
New	Customer	Create a new Customer - see Customers chapter
New	Supplier	Create a new Supplier - see Suppliers chapter
New	Paper	Create a new Paper - see Paper chapter
New	Large Format Media	Create a new Large Format Media - see Large Format Media chapter
New	Pre-Press Item	Create a new Pre-Press Item - see Pre-Press chapter
New	Sheetfed Press	Create a new Sheetfed Press - see Press chapter
New	Copier	Create a new Copier or Digital equipment - see Copy-Digital chapter
New	Large Format Printer	Create a new Sheetfed Press - see Press chapter
New	Post-Press	Create a new Post-Press item - see Post-Press chapter
New	Layout	Create a new Layout - see Layout Library chapter
New	Graphic	Create a new Graphic - see Graphic Library chapter

Menu	Menu Item	Usage / Where to find Information
New	Item Description	Create a new Item Description - see Item Description chapter
New	Ink	Create a new Ink - see Ink chapter
New	AA's (Authors Alterations)	Create a new AA - see AA's chapter
New	Note	Create a new Note - see Note chapter
List View	Estimates	Open the Estimates List View
List View	Quotes	Open the Quotes List View
List View	Jobs	Open the Job List View
List View	Customers	Open the Customers List View
List View	Contacts	Open the Contacts List View
List View	Suppliers	Open the Suppliers List View
List View	Paper	Open the Paper List View
List View	Large Format Media	Open the Large Format Media List View
List View	Pre-Press Items	Open the Pre-Press Items List View
List View	Pre-Press Table	Open the Pre-Press Table
List View	Sheetfed Press	Open the Press List View
List View	Copier	Open the Copier List View
List View	Large Format Printer	Open the Large Format Printer List View
List View	Post-Press	Open the Post-Press List View
List View	Estimate Templates	Open the Estimate Templates List View
List View	Layout Library	Open the Layout Library List View
List View	Graphic Library	Open the Graphic Library List View
List View	Item Descriptions	Open the Item Descriptions List View
List View	AA's	Open the AA's List View
List View	Ink List	Open the Ink List View
List View	Ink Table	Open the Ink Table
List View	Price Lists	Open the Price Lists List View
List View	Notes	Open the Notes List View
Accounting	New Invoice	Generate a new Invoice - see Invoicing chapter

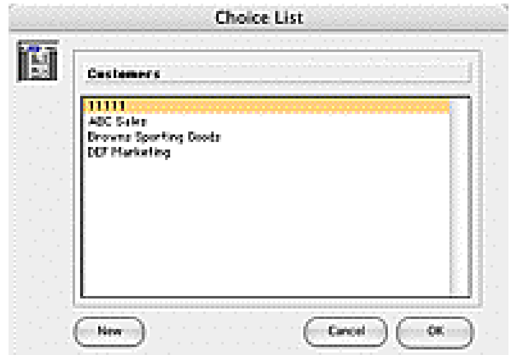
Menu	Menu Item	Usage / Where to find Information
Accounting	Invoices List View	Open the Invoices List View
Accounting	New Purchase Order	Create a new Customer - see Customers chapter
Accounting	Review Purchase Order	Open the Customers List View
Accounting	New Sales Rep	Create a new Sales Rep - see Sales Reps and Commissions chapter
Accounting	Sales Rep List View	Open the Sales Rep List View
Accounting	Sales Commission Review	Open the Commissions List View
Accounting	Sales Tax Settings...	Opens the Sales Tax Settings Dialogs used by QuickBooks, AccountEdge (MYOB) and Peachtree.
Accounting	Terms	Open the Terms dialog - see Terms chapter
Accounting	Edit Sales Categories	Open the Edit Sales Categories dialog - see Sales Category chapter
Accounting	Sales Category Reports	Open the Sales Category Reports dialog - see Sales Category chapter
Accounting	Chargebacks	Open the Chargeback Editor - see Chargebacks chapter
Job Costing	Collect Data	Open Data Collection Window - see Job Costing chapter
Job Costing	Express Setup	Open Express Setup - see Job Costing chapter
Job Costing	Reports	Print Job Costing reports - see Job Costing chapter
Job Costing	New Material	Create a new Material - see Job Costing chapter
Job Costing	Material List View	Open the Materials List View
Job Costing	New Employee	Create a new Employee - see Job Costing chapter
Job Costing	Employees List View	Open the Employees List View
job Costing	Employee EOS Report	Opens Employee End Of Shift Report dialog
Extras	Navigation Palette	View the PrintPoint Navigator
Extras	Number Out	View the Number Out screen - see Estimating Tools - Number Out chapter

Menu	Menu Item	Usage / Where to find Information
Extras	Shipping	Generate a Shipping record and/ or documents - see Shipping chapter
Extras	Job Tracking	Open the Job Tracking List View - see Job Tracking chapter
Extras	PhoneBook	View the PhoneBook screen - see PhoneBook chapter
Extras	Decimal Converter	View a conversion table for inches (fractions) to inches (decimals) to millimeters
Extras	On-Line Help	Access PrintPoint's online Help File
Extras	Tool Tips On	Set Tool Tips On or Off
Extras	Bug Reporter	Report PrintPoint bugs via fax or E-mail
Extras	Demo	Access the PrintPoint demo / tutorial
Extras	Check Website for Updates	Check the PrintPoint web site for updates using your Web Browser such as Internet Explorer, Netscape or Safari
Help	About PrintPoint	View PrintPoint information (personnel involved, datafile location, software version, current user)

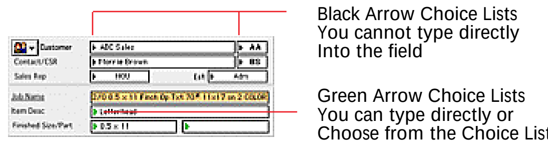
Choice Lists

Choice Lists are used to make selections for commonly-used information such as customers, paper, press, etc. Some lists are sorted alphabetically, while others are sorted by frequency of use.

If they are sorted alphabetically, you can type the first few letters of the selection to move to that place in the list.



Fields that use Choice Lists for data entry employ two different implementations of the Choice Lists:



- Fields with a "Black" arrow present a Choice List but do not allow typing directly into the field. When you view a field with a Black arrow, you must select one of the listed items from the Choice List.
- Fields with a "Green" arrow allow you to enter text directly into the field or choose from a Choice List. Most users elect to type some entries directly into a field when the feel that entry will not be used very often.

Selecting an Item from a Choice List

Use the steps in this procedure to select items from a Choice List:

1. Scroll through the list, highlight the desired item, then double-click it

   OR

2. Scroll through the list, highlight the desired item, then click the OK button.

   TIP

   Use the up-arrow and down-arrow keys on the keyboard to scroll through the list.

   OR

3. Quickly type the first few characters of the entry you are looking for, then click the OK button when the correct entry is highlighted (after each character you enter, the selection bar moves to that part of the list.)

Adding an Item to a Choice List

1 Display the Choice List.

2 Click the New button.

PrintPoint displays a blank entry screen for the type of database item you are adding.

3 Enter the appropriate information in the entry screen, then click the OK button.

PrintPoint inserts the new item for you.

TIP

You can only add one item at a time to a Choice List. If you want to add multiple items, repeat steps 1, 2, and 3.

On-The-Fly Database Management

Adding items to a Choice List provides what PrintPoint calls On-The-Fly database management. It allows you to build your database of papers, press, customers, etc. as you go. You do not need to setup any rates or sizes in advance. For example, as you work on an estimate, you enter new database items which will adjust not only the current estimate by all future estimates as well.

Deleting Items from a Choice List

Deleting items from Choice Lists is done from the List Editor.

1 File Menu > List Editor.

2 Select the list from the window of Available Lists.

3 Click the Delete button.

4 Confirm the deletion.

QuickLinks

PrintPoint uses QuickLinks in Estimating to provide access to supplementary entry dialog boxes. For instance, PrintPoint uses QuickLinks to provides access to the database and detailed explanations of all calculations on the estimating ShortForm or WorkSheet.

The key advantage of this linking method is that you do not need to remember where any information is stored in your database.

QuickLinks are “triggered” by moving the mouse over certain words or fields. The cursor changes to a different shape. Click once to activate the link.

Standard Drawing Dialog

1 Click on the Standard Drawing button to the right of the Run Size in the Paper area on the ShortForm

OR

2 click on the x between Width and Length for Flat Size, Bleed Size, Press Sheet, or Parent Sheet in the Paper/Layout area of the WorkSheet.

3 PrintPoint displays the Standard Drawing Dialog.

Booklets & Lots Dialog

1 Click on the "Booklets/Lots" button in the middle of the ShortForm

OR

1 click on the Blue area under the words "Booklets/lots" on the WorkSheet.

PrintPoint displays the Booklets & Lots Dialog.

Explanation of Calculation

1 Move your mouse over the black words under the word "Quantity" in the upper right quadrant of the ShortForm

OR

1 move your mouse over the white words on the blue background in the two upper right quadrants of the WorkSheet.

PrintPoint changes the look of the mouse.

2 Click to see the Explanation of Calculation.

Profit and Quantity Review

1 Click on the green $ icon in the upper center of the ShortForm

OR

1 click on the word "Qty" in the upper right quadrant of the WorkSheet.

PrintPoint displays the Profit and Quantity Review dialog.

2 Adjust the Local Markup/Discount and Profit/Loss as required.

3 Click Print to print the Profit and Quantity Review for the selected job.

Paper Selector

1 Click on the black arrow in the top window in the Paper area of the ShortForm

OR

1 click on the words "Run Size," "Bleed Size," Press Sht," or "Parent Sheet" in the Paper/Layout area of the WorkSheet.

PrintPoint displays the Paper Selector.

Ink and Run Setup

1 Click on the Ink/Passes icon in the ShortForm

OR

1 click on the words "Ink/Passes" or "Qty/Method" in the Press/Ink Setup area of the WorkSheet.

PrintPoint displays the Ink & Run Setup Dialog.

Database Access

1 In the ShortForm, click on the Code Name, Paper, or Press icon

OR

1 In the WorkSheet, click on the words "Code Name," "Paper," "Press," "Plates," "Make Ready," or "Wash" or on the words in the PrePress area or on the words in the Post-Press/Outside Service areas to view and/or change the applicable database item.

Exiting from PrintPoint

1. File Menu > Quit (Cntl+Q (Window) / Cmd+Q (Mac).
2. Click Quit to leave PrintPoint or Cancel to remain in the application.

NOTE

Windows Users: clicking on the X in the upper-right corner of your screen does not close PrintPoint.

Chapter 4
Users & Passwords

Overview

PrintPoint includes a comprehensive password access system. Because your database contains confidential information about your company and customers. PrintPoint allows the *administrator* to control access to that information by creating *users*, setting *passwords*, and assigning users to *groups*.

- The *database administrator* (or the "administrator") is the person who has access to everything in PrintPoint. This person creates user names, assigns passwords, gives the users access to the groups available, and allows a specific user to share his/her privileges.

NOTE

The administrator is the owner and member of the "admin" group. If you choose to give a user access to the entire program, simply make the user a member of the "admin" group.

- A *user* is the name used to identify a person logging into the system.
- A *password* is a set of characters that a user must enter to log into PrintPoint. Once the user enters the password, they are given access to specific information based on the group membership.

NOTE

Passwords are not required, but we highly recommend their use. There are many areas of the program that create logs to keep track daily activities. Without passwords, which enforces a "login", PrintPoint is unable to track the user's activities.

- A *group* is a set of functions inside of PrintPoint. Groups are used to limit/grant access to record operations (e.g., adding records, modifying, deleting and viewing records), screens and dialogs, menus and menu items, etc.

NOTE

All groups are "pre-defined" by PrintPoint. You cannot create or delete groups. See the Appendix on "Password Groups" for a complete list of groups and definitions of their scope.

BEFORE YOU BEGIN

- Decide whether you want to use passwords for your company.
- Decide what format you want to use for your user names.
- Review the available groups and decide who should have access to what.
- Decide who your Administrator will be.

Guidelines for User Names

You can use up to 80 alphanumeric characters for a user name.

Example The user name can be either the first or last name of the user, or even a nickname. “Bob Smith” would be a typical name of a user. It is recommended to use the first and last name together.

Guidelines for Passwords

You can use up to 15 alphanumeric characters for a password.

Passwords are NOT case sensitive, therefore users may enter the password without concern for the “caps lock key” or upper and lower case letters.

Example If the Administrator defines the password as “Holycow”, your employee may type the entire password in lowercase letters or uppercase letter or any combination. PrintPoint will accept the password just as long as it is spelled correctly.

STEP-BY-STEP

This section includes the following topics:

- Turning On Password Protection
- Turning Off Password Protection
- Choosing the Default Groups Used for All New Users
- Adding a User
- Deleting a User
- Reviewing A User’s Group Membership
- Reviewing Members in Groups
- Temporarily Suspending a User’s Privileges
- Restoring a User’s Privileges
- Changing the Groups Assigned to a User
- Changing a Users Password
- Reviewing How Often a User Accesses PrintPoint

Turning On Password Protection

You can enable passwords in one of three ways:

- From the Preferences Dialog
- Choosing Users & Passwords for the first time
- From the Setup Wizard

Turning on Password Protection from the Preferences Screen

1. Select File ➤ Preferences.
2. From the drop-down list, select Startup Options and Misc Defaults.
3. Turn *on* the Use Passwords option.

   Your users must now enter a password to access PrintPoint.
4. Click the OK button.

Selecting Users & Passwords

1. Select File ➤ Users & Passwords.
2. Click the Activate Passwords at the alert dialog.
3. Passwords are now enabled.

Turning on Password Protection from the Setup Wizard

1. Select File ➤ Setup Wizard.
2. Fill in the information on each screen.
3. Turn *on* the Use Passwords option when the wizard's Password screen displays

Turning Off Password Protection

1. Select File ➤ Preferences.
2. From the drop-down list, select Startup Options and Misc Defaults.
3. Turn *off* the Use Passwords option.

   NOTE

   Your users no longer have to use a password to access PrintPoint.
4. Click the OK button.

Choosing the Default Groups Used for All New Users

Use the steps in this procedure to choose which groups are automatically assigned when you create new users. This helps you quickly setup new users without have to manually assign group membership each time.

1. Select File ➤ Users & Passwords.
2. Click the Edit User & Group Membership button.
3. Create a new user that will serve as the model for the “default” user.

   TIP

   You may even choose to create that user with the name “Default” so it is clear to you at a future time if you need to adjust the group membership for the default user. This “Default” user will not actually be used for logging into the system.

4. Select which groups you want to use as the default for all new users.
   - To add groups: highlight the group name, then click the Add button.
   - To keep the person from having access to a specific group: highlight the group name, then click the Remove button.
5. Click the Defaults button.

   The groups in the Member of... column are automatically used the next time you create a new user.
6. Click the OK button.
7. Click the Done button

Adding a User

This section explains how to add a new user to the PrintPoint database. When you add a new user to the system, you choose the user’s system name, the password that the person uses to log onto PrintPoint, and which groups the user belongs to.

NOTE

You must have Administrator privileges to work with the user and passwords options.

TIP

If you set choose your default groups *before* you add your users, you save a lot of time. (For more information see “Choosing the Default Groups Used for All New Users”.)

1 Select File ➤ Users & Passwords.
2 Click the New button.
3 In the User field, type the *name the person will use when they log onto the system*.
4 In the Password field, type the *password the person uses to identify themselves to the system*.
5 In the Confirm Password field, type the *user's password* a second time.
6 Use the following steps to assign group membership:
   - If you want to give a user access to everything, make them a member of the Admin group

     OR
   - Highlight the group name, then click the Add button to give a person access to the highlighted group

     OR
   - Highlight the group name, then click the Remove button to keep the person from having access to a specific group.
7 Click the OK button.

   NOTE

   The user is added to the system.

8 Click the Done button.

Deleting a User

This section describes how to delete users that are no longer allowed access to your system. When you delete a user, you can choose whether you want to delete them permanently or temporarily block their system privileges. (For more information see “Temporarily Suspending a User’s Privileges”.)

NOTE

You must have Administrator privileges to work with the user and passwords options.

1 Select File ➤ Users & Passwords.

2 Highlight the user you want to delete.
3 Click the Delete button.
4 At the system prompt, click the Yes button.

Reviewing A User’s Group Membership

You can review which groups a users belongs to by following these step:

1 Select File ➤ Users & Passwords.
2 Highlight the user for whom you want to review membership.

   The name of the user will appear in red above the Group Membership list with the groups to which the user belongs displayed in the list.

Reviewing Members In Groups

You can review which users belong to which groups quickly by following these step:

1 Select File ➤ Users & Passwords.
2 In the Groups list located in the lower left corner of the dialog, highlight the group for whom you want to review membership.

   The name of the group and number of users in that group will appear in red above the Members In Group list. Each user (member) in that group will appear in the list.

Temporarily Suspending a User’s Privileges

Use the steps in this procedure to keep a user in your PrintPoint database, but temporarily prevent them from accessing it. This option does not permanently delete the user from the system so you don't have to recreate a new user if you decide that they should be able to use the system again.

1. Select File ➤ Users & Passwords.
2. Highlight the user you want to temporarily disable.
3. Click the Edit User & Group Membership button.
4. Turn on the Account Disabled option.
5. Click the OK button.
6. Click the Done button.

Restoring a User's Privileges

1. Select File ➤ Users & Passwords.
2. Highlight the user you want to restore privileges to.
3. Click the Edit User & Group Membership button.
4. Turn off the Account Disabled option.
5. Click the OK button.
6. Click the Done button.

Changing the Groups Assigned to a User

Adding a User to More Groups

1. Select File ➤ Users & Passwords.
2. Double-click the user whose groups you want to change.
3. From the Not a member... of list, highlight the group you want the user to be a member of.
4. Click the Add button.
5. Repeat step 3 until all the groups are properly assigned.
6. Click the OK button.
7. Click the Done button.

Removing a User's Access to a Group

1. Select File ➤ Users & Passwords.
2. Double-click the user whose groups you want to change.
3. From the Member of... list, highlight the group you do not want the user to be a member of.
4. Click the Remove button.
5. Repeat step 4 until all the groups are properly assigned.
6. Click the OK button.
7. Click the Done button.

Changing a User's Password

Use the steps in this procedure to change the password originally assigned to a user. You may want to change the password because someone has forgotten it or you may be concerned about unauthorized people having access to your system.

1. Select File ➤ Users & Passwords.
2. Double-click the user whose password you want to change.
3. In the Password field, type the new *password.*
4. In the Confirm Password field, type the *new password* a second time.
5. Click the OK button.
6. Click the Done button.

Reviewing How Often a User Accesses PrintPoint

Use the steps in this procedure to review the activity for a specific user. PrintPoint keeps track of when a user last accessed PrintPoint and the total number of times they have accessed PrintPoint.

1. Select File ➤ Users & Passwords.
2. Double-click the user whose history you want to view.

   NOTE

   At the lower left corner of the screen, PrintPoint displays the User Access information, which includes the date and time of the most recent access and the total number of times the employee has accessed the database.

3. When you are done reviewing the user access information, click the OK button.
4. Click the Done button.

Chapter 5
User Settings

OVERVIEW

User Settings allow you to customize basic settings such as button positions, choice list options, e-mail address, etc. for each user you have set up in the Users & Password editor. The administrator can configure his/her own settings as well as all the other users. Each user can modify only his/her own settings.

Some changes take immediate effect on closing the dialog, while others require restarting the program.

TIP

It is suggested that you create a “default set” for User Settings that will automatically become the settings for each new user as they are created. You or the user can then override any of the individual settings where appropriate.

BEFORE YOU BEGIN

You should...	Where...
Enable passwords	File Menu > Preferences > Startup Options & Miscellaneous Defaults; or Select File Menu > Users & Passwords for the first time
Add the user name to the user list	See Users & Passwords Chapter
Know the e-mail address for the user	Settings or Preferences in your e-mail application such as Netscape, Outlook, Eudora or AOL
I if you have purchased PrintPoint's data collection module, find out if you are using Barcode scanners to do data collection	Ask your system administrator.

STEP-BY-STEP

This section includes the following topics:

- Accessing User Settings
- Setting the Default Settings for New Users
- Choosing a language
- Entering an e-mail address
- Choosing What Lists Display and Navigator Appearance at Startup
- Choosing Where the Buttons are Placed on List Views
- Displaying Tool Tips on the Screen
- Choice List
- Choosing the New Estimate Worksheet
- Setting Acrobat Reader Location (Windows Users Only)
- Data Collection Using A Bar Code Scanner

Accessing User Settings

NOTE

If you are an individual user, you can only make changes to your own settings.

NOTE

If you are the Administrator you will be able to adjust the settings for yourself and all other users as well as the “default” settings for all new users.

1 Select File ➤ User Settings

Highlight the name of user from the users list.

Choosing the Default Settings for All New Users

As the administrator you have the option of setting a “default setup” for each new user by making selections in the previous sections and then clicking the Save As Default button at the bottom of any of the tabbed pages.

1 Select File ➤ User Settings.

2 Highlight Administrator.

3 Select each of the tabs and make the appropriate settings.
4 Select the default settings.
5 Click the Save As Default button.
6 Click OK to save your settings and close the User Settings dialog.

Choosing a Language

PrintPoint allows each user to work in his/her own language. As the user signs on the system, PrintPoint checks the User Settings and changes the displayed language for forms, messages, menus, etc.

TIP

Each user can create his/her own language file and select that "customized language" in the Forms Layout Language setting below. The Language for Menus and Notifications is selectable but not user-modifiable.

1 Click the Language tab.
2 From the Forms Layout Language drop-down list, select the language the user wants for all screens, forms, field labels, etc.
3 From the Language for Menus and Notifications drop-down list, select the language the user wants to use for the menus and system error messages.
4 If finished editing User Settings, Click the OK button.

OR

Click on another tab to edit those settings.

Entering an E-mail Address

1 Select File ➤ User Settings.
2 Highlight the name of user from the users list.
3 Click the e-mail tab.
4 In the e-mail address text box, enter the return e-mail address for that user when sending e-mail messages.

Example mbrown@printpint.com

5 If your email provider requires authentication, enter the User Name and Password in the text boxes provided.
6 If you desire to have a message which will be in the body of any email sent as an attachment, enter that message in the Attachment Message box.

7 If finished editing User Settings, Click the OK button.

OR

Click on another tab to edit those settings.

Choosing What Lists Display and Navigator Appearance at Startup

Choosing Which Lists Display at Startup

Depending on job function, you can choose which List Views display for a specific user when they open their copy of PrintPoint.

TIP

Remember, you can choose different settings for each user, but the changes do not take effect until you restart PrintPoint.

1. Select File ➤ User Settings.
2. Highlight the name of user from the users list.
3. Click the Startup tab.
4. Turn on each of the List Views that you want automatically opened when you start PrintPoint.

Open the Navigator Palette at Startup

You can elect the Navigator to open in any of the following states:

as a full floating palette with all functions displayed in a vertical button layout or displayed in a truncated view with a popup list of functions.

Radio Button	What will you see...
Show Buttons	A full floating palette with all functions displayed in a vertical button layout.
Show List	A condensed Navigator with a popup list of functions. TIP You can switch views at any time during a PrintPoint session by clicking on the small “Page Icon” next to the “Tile All Windows” popup menu.
Data Collection	Only a Data Collection button.
Job Tracking	Only a Job Tracking button.

Radio Button	What will you see...
Data Collection / Job Tracking	Both Data Collection and Job Tracking buttons. TIP Use this option when users collecting data will also need to enter AA's.
Receiving	Only Receiving button
Mac OSX Dock Offset	Enter the number of pixels you want the navigator to offset so it doesn't lineup on top of the dock.

Choosing Where the Buttons are Placed on List Views

This option allows you to select the position of List View buttons as follows:

- Small picture buttons at the top of the screen (with no text)
- Small pictures with text on the left side of the screen
- Big pictures and text at the bottom of the screen.

1 Select File ➤ User Settings.
2 Highlight the name of user from the users list.
3 Click the List Buttons tab.
4 Click the appropriate radio button.
5 If finished editing User Settings, Click the OK button.
OR
Click on another tab to edit those settings.

Displaying Tool Tips on the Screen

Tool Tips (information about a specific field, field name, or button) are displayed in small "popup" boxes as you move your mouse over various parts of PrintPoint screens.

1 Select File ➤ User Settings.
1 Highlight the name of user from the users list.
2 Click the Tool Tips tab.
3 Turn on the Tool Tips option.

4 If finished editing User Settings, Click the OK button.

OR

Click on another tab to edit those settings.

TIP

You must also turn enable/disable Tool Tips from the Extras Menu for a particular PrintPoint session.

Choice Lists

There are three Choice Lists that each user can control the functions of:

Choice List	Where Used	Reason to select option
Item Description	WorkSheet and Short Form Estimating Screens	Automatically displays the Item Description Choice List when clicking on or tabbing into the Item Description field. Some users prefer to always type the Item Description directly into the field...and as such, the Choice List is an unnecessary hindrance to their data entry process.
Finished Size	WorkSheet and Short Form Estimating Screens	Same as above
Use Paper Choice List	Estimating Screens, NumOut, Templates, other	Choose between the Paper Selector or the Paper Choice List. For backward compatibility with earlier versions of PrintPoint, this option is offered for those users who are already so familiar with their inventory of paper the use of the new Paper Selector dialog is not a desirable option. TIP By toggling using the Option key (Macintosh) or Alt key (Windows), you can switch On-The-Fly to use either the paper Selector or the paper List.

1. Select File ➤ User Settings.
2. Highlight the name of user from the users list.
3. Click the Choice Lists tab.
4. Turn on/off the appropriate options.
5. If finished editing User Settings, Click the OK button.

   OR

   Click on another tab to edit those settings.

Choosing the New Estimate Worksheet

1 Select File ➤ User Settings.
2 Highlight the name of user from the users list.
3 Click the Estimates tab.
4 Check the Use New Worksheet check box.
5 If finished editing User Settings, Click the OK button.
OR
Click on another tab to edit those settings.

Setting Acrobat Reader Location (Windows Users Only)

1 Select File ➤ User Settings.
2 Highlight the name of user from the users list.
3 Click the Acrobat tab.
4 Click the Set Acrobat Reader Location button.
5 Click OK at the Alert window.
6 Locate your Acrobat Reader and click OK.
7 If finished editing User Settings, Click the OK button.
OR
Click on another tab to edit those settings.

Data Collection Options

1 Select File ➤ User Settings.
2 Highlight the name of user from the users list.
3 Click the Data Collection tab.
4 Put a mark in the Use bar code scanner/wand to collect data checkbox to enable data collection using a bar code scanner for an individual user.

NOTE

If you do not select this option, then the user will still be able to collect data, but will select an operation from a Choice List of operations.

5 Put a mark in the Open New Data Collection Record on Startup checkbox so that the user is ready to collect data at startup.

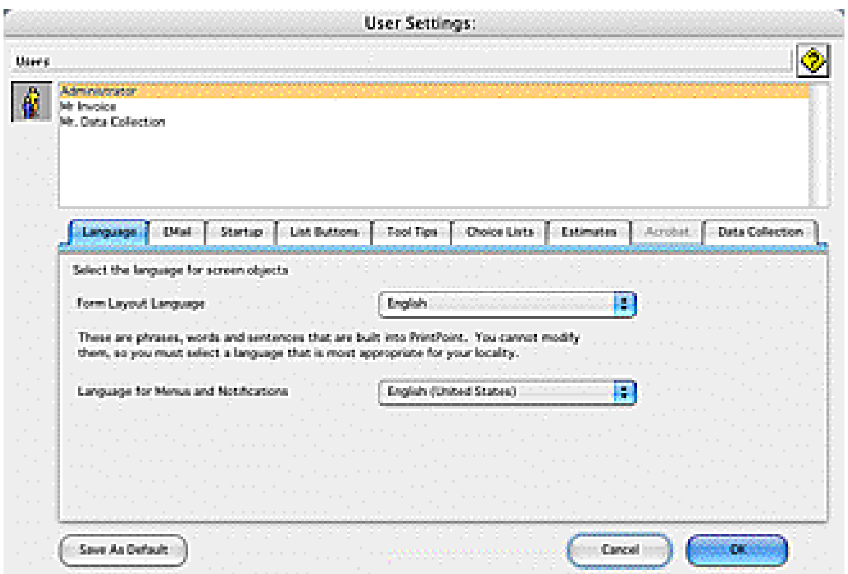
6 Click the OK button.

About the Screens

The User Settings dialog box is a tabbed dialog with each pane containing a variety of settings grouped by functionality. Above the tabbed panes are the list of users. At the bottom are the buttons for saving the settings as default, cancelling any changes or saving the changes.

Here is a list of the screens used for User Settings:

- Language
- e-mail
- Startup
- List Buttons
- Tool Tips
- Choice Lists
- Estimates
- Acrobat
- Data Collection



Chapter 6
Preferences

OVERVIEW

Everyone has their own way to run their company. Using PrintPoint's Preferences, you choose how you access, view, and make entries throughout the system.

The options in the Preferences dialog box are divided into 26 tabbed subsections. Some of these are technical parameters, others are handy time-savers for anyone.

STEP-BY-STEP

This section covers the following areas:

- Accessing Preferences
- Navigating Preferences
- Company Info
- Estimating
- Quotes
- SuperReports
- Logo
- List Views
- Global Markup or Discount
- Paper
- Sequence Numbering
- Shipping
- Number Out Defaults
- Invoices
- Accounting Links
- Customer Import & Export Defaults
- Authors Alterations
- Jobs
- Job Description
- Post-Press Defaults
- Press & Large Format Defaults
- Telecommunications
- ANZ Tax Settings
- Wizards
- Data Collection
- ChargeBack
- Startup Options & Misc Defaults
- Localization

Accessing Preferences

1 Select File menu > Preferences...

The Preferences dialog box opens with the Company Info preference screen displayed.

Navigating Preferences

The Preferences dialog box has many screens. You can navigate through them using the drop-down list in the top left corner or the arrows in the bottom left corner.

Company Info

Enter your company name, address, telephone, fax number, and Internet information. This information appears on much of the printed correspondence that is generated by PrintPoint.

CAUTION

Your company name is directly linked to your Registration Number. PrintPoint will alert you that you if you attempt to change the company name that you previously entered in the Registration dialog box.

The Company Information screen also displays:

- PrintPoint Application Version
- Data Version
- PrintPoint Module

Estimating

Auto Data Entry

Use Estimate Templates On New Estimates

Place a mark in the checkbox to activate PrintPoint's AutoStart screen. We recommend this feature for most users, but experienced PrintPoint users may prefer to leave this feature off.

Use Auto Data Entry on New Estimates

Place a mark in the checkbox to have PrintPoint prompt you for information at each step of the estimate process.

WorkSheet Booklets & Lots Font Style

When estimating booklets or lots, fields on the WorkSheet and ShortForm that are affected by booklets and lots calculations will be displayed with the typeface selected.

Ink Defaults

Start New Estimates with Calculated Ink Method

Place a mark in the checkbox if you run many large jobs and you want to use PrintPoint's calculated method for determining ink usage.

If you do a lot of simple jobs, you might want to leave this unchecked, and PrintPoint will calculate ink charges based on a flat rate.

Start New Estimate with Black Ink

Place a mark in the checkbox if you use black ink for most jobs.

Percent of Coverage if Calculated Ink Method

In the box, enter a default value for the ink coverage you are normally use.

Default % on 4 Color

Set the default percentages for each color on 4-color jobs.

Alerts & Miscellaneous

Use cutting alert

Place a mark in the checkbox if you want PrintPoint to alert you when either the layout or cutout appear to suggest cutting when you may have not indicated it in the Post-Press section of the estimate.

Use Ink alert

Place a mark in the checkbox if you want PrintPoint to alert you when ink has not been selected on an estimate.

Exclude Outside Service from Global...

Place a mark in the checkbox if you do not want outside services to be included in the global markup.

Suppress Comp Vs. Custom Dialog when changing quantity

Place a mark in the checkbox if you don't want PrintPoint to display a dialog box every time you change quantity on a WorkSheet.

Lock Pre-Press Dialog Rates on Short Form

Place a mark in the checkbox so users cannot alter these rates when making an estimate. This is useful if you have people in your shop who are using the Short Form for estimating and you want to limit their ability to change your film and prep rates.

Hide Adjusted Total on Estimate Printout

Place a mark in the checkbox if you do not want the total to print on the estimate.

Copy Estimate

Use Radio Buttons instead of Popup Menu

Place a mark in the checkbox if you prefer to select 1 Sided or 2 Sided copies using radio button instead of the standard popup menu that allows selection of 1-1, 2-2, 1-2, 2-1 sided copies

Use Total Copies all trays for Matrix Calcs

Place a mark in the checkbox if you want the copy pricing matrix base the estimated price of copies.

Quotes

CombiQuote & LetterQuote Default Text

Modify the default Salutation, Opening Message, and Ending Message you want to use on your quotes. You can always override these messages on individual quotes.

NOTE

You cannot modify the part of the salutation that reads "+ Customer Salutation + Customer Contact." This will insert your customer's name in the first line of the letter. The Customer Salutation and Customer Contact fields are picked up from entries you make for each individual customer.

Quote Style

Choose a default style from the drop-down menu. The style options are specified by country.

Quote Font

Select the font for PrintPoint's quote reports from the drop-down menu.

> NOTE
>
> The selection you make here will also affect the text that displays on Invoices.

Quote Rounding

Click and hold the pop-up button to select the method for rounding dollar amounts on your quotes. Monetary units can be rounded to Whole Dollars, to the closest 10 cents, or select Standard to round to 5 cent intervals.

CombiQuote Entry: Estimate Display Filter

Click either the **Est Back** or the **Days Back** radio button and enter a number of days below the one you selected. The choice you make here will determine the estimates that display in the Estimate List View.

Include Tax (ANZ only) Quotes & Invoice

Place a mark in the checkbox if you are using PrintPoint in Australia.

Print CombiQuote Footer

Place a mark in the checkbox to print a footer line along the bottom of your quotes with your company name, telephone, and fax.

Print Page Numbers on CombiQuote

Place a mark in the checkbox to print page numbers on your CombiQuote.

LetterQuote Custom Headings

You can customize default headings for your LetterQuotes by entering your headings in the entry areas to the right of the default headings. If you leave any lines blank, PrintPoint's default value will be used.

SuperReports

PrintPoint comes with many built-in reports. In addition, with SuperReports, you can design and use your own reports.

On the SuperReports preference screen, you designate custom reports to take the place of PrintPoint's built-in reports.

The Price List, Combi-Job Ticket, and Sales Rep Statistics reports are available in SuperReport format only. These reports always use the report template you have selected from the drop-down list. By default, these are set to the report templates that come with PrintPoint. You will want to keep these settings unless you have created your own custom reports.

To Select a SuperReport:

Click and hold the pop-up menu (to the right of the Report Name) to activate the custom report you want to use for each item you checked.

NOTE

The list will only contain reports that have been loaded into PrintPoint using the Report Manager.

To Activate a SuperReport:

Double-click the On/Off column to the left of the Report Name. An “X” will displayed to specify that you want to replace a built-in report with the SuperReport selected from the Report Name column.

Logo

Options

Select one of the three choices that you want PrintPoint to use for displaying your company information in the header of built-in Quotes and Invoices:

- **Use Pre-printed forms** in printer to use pre-printed forms and suppress the printing of any text or graphic on the top of the quote.
- **Use Company Info** to use the information you entered in the Company Info preferences box.
- **Use Custom Logo** to use a pasted/imported logo.

Logo Placement

1 Click on the appropriate radio button to select how you want your logo to be justified on the forms.

Pasting/Importing a non-Postscript/EPS Custom Logo

There are two methods to place a non-postscript/eps logo (.pict, .bmp, .jpeg, .gif, etc.) into the picture field in preferences:

1 Copy the graphic from it’s source.
2 Click directly on the picture field in PrintPoint Preferences > Logo.
3 Paste.

OR

1 Click on the Import button.
2 Select you logo from the Open File dialog.
3 Click OK to save Preferences.

Creating and Pasting an EPS/Postscript Custom Logo

Your logo can be pasted into PrintPoint using one of the following techniques:

Macintosh users should follow these steps to insert a logo:

1. Open your logo in a drawing program like Illustrator or Freehand. Create a white box with no border that is 354 x 118 pixels and send it to the back. Center your logo in the box and save the resulting image to a new file.
2. Option-Copy the object to the Clipboard. If you are using Illustrator or Freehand on the Macintosh, you must hold down the Option key while you copy the image.

If this technique does not work (specifically does not print a good postscript logo from PrintPoint) then follow these steps:

1. Save your graphics as an.eps.
2. Open Microsoft Word and create a new blank document.
3. Select Insert Menu > Picture > From File...
4. Locate your ".eps" file and insert it.
5. Highlight the logo and copy it.
6. Go to PrintPoint and paste it into the logo field.

NOTE

If you cannot go directly to PrintPoint to paste, then paste it into a scrapbook and move the scrapbook file to the computer you need so you can copy from there.

Windows users should follow these steps to insert a logo:

1. Open your logo in a drawing program like Illustrator or Freehand. Create a white box with no border that is 354 x 118 pixels and send it to the back. Center your logo in the box.
2. Save your graphics as an.eps file with no preview. You definitely **don't** want to create a preview for the image.
3. Open Microsoft Word and import your eps graphic into MS Word. It will appear as a box with text in it describing the path to the file. You will not actually see the graphic.
4. Copy the graphic object to the clipboard.
5. Click the picture field in the center of the Logo preference screen and paste the graphic object into PrintPoint. Again, you will only see the text description of the.eps file.

List Views

Default Sort Order

Choose whether to have the items on your 7 list views arranged in ascending (i.e. 1 to 10) or descending numerical order.

NOTE

You can override the settings you make here when you are using any of the list views.

Display records many days back

Type the number of days back from the current day that you wish to display records for in the Estimates, Quotes, and Invoices list views.

Show Totals In Footer

Check the box to have the totals of each column to show in the footer of the list view.

Show Colors in Job List View

Check the box to display colors in the list view columns

Max Number of Rows To Color

Type the number of rows you want to be colored.

NOTE

The larger the number of rows that are colored, the longer it will take to sort the list.

Use Alternate Row List Coloring

Mark the checkbox if you wish to have every other row colored.

Global Markup or Discount

Percent Markup/Discount for Entire Job (by rating)

If you decide to base your rates on Cost Basis, enter a markup or discount percentage for each of the three Customer Ratings (AA, BB, CC) that will be added to the estimated total.

These markups can be adjusted on a job-by-job basis.

Use individual customer markups instead of global

Place a mark in the checkbox to override the global markups with individual customers' markups.

Exclude Outside Service from Global...

Check this box to exclude any of the outside services you setup in the Post Press database from having a global markup added. During the PostPress setup you will have the option of adding a markup to the specific outside service.

Exclude Paper From Global Markup

Check this box to exclude any of the papers you setup in the Paper database from having a global markup added. During the Paper setup you will have the option of adding a markup to the specific paper.

Paper

Activate all automatic paper inventory features

Put a mark in the checkbox to reduce inventory from stock when you convert an Estimate to a Job.

Print Paper PO with Job Ticket

Put a mark in the checkbox to print a paper purchase order with the job ticket.

Activate paper to press speed link

Put a mark in the checkbox to tell PrintPoint to automatically adjust the press speed dependent on the setting you have specified on each paper's Press Speed Link screen. Each paper can be linked to one of three press speeds stored with each press.

Use next full carton on papers that cannot be split

Put a mark in the checkbox to use the price for the next full carton on papers that cannot be split.

Exclude Paper from Global Markup

Put a mark in the checkbox to override the global markups with individual papers' markups.

New Paper Defaults

For the **NCR Default Pricing** radio button, select **Per Sheet** or **Per Set** pricing.

In the **Markup for new Paper** entry box, set a default markup percentage for new paper.

Paper Selection Dialog

Specify the sort order of the columns in the Paper Selector by making selections from the drop-down menu.

Sequence Numbering

Set the next sequential numbers for estimates, quotes, jobs, and invoices. This setting is important if you are converting from another system and already have number sequencing in progress.

Automatic Job Numbering

Put a mark in the checkbox if you want PrintPoint to automatically assign job numbers (numeric only) to new jobs. Using Automatic Job Numbering is important because unique (non-duplicated) numbers are essential for many of PrintPoint's automatic invoicing and shipping features.

Manual Job Numbering

If you did not select Automatic Job Numbers, PrintPoint allows you to specify your own Job Numbers. Put a mark in the **Check for duplicate job numbers** checkbox if you want PrintPoint to check for duplicate job numbers.

TIP

Checking for duplicate job numbers slows down job number entry.

Use Alpha Sequence letters for Linked Jobs

Check this box to use alpha instead of numerals for linked jobs. An alpha linked job number would be 1001.A. If you do not check the box a linked job number would be 1001.1.

Custom Linked Job Separator

This is the symbol you want to use between the job number and the alpha or numeric linked number.

User for ... checkboxes

Use these boxes to duplicate numbers from estimate to invoice.

Shipping

Shipping Methods

The first four shipping methods are PrintPoint defaults and are not user modifiable. Customize the additional entries that are displayed with your own shipping instructions.

Default reports/ printers for shipping reports

PrintPoint allows you to choose how many and which reports will be printed by default during the actual shipping process.

Choose your shipping documents (Packing Slip, Delivery Receipt, Shipping Label) from the appropriate pull-down menu.

1 You may elect to print either or both Packing Slips and Delivery Receipts.
2 You should set defaults for each style of report.

NOTE

The next step if for Macintosh only.

3 Click the Set... button to define the default printer for the packing slips, delivery slips, and labels.

   PrintPoint will display a print driver/printer selection dialog.

4 Select a Print Driver from the top list and then select the Printer from the list of available printers.

Use customer's default...

Put a mark in the checkbox to automatically insert the customer's default shipping address when creating shipping labels from the Jobs screen, if you did not specify the address on the estimate.

Number Out Defaults

Number Out preferences contains two columns of sheet sizes: one for press sheets and one for parent sheets. These values are also used for the Increment and Decrement arrows in the Standard Drawing Dialog Box and the Booklets and Lots Dialog Box.

When you open Number Out from the Extras menu, these sizes appear in the Layout Press Sheet and Parent Sheet areas.

Invoices

Invoice Rounding

Click and hold the pop-up button to select the method for rounding dollar amounts for Line Amount, Tax Amount, and Shipping on your invoices. Monetary units can be rounded to Whole Dollars, to the closest 10 cents, or select Standard to round to 5 cent intervals.

Default Invoice Message

Enter a default message to appear on Invoices.

Tax Labels

Enter a customized label for the taxes included on the invoice.

Miscellaneous Invoice Details

Apply Tax to Shipping

Put a mark in the checkbox if you need to tax your shipping charges.

Show Export Acct Number on Invoice Screen

Put a mark in the checkbox to display the account number for exporting.

Hide Discount on Invoice

Put a mark in the checkbox so any discount you specify does not appear on the printed invoice. Applicable for all PrintPoint clients except ANZ.

Jobs Done only in Jobs To Be Invoiced List

Put a mark in the checkbox if you want to limit the selection list on the Invoice entry screen to jobs that are marked as done.

Load Ship Address from Estimate

Put a mark in the checkbox to use the same shipping addresses you specified on estimates for invoices.

Use Account Limit Notification

Put a mark in the checkbox for new estimates and invoices to display a message if the customer exceeds their account limit.

Include AAs from Job Total for Invoicing

Put a mark in the checkbox if you want to automatically include author's alteration costs on invoices.

Alert if Job Total differs from Estimate Total

Put a mark in the checkbox to display a message warning you when your job and estimate totals are different.

Mark Job Done when Invoiced

Put a mark in the checkbox to mark the job done when it is invoiced.

Use Job Number for Invoice

Check this box to use the same number for the invoice that is being used for the job number.

Show Totals in Footer

Put a mark in the checkbox have the totals of each column in the list view show in the footer of the list view.

Invoice Date from Client

Put a mark in the checkbox to use the date which is used for invoicing from the client's machine.

Invoice Style

Choose a default style from the drop-down list. The style options are specified by country.

Invoice Font

Select the font for PrintPoint's quote reports.

Accounting Links

PrintPoint enable you to create invoices and then export them to the accounting package of your choice. In addition to invoices, PrintPoint also supports integration with accounting packages to synchronize your customer database.

Export Invoices to:

Click and hold the pop-up menu and select one of the following accounting packages:

- MYOB (AccountEdge)
- QuickBooks for Windows
- Peachtree Complete for Windows
- Custom package

TIP

If you are not exporting to an accounting package, make sure this is set to **None**.

Choose Script for Exporting Invoices

Click to select a script to use when exporting your invoice data to the selected accounting package.

NOTE

QuickBooks does not require a script.

Save Name & Location of Exported Invoice File

Click to select a destination folder for the exported invoice data.

Launch Path to Accounting Program

Click to select an accounting application to launch automatically.

Auto launch accounting program on export

Check to automatically start your accounting program when you export invoices.

Default G/L Account Names/Number for New Customers

TIP

The default entries are used for new customers. You may adjust these values for individual customers when your are entering their accounting information.

MYOB/AccountEdge

Field	Definition
Sales Income	MYOB General Ledger Sales Income Account
Tax Code	MYOB Sales Tax Code
Tax Rate	MYOB Sales Tax Rate

QuickBooks for Windows

Field	Definition
Accounts Receivable (G/L)	QuickBooks General Ledger Accounts Receivable Account
Sales Income (G/L)	QuickBooks General Ledger Sales Income Account
Freight (G/L)	QuickBooks General Ledger Freight Account
Sales Tax Payable (G/L)	QuickBooks General Ledger Sales Tax Payable Account
Tax Item	QuickBooks Tax Item from Item List
Tax Rate	Matching Tax Rate to the default Tax Item above
Taxable vs. Non Taxable Line Item Status	Are the line items in an invoice going to be taxable or non taxable for your "default" new customer. This is (of course) over-rideable during the creation of the invoice line item. (Tax, Non-Tax, etc.)
Tax Agency	Vendor to whom you actually pay the sales tax to. State, county, etc.

Peachtree

Field	Definition
Accounts Receivable (G/L)	Peachtree General Ledger Accounts Receivable Account
Sales Income (G/L)	Peachtree General Ledger Sales Income Account
Freight (G/L)	Peachtree General Ledger Freight Account

Field	Definition
Sales Tax Payable (G/L)	Peachtree General Ledger Sales Tax Payable Account
Sales Tax Code	Peachtree Sales Tax Code from Peachtree's Maintain Menu > Sales Taxes > Sales Tax Codes. This could be a single tax authority or a combination of authorities.
Tax Rate	Matching Tax Rate to the default Sales Tax Code above.
Taxable vs. Non Taxable Line Item Status (Item Tax Type)	Peachtree's Item Tax Type. Are the line items in an invoice going to be taxable or non taxable for your "default" new customer. This is (of course) over-rideable during the creation of the invoice line item. Peachtree's Maintain Menu > Default Information > Inventory Items > Taxes/ Shipping Tab. (Values 1-25)
Tax Vendor	Vendor to whom you actually pay the sales tax to. State, county, etc.

Customer Import & Export Defaults

Set the values using the buttons below to store the proper scripts for importing and exporting.

TIP

Scripts are stored in the Import/Export Folder.

Option	Function
Choose Script for Exporting Customers	Click on the button to navigate to the folder which contains the Customer Export Script
Save Name & Location of Exported Customer File	Click on the button to navigate to the folder where you would like to store the exported Customers
Choose Script for Importing Customers	Click on the button to navigate to the folder which contains the Customer Import Script

Purchase Orders

Default PO Message	Modify the PO message you want to use on your POs. You can always override this message on individual POs
Purchase Order Style	Choose a default style from the drop-down menu. The style options are specified by country.
Purchase Order Font	Select the font for PrintPoint's purchase order report from the drop-down menu.

Authors Alterations

Include Quantity & Rate Basis in AA's Description	Put a mark in the checkbox if you want the customer to see the quantity and rate basis information.
Include Total in AA's Description	Put a mark in the checkbox if you want the customer to see the total.
AA's Title for Description	Enter the Title for the AA's description.
Notification Opening Message	Enter the Notification Opening message.
Notification Closing Message	Enter the Notification Closing message

Jobs

Show Work in Progress Only in Job List	Place a mark in the checkbox so that finished jobs are not displayed in the job list.
Due Date Alarms	Specify the number of days you want in the Level 1 and Level 2. These settings correspond to buttons on the Job List View that let you quickly see a list of jobs with upcoming due dates.
Show Totals in Footer	Put a mark in the checkbox have the totals of each column in the list view show in the footer of the list view.

Show Job Due in To Do list

Check this box to automatically have the job due date show in the calendar to do list.

Use Colors in Job List View

By selecting this box you will have the job list view show in colors based on the the options you choose for the colors of each of the available items.

Automatic Job Due Date

Enter the number of days you want PrintPoint to add to the job date to calculate the job due date.

Job Linking

Check the box to have PrintPoint prompt you to link jobs that have linked estimates.

Print Job Tik Pictures

Place a mark in the checkbox if you want the job ticket pictures printed on the job ticket.

Use Invoice/Quote Desc as default on Job Review

Place a mark in the checkbox if you want to use the same description for the job ticket as you did for the quote.

Show Print Dialogs for Job Ticket, Graphics, and Paper PO when printing from Job Detail Screen

Place a mark in the checkbox if you want to show standard print dialogs when printing from Job Detail Screen.

Print Outside Service Purchase Order

Check this box to have PrintPoint automatically print the purchase order when printing a job ticket.

NOTE

You must select the Purchase Order SuperReport from the list.

Create Digital Job Folder

Check this box to get the options to select a folder location and name options for the folder. This folder will provide a place to store any documents, graphic files, ect that are required to produce the job.

Job Description

NOTE

The Job Description section of PrintPoint covers the default Job Description for each of the Offset, Copy, Large Format and PrePress modules. You will need to set the defaults for the General, Quote, Invoice and Shipping Tabs for each of the modules.

Custom Labels

PrintPoint allows you to customize the way in which your job descriptions will be built and displayed. By default, PrintPoint uses the labels displayed in the Labels (Default) column.

To enter your own labels follow these steps:

Custom Labels

Highlight any entry field in the column and enter a new label. You can add any punctuation and/or space before or after the entered text. If you erase the Custom Label, the default description will appear.

NOTE

Type a minus (“-”) sign into any Custom Label entry field to hide that entire category and its related description from the Job Description.

Use X/X

Place a mark in the checkbox to have the inks displayed as “1/1” instead of by name.

NOTE

If you select this option, you will probably also want to update the **Inks On Side A:** custom label to read: “Inks:”.

Separators

Use these to indicate what happens between each section. See the List of Separators on the right to help you. Most commonly used will be “A” for a single carriage return and “B” for a double carriage return.

Sample Descriptions

Click to preview what the Job Description will look like.

Quote Report Font

Click and hold the pop-up box and select the font.

NOTE

Remember, this font is also used for quotes and invoices.

Post-Press Defaults

Click on the black arrow to select up to twelve operations that will appear by default in the post-press area for Offset, Copy, and Large Format estimates.

Press, Copier, Large Format Defaults

Default Field Labels when creating a New Press

Specify the labels that will be used as defaults on the Press entry screen each time you create a new press. You can override these when you are setting up a new press.

Example: You might want to specify “Envelopes” as the field label for Press Speed Level 2.

Default Field Labels when creating a New Large Format Device

Specify the labels that will be used as defaults on the Large Format entry screen each time you create a new Large Format device. You can override these when you are setting up a new device.

Telecommunications

Email Host Address

Enter your company's e-mail address which PrintPoint will use to indicate the Sender when sending E-mail.

NOTE

The company e-mail address can be overridden for individual users by going to **File Menu > User Settings...**

Carbon Copy outgoing E-mail messages to sender

Place a mark in the checkbox to receive a copy of all of your outgoing mail.

TIP

This is an important feature which allows you to keep a copy of all of your outgoing E-mail correspondence.

Password Authentication Required for Email

Place a mark in the checkbox if you email server requires authentication.

If you desire to have a prefix added to the name of a quote when the .pdf is created, enter the desired prefix in the Prefix for PDF attachment file name box.

ANZ Tax Settings

Australia/New Zealand

Place a check mark against each item that should be included with Printing in Quotes and Invoices. Unchecked items will be included with PrePress items on Quotes and Invoices.

If GST is applicable then check the box along with the default rate. (Remember to set the Tax rates from the Accounting menu if you are using a package such as Myob or Quickbooks etc.).

NOTE

The tax status of unspecified items is set with each item's individual record. For unspecified items, whether an item is included with Printing cost or pre-press cost is set with each item's individual record.

Wizards

PrintPoint's Wizards help you setup the following areas of your database:

- Presses
- Paper
- Customers
- Post-Press

Put a mark in the appropriate checkbox(es) to activate a wizard.

Data Collection

Category Codes

NOTE

Category Codes are used for easy sorting, accumulation, and reporting of activities and materials which are to be charged to a job.

TIP

Category Codes can be a maximum of 2 characters.

1. Enter the Category Codes for Time & Production (usually used to collect Labor, in Hours)

   Example Time & Production: T

2. Enter the Category Codes for Pause (used to collect time spent while a Labor operation is paused, for instance while the operator is waiting for a press proof)

   Example Pause: Z

3. Enter the Category Codes for Material (collect materials used for a job)

   Example Material: M

4. Enter the Category Codes for Paper (collect paper used for a job)

   Example Paper: P

5. Enter the Category Codes for Outside Services (collect charges for purchases of outside services which are to be charged to the job)

   Example Outside Services: O

Auto-Tab Filters

PrintPoint uses Auto-Tab Filters to let users who are NOT using Bar Code Scanners to define the size of input fields, such as Employee and Job Numbers, and Operation, Material, and Paper Codes. Because of the filters, PrintPoint recognizes when the user has entered the full code into the field, and automatically “tabs” to the next field, to make data entry easier.

NOTE

Enter the # symbol for each character allowed so that PrintPoint will tab from field to field properly.

A maximum of 10 characters is permitted in any field with an Auto-Tab Filter

1 Enter the Auto-Tab Filter for Employee Number.

NOTE

Employees will use this number to identify themselves to PrintPoint. It is usually a company-assigned number or the employee’s Social Security Number.

Example Employee Number: ### if your Employee Numbers have 3 characters/number

2 Enter the Auto-Tab Filter for Job Number.

Example Job Number: ##### if your Job Numbers have 5 characters/ numbers

3 Enter the Auto-Tab Filter for Operation Code.

Example Operation Code: ##########. By default, PrintPoint expects your numbering in the following format: 10-100-020, allowing for 2 digits for Department, 3 digits for Cost Center and 3 digits Operations + 2 digits for the “-” dashes between.

4 Enter the Auto-Tab Filter for Material Code.

Example Material Code: ### if your Job Numbers have 3 characters/ numbers.

5 Enter the Auto-Tab Filter for Paper Part Number.

Example Paper Part Number: ######. By default, PrintPoint assigns a unique Paper Part Number as a permanent identifier to each paper. This number is not the same as the vendors inventory number.

Shift Start Times

Shift Start Times are used to select and report data collected by shift, on the End-of-Shift Report.

1 Enter the Number of Shifts.
2 Enter Start Time for Shift 1.

TIP

Click the clock icon to set the time.

3 Enter Start Time for Shift 2 (if applicable).

TIP

Click the clock icon to set the time.

4 Enter Start Time for Shift 3 (if applicable).

TIP

Click the clock icon to set the time.

Chargeback

Mark as Invoiced when Printed

Place a mark in the checkbox to automatically mark printed records as if they had been invoiced.

Mark as Invoiced when Exported

Place a mark in the checkbox to automatically mark exported records as if they had been invoiced.

Include Invoiced Jobs

Place a mark in the checkbox to enable you to chargeback jobs that have been invoiced using PrintPoint's internal invoicing system. This option allows you to create both an invoice and a chargeback report.

Startup Options and Miscellaneous Defaults

Use Passwords

Place a mark in the checkbox if you want PrintPoint to ask for a password when starting up

No sounds on Alerts & Confirms

Place a mark in the checkbox if you want PrintPoint to run without sounds.

Rebuild Layout Library on Startup

Place a mark in the checkbox if you use the Layout Library as part of your estimating process

TIP

If you do not use the Library, speed up PrintPoint startup by deselecting the checkbox.

Rebuild Graphic Library on Startup

Place a mark in the checkbox if you use the Graphic Library as part of your estimating process.

TIP

If you do not use the Library, speed up PrintPoint startup by deselecting the checkbox.

Hide Cursor Changing on WorkSheet and ShortForm

Place a mark in the checkbox if you do not want the cursor to change shape when QuickLinks are used

Increase List View Memory

Place a mark in the checkbox if you are experiencing the error message “An array of this type cannot be modified in a compiled database.”

Price Lists Rounding

Click and hold the pop-up button to select the method for rounding dollar amounts on your Price Lists. Monetary units can be rounded to Whole Dollars, to the closest 10 cents, or select Standard to round to 5 cent intervals.

Set Holiday Dates

Click the button to display a calendar. You can then select the days you will be closed for holiday. These days will show on the PrintPoint Calendar which will assist you in job scheduling.

Localization

Localization

Click and hold the pop-up box and select the appropriate Country or Language.

Currency & Number Formats

Click and hold the pop-up box and select the appropriate format for your location. A sample of the selected format will appear on the screen.

Linear & Sq Units Measurement

Click and hold the pop-up box and select either Inches or Millimeters as your standard unit of measurement.

Ink Units of Measurement

Click and hold the pop-up box and select either Pounds or Kilograms as your standard unit of measurement for ink.

Chapter 7
PrintPoint Workflow

OVERVIEW

PrintPoint's full suite of software provides a fully-featured Client-Server system that works on Windows and/or Macintosh platforms, standalone or networked.

This chapter discusses PrintPoint's standard workflow:

- Estimating
- Layouts
- Quotations
- Convert an Estimate to a Job
- Job Confirmation Letter
- Job Tickets
- Job Tracking, Job Costing, & Data Collection
- Author's Alterations
- Shipping
- Invoicing
- Links to Accounting Packages and Chargeback Systems.

STEP-BY-STEP

Estimating

PrintPoint's Estimating System allows you to use:

- Single-Screen ShortForm or Single-Screen WorkSheet for sheetfed, offset presses
  - the ShortForm provides a simplified view of an estimate and allows for customizing
  - the WorkSheet allows access to every aspect of an estimate from a single screen.
- Copy/Digital Estimating for jobs that use copiers or digital equipment
- Large Format Estimating for jobs that use large format equipment.

QuickLinks, On-The-Fly database management, and other tools enable you to create an estimate without needing to do any preliminary setup of your database.

Options allow you to clone and print the estimate, create a template with it, create a quote from it, convert it to a job, and generate a price list.

Layouts

PrintPoint's Standard Drawing, Booklets & Lots and Number Out Dialogs are used to visually setup and layout jobs for accurate estimating. By confirming the layouts and cutting with graphics and sample impositions, you can guarantee greater accuracy and communication throughout your shop.

Quotations

PrintPoint's powerful quotation system and built-in word processor includes two options:

- CombiQuotes
- LetterQuotes

You can use SuperReports to customize the format of your CombiQuotes or edit provided scripts to customized quote letters and then print, fax, or e-mail them to your clients. Our CombiQuote function allows an unlimited number of items per quote, with 3 different quantities per each quote.

Convert an Estimate to a Job

PrintPoint makes it simple to convert an estimate to a job. Job numbers can be automatically assigned. Jobs are easily linked back to the estimates where they were created, and you can link jobs that are components of a project. Special functions make it easy to handle jobs that are re-run regularly.

Job Confirmation Letter

Generate, print, e-mail, or fax a customizable confirmation letter to your client with the details of the job they requested.

Job Ticket

PrintPoint allows you to generate and print your own customized electronic and printed job ticket. The system handles multiple items on a job ticket or individual tickets for each component of a job.

Job Tracking

PrintPoint allows you to easily track jobs as they move through your shop.

Data Collection, and Job Costing

With PrintPoint's add-on Data Collection and Job Costing module, you can follow your job in real-time and accurately cost the labor and materials expended on your jobs.

AAs (Author's Alterations)

PrintPoint handles Authors Alterations properly - print, fax, or e-mail Letters of Authorization to your clients, log the approval back into the system, and accurately collect all costs related to the AA's for accurate invoicing.

Shipping

For easy shipping, PrintPoint maintains multiple shipping addresses for each customer. Ship single or multiple jobs at the same time. Using SuperReports, customize the layout of your forms - Packing Slips, Delivery Receipts, and Labels.

Invoicing

PrintPoint's Invoicing includes many powerful features for ease of use (it handles multiple items on an invoice, taxes, discounts, and flexible payables terms and due dates). It allows you to review Author's Alterations so that all applicable charges are billed. Using SuperReports, you can customize the format and content of your invoice, and customize messages that will print on the invoice. Print or automatically fax the invoice to your client.

Links to Accounting and Chargeback Systems

Export your sales information to MYOB/AccountEdge Accounting for Macintosh or Windows, QuickBooks for Windows, Peachtree Complete Accounting for Windows, Flexware, or to your own custom accounting or chargeback system.

PrintPoint's Chargeback System allows you to select the jobs that were completed for any or all of your customers, during any designated period, and then print a report and / or create a file which contains the chargeback information.

Estimating

Chapter 8

Estimating Tools: Introduction

OVERVIEW

PrintPoint estimating system is comprised of several estimating modules: the WorkSheet and Shortform for offset printing, a Copy module and Large Format module. Each of these modules employ PrintPoint's Single Screen technology with various "tools" such as Subsections, Dialogs, Tools and QuickLinks for managing different components of estimating.

This chapter is an overview of these "tools" with cross-references to the appropriate chapters for each of them. When a tools is common to the all-inclusive screens such as the WorkSheet or ShortForm, we do not repeat the coverage of each of components in every chapter. Rather, we refer you to the specific chapter about that tool.

The following table defines the chapters that cover these tools used by the estimating modules

Chapter	Function/Module	Definition
AutoStart	Dialog - Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	PrintPoint's Auto Start feature uses Estimate Templates to simplify the process of creating an estimate using the ShortForm, WorkSheet, Copy and Large Format estimates OR Provides QuickLinks to the Booklets, Lots, and Standard Drawing Dialogs for Offset Estimating
ShortForm	Single Screen Estimate Form for Offset & Simple Copy Estimating	The ShortForm is ideal for creating estimates when you don't want or need to see or adjust the amount of detail normally found on a WorkSheet. It provides a simplified view of an estimate and allows for customizing.
WorkSheet	Single Screen Estimate Form for Offset & Simple Copy Estimating	PrintPoint's WorkSheet allows access to every aspect of an estimate from a single screen. QuickLinks, On-The-Fly database management, and other tools enable you to create an estimate without needing to do any preliminary setup of your database.
Copy/Digital	Single Screen Estimate Form for sophisticated Copy/ Digital Estimating	Copy/Digital Estimating allows you to generate new estimates for jobs that use copiers or digital copier equipment with multiple trays and papers.

Chapter	Function/Module	Definition
Large Format	Single Screen Estimate Form for Large Format Estimating	Large Format Estimating allows you to generate new estimates for jobs that use large format equipment, media, inks and square area measurement pricing.
Pre-Press Only	Single Screen Estimate Form for Pre-Press Only estimating	Pre-Press Only Estimating allows you to generate new estimates for jobs where only Pre-Press items are required.
Standard Draw Dialog	Layout Dialog for ShortForm and WorkSheet for Offset Estimating	Drawing tool - used by ShortForm and WorkSheet for standard layouts not covered by Booklets or Lots.
Booklets Dialog	Layout Dialog for ShortForm and WorkSheet for Offset Estimating	Drawing tool - used by ShortForm and WorkSheet for common Booklets and advanced booklet layouts with multiple forms.
Lots Dialog	Layout Dialog for ShortForm and WorkSheet for Offset Estimating	Drawing tool - used by ShortForm and WorkSheet for common Lots (number or originals) and advanced lot layouts with multiple forms.
Number Out	Diagramming Tool used for advanced setup of cutouts.	Drawing tool - used by various estimate forms displaying 4 ways to run a Press Sheet and 4 ways to cut a Parent Sheet including dutch cuts, grippers and borders. Commonly used before you actually know how you are going to run a job.
Paper Selection	Dialog or Choice List for ShortForm, WorkSheet, Copy/ Digital and Large Format	PrintPoint employs several options for selecting paper for each of its various estimating forms. These options include: Paper Selector Dialog, Paper Choice List, Size Matching Buttons
Ink & Run Dialog	Dialog used by ShortForm and WorkSheet for Offset Estimating Ink Selection and Run Setup	The Ink & Run Setup Dialog is used to define which inks will be used on either or both sides of the sheet, the percentage of coverage for each ink if “Calculated Ink Method is being used and the run style such as Sheetwise or Work & Turn if you have not previously customized this setup in the Booklets & Lots Custom Setup Dialogs.

Chapter	Function/Module	Definition
PrePress	Dialog or Choice List used by ShortForm, WorkSheet, Copy/ Digital and Large Format for selecting pre-press	Divided into 4 user-modifiable buttons displaying 4 categories of pre-press information from the Pre-Press Table and 4 additional free-form fields for additional pre-press selections from choice lists.
Post-Press	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	Sub-Section of estimating forms with 12 default choices and an optional Post-Press Selector Dialog for adding detail and customizations to post-press selections. Note: The Post-Press and Outside Service areas share a common subsection of the estimating forms.
Outside Services	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	Sub-Section of estimating forms with 12 default choices and an optional Outside Service Selector Dialog for adding detail and customizations to post-press selections. Note: The Post-Press and Outside Service areas share a common subsection of the estimating forms.
CompVsCustom Dialog	Common Tool for ShortForm, WorkSheet	Tracks all customization to an estimate, allowing you to lock values, clear values, etc.
Description Dialog	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	• Updating the Default Job Description • Quote and Invoice Description • Shipping Description
Notes Dialog	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	• Enter Estimate Notes. • Enter Job Ticket Notes. • Review Estimate History • Review the Last Job Number if the current estimate is a clone of an existing job. • Enter a custom paper or paper color to appear on your Job Ticket and Paper Purchase Order
Profit & Quantity Review Dialog	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	Dialog that allows you to markup or discount the estimated price of a job using percentages or by directly entering a desired profit for all three quantities.

Chapter	Function/Module	Definition
Shipping	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	Sub-Section or Dialog that allows you to enter directly or select an instructions, address and telephone number from a pre-defined customer based list. TIP More advanced features of shipping are handled at the Job and Shipping Modules.
Price Lists	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	PrintPoint. allows you to generate Price Lists from existing or newly created estimates and maintain books of your price lists.
Cloning	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	PrintPoint's Cloning feature allows you to make a duplicate of an existing estimate. Cloning is a great time saver when you want to create a new estimate that is similar to an existing estimate in your database.
Templates	Common Tool to ShortForm, WorkSheet, Copy/ Digital and Large Format	PrintPoint enables you to save "templates" of existing estimates that have previously been created. All aspects of the original estimate are used to recreate new estimates.
Linking	Common Tool for ShortForm, WorkSheet, Copy/ Digital and Large Format	
Graphic Library	Common Tool for ShortForm, WorkSheet	PrintPoint's Graphic Library provides a collection of graphic illustrations of common jobs (e.g., Envelope, 16 Page Booklet) and allows the user to add additional illustrations. These graphics can be selected at estimating time, and can then be printed on the Job Ticket to minimize the risk of errors when the job is actually printed.

Chapter	Function/Module	Definition
Layout Library	Common Tool for ShortForm, WorkSheet	The Layout Library stores dimensions and specifications of common layouts used by the Standard Drawing and Booklets/ Lots dialogs. These layouts contain information about the length, width, grippers, borders, number of pages, signatures, etc. It also allows you to attach a graphic from the Graphic Library.
Mobile	Optional Module	PrintPoint Mobile is an optional module that allows you to create estimates on a separate computer such as a laptop (not connected as a client to the PrintPoint Server) and import those estimates into your central database.

Chapter 9

Estimating Tools: Estimate Template & AutoStart Wizard

OVERVIEW

PrintPoint's Estimate Template & Auto Start Wizard is one of the key modules of PrintPoint's estimating tools. When a user creates a new estimate, the wizard is displayed immediately after selecting a customer from the Customer Choice List.

Five estimating paths are presented to the user:

- The use of Estimate Templates (a selection of pre-defined estimates).
- A QuickLink button to the Booklets graphical estimating environment.
- A QuickLink button to the Lots graphical estimating environment.
- A QuickLink button to the Standard Drawing graphical estimating environment.
- A Cancel button to return to the main estimating screen such as the WorkSheet or ShortForm.

If you select Use Estimate Templates On New Estimates in Preferences, the Estimate Template dialog will be presented as described above...and you will be able to select from a list of pre-defined estimate templates.

Additionally, once you have selected this option you are can also select Auto Data Entry On New Estimates in Preferences. This option is directly connected to the use the Booklets, Lots or Standard Draw graphical estimating dialogs. After you have defined the estimate in one of those three areas, you will then be presented with several more dialogs requesting quantities, job name, item description and inks to help you avoid leaving out any "key" information.

The Auto Data Entry option is generally provided for new users or users who prefer to have data entry presented in a more linear fashion (direct step-by-step question and response style.)

BEFORE YOU BEGIN

You should...	Where this information is found...
Configure your Preferences	File Menu > Preferences > Estimating > Auto Data Entry > Use Estimate Templates on New Estimates
Configure your Preferences	File Menu > Preferences > Estimating > Auto Data Entry > Use Auto Data Entry on New Estimates TIP This second option is available only if you have first set the Use Estimate Templates on New Estimates preference.

STEP-BY-STEP

This section includes the following topics:

- Accessing the Estimate Template & AutoStart Wizard.
- Using Estimate Templates.
- Using Auto Data Entry when using the Booklets, Lots or Standard Drawing QuickLink Buttons. (Only for the ShortForm and WorkSheet)
- Go Directly To Estimate.

Accessing the Estimate Template & AutoStart Wizard

For the purpose of this example, we will choose the ShortForm as the Estimating Tool. However, all estimating tools including the WorkSheet, Copy and Large Format use the Estimate Template & AutoStart Wizard as well.

1. Select Navigator > Estimates.

   PrintPoint displays the Estimates List View.
2. Click the New Button.
3. Select one of the estimate types from the pull-down list.

   The Estimate Form is displayed.
4. Select a customer from the Customer Choice List.

   The Estimate Template & AutoStart Wizard is displayed.

Using Estimate Templates

1. Highlight one of the Template Types from the list on the left side of the Wizard.

   PrintPoint narrows your available template choices (searching all templates by “type”) and displays them on the right hand list sorted by name. It also lists the quantity range for each template in the last column of the list.
2. Highlight the exact Template Name you would like to use.

   The Selected Template button with will be titled with the name of the templates you have selected.

3 Click the Selected Template button.

PrintPoint closed the wizard and populates the estimate using the information from the estimate template.

TIP

Shortcut: Double-click the desired Template Name will perform the actions in steps 2 & 3 above in a single step.

4 Review the information on the estimate and make adjustments as necessary.

TIP

If you make adjustments, click Calc to re-calculate the estimate totals.

5 When you are done, click Accept to save your estimate.

Using Auto Data Entry when using the Booklets, Lots or Standard Drawing QuickLink Buttons

NOTE

This option is only available for estimates created with the ShortForm or WorkSheet.

1. Click on any one of the 3 QuickLinks buttons to the graphic estimating environments.
2. After you have completed filling in all the necessary information (see the individual chapters: Estimating Tools - Booklets; Estimating Tools - Lots; or Estimating Tools - Standard Drawing for specifics on each of these tools) click OK to return to the main estimating screen.
3. The Ink and Run Setup will be displayed. (See the chapter: Estimating Tools: Ink & Run Dialog for further information on this dialog.)
4. Select your inks and run style and click OK.
5. Enter up to 3 quantities from the Auto Data Entry Wizard and click Next.
6. Enter the Job Name in the Auto Data Entry Wizard and click OK.

7 Select an Item Description from the Item Description Choice List and click OK.

8 You will now be returned to the WorkSheet or ShortForm to continue estimating. Your cursor will most likely be at the Item Description or Finished Size fields.

TIP

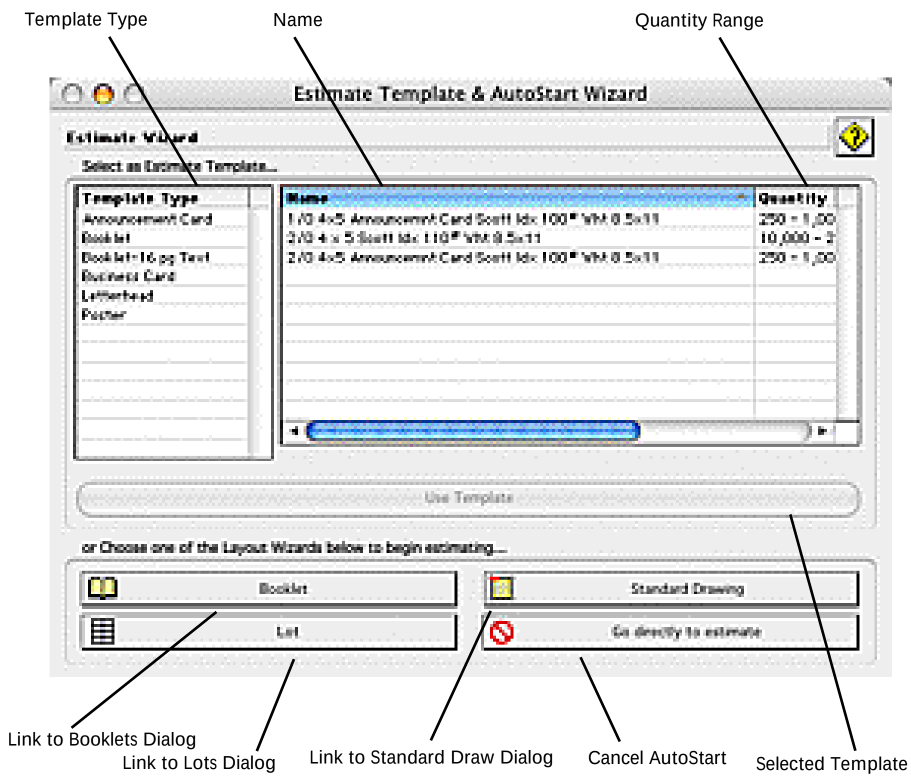
You can stop the Auto Data Entry process by clicking on the Stop button of the Auto Data Entry Wizard at any time.

Go Directly To Estimate

If you choose NOT to use the Estimate Template & Auto Start Wizard, click on the Go Directly To Estimate button to continue the process of estimating without any assistance from the wizard.

About The Screens

Estimate Template & AutoStart Wizard

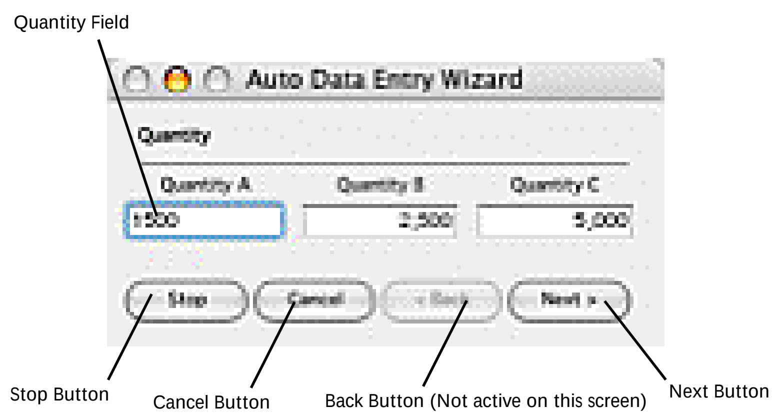


Column LIst / Button	Definition
Template Type	Type of template (grouping) to categorize templates for quicker “drill down” selection
Name	Specific Name of the template
Quantity Range	Defines the quantity range for a template to help select the correct template for the desired quantity.
Template (button)	Button is titled with the name of the selected template from the Name column
Booklet (button)	QuickLink to the Booklets Drawing Dialog
Lot (button)	QuickLink to the Lots Drawing Dialog
Standard Drawing (button)	QuickLink to the Standard Drawing Dialog
Go Directly To Estimate (button)	Returns to the estimating screen (WorkSheet, ShortForm, Copy or Large Format)

Auto Data Entry Wizards

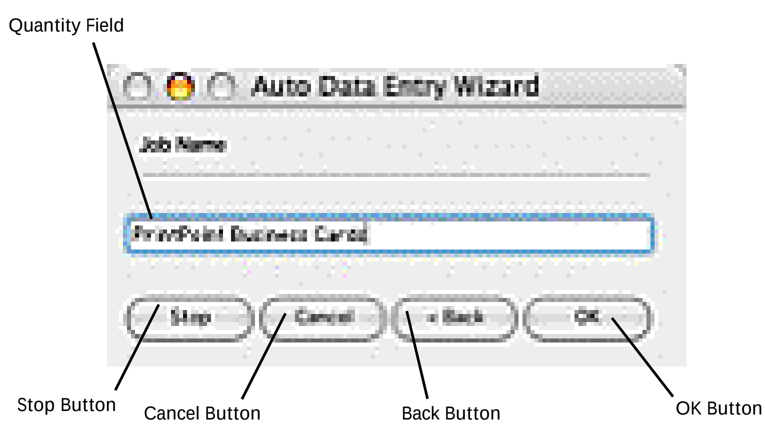
After leaving any of the 3 graphic estimating environments (Booklets, Lots or Standard Drawing) you will first be presented with the Ink & Run Setup Dialog and then the following two wizards:

Auto Data Entry Quantity Wizard



Column / Button	Definition
Quantity A, B, C	Enter up to three quantities for the estimate.
Stop button	Stops the entire Auto Data Entry process.
Cancel button	Cancels this dialog, but continues the Auto Data Entry process
Back button	Not enabled on this screen
Next button	Accepts the entries on the screen and moves you to the next screen. You can click the button or press the Enter key on your numerical keypad

Auto Data Entry Job Name Wizard



Column / Button	Definition
Job Name	Enter up to 80 characters for the Job Name.
Stop button	Stops the entire Auto Data Entry process.
Cancel button	Cancels this dialog, but continues the Auto Data Entry process
Back Button	Returns to the Quantity wizard
OK button	Accepts the entries on the screen. You can click the button or press the Enter key on your numerical keypad

Chapter 10
Estimating Tools: The ShortForm

OVERVIEW

The ShortForm is one of PrintPoint's two offset estimating tools. Derived from the "original" Single Screen WorkSheet, the ShortForm (as it's name implies) is a simplified view of the estimate displaying less detail while still providing the ability to drill down, link to/add database items On-The-Fly and customize when necessary.

The ShortForm's QuickLinks give you access to database items such as Customers, Press, Paper, Ink, PrePress, and Post-Press for On-The-Fly manipulation of data and access to the thee graphical estimating environments: Standard Draw, Booklet and Lots.

It's Explanation of Calculation dialogs help you interpret the numbers and check for accuracy, while the X-Ray button displays hidden details on the second page of the estimate screen enabling finer control and customization of various components of the estimate.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your estimating preferences	File Menu > Preferences > Estimating

STEP-BY-STEP

This chapter includes the following topics, specific to ShortForm estimating.

- Creating an estimate with the ShortForm
  - Job Information
  - Quantities
  - Paper/Layout
  - Paper Color
  - Press
  - Ink & Run Setup
  - Pre-Press & Fixed
  - Post-Press/Outside Service
  - Calculating and adjusting
  - Explanation of Calculation
  - X-Ray View
  - Computer vs. Custom Dialog

The chapter also includes abbreviated steps to the following estimating tasks that are common to all estimating forms with references to the appropriate chapters covering these subjects in detail.

- Common Estimating Tasks To All Estimating Forms
  - Accepting/Saving
  - Reverting
  - Closing
  - Shipping
  - Printing an estimate
  - Creating a Quote
  - Converting to a Job
  - Description
  - Estimate Notes, Job Notes, History, Last Job Number, Paper Color
  - Cloning an Estimate
  - Creating an Estimate Template
  - Generating a Price List

Creating an Estimate with the ShortForm

This section steps you through the “generic” estimate process without the use of the Estimate Template & Auto Start Wizard, highlighting the “tools” used to create an estimate. It is not intended as specific tutorial for a specific job.

Creating a New ShortForm

1. Select Navigator > Estimates.

   PrintPoint displays the Estimates List View.
2. Click the New button.
3. Select ShortForm from the drop-down list.

   PrintPoint displays the New ShortForm Estimate.

Job Information

1. Select a Customer from the Customer Choice List in the upper right corner of the screen.
2. Click the OK button.

   PrintPoint displays Customer Code Name, Customer Rating, Primary Contact, CSR, Sales Rep, and Estimator on the ShortForm.

   TIP

   Change any information that you want to change for this specific estimate.

   TIP

   If you would like to review or make a permanent change to information in the customer database, click on the QuickLink drop-down button to the left of the words “Code Name” to view or change the Customer Record, or select Additional Information from the drop-down to review the Custom Fields, Estimator, Contact, and CSR for the current estimate.
3. Enter the Job Name.

TIP

You should assign a unique name to all estimate/jobs in your database. For example, a job name would be “Big Apple 2003 Annual Report” and not just “Annual Report”. You may very possibly be working on several annual reports simultaneously for different customers or even the same customer.

TIP

You can make the Job Name as long as you like, even though the field on the WorkSheet displays only 23 letters. Click on the words “Job Name” to see the complete Job Name

4 Press tab.

5 Select an item from the Item Description Choice List. The item description differs from the Job Name by it’s “generic” nature. In the example above where the suggested Job Name was “Big Apple 2003 Annual Report”, the Item Description would be just “Annual Report”.

6 Select a Finished Size from the Finished Size Choice List.

NOTE

If you have “attached” a finished size to an Item Description in the Item Description database, the Finished Size Choice List will not be displayed.

Quantities

1 Press the Tab key.

2 Enter up to three Quantities tabbing between each field.

TIP

Click the inverted arrows next to the “A”, “B”, or “C” to select a quantity from the pop-up lists. The entries in these lists are maintained from the File Menu > List Editor.

3 Select the shipping method from the Shipping Choice List.

TIP

You can change the Shipping Address for this estimate by clicking on the black arrow.

4 Enter up to three quantities and press tab.

TIP

Click the inverted arrows next to the “A”, “B”, or “C” to select a quantity from the pop-up lists.

Paper/Layout

1 If this is a simple job and you already know your paper and all your paper sizes, enter the information directly in the Paper/Layout area

OR

TIP

If you want to view the layout for the job, move the cursor to the Layout Icon button on the right side of the Paper area and click to display the Standard Drawing dialog.

See Estimating Tools: Standard Drawing Dialog for details.

OR

If this is a Booklet or Lots job, click the Booklets/Lots icon next to the words "Booklets/Lots" in the center of the ShortForm. This opens the Booklets & Lots dialog where you can layout and adjust your Booklets & Lots estimates.

See the Estimating Tools: Booklets & Lots Dialog chapter for details.

Paper Color

PrintPoint allows you to enter a "custom" paper color for those stocks that you keep in your database where you have not already specified the color as part of the paper name and definition.

Often people will setup "8.5 x 11 Bond Colors" and have to indicate somewhere what the exact color being used on the estimate is. Or...they may set "Customer Stock" and need to indicate something specific about the paper being used.

1 Click the Notes button to open the Notes Dialog.
2 Enter the Paper/Paper Color.

Press

1 Select the Press for the estimate from the Press Choice List.

TIP

For any jobs that will be using a dutch or cross-grain layout, select Extras Menu > Number Out to view all eight layouts and cutouts. See Chapter on Number Out for more information.

Ink & Run Setup

1 Click the Ink Color Burst icon in the Ink/Passes area to display the Ink & Run Setup Dialog.
2 Select the Flat Method or Calculated Method radio button.

NOTE

The **Flat Method** multiplies the rate per ink by the number of inks, while the With the **Calculated Method**, each ink is individually calculated:

Total inches = Width x Length of Press Sheet x Number of Press Sheets.

Square inches of coverage for each Ink = Intersection of Ink Type and Paper Type on the Ink table

Lbs. of Ink = Total inches / (divided by) number of inches of coverage x Percentage of Coverage.

Cost of Ink = $ Price Break (from the Ink Table) x lbs. of Ink + Percentage of Ink Waste (from the Ink table).

TIP

If the amount calculated is less than the minimum charge for each ink, the minimum is applied. The total price can reflect any combination of "real" charges and minimum charges.

3 Choose a Run Style from the upper right quadrant.

Sheetwise indicates you will run the job, possibly with different images on each side. PrintPoint will examine the number of inks on sides A & B and, depending on the value you entered in response to "How many Side A plates are used on Side B?", will determine the number of plates, make readies, etc.

TIP

This is also the default for 1-sided printing.

Work & Turn and **Work & Tumble** will calculate the number of plates, make readies, etc. based on the standard work & turn or work & tumble layout.

TIP

If you fill in the inks on Side A first, then click on either of these two radio buttons, PrintPoint will automatically fill in the same inks on Side B and prevent direct entry in those fields.

TIP

Click the eraser icon to get rid of the default inks for side A.

4 The words **Bleeds** or **No Bleed** will appear, if you have previously set a bleed size larger than the run size (or page size in the case of booklets).

NOTE

This setting does not affect any calculations; it only appears on the job ticket. If the Run Size and Bleed Size are different, this box is automatically checked.

5 Click any inks you want to add from the Ink List at the bottom right of the window. For process color jobs, you can click the 4-color icon.

OPTIONS

6 Add percentages for each color if you are using the Calculated Ink Method.

TIP

If this is a two-sided job, repeat the previous two steps for Side B.

7 When you are finished specifying inks, click OK to return to the ShortForm.

Your specifications are displayed. The number of passes is figured, based on the type of press and the number of inks you selected.

NOTE

You can manually override this setting.

Pre-Press & Fixed

1 Click any of the four buttons in the top part of the Pre-Press & Fixed area and enter quantities for these items.

NOTE

You can change the items that display in this area by going to the Pre-Press Table (Navigator > Pre-Press Table) and clicking on Custom Labels.

2 If you have additional Pre-Press items, click the Black Triangle Arrow in one of the blank windows.

The Pre-Press Choice List is displayed.

3 Select any additional items from the Pre-Press Choice List.

Post-Press/Outside Service

1 Click the checkboxes for Post-Press or Outside Services.

TIP

Move the cursor over any of the listed items and it changes to a QuickLink “right arrow.” Click to see the Post-Press Selector and to have access to he database, if you want to make changes.

Calculating and Adjusting

1 Click Calc to calculate the pricing for this estimate.

TIP

The Calc button will turn red if the estimate needs to be re-calculated. Click on the button or hit Enter on your numeric keypad to re-calculate.

2 To make adjustments to this estimate:

a. go to the pricing in the upper right quadrant of the ShortForm
b. select the price you want to change
c. enter a new value

OR

a. click the X-Ray > button in the upper right corner of the ShortForm. PrintPoint displays details used in the pricing calculations.

b. make the changes you require
c. click <Back to return to the estimate.

3 Click Calc to re-calculate the estimate.

4 Click Calc again.

TIP

Explanation of Calculation

Move the cursor over any of the words under “Quantity” in the upper right quadrant of the ShortForm and it changes to a Question Mark. Click to get a detailed Explanation of Calculation for each of the prices and to have access to the database, if you want to make changes.

X-Ray View

Like the WorkSheet, the ShortForm give you the ability to drill down, reviewing each of the calculations using the X-Ray View.

1 Click on the X-Ray >> button in the upper right subsection of the ShortForm.

The X-Ray View will be displayed.

2 Review all sub-calculations or override any where necessary.

3 Click on the <<Back button to return to the main page of the ShortForm.

Computer vs. Custom Dialog

Any time you override one of the default values on the ShortForm, the Calc Method button on the X-Ray Page, will change to Customized, indicating that you have overridden the computer-based calculations. Click this button to display the Comp vs. Custom Dialog to reset your custom setting.

See the chapter Estimate Tools: Calc Method & Comp vs. Custom Dialog for more information.

Common Estimating Tasks To All Estimating Forms

The following tasks are all performed from the Estimate Button Bar located on the right side of the screen.

Accepting/Saving

The accept button will save all changes to a new or existing estimate, removing it from the screen and storing for future retrieval.

Reverting

The revert button will return the estimate to the last saved condition

Closing

The close button will remove the estimate from the screen. If you have made any changes you will be alerted and be given an opportunity to save.

Shipping

See the chapter Estimate Tools: Shipping

Printing an Estimate

1 Click Print.

2 PrintPoint displays the standard print dialogs.

See the Estimating Tools: Printing an Estimate chapter.

Description

1 Click the Desc button.

2 PrintPoint displays the Estimate Description Dialog.

See the Estimating Tools: Description Dialog chapter.

Creating a Quote

1 Click and hold the Quote button.

2 Select New CombiQuote or New LetterQuote from the drop-down menu.

PrintPoint displays a New CombiQuote or LetterQuote Detail screen.

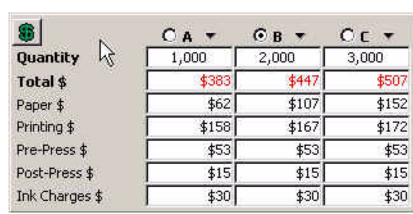
See the Quotes: CombiQuotes or Quotes: LetterQuotes chapters.

Convert to a Job

1 Click in a radio button next to A, B, or C to select a quantity.

2 Click Job.

PrintPoint displays the Electronic Job Ticket screen.



	A	B	C
Quantity	1,000	2,000	3,000
Total $	$383	$447	$507
Paper $	$62	$107	$152
Printing $	$158	$167	$172
Pre-Press $	$53	$53	$53
Post-Press $	$15	$15	$15
Ink Charges $	$30	$30	$30

See the Jobs - Converting an Estimate To a Job chapter.

Notes, History, Last Job Number, Paper Color

You can log notes at the estimating stage for the estimate itself as well as the upcoming job. Additionally PrintPoint will automatically keep a log of changes, the Last Job Number, and Customized Paper Color in the Notes dialog. Any of this information can be used later on for reporting purposes such as Job Tickets or Paper Purchase Orders.

1 Click the Notes button.

PrintPoint displays the Notes Dialog.

See the Estimating Tools: Notes Dialog chapter.

Cloning an Estimate

1 Click and hold the Extras button.
2 Select Clone Estimate.

PrintPoint displays the Clone Dialog.

Creating an Estimate Template

1 Click and hold the Extras button.
2 Select Create Estimate Template.
3 Click Yes to confirm.

PrintPoint displays the Estimate Template Detail screen.

See the Estimating Tools: Templates chapter.

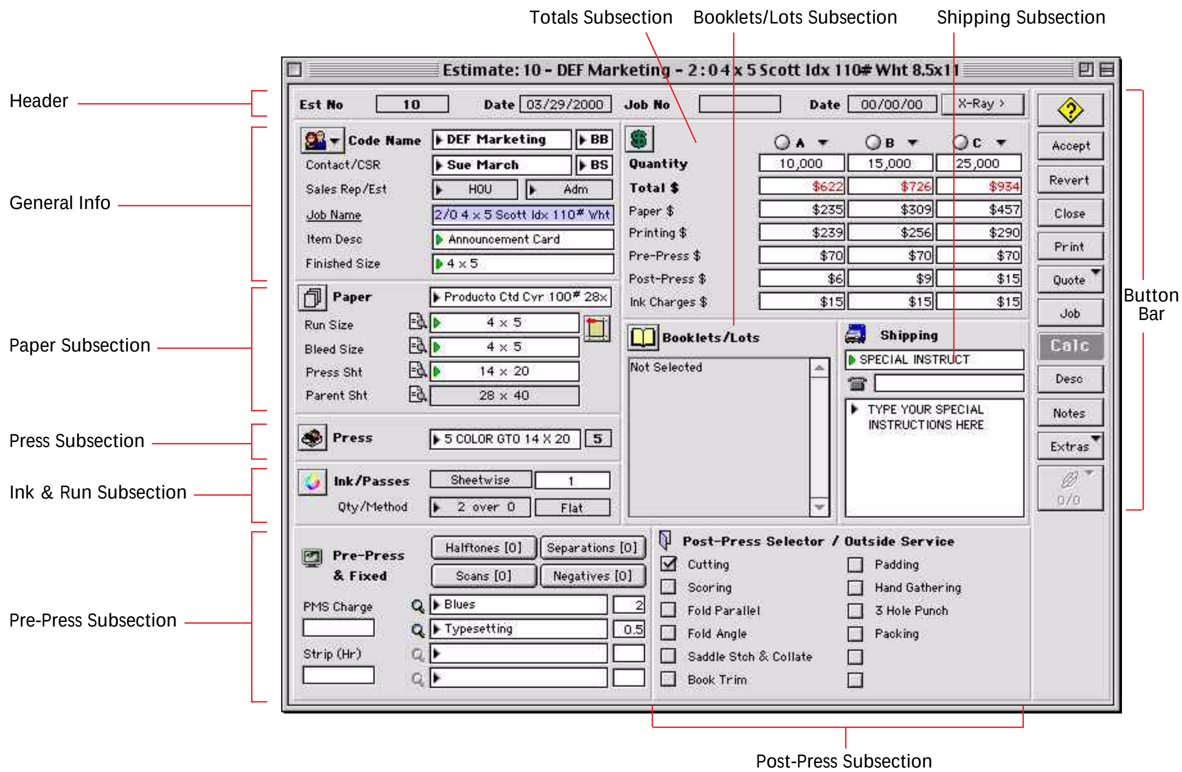
Generating a Price List

1 Click and hold the Extras button.
2 Select Generate Price List...
3 PrintPoint displays the Price List Preview dialog.

See the Estimating Tools: Price Lists chapter.

About the Screens

Short Form The Short Form Estimating Screen is broken down into Subsections for easy single screen estimating capabilities.

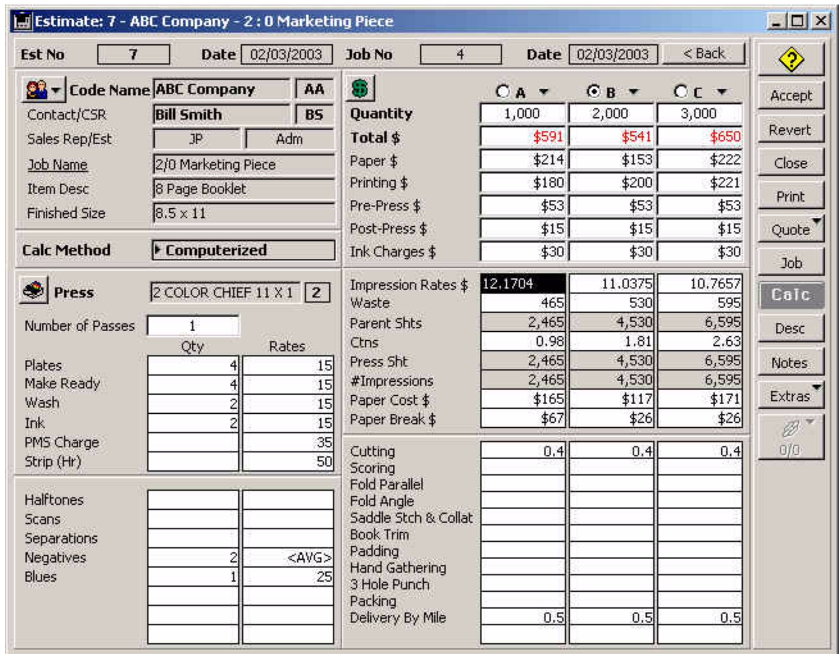


Estimate Header

Field Name	Contents/Use
Est No	Number created by PrintPoint when estimate is created.
Date	Date the estimate was created.
Job No	Number assigned (automatically or manually) when estimate is turned into a job.

Date	Job Date.
X-Ray (button)	QuickLink to detailed breakdown of the estimate.

X-Ray View

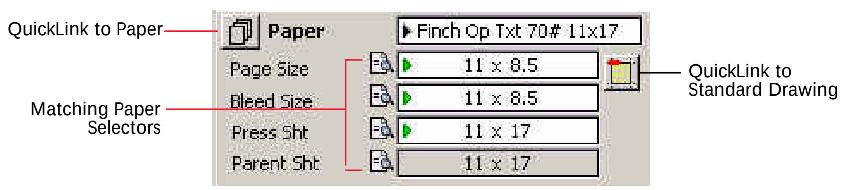


General Information Subsection

Field Name	Contents/Use
QuickLink to Customer Record (Drop-down menu button)	Drop-down menu with options to view the customer record or to view the 8 custom fields and additional information for the estimate.
Customer Name / Customer Rating	Name of the customer (chosen from the customer list) and the rating for that customer (Chosen from the Customer List).
Contact / CSR	Customer contact (chosen from the contact list) and the customer sales rep for that contact.

Sales Rep/ Est	Sales Rep for the customer and the person who created this estimate.
Job Name	Name given to this job (this can be chosen from a list or manually typed in).
Item Description	Description of this job (this can be chosen from a list or manually typed in).
Finished Size	Final size of the piece when ready to ship (this can be chosen from a list or manually typed in).

Paper Subsection

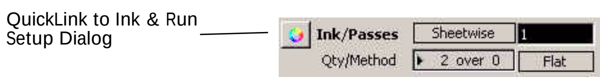


Field Name / Button	Contents /Use
QuickLink to Paper Review Dialog (button)	Click to view or to add additional information to the Paper Record.
Matching Paper Selectors (buttons)	Click on magnifying/paper button to limit the Paper Matching Selector to show only sizes displayed in the fields to the right of the buttons.
QuickLink to Standard Drawing Dialog (button)	Click to see a detailed view of the paper and run information.
Paper field	Name of the paper selected for this estimate. Choose from the Paper Selector or Paper Choice List.
Run / Page Size	Finished printing size before post-press (if estimate is a booklet/lot the will show as Page Size).
Bleed Size	Run size plus any bleeds.
Press Sht	Size of the press sheet.
Parent Sht	Size of the parent sheet.

Press Information Subsection

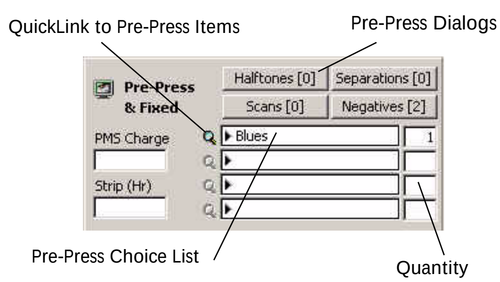
Field Name	Contents/Use
QuickLink to Press Record (button)	Click to view or to add additional information to the Press Record.
Press field / Black Arrow	Displays the name of the Press selected from the Press Choice List.

Press Information Area



QuickLink to Ink & Run Setup Dialog (button)	Click to display the Ink & Run setup to make selections of ink and run style.
Ink / Passes	Displays the type of run (Sheetwise, Work & Turn or Work & Tumble) and how many passes are required on the selected press.
Qty / Method	Displays the number of inks on each side of the form and the type of ink calculation method (Flat or Calculated) for the estimate.

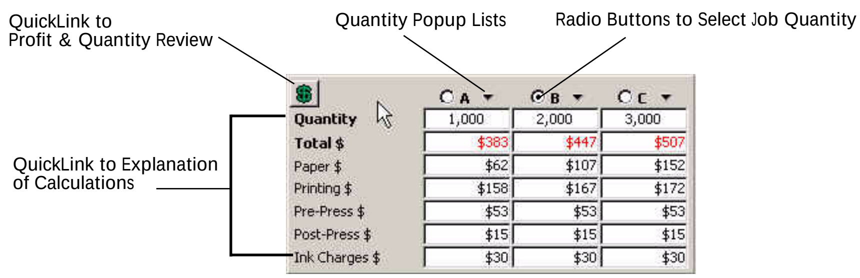
Pre-Press Information Area



Field Name	Contents/Use
Pre-Press (Buttons) (4)	Preset buttons used to select Pre-Press operations from the Pre-Press Table.
Pre-Press fields	Used to select Pre-Press operations from a the Pre-Press Items Choice List.
Quantity	The quantity of each of the Pre-Press operations selected from the Pre-Press Items Choice list.

PMS Charge	The number of PMS mixing charges (the dollar amount is included into the press setup charges of the printing totals). User modifiable labels and fields that can be used for other purposes. (attached to each press - see the Press chapter)
Strip (Hr.)	The number of hours of stripping that are required for the job (the dollar amount is included in the press setup charge of the printing total). User modifiable labels and fields can be used for other purpose. (attached to each press - see the Press chapter)

Totals Area



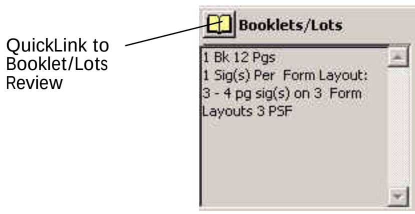
NOTE

The Explanation of Calculation dialogs are displayed by clicking on the labels of the rows for each section (i.e. Click on the label “Paper$” to see a detail explanation of the paper cost).

Field Name	Contents/Use
QuickLink to Profit and Quantity Review (button)	Click to view the Profit and Quantity Review dialog. See the Estimate Tools: Profit & Quantity Dialog chapter
Quantity Popup List	Used to select a quantity for the estimate
Radio Buttons for Selected Job Quantity	Used to select the quantity when the estimate is being turned into a job.
Quantity	The number of pieces the customer wants to be quoted on (can be entered manually or chosen from the Quantity Popup List).

Total	Total cost of the estimate per quantity.
Paper	Total cost of paper.
Printing	Total cost of printing.
Pre-Press	Total cost of pre-press.
Post-Press	Total cost of post-press.
Ink Charges	Total cost of ink.

Booklet/Lots Information Area



NOTE

A detailed view of the Booklets / Lots section can be seen by clicking on the Booklets / Lots button.

Field Name	Contents/Use
QuickLink to Booklet/Lots Review Dialog (button)	Click to view the Booklets/Lots Review Dialog.
Booklets / Lots area	Brief description of the booklet / lots detail.

Shipping Information Area

Field Name	Contents/Use
Shipping	View of how and where to ship.

Post-Press/Outside Service Information Area

NOTE

To setup the Post-Press / Outside Service default selection see the chapter on preferences.

Estimate Tool Bar

Button	Action
Help	Opens the PrintPoint PDF Manual.
Accept	Accepts and save this estimate
Revert	Reverts to the previously saved version of the estimate.
Close	Closes this estimate with options to Save, Close and Cancel.
Print	Prints the estimate sheet.
Quote	Drop-down menu button to create/review CombiQuotes and LetterQuotes.
Job	Converts an Estimate into a Job and Electronic Job Ticket.
Calc	Calculates the estimate.
Desc	Opens the estimate Description Dialog.
Notes	Opens the Notes Dialog.
Extras	Drop-down menu button to Clone, Create a Template or Generate a Price List based on this estimate.

Chapter 11
Estimating Tools: WorkSheet

OVERVIEW

The WorkSheet is one of PrintPoint's two offset estimating tools. It is the "Original" Single Screen estimating module, displaying all detail on one screen while still providing the ability to drill down, link to/add database items On-The-Fly and customize when necessary.

The Worksheet's QuickLinks give you access to database items such as Customers, Press, Paper, Ink, PrePress, and Post-Press for On-The-Fly manipulation of data and access to the thee graphical estimating environments: Standard Draw, Booklet and Lots.

It's Explanation of Calculation dialogs help you interpret the numbers and check for accuracy.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your estimating preferences	File Menu > Preferences > Estimating

STEP-BY-STEP

This chapter includes the following topics, specific to WorkSheet estimating.

- Creating an estimate with the WorkSheet
  - Job Information
  - Quantities
  - Paper/Layout
  - Paper Color
  - Press
  - Ink & Run Setup
  - Pre-Press & Fixed
  - Post-Press/Outside Service
  - Calculating and adjusting
  - Explanation of Calculation
  - Computer vs. Custom Dialog

The chapter also includes abbreviated steps to the following estimating tasks that are common to all estimating forms with references to the appropriate chapters covering these subjects in detail.

- Common Estimating Tasks To All Estimating Forms
  - Accepting/Saving
  - Reverting
  - Closing
  - Shipping
  - Printing an estimate
  - Creating a Quote
  - Converting to a Job
  - Description
  - Estimate Notes, Job Notes, History, Last Job Number, Paper Color
  - Cloning an Estimate
  - Creating an Estimate Template
  - Generating a Price List

Creating an Estimate with the WorkSheet

This section steps you through the “generic” estimate process without the use of the Estimate Template & Auto Start Wizard, highlighting the “tools” used to create an estimate. It is not intended as specific tutorial for a specific job.

1. Select Navigator > Estimates.

   PrintPoint displays the Estimates List View.

2. Click the New button.
3. Select WorkSheet from the drop-down list.

   PrintPoint displays the New WorkSheet Estimate.

Job Information

1. Select a Customer from the Customer Choice List in the upper right corner of the screen.
2. Click the OK button.

   PrintPoint displays Sales Rep, Customer Code Name, and Customer Rating.

   TIP

   Change any information that you want to change for this specific estimate.

   TIP

   If you would like to review or make a permanent change to information in the customer database, move your cursor over the label “Code Name” and select the QuickLink drop-down button to view or change the Customer Record, or select Additional Information from the drop-down to review the Custom Fields, Estimator, Contact, and CSR for the current estimate.

3. Enter the Job Name.

TIP

You should assign a unique name to all estimate/jobs in your database. For example, a job name would be “Big Apple 2003 Annual Report” and not just “Annual Report”. You may very possibly be working on several annual reports simultaneously for different customers or even the same customer.

TIP

You can make the Job Name as long as you like, even though the field on the WorkSheet displays only 23 letters. Click on the words “Job Name” to see the complete Job Name.

4 Press tab.

5 Select an item from the Item Description Choice List. The item description differs from the Job Name by it's "generic" nature. In the example above where the suggested Job Name was "Big Apple 2003 Annual Report", the Item Description would be just "Annual Report".

6 Select a Finished Size from the Finished Size Choice List.

NOTE

If you have "attached" a finished size to an Item Description in the Item Description database, the Finished Size Choice List will not be displayed.

Quantities

1 Press the Tab key.

2 Enter up to three Quantities tabbing between each field.

TIP

Click the inverted arrows next to the "A", "B", or "C" to select a quantity from the pop-up lists. The entries in these lists are maintained from the File Menu > List Editor.

3 Select the shipping method from the Shipping Choice List.

TIP

You can change the Shipping Address for this estimate by clicking on the black arrow.

4 Enter up to three quantities and press tab.

TIP

Click the inverted arrows next to the "A", "B", or "C" to select a quantity from the pop-up lists.

Paper/Layout

1 If this is a simple job and you already know your paper and all your paper sizes, enter the information directly in the Paper/Layout area

OR

TIP

If you want to view the layout for the job, move the cursor to the Layout Icon button on the right side of the Paper area and click to display the Standard Drawing dialog.

See Estimating Tools: Standard Drawing Dialog for details.

OR

If this is a Booklet or Lots job, click the Booklets/Lots icon next to the words “Booklets/Lots” in the center of the ShortForm. This opens the Booklets & Lots dialog where you can layout and adjust your Booklets & Lots estimates.

See the Estimating Tools: Booklets & Lots Dialog chapter for details.

Paper Color

PrintPoint allows you to enter a “custom” paper color for those stocks that you keep in your database where you have not already specified the color as part of the paper name and definition.

Often people will setup “8.5 x 11 Bond Colors” and have to indicate somewhere what the exact color being used on the estimate is. Or...they may set “Customer Stock” and need to indicate something specific about the paper being used.

1. Click the Notes button to open the Notes Dialog.
2. Enter the Paper/Paper Color.

Press

1. Select the Press for the estimate from the Press Choice List.

TIP

For any jobs that will be using a dutch or cross-grain layout, select Extras Menu > Number Out to view all eight layouts and cutouts. See Chapter on Number Out for more information.

Ink & RunSetup

1. Move the cursor over the words Ink/Passes to display the Ink & Run Setup Dialog.
2. Select the Flat Method or Calculated Method radio button.

NOTE

The **Flat Method** multiplies the rate per ink by the number of inks, while the With the **Calculated Method**, each ink is individually calculated:

Total inches = Width x Length of Press Sheet x Number of Press Sheets.

Square inches of coverage for each Ink = Intersection of Ink Type and Paper Type on the Ink table

Lbs. of Ink = Total inches / (divided by) number of inches of coverage x Percentage of Coverage.

Cost of Ink = $ Price Break (from the Ink Table) x lbs. of Ink + Percentage of Ink Waste (from the Ink table).

TIP

If the amount calculated is less than the minimum charge for each ink, the minimum is applied. The total price can reflect any combination of "real" charges and minimum charges.

3 Choose a Run Style from the upper right quadrant.

Sheetwise indicates you will run the job, possibly with different images on each side. PrintPoint will examine the number of inks on sides A & B and, depending on the value you entered in response to "How many Side A plates are used on Side B?", will determine the number of plates, make readies, etc.

TIP

This is also the default for 1-sided printing.

Work & Turn and Work & Tumble will calculate the number of plates, make readies, etc. based on the standard work & turn or work & tumble layout.

TIP

If you fill in the inks on Side A first, then click on either of these two radio buttons, PrintPoint will automatically fill in the same inks on Side B and prevent direct entry in those fields.

TIP

Click the eraser icon to get rid of the default inks for side A.

4 The words **Bleeds** or **No Bleed** will appear, if you have previously set a bleed size larger than the run size (or page size in the case of booklets).

NOTE

This setting does not affect any calculations; it only appears on the job ticket. If the Run Size and Bleed Size are different, this box is automatically checked.

5 Click any colors you want to add from the Ink List at the bottom right of the window. For process color jobs, you can click the 4-color icon and add percentages for each color.

TIP

If this is a two-sided job, repeat the previous two steps for Side B.

6 When you are finished specifying inks, click OK to return to the WorkSheet.

Your specifications are displayed. The number of passes is figured, based on the type of press and the number of inks you selected. You can manually override this setting.

Pre-Press & Fixed

1 Enter a quantity and rate for each of your 4 pre-defined Pre-Press activities.

NOTE

You can change the items that display in this area by going to the Pre-Press Table (Navigator > Pre-Press Table) and clicking on Custom Labels.

2 If you have additional Pre-Press items, click the black arrow in one of the blank windows.

The Pre-Press Choice List is displayed.

3 Select any additional items item from the list.

Post-Press/Outside Service

1 Click the check boxes for Post-Press or Outside Services.

TIP

Move the cursor over any of the listed items and it changes to a QuickLink "right arrow." Click to see the Bindery Selector and to have access to he database, if you want to make changes.

Calculating and Adjusting

1 Click Calc to calculate the pricing for this estimate.

TIP

The Calc button will turn red if the estimate needs to be re-calculated. Click on the button or hit Enter on your numeric keypad to re-calculate.

2 To make adjustments to this estimate:

a. go to the pricing in the upper right quadrant of the WorkSheet
b. select the price you want to change

c. enter a new value

OR

a. move the cursor over the word "Qty" in the upper right quadrant of the WorkSheet

b. click once.

PrintPoint displays the Profit & Quantity Review.

c. Adjust the Local Markup/Disc. or the Profit/Loss for any of the three quantities to calculate a new adjusted total.

TIP

These values are directly related, so if you adjust one, it will change the other.

3 When you are satisfied with your changes, click OK to return to the WorkSheet.

NOTE

You will notice the Total $ line is now red to indicate you have added custom values.

4 Click Calc to re-calculate the estimate.

TIP

Explanation of Calculation

Move the cursor over any of the words under "Quantity" in the upper right quadrant of the ShortForm and it changes to a QuickLink. Click to get a detailed Explanation of Calculation for each of the prices and to have access to the database, if you want to make changes.

Computer vs. Custom Dialog

Any time you override one of the default values on the WorkSheet, the Calc Method button, in the center of the screen, will change to Customized, indicating that you have overridden the computer-based calculations. Click this button to display the Comp vs. Custom Dialog to reset your custom setting.

See the chapter Estimate Tools: Calc Method & Comp vs. Custom Dialog for more information.

Common Estimating Tasks To All Estimating Forms

The following tasks are all performed from the Estimate Button Bar located on the right side of the screen.

Accepting/Saving

The accept button will save all changes to a new or existing estimate, removing it from the screen and storing for future retrieval.

Reverting

The revert button will return the estimate to the last saved condition

Closing

The close button will remove the estimate from the screen. If you have made any changes you will be alerted and be given an opportunity to save.

Shipping

See the chapter Estimate Tools: Shipping

Printing an Estimate

1. Click Print.
2. PrintPoint displays the standard print dialogs.

See the Estimating Tools: Printing an Estimate chapter.

Creating a Quote

1. Click and hold the Quote button.
2. Select New CombiQuote or New LetterQuote from the drop-down menu.

   PrintPoint displays a New CombiQuote or LetterQuote Detail screen.

See the Quotes: CombiQuotes or Quotes: LetterQuotes chapters.

Convert to a Job

1. Click in a radio button next to A, B, or C to select a quantity.
2. Click Job.

   PrintPoint displays the Electronic Job Ticket screen.

See the Jobs - Converting an Estimate To a Job chapter.

Description

1. Click the Desc button.
2. PrintPoint displays the Estimate Description Dialog.

See the Estimating Tools: Description Dialog chapter.

Notes, History, Last Job Number, Paper Color

You can log notes at the estimating stage for the estimate itself as well as the upcoming job. Additionally PrintPoint will automatically keep a log of changes, the Last Job Number, and Customized Paper Color in the Notes dialog. Any of this information can be used later on for reporting purposes such as Job Tickets or Paper Purchase Orders.

1. Click the Notes button.

   PrintPoint displays the Notes Dialog.

See the Estimating Tools: Notes Dialog chapter.

Cloning an Estimate

1. Click and hold the **Extras** button.
2. Select Clone Estimate.

   PrintPoint displays the Clone Dialog.

Creating an Estimate Template

1. Click and hold the **Extras** button.
2. Select Create Estimate Template.
3. Click Yes to confirm.

   PrintPoint displays the Estimate Template Detail screen.

See the Estimating Tools: Templates chapter.

Generating a Price List

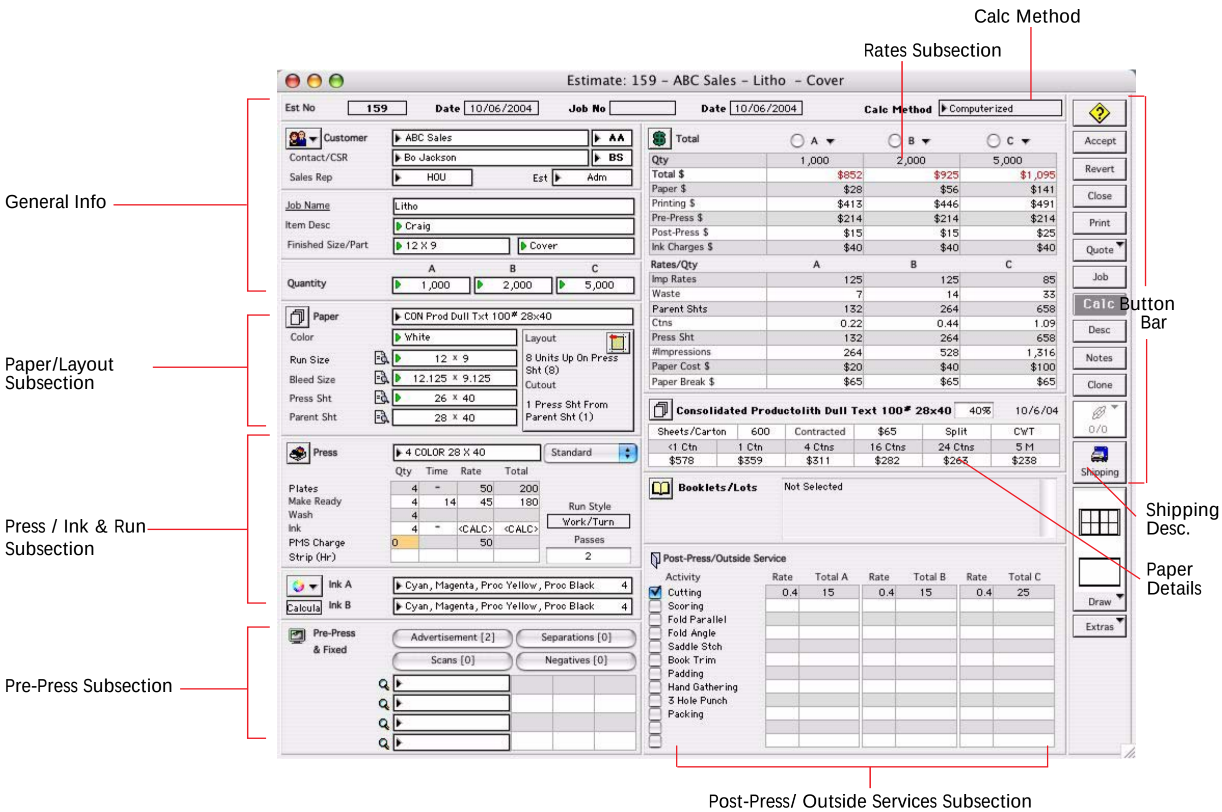
1. Click and hold the **Extras** button.
2. Select Generate Price List...
3. PrintPoint displays the Price List Preview dialog.

   See the Estimating Tools: Price Lists chapter.

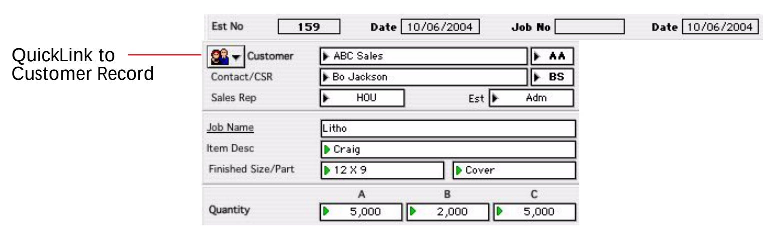
About the Screens

WorkSheet

The Worksheet Estimating Screen is broken down into Subsections for easy single screen estimating capabilities.



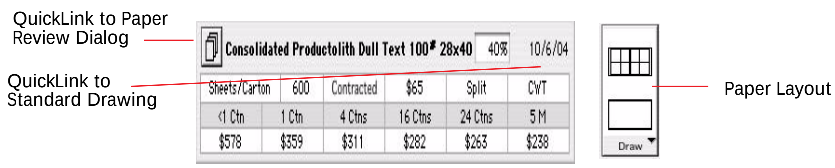
General Info Section



Field Name	Contents/Use
Date	Date the estimate was created.
Job No	Number created by PrintPoint when estimate is turned into a job.

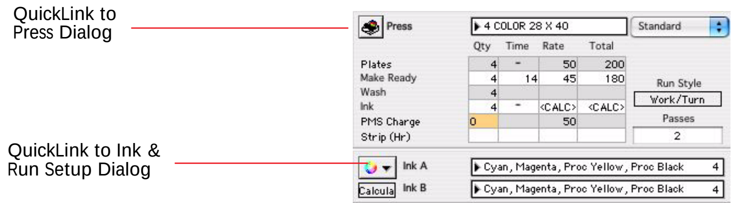
Estimate No.	Number created by PrintPoint when estimate is created.
Sales Rep/ Est	Sales Rep for the customer and the person who created this estimate.
QuickLink to Customer Record (button)	Click on the text Customer Code to view or to add additional information to the Customer Record.
Customer Name / Customer Ratings	Name of the customer (chosen from the customer list) and the rating for that customer (Chosen from the Customer List).
Job Name	Name given to this job (this can be chosen from a list or manually typed in).
Item Description	Description of this job (this can be chosen from a list or manually typed in).
Finished Size	Final size of the piece when ready to ship (this can be chosen from a list or manually typed in).

Paper / Layout Section



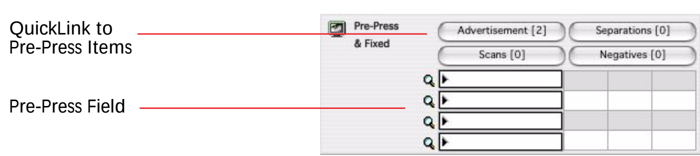
Field Name / Button	Contents /Use
QuickLink to Paper Review Dialog	Click on the text Paper to view or to add additional information to the Paper Record.
QuickLink to Standard Drawing Dialog	Click on the “x” to see a detailed view of the paper and run information.
Paper field	Name of the paper selected for this estimate. Choose from the Paper Selector or Paper Choice List.
Run / Page Size	Finished printing size before post-press (if estimate is a booklet/lot the will show as Page Size). If using Booklets/Lots this text will change to Page Size.
Bleed Size	Run size plus any bleeds.
Press Sht	Size of the press sheet.
Parent Sht	Size of the parent sheet.
Units Up	How many finished pieces per press sheet.
PrShts Out	How many Press Sheets out of the Parent Sheet.
Paper Layout	Displays the Press and Parent Sheet Layouts

Press / Ink & Run Section



Field Name	Contents/Use
QuickLink to Press Record	Click on the text Press to view or to add additional information to the Press Record.
Press	Name of the Press selected for this estimate (chosen from the press list).
QuickLink to Ink & Run Setup Dialog	Click on the text Ink/Passes to display a detailed view of the Ink & Run setup.
Ink / Passes	Displays the type of run and how many passes are required (chosen from the Ink /Run dialog).
Qty / Method	Displays the number of inks on each side of the form and the type of ink calculation that was used to figure pricing.
Plates	Shows how many plates, cost per plate and total cost.
Make Ready	Shows how many make readies, cost per make ready and total cost.
Wash	Shows how many washups, cost per washups and total cost.
Ink	Shows how many ink mixes, cost per ink mix and total cost.

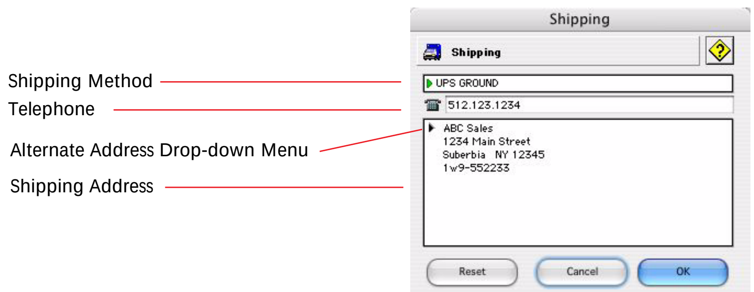
Pre-Press Section



Field Name	Contents/Use
Pre-Press Quicklinks (4)	Preset fields used to select Pre-Press operations from the Pre-Press Table.

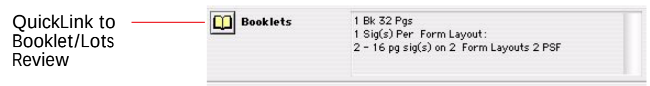
Pre-Press fields	Used to select Pre-Press operations from a the Pre-Press Items Choice List.
Quantity Column	The quantity of each of the Pre-Press operations selected from the Pre-Press Items Choice list.
Rate Column	The cost per piece of each of the Pre-Press operations selected from the Pre-Press Item Choice list.
Total Column	The total cost of each of the Pre-Press operations selected from the Pre-Press Item Choice list.

Shipping Section



Field Name	Contents/Use
NOTE To access the Shipping dialog click on the Shipping Button	
Shipping Method	Click to select shipping method.
Telephone	Shipping contact phone number
Alternate Shipping Address (Drop-down menu)	Click to select an alternate shipping address
Shipping Address	Address to ship the job to

Booklets / Lots Section



NOTE

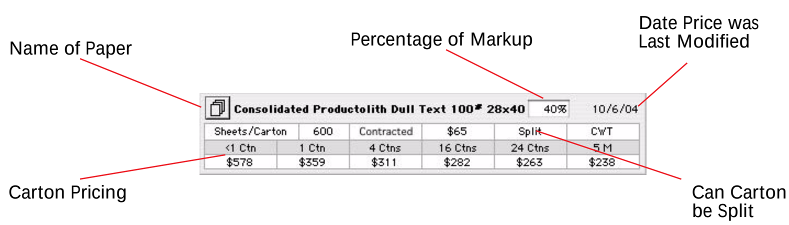
The text heading of the Booklets/Lots section will change depending upon if the estimate is a Booklets or Lots or Standard Drawing estimate.

Field Name	Contents/Use
QuickLink to Booklet/Lots Review Dialog	Click on the text Booklets/Lots to view the Booklets/Lots Review Dialog.
Booklets / Lots area	Brief description of the booklet / lots detail.

Calc Method Section

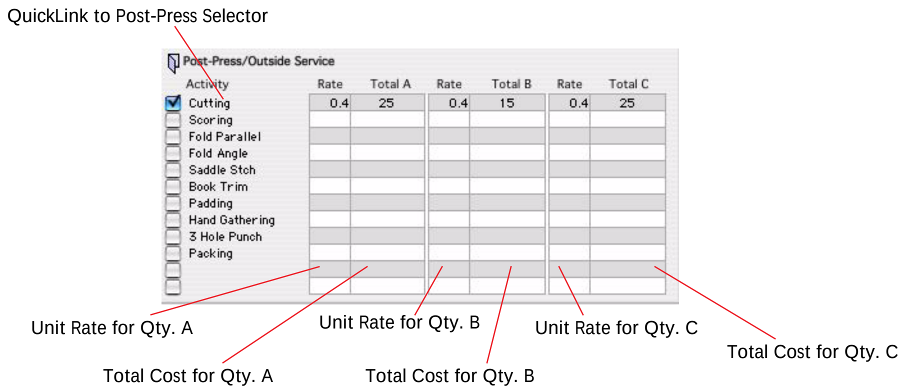
Option	Contents/Use
Calc Method Drop-Down Menu	See the Estimate Tools: Computer Vs. Customized Chapter

Paper Detail Section



Field Name	Contents/Use
Name of Paper	Paper name as entered in the Paper Review.
Percentage of Markup	Markup as entered in the Paper Review.
Date Price was Last Modified	Generated from the Paper Review.
Can Carton be Split	Will show Split or No Split generated from the Paper Review.
Carton Pricing	Generated from the Paper Review.

Post-Press/Outside Service Section

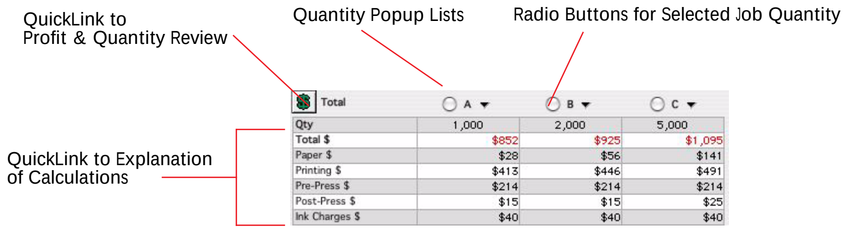


Field Name	Contents/Use
QuickLink to Post-Press Selector	Preset fields used to select Post-Press operations from the Post-Press Table.
Unit Rate for Qty. A	Dollar amount charged per unit for the selected Post-Press operation for Qty. A.
Total Cost for Qty. A	Total dollar amount charged for the selected Post-Press operation for Qty. A.
Unit Rate for Qty. B	Dollar amount charged per unit for the selected Post-Press operation for Qty. B.
Total Cost for Qty. A	Total dollar amount charged for the selected Post-Press operation for Qty. B.
Unit Rate for Qty. C	Dollar amount charged per unit for the selected Post-Press operation for Qty. C.
Total Cost for Qty. A	Total dollar amount charged for the selected Post-Press operation for Qty. C.

To setup the Post-Press / Outside Service default selection see the Preferences Chapter:

File Menu > Preferences > Post-Press Defaults > Offset

Totals Section



Field Name	Contents/Use
QuickLink to Profit and Quantity Review	Click on the text QTY to view the Profit and Quantity Review dialog.
QuickLink to Explanation of Calculations	Click on any of the text to see a detailed view of the calculations for that area.
Quantity Popup List	Used to select a quantity for the estimate
Radio Buttons for Selected Job Quantity	Used to select the quantity when the estimate is being turned into a job.
Quantity	The number of pieces the customer wants to be quoted on (can be entered manually or chosen from the Quantity Popup List).
Total	Total cost of the estimate per quantity.
Paper	Total cost of paper.
Printing	Total cost of printing.
Pre-Press	Total cost of pre-press.
Post-Press	Total cost of post-press.
Ink Charges	Total cost of ink.
User Modifiable Fields	All user-modifiable values.

NOTE

The detailed view of each area in this section can be seen by clicking on the name (i.e.... to see a detail view of the paper cost click on the word paper).

Rates/Qty Section

QuickLink to Explanation of Calculations

Field Name	Contents/Use
QuickLink to Explanation of Calculations	Click on any of the text to see a detailed view of the calculations for that area.
User Modifiable Fields	Impression Rates, Waste, Cartons, Paper Cost and Paper Break are all user-modifiable values.

Chapter 12
Estimating Tools: Copy-Digital

OVERVIEW

PrintPoint's Copy/Digital estimating module allows you to generate estimates for jobs that use copiers or digital equipment.

Handling up to 6 trays, each estimate can be based on various pricing methods:

- Per Click Charge
- Matrix of Total copies
- Matrix Number of originals and copies
- Customized matrices for individual customers
- Other Estimates
- Price Lists

QuickLinks give you access to database items such as Customers, Paper, Copiers Post-Press / Outside Services, and to the Profit & Quantity Review and Explanation of Calculation.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your estimating preferences	File Menu > Preferences > Estimating File Menu > Preferences > Post Press Defaults > Copy

STEP-BY-STEP

This chapter includes the following topics, specific to Copy/Digital estimating.

- Creating an estimate with the Copy/Digital form
  - Job Information
  - Quantities
  - Paper/Layout
  - Paper Color
  - Press
  - Ink & Run Setup
  - Pre-Press & Fixed
  - Post-Press/Outside Service
  - Calculating and adjusting
  - Explanation of Calculation
  - Computer vs. Custom Dialog

The chapter also includes abbreviated steps to the following estimating tasks that are common to all estimating forms with references to the appropriate chapters covering these subjects in detail.

- Common Estimating Tasks To All Estimating Forms
  - Accepting/Saving
  - Reverting
  - Closing
  - Shipping
  - Printing an estimate
  - Creating a Quote
  - Converting to a Job
  - Description
  - Estimate Notes, Job Notes, History, Last Job Number, Paper Color
  - Cloning an Estimate
  - Creating an Estimate Template
  - Generating a Price List

Creating a Copy/Digital Estimate

1. Select Navigator > Estimates.

   PrintPoint displays the Estimates List View.
2. Click the New button.
3. Select Copy-Digital from the drop-down list.

   PrintPoint displays the Copy Estimate.

Job Information

1. Select a Customer from the Customers Choice List.

   PrintPoint displays Customer Code Name, Customer Rating, Customer's Primary Contact, Customer Service Rep, Sales Rep, and Estimator.

   TIP

   Change any that you want to change for this specific estimate.

TIP

Click on the down arrow on the button to the left of the words "Code Name" to:

- QuickLink to (lookup) Customer Record

  OR
- Edit Additional Customer Info...(information on the Custom Fields for this customer)

   TIP

   Change any information that you want to change for this specific estimate.

2. Enter the Job Name.

TIP

You should assign a unique name to all jobs in your database.

3. Press tab.
4. Select an item from the Item Description choice list.
5. Select a Copier from the Copier Choice List.

Tray Information

PrintPoint displays tabs with the Tray Number for each tray that was setup for this device, and the following information for every Tray:

- Tray Description
- Paper

- Run Size
- Sides / Colors
- Pricing Method
- No Click Charge

TIP

Change any information that you want to change for this specific estimate.

6 The default information from the Copier will be loaded into the 1st tray.

7 Select the appropriate Sides option, depending on whether the Pricing for that Tray is to be based on single- or double-sided.

NOTE

Within the Copy estimate screen there are two options on how the screen will display 1 sided or 2 sided imaging.

The choice is made in the Preferences and the options are:

a) Radio Buttons: Single or Double

b) Drop-down Menu: To show how the copies are going to be produced,

1-1 indicating single sided original single sided copy
1-2 single sided original double sided copy
2-1 double sided original, single sided copy
2-2 double sided original, double sided copy

See File menu -> Preference -> Estimating to set these options.

8 Color Configuration options are available for color copiers. The Copy Estimate Entry screen changes depending on whether the copier chosen is a B & W or Color copier.

If it is a color copier, then the estimating screen will display a popup allowing you to specify color arrangement in the printed output.

The choices are:

Menu Selection	Option
1/0	one color on one side
1/1	one color each side
4/0	4 color one side
4/1	4 color one side, one color the other
4/4	4 color each side

TIP

Click the Clear Tray button if you wish to clear out all the default values for any specific tray.

9 Go through the above for each tray that was setup for this device.

10 Enter up to three quantities and press tab.

TIP

Click the inverted arrows next to the “A”, “B”, or “C” to select a quantity from the pop-up lists.

Pre-Press & Fixed

11 Click any of the four buttons in the top part of the Pre-Press & Fixed area and enter quantities for these items.

NOTE

You can change the items that display in this area by going to the Pre-Press Table (Navigator > Pre-Press Table) and clicking on Custom Labels.

12 If you have additional Pre-Press items, click the black arrow in one of the blank windows.

The Pre-Press Choice List is displayed.

13 Select any additional items from the list.

Post-Press/Outside Service

14 Click the check boxes for Post-Press Selector / Outside Services.

TIP

Move the cursor over any of the listed items and click to see the Post-Press Selector, to have access and make changes to the database.

15 Select the No Click Charge checkbox if you do not want Click Charges calculated on this estimate.

Calculating and Adjusting

16 Click Calc to calculate the pricing for this estimate.

TIP

The Calc button will turn red if the estimate needs to be re-calculated.

PrintPoint displays the pricing for each quantity for the estimate in the upper right quadrant, and also displays the following information for each tray, for each quantity, in the middle section of the screen:

- # of originals
- # Up / # On
- Paper $
- Tray $
- Price per Copy
- Total Copies
- Waste
- Total Copies plus Waste

TIP

Click on the Tray tabs to the left, to display the information for any specific tray.

17 To make adjustments to this estimate:

- go to the pricing for the estimate in the upper right quadrant, or go to the pricing for any specific tray
- select the price you want to change
- enter a new value.
- Click Calc to re-calculate the estimate.

TIP

PrintPoint displays the word “Customized” in Red, in the upper right-hand quadrant to indicate the estimate has been manually-adjusted.

NOTE

You can click on the word “Customized” to reset the entire estimate to Computer Generated.

Profit & Quantity Review

18 Move the cursor over the word “Copies” in the upper right quadrant and it changes to a QuickLink or click the Green Dollar Sign to get the Profit & Quantity Review and to make adjustments to the estimate.

Explanation of Calculation

19 Move the cursor over any of the words under “Copies” in the upper right quadrant and it changes to a QuickLink. Click to get a detailed Explanation of Calculation for each of the prices.

Computer vs. Custom Dialog

Whenever you customize a rate or quantity on the Copy Estimate, the Calc Method Button menu changes from “Computer Generated” to “Customized”. You then have the opportunity to reset values to computer generated calculations by clicking on the button

Common Estimating Tasks To All Estimating Forms

The following tasks are all performed from the Estimate Button Bar located on the right side of the screen.

Accepting/Saving

The accept button will save all changes to a new or existing estimate, removing it from the screen and storing for future retrieval.

Reverting

The revert button will return the estimate to the last saved condition

Closing

The close button will remove the estimate from the screen. If you have made any changes you will be alerted and be given an opportunity to save.

Shipping

See the chapter Estimate Tools: Shipping

Printing an Estimate

1. Click Print.
2. PrintPoint displays the standard print dialogs.

See the Estimating Tools: Printing an Estimate chapter.

Creating a Quote

1. Click and hold the Quote button.
2. Select New CombiQuote or New LetterQuote from the drop-down menu.

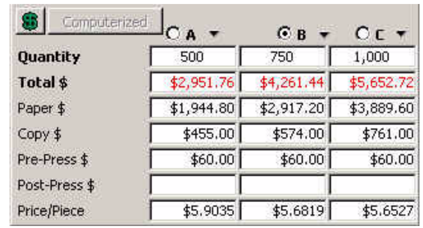
   PrintPoint displays a New CombiQuote or LetterQuote Detail screen.

See the Quotes: CombiQuotes or Quotes: LetterQuotes chapters.

Convert to a Job

1. Click in a radio button next to A, B, or C to select a quantity.
2. Click Job.

   PrintPoint displays the Electronic Job Ticket screen.



Computerized	A	B	C
Quantity	500	750	1,000
Total $	$2,951.76	$4,261.44	$5,652.72
Paper $	$1,944.80	$2,917.20	$3,889.60
Copy $	$455.00	$574.00	$761.00
Pre-Press $	$60.00	$60.00	$60.00
Post-Press $			
Price/Piece	$5.9035	$5.6819	$5.6527

See the Jobs - Converting an Estimate To a Job chapter.

Description

1. Click the Desc button.
2. PrintPoint displays the Estimate Description Dialog.

See the Estimating Tools: Description Dialog chapter.

Notes, History, Last Job Number, Paper Color

You can log notes at the estimating stage for the estimate itself as well as the upcoming job. Additionally PrintPoint will automatically keep a log of changes, the Last Job Number, and Customized Paper Color in the Notes dialog. Any of this information can be used later on for reporting purposes such as Job Tickets or Paper Purchase Orders.

1. Click the Notes button.

   PrintPoint displays the Notes Dialog.

See the Estimating Tools: Notes Dialog chapter.

Cloning an Estimate

1. Click and hold the Extras button.
2. Select Clone Estimate.

   PrintPoint displays the Clone Dialog.

Creating an Estimate Template

1. Click and hold the Extras button.
2. Select Create Estimate Template.
3. Click Yes to confirm.

   PrintPoint displays the Estimate Template Detail screen.

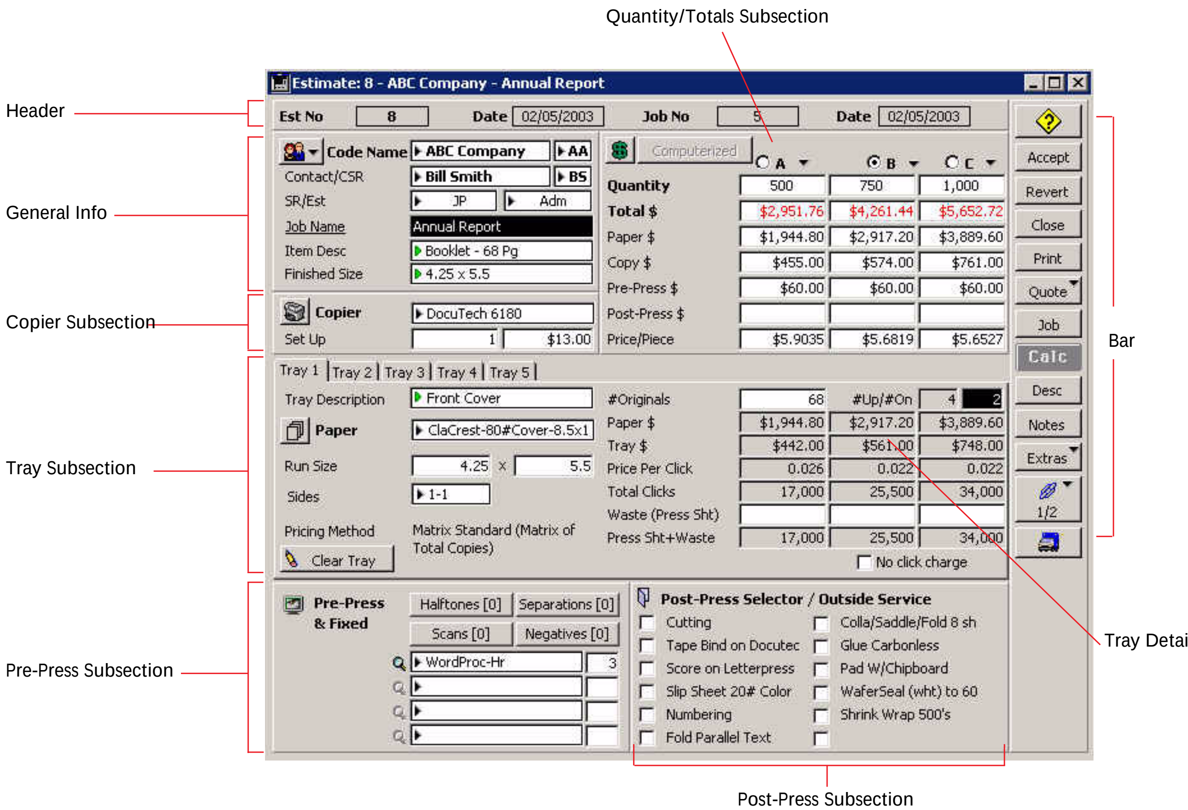
See the Estimating Tools: Templates chapter.

Generating a Price List

1. Click and hold the Extras button.
2. Select Generate Price List...
3. PrintPoint displays the Price List Preview dialog.
4. See the Estimating Tools: Price Lists chapter.

About the Screens

Copy Digital Estimate Screen



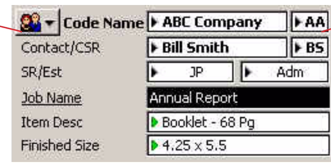
The Copy Estimating Screen is broken down into sections for easy one screen estimating capabilities.

Estimate Heading

Field Name	Contents/Use
Estimate No.	Number created by PrintPoint when estimate is created.
Date	Date the estimate was created.

Job No	Number created by PrintPoint when estimate is turned into a job.
Date	Date the estimate was turned into a job.

General Information Area

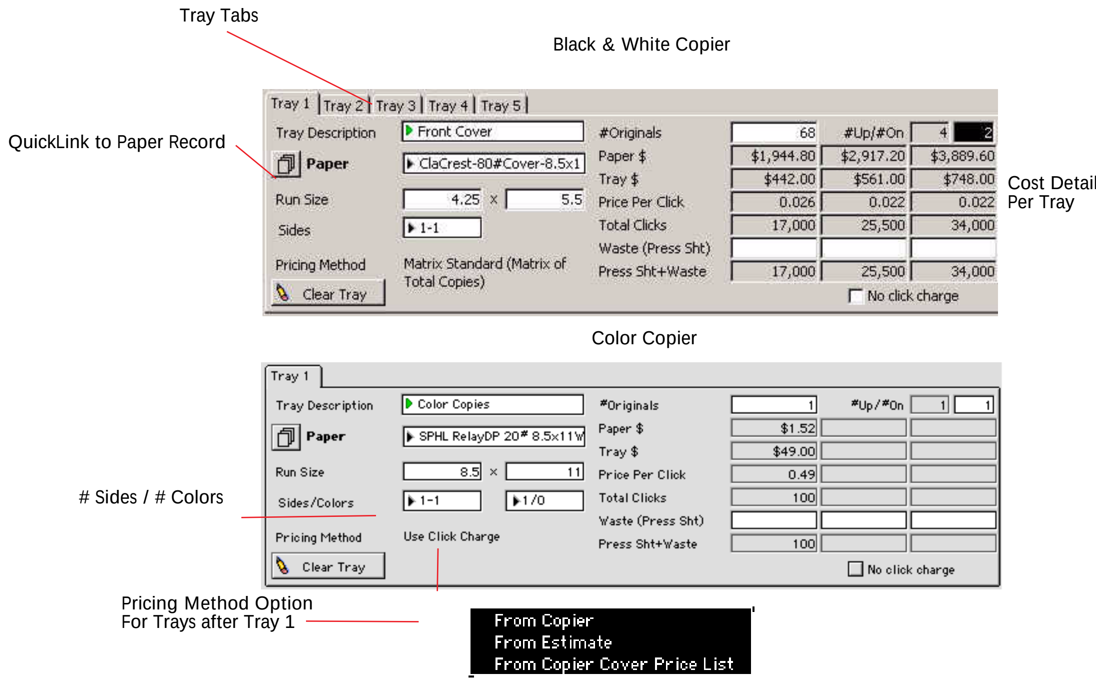


Field Name	Contents/Use
QuickLink to Customer Record (button)	Click to view or to add additional information to the Customer Record.
Customer Name / Customer Rating	Name of the customer (chosen from the customer list) and the rating for that customer (Chosen from the Customer List).
Contact / CSR	Customer contact (chosen from the contact list) and the customer sales rep for that contact.
Sales Rep/ Est	Sales Rep for the customer and the person who created this estimate.
Job Name	Name given to this job (this can be chosen from a list or manually typed in).
Item Description	Description of this job (this can be chosen from a list or manually typed in).
Finished Size	Final size of the piece when ready to ship (this can be chosen from a list or manually typed in).

Copier Information Area

Field Name	Contents/Use
QuickLink to Copier Record (button)	Click to view or to add additional information to the Copier Record.
Copier	Name of the Copier selected for this estimate (chosen from the press list).
Set Up	Number of setups and the charge for each.

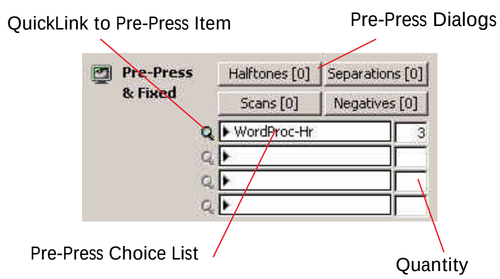
Copier Detail & Paper Area



Field Name / Button	Contents /Use
Tray Tabs	6 possible trays for each copy/digital device.
Tray Description	Each tray can have it's own description for the job ticket.
QuickLink to Paper Review Dialog (button)	Click to view or to add additional information to the Paper Record.
Paper field	Name of the paper selected for this estimate. Choose from the Paper Selector or Paper Choice List.
Run Size	Finished size before post-press.
Sides	1-1 indicating single sided original single sided copy 1-2 single sided original double sided copy 2-1 double sided original, single sided copy 2-2 double sided original, double sided copy
Colors	1/0 -one color on one side 1/1 - one color each side 4/0 - 4 color one side 4/1 -4 color one side, one color the other 4/4 - 4 color each side

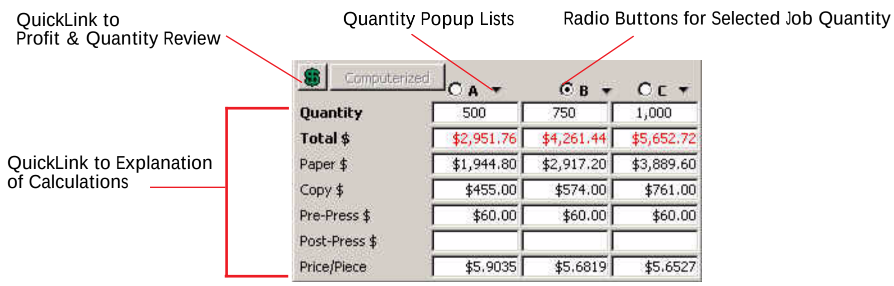
Pricing Method	Tray 1 is always click charge Trays 2-6 can be based on click charge, another estimate or a copier cover price list
No Click Charge (checkbox)	Remove click charge from a particular tray

Pre-Press Information Area



Field Name	Contents/Use
Pre-Press (Buttons) (4)	Preset buttons used to select Pre-Press operations from the Pre-Press Table.
Pre-Press fields	Used to select Pre-Press operations from a the Pre-Press Items Choice List.
Quantity	The quantity of each of the Pre-Press operations selected from the Pre-Press Items Choice list.

Quantity Area

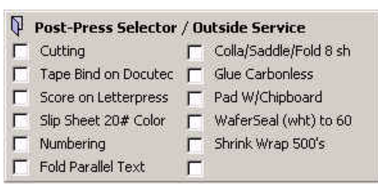


Field Name	Contents/Use
QuickLink to Profit and Quantity Review (button)	Click to view the Profit and Quantity Review dialog.
Quantity Popup List	Used to select a quantity for the estimate
Radio Buttons for Selected Job Quantity	Used to select the quantity when the estimate is being turned into a job.
Quantity	The number of pieces the customer wants to be quoted on (can be entered manually or chosen from the Quantity Popup List).
Total	Total cost of the estimate per quantity.
Paper	Total cost of paper.
Copy	Total cost of copying.
Pre-Press	Total cost of pre-press.
Post-Press	Total cost of post-press.
Price/Piece	Total cost per piece.

NOTE

The detailed view of each area in this section can be seen by clicking on the name (i.e.... to see a detail view of the paper cost click on the word paper).

Post-Press/Outside Service Information Area



NOTE

To setup the Post-Press / Outside Service default selection see the Preferences Chapter:

File Menu > Preferences > Post-Press Defaults > Copy

Estimate Tool Bar

Field Name	Contents/Use
Help (button)	Click to open the PrintPoint Manual.
Accept (button)	Click to accept and save this estimate
Revert (button)	Click to revert to the previously saved version of this estimate.
Close (button)	Click to close this estimate.
Print (button)	Click to print the estimate sheet.
Quote (button)	Click to create a quote sheet.
Job (button)	Click to create a job ticket.
Calc (button)	Click to calculate this estimate.
Desc (button)	Click to view or change the estimate description.
Notes	Click to view or add notes to this estimate.
Extras	Click to clone, create a template or generate a price lists based on this estimate.
Shipping	View of how and where to ship.

Chapter 13
Estimating Tools: Large Format

OVERVIEW

PrintPoint's Large Format Estimating allows you to generate estimates for jobs that use large format equipment.

Based on square area (feet or meters), number of originals, print speed and ink coverage, Large Format Estimating is uniquely designed to meet the specific costing needs of the Large Format printers.

Each estimate can be based on a square area matrices can be created based on:

- Total square area
- Matrix of square area
- Matrix of Number of originals and area
- Customized matrices for individual customers

QuickLinks give you access to database items such as Customers, Media, Large Format Devices, Post-Press/Outside Services, Profit & Quantity Review and Explanation of Calculation.

NOTE

Many printers refer to Large Format as Wide Format.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your Estimating preferences	File Menu > Preferences > Estimating File Menu > Preferences > Press & Large Format Defaults File Menu > Preferences > Post Press Defaults > Large Format

STEP-BY-STEP

This chapter includes the following topics, specific to Large Format estimating.

- Creating an estimate with the Large Format Estimate Form
  - Job Information
  - Quantities
  - Paper/Layout
  - Paper Color
  - Press
  - Ink & Run Setup
  - Pre-Press & Fixed
  - Post-Press/Outside Service
  - Calculating and adjusting
  - Explanation of Calculation
  - Computer vs. Custom Dialog

The chapter also includes abbreviated steps to the following estimating tasks that are common to all estimating forms with references to the appropriate chapters covering these subjects in detail.

- Common Estimating Tasks To All Estimating Forms
  - Accepting/Saving
  - Reverting
  - Closing
  - Shipping
  - Printing an estimate
  - Creating a Quote
  - Converting to a Job
  - Description
  - Estimate Notes, Job Notes, History, Last Job Number, Paper Color
  - Cloning an Estimate
  - Creating an Estimate Template
  - Generating a Price List

Creating a Wide Format Estimate

1 Select **Navigator > Estimates.**

PrintPoint displays the Estimates List View.

2 Click the New button.

3 Select Large Format from the drop-down list.

PrintPoint displays the Large Format estimate.

Job Information

1 Select a customer from the Customer Choice List.

PrintPoint displays Customer Code Name, Customer Rating, Customer's Primary Contact, Customer Service Rep, Sales Rep, and Estimator.

TIP

Change any that you want to change for this specific estimate.

TIP

Click on the down arrow on the button to the left of the words "Code Name" to:

- QuickLink to (lookup) Customer Record

  OR
- Edit Additional Customer Info...(information on the Custom Fields for this customer)

TIP

Change any information that you want to change for this specific estimate.

2 Enter the job name.

TIP

You should assign a unique name to all jobs in your database.

3 Press tab.

4 Select an item from the Item Description choice list.

PrintPoint displays the Finished Size.

5 Select a Device from the Device Choice List.

6 Enter up to three quantities and press tab.

TIP

Click the inverted arrows next to the "A", "B", or "C" to select a quantity

7 from the pop-up lists.

Pricing

PrintPoint displays the default Pricing Method for the device.

TIP

You can change the pricing method by clicking on the icon to the left of the word “Device” and changing the Pricing Method on the Pricing tab.

8 Select the Ink Coverage radio button for this estimate.

9 Select the Print Speed radio button for this estimate.

Shipping Information

PrintPoint displays the default Shipping Information for the customer.

TIP

Click the green arrow to select from the Shipping Method choice list.

TIP

You can override the telephone number by clicking next to the telephone icon.

TIP

You can change the Shipping Address for this estimate by clicking on the black arrow.

Pre-Press & Fixed

10 Click any of the four buttons in the top part of the Pre-Press & Fixed area and enter quantities for these items.

TIP

You can change the items that display in this area by going to the Pre-Press Table (Navigator > Pre-Press Table) and clicking on Custom Labels.

11 If you have additional Pre-Press items:

- click the black arrow in one of the blank windows
- PrintPoint displays the Pre-Press Choice List
- select any additional items from the list
- enter how many of those items will be used on this estimate.

Post-Press/Outside Service

12 Click the check boxes for Post-Press Selector / Outside Services.

TIP

Move the cursor over any of the listed items and click to see the Post-Press Selector, to have access and make changes to the database.

Calculating and Adjusting

13 Click Calc to calculate the pricing for this estimate.

TIP

The Calc button will turn red if the estimate needs to be re-calculated.

PrintPoint displays the pricing for each quantity for the estimate in the upper right quadrant.

14 To make adjustments to this estimate:

- go to the pricing for the estimate in the upper right quadrant
- select the price you want to change
- enter a new value.
- Click Calc to re-calculate the estimate.

TIP

PrintPoint displays the word “Customized” in Red, on the left side of the estimate (next to the words “Calc Method”, to indicate the estimate has been manually-adjusted.

NOTE

You can click on the word “Customized” to reset the entire estimate to Computer Generated.

Profit & Quantity Review

15 Move the cursor over the word “Quantity” in the upper right quadrant and it changes to a QuickLink or click the Green Dollar Sign to get the Profit & Quantity Review and to make adjustments to the estimate.

Explanation of Calculation

16 Move the cursor over any of the words under “# Originals” in the upper right quadrant and it changes to a QuickLink. Click to get a detailed Explanation of Calculation for each of the prices.

Computer vs. Custom Dialog

Whenever you customize a rate or quantity on the Copy Estimate, the Calc Method Button menu changes from “Computer Generated” to “Customized”. You then have the opportunity to reset values to computer generated calculations by clicking on the button

Common Estimating Tasks To All Estimating Forms

The following tasks are all performed from the Estimate Button Bar located on the right side of the screen.

Accepting/Saving

The accept button will save all changes to a new or existing estimate, removing it from the screen and storing for future retrieval.

Reverting

The revert button will return the estimate to the last saved condition

Closing

The close button will remove the estimate from the screen. If you have made any changes you will be alerted and be given an opportunity to save.

Shipping

See the chapter Estimate Tools: Shipping

Printing an Estimate

1 Click Print.

2 PrintPoint displays the standard print dialogs.

See the Estimating Tools: Printing an Estimate chapter.

Creating a Quote

1 Click and hold the Quote button.

2 Select New CombiQuote or New LetterQuote from the drop-down menu.

PrintPoint displays a New CombiQuote or LetterQuote Detail screen.

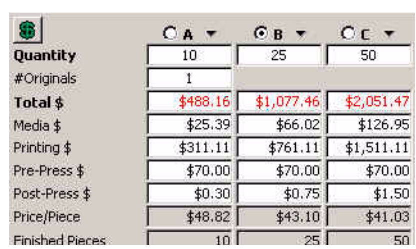
See the Quotes: CombiQuotes or Quotes: LetterQuotes chapters.

Convert to a Job

1 Click in a radio button next to A, B, or C to select a quantity.

2 Click Job.

PrintPoint displays the Electronic Job Ticket screen.



See the Jobs - Converting an Estimate To a Job chapter.

Description

1. Click the Desc button.
2. PrintPoint displays the Estimate Description Dialog.

See the Estimating Tools: Description Dialog chapter.

Notes, History, Last Job Number, Paper Color

You can log notes at the estimating stage for the estimate itself as well as the upcoming job. Additionally PrintPoint will automatically keep a log of changes, the Last Job Number, and Customized Paper Color in the Notes dialog. Any of this information can be used later on for reporting purposes such as Job Tickets or Paper Purchase Orders.

1. Click the Notes button.

   PrintPoint displays the Notes Dialog.

See the Estimating Tools: Notes Dialog chapter.

Cloning an Estimate

1. Click and hold the **E**xtras button.
2. Select Clone Estimate.

   PrintPoint displays the Clone Dialog.

Creating an Estimate Template

1. Click and hold the **E**xtras button.
2. Select Create Estimate Template.
3. Click Yes to confirm.

   PrintPoint displays the Estimate Template Detail screen.

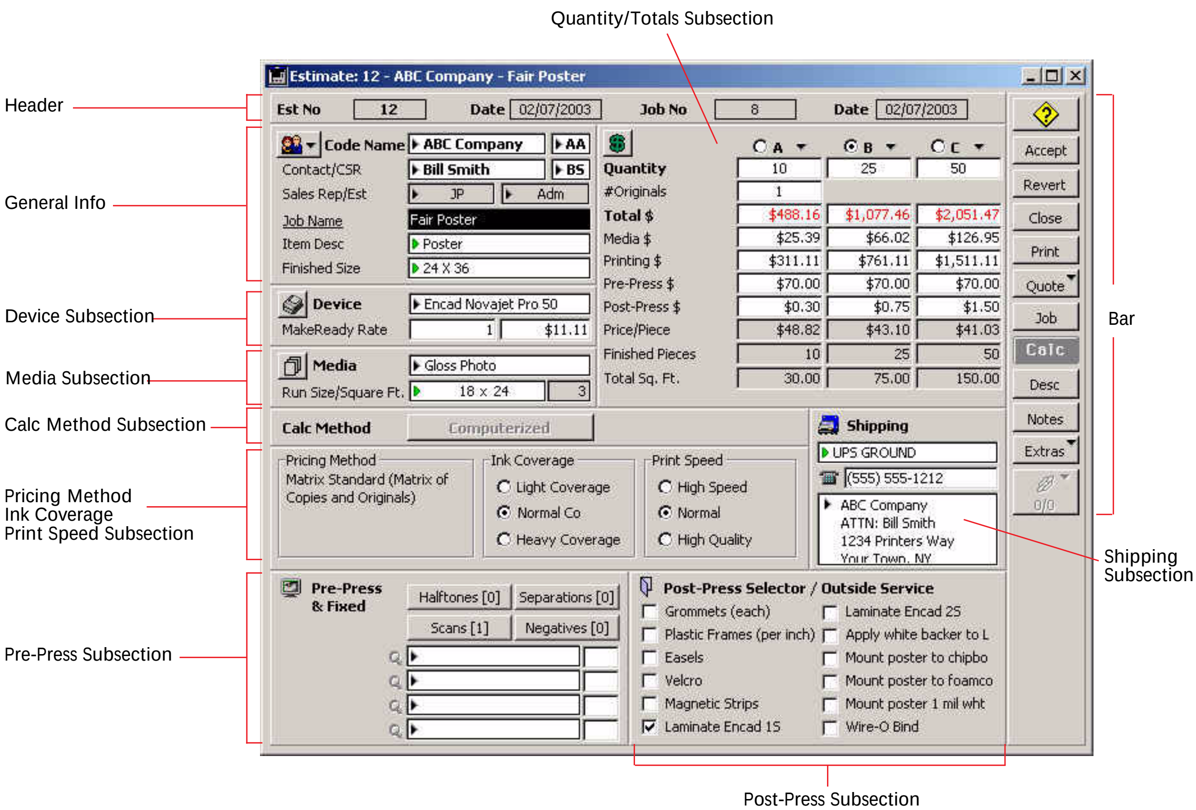
See the Estimating Tools: Templates chapter.

Generating a Price List

1. Click and hold the **E**xtras button.
2. Select Generate Price List...
3. PrintPoint displays the Price List Preview dialog.
4. See the Estimating Tools: Price Lists chapter

About The Screens

Large Format Estimate Screen



The Large Format Estimating Screen is broken down into sections for easy one screen estimating capabilities.

Estimate Information Heading

Field Name	Contents/Use
Estimate No.	Number created by PrintPoint when estimate is created.
Date	Date the estimate was created.
Job No	Number created by PrintPoint when estimate is turned into a job.
Date	Date the estimate was turned into a job.

General Information Area

Field Name	Contents/Use
QuickLink to Customer Record (button)	Click to view or to add additional information to the Customer Record.
Customer Name / Customer Rating	Name of the customer (chosen from the customer list) and the rating for that customer (Chosen from the Customer List).
Contact / CSR	Customer contact (chosen from the contact list) and the customer sales rep for that contact.
Sales Rep/ Est	Sales Rep for the customer and the person who created this estimate.
Job Name	Name given to this job (this can be chosen from a list or manually typed in).
Item Description	Description of this job (this can be chosen from a list or manually typed in).
Finished Size	Final size of the piece when ready to ship (this can be chosen from a list or manually typed in).

Media Information Area

Field Name / Button	Contents /Use
QuickLink to Paper Review Dialog (button)	Click to view or to add additional information to the Paper Record.
Paper field	Name of the paper selected for this estimate. Choose from the Paper Selector or Paper Choice List.
Run Size / Square Ft.	Finished printing size and total square ft. before post-press.

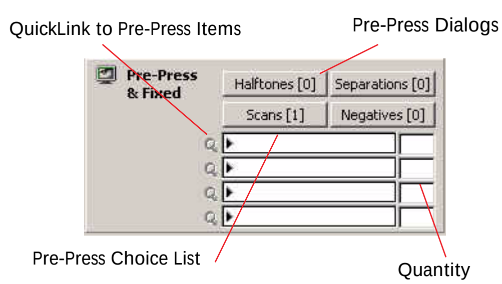
Device Information Area

Field Name	Contents/Use
QuickLink to Device Record (button)	Click to view or to add additional information to the Device Record.
Device	Name of the Press selected for this estimate (chosen from the press list).
Makeready Rate	Number of setups and the charge for each.

Calc Method Area

Field Name	Contents/Use
Pricing Method	Describes which pricing method is used.
Ink Coverage	3 device dependent (user modifiable) choices of ink coverage: Light, Normal, Heavy are the defaults set by the user in Preferences: File Menu > Preferences > Press & Large Format Defaults
Press Speed	3 device dependent (user modifiable) choices of press speed: High Speed, Normal, High Quality are the defaults set by the user in Preferences: File Menu > Preferences > Press & Large Format Defaults

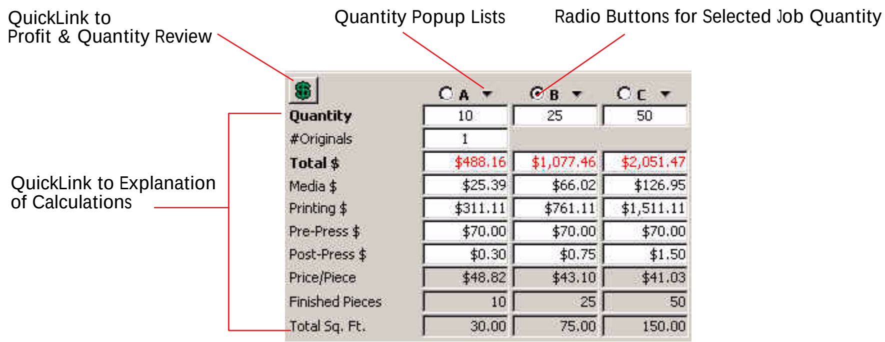
Pre-Press Information Area



Field Name	Contents/Use
Pre-Press (Buttons) (4)	Preset buttons used to select Pre-Press operations from the Pre-Press Table.

Pre-Press fields	Used to select Pre-Press operations from a the Pre-Press Items Choice List.
Quantity	The quantity of each of the Pre-Press operations selected from the Pre-Press Items Choice list.

Quantity and Printing Information Area



NOTE

The Explanation of Calculation of each area in this section can be seen by clicking on the name (i.e.... to see a detail view of the paper cost click on the word paper).

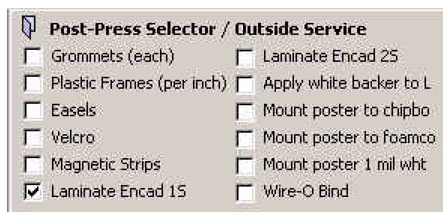
Field Name	Contents/Use
QuickLink to Profit and Quantity Review (button)	Click to view the Profit and Quantity Review dialog.
Quantity Popup List	Used to select a quantity for the estimate
Radio Buttons for Selected Job Quantity	Used to select the quantity when the estimate is being turned into a job.
Quantity	The number of pieces the customer wants to be quoted on (can be entered manually or chosen from the Quantity Popup List).
Originals	Total number of originals for the job.
Total	Total cost of the estimate per quantity.
Media	Total cost of media.
Printing	Total cost of printing.
Pre-Press	Total cost of pre-press.
Post-Press	Total cost of post-press.
Price/Piece	Total price per piece.

Finished Pieces	Total number of pieces (number of originals X quantity).
Total Sq.Ft.	Total area printed.

Shipping Information Area

Field Name	Contents/Use
Shipping	View of how and where to ship.

Post-Press/Outside Service Information Area



NOTE

To setup the Post-Press / Outside Service default selection see the Preferences Chapter:

File Menu > Preferences > Post-Press Defaults > Offset.

Estimate Tool Bar

Field Name	Contents/Use
Help (button)	Click to open the PrintPoint Manual.
Accept (button)	Click to accept and save this estimate
Revert (button)	Click to revert to the previously saved version of this estimate.
Close (button)	Click to close this estimate.
Print (button)	Click to print the estimate sheet.
Quote (button)	Click to create a quote sheet.
Job (button)	Click to create a job ticket.
Calc (button)	Click to calculate this estimate.
Desc (button)	Click to view or change the estimate description.
Notes	Click to view or add notes to this estimate.
Extras	Click to clone, create a template or generate a price lists based on this estimate.

Chapter 14

Estimating Tools: Standard Drawing Dialog

OVERVIEW

The Standard Drawing Dialog is one of PrintPoint's AGE (Advanced Graphical Environment) estimating components accessible from the WorkSheet and ShortForm. It enables you to visually layout estimates and generate printable diagrams using the following techniques:

- Select and adjust press, paper, run size, bleed size, press sheet size, parent sheet sizes, grippers and borders
- Use pre-defined layouts from the Layout Library or create new layouts On-The-Fly to store in the Layout Library
- Use pre-defined sample graphics from the Graphic Library.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet

STEP-BY-STEP

This section includes the following topic:

- Accessing the Standard Drawing Dialog
- Using the Standard Drawing Dialog
- Layout Library

Accessing the Standard Drawing Dialog

From the Estimate Templates and AutoStart Wizard

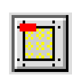
1. Open a new ShortForm or WorkSheet estimate.

   With Use Estimate Templates turned on in Preferences, the Estimate Template and AutoStart Wizard is displayed.
2. Click the Standard Drawing button.
3. Go to the section in this chapter “Using the Standard Drawing Dialog”.

From the WorkSheet

1. Open an existing or create a new WorkSheet estimate.
2. If you are working with a new estimate, make customer selection, enter job name etc.
3. Move the cursor over the “x” between the width and length of any of the size fields in the Paper section until it changes into a “square” icon. Click once to display the Standard Drawing dialog.
4. Go to the section in this chapter “Using the Standard Drawing Dialog”.

From the ShortForm

1. Open an existing or create a new ShortForm estimate.
2. If you are working with a new estimate, make customer selection, enter job name etc.
3. Click the Standard Drawing icon  in the center of the screen.
4. Go to the section in this chapter “Using the Standard Drawing Dialog”.

Using the Standard Drawing Dialog

Once you have accessed the Standard Drawing Dialog, you can begin to setup the estimate. This next section assumes you are setting up an estimate from scratch, describing the automated steps that will occur as you make your selections regarding press, run size, etc.

1 When the Standard Drawing Dialog is displayed, select a press from the Press Choice List.
2 Select a Press Speed if desired.
3 Click OK.
4 Select the run size from the Run Sizes Choice List.

TIP

An “8.5” x “11” flat size should be entered “11” x “8.5” if you are planning to run the job on an “11” x “17” sheet.

TIP

If you choose a size from the Run Size pop-up menu, PrintPoint may suggest that you “flip” the entered dimensions to get more units up.

5 Select a paper from the Paper Selector.

PrintPoint lays out the job for you.

6 You can adjust any of the dimensions (e.g., gripper or border) related to the job. When specifying your settings, keep in mind that flat and bleed sizes must fit properly on a press sheet, and the press sheet must fit on the Parent sheet.

TIP

If you modify these dimensions, be sure to click Draw so PrintPoint redraws the layout.

7 If you are satisfied with this layout, click OK to return to the estimate.

OPTIONS

8 When the Standard Drawing Dialog is displayed, cancel the Press Choice List.
9 In the Layout Library subsection, double-click one of the layout descriptions.

PrintPoint will automatically fill the Standard Drawing Dialog with the choices stored in the Layout Library and then display the Paper Selector for the selected parent size.

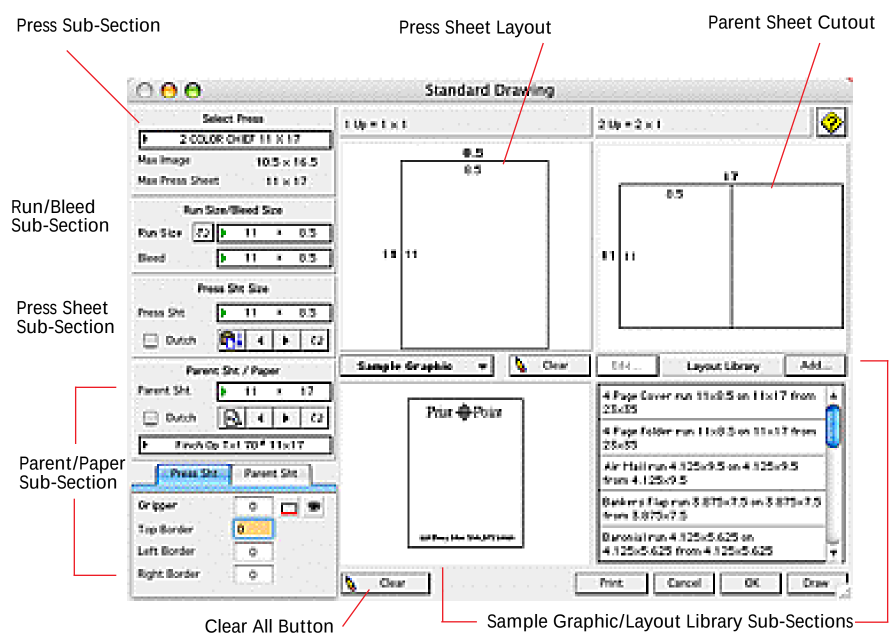
Layout Library

The Layout Library is a tool which enable you to select layout graphics that can be added to the Electronic Job Ticket.

For more information see the chapter “Estimating Tools: Layout Library”.

About the Screens

Standard Drawing Dialog



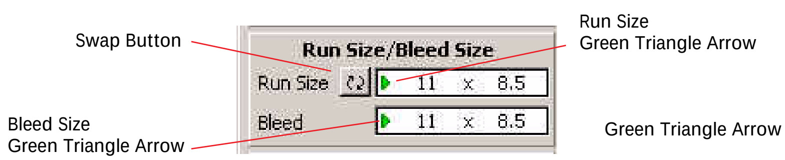
Sub-Sections	Definition
Press Sub-Section	See Sub-sections below
Run/Bleed Sub-Section	See Sub-sections below
Press Sheet Sub-Section	See Sub-sections below
Parent/Paper Sub-Section	See Sub-sections below
Sample Graphic/Layout Library Sub-Section	See Sub-sections below
Press Sheet Layout	Diagram for layout of Run/Bleed size pieces on the Press Sheet
Parent Sheet Cutout	Diagram for the cutout of the Press Sheets from the Parent Sheet
Clear (button)	Clears all info in the Standard Drawing Dialog

Sub-Sections	Definition
Print (button)	Prints the Press and Parent Sheet cutting diagrams
Draw (button)	Draws and Calculates the Run/Page units from the Press Sheets and the Press Sheets from the Parent Sheets.

Press Sub-Section

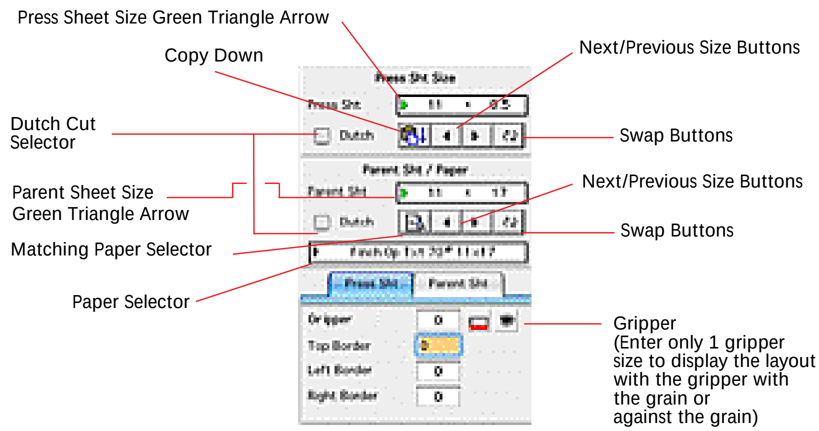
Button / Option	Definition
Press Selector (Black Triangle Button)	Opens the Press Selector Dialog
Max Image	Displays the Maximum Image for the Press
Max Press Sheet	Displays the Maximum Press Sheet size for the Press

Run/Bleed Size and Press Area



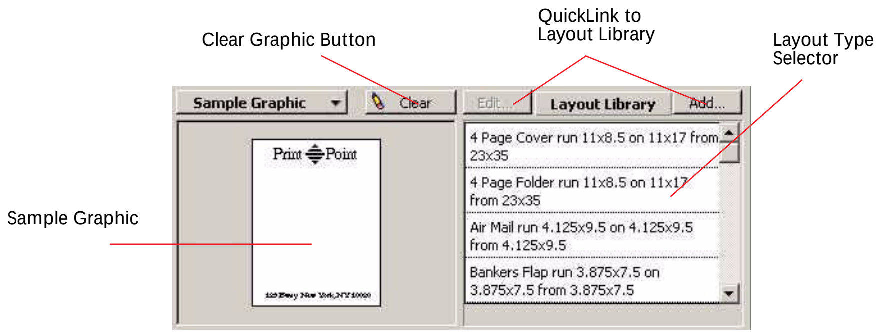
Button / Fields	Definition
Swap Button	Opens the Press Selector Dialog
Run Size (Green Triangle Button - or - manual entry)	The flat/trimmed size of the piece as it's being run before bindery
Bleed Size (Green Triangle Button - or - manual entry)	The flat/untrimmed size of the piece as it's being run before bindery

Press/Parent Sheet Area



Button / Fields	Definition
Press Sheet Size (Green Triangle Button - or - manual entry)	The size of the press sheet (manual entry or select choice list)
Parent Sheet Size (Green Triangle Button - or - manual entry)	The size of the parent sheet (manual entry or select from choice list)
Dutch Cut Selector	Place a check mark to display a dutch cut
Copy Down (button)	Copies the Press Sheet info to the Parent Sheet info and opens the Matching Paper Selector.
Previous Size (button)	Used to select the previous paper size from your 15 standard sizes stored in the NumOut Preferences
Next Size (button)	Used to select the next paper size from your 15 standard sizes stored in the NumOut Preferences
Paper Selector (Triangle button)	Used to access the Paper Selector
Matching Paper Selector (button)	Used to access the Matching Paper Selector
Press Sheet/Parent Sheet Tabs	Used to select the Gripper and Borders of the Press and Parent Sheet.

Sample Graphic/ Layout Library Sub-Section



Column / Button / Option	Definition
QuickLink to Layout Library	Used to modify or add to the Layout Library
Sample Graphic	Displays the graphic view of the Layout Library
Layout Selector	Select the layout type for the job.
Clear All (button)	Clears all info in the Standard Drawing Dialog
Clear Graphic (button)	Clears the Sample Graphic
Print (button)	Prints the Press and Parent Sheet cutting diagrams
Draw (button)	Draws and Calculates the Run/Page units from the Press Sheets and the Press Sheets from the Parent Sheets.

Chapter 15
Estimating Tools: Booklets

OVERVIEW

The Booklets & Lots Dialog is one of PrintPoint's AGE (Advanced Graphical Environment) estimating components accessible from the WorkSheet and ShortForm. It must be used to setup and layout "Book/Booklet" estimates and generate printable diagrams.

Using the following techniques you can:

- Select and adjust press, paper, page size, bleed size, press sheet size, parent sheet sizes, grippers and borders.
- Use pre-defined layouts from the Layout Library or create new layouts On-The-Fly to store in the Layout Library.
- Use pre-defined sample graphics from the Graphic Library.

NOTE

If you enter the dialog without having used the AutoStart Wizard or a Template use the radio buttons at the upper right corner of the screen 

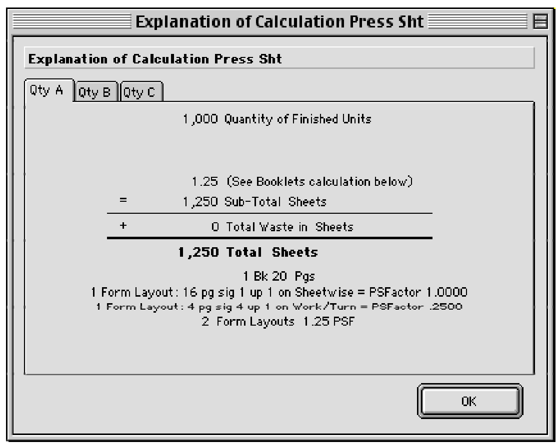
to select either booklets or lots.

Important concepts

There are several fundamental concepts and/or terms related to booklets that you should understand before you begin:

1 Press Sheet Factor (PSF): In order to calculate the correct number of press sheets required for a job, PrintPoint will generate a number referred to as the Press Sheet Factor (PSF) for Booklets. It will then multiply that number by the quantity of books to arrive at the final number of “real” press sheets.

Example If you run 1,000 20 page books as 1-16 pg signature sheetwise and 1-4 pg signature work/turn, the PSF will be 1.25 yielding 1,250 press sheets (without waste).



2 Plates and Makereadies: The number of plates and makereadies for booklets are calculated from the number of Form Layouts (see Tip below) multiplied by the number of colors and the run style applied to each form layout (Sheetwise, Work & Turn or Work & Tumble). This information can only be setup accurately using the Booklets Dialog.

TIP

In PrintPoint terminology, a Form Layout represents the individual physical press sheet containing one or more signatures imposed on both sides of a printed “form”. Traditional printing terminology refers to a “form” as 1 side of a sheet...this is why we had created the term “form layout” to cover the layout of signatures on both sides of the sheet.

3 Post-Press Variations: Some post-press activities are Press Sheet-based, while others are Quantity-based. For example, Scoring, which is often Press Sheet-based, will look at the actual number of Press Sheets that will be scored. By contrast, Collating will look at the Finished Quantity of books multiplied by the Number of Press Form Layouts.

STEP-BY-STEP

This section includes the following topics:

- Accessing the Booklets Dialog
  - From the Estimate Template and AutoStart Wizard
  - From the WorkSheet
  - From the ShortForm
- Setting up a Booklet
- Specifying a Custom Booklet layout
- Layout Library
- Alternate Signatures
- Linking Booklet Components

Accessing the Booklets Dialog

From the Estimate Templates and AutoStart Wizard

1. Open a new ShortForm or WorkSheet estimate.

   With Use Estimate Templates turned on in Preferences, the Estimate Template and AutoStart Wizard is displayed.
2. Click the Booklets button.
3. Go to the section in this chapter “Setting Up a Booklet”.

From the WorkSheet

1. Open an existing or create a new WorkSheet estimate.
2. Click once on the Booklets/Lots icon.

   PrintPoint displays the Booklets/Lots dialog.
3. Go to the section “Setting Up a Booklet” in this chapter.

From the ShortForm

1. Open an existing or create a new ShortForm estimate.
2. Click the Booklets icon in the center of the screen.
3. Go to the section “Setting Up a Booklet” in this chapter.

Setting up a Booklet

Once you have accessed the Booklets & Lots Dialog, you can begin to setup the booklet. This next section assumes you are setting up a booklet from scratch, describing the automated steps that will occur as you make your selections regarding press, page size, number of pages, etc.

1. When the Booklets Dialog opens, select a Press from the Press Choice List.
2. Select a Page Size from either the Page Size Choice List.

   TIP

   This size is the final individual page size. If the pages require Bleed, you will have to go back and enter the bleed size.

3. Select the Number of Pages from Choice List.
4. Select Total Pages Per Booklet from the Choice List.
5. Select the Pages Per Signature from the Choice List.

   PrintPoint will draw a signature layout for you.

6. If you are attempting to estimate several booklets of the same size, you may need to enter the Number of Different Booklets.
7. Select a paper by double-clicking the Black Triangle in the Paper Field.

   OR

   Click on the Paper Matching button to display a list of papers that match the Parent Sheet Size.

8. Specify gripper or border dimensions.

   TIP

   If you modify these dimensions, be sure to click Draw so PrintPoint redraws the layout.

9. If you are satisfied with this setup, click OK to return to the estimate.

Specifying a Custom Booklet Layout

When the number of pages in a booklet does not fit evenly on the press sheet, you must tell PrintPoint how you intend to run the booklet.

1. Access the Booklet dialog from an estimate.
2. Setup the booklet as described in the preceding section.
3. When the drawing occurs, you will receive an alert in red color “You must used customized setup or change your layout” in the Booklet Explanation text box.
4. Click the Open Custom button.
5. Enter the Quantity of Form Layouts in the Form Layout 1 line

6 Tab and enter the Pages Per Sig for Form Layout 1

NOTE

The Pages per Sig for Form Layout 1 should be the same as the as your Pages per Sig in the Booklets/Lots dialog. If you specify a different Pages per Sig in Form Layout 1, when you return to the Booklets/Lots dialog the Pages per Signature will change to the number specified in the customized Booklets Setup dialog.

TIP

If you specify a Pages per Sig which cannot fit on the sheet, the Number Sigs Up field will clear.

NOTE

The Number Sigs Up refers to the number of signatures of this size that can fit on the sheet.

7 Tab and enter the Original Sigs On for Form Layout 1

NOTE

The Original Sigs On refers to the number of signatures you have decided to run on the press sheet.

TIP

If you specify an unsuitable number ON, an alert will be displayed in the Booklets dialog header.

NOTE

The number of pages per form layout and the Total pages are displayed in the next two columns so you can confirm the Form Layout.

8 Click on the Black Triangle in the Run Style field

Printpoint displays a drop-down of possible run styles.

9 Select the appropriate Run Style

NOTE

In the Press Sheet Factor column, PrintPoint displays the number of Press Sheets required to print the signatures in the Form Layout 1 line. (See the Important Concepts 1 above)

Repeat steps 1 to 6 for each additional Form Layout required to complete the booklet.

NOTE

The Total pages you have setup for the booklet is displayed at the foot of the Total Pages column. This total must match the Pages Per Booklet displayed at the bottom left of the Booklets Dialog. An alert is displayed in the Booklets dialog header if you try to accept the customized form layout without the match.

TIP

You can change the number of pages in the Booklet by over-typing the number displayed in the Pages Per Booklet field.

NOTE

The Press Sheet Factor total is shown at the foot of the Press Sht Factor column.

OPTIONS

10 When the Booklets Dialog is displayed, cancel the Press Choice List.

11 In the Layout Library subsection, double-click one of the layout descriptions.

PrintPoint will automatically fill the Booklets Dialog with the choices stored in the Layout Library and then display the Paper Selector for the selected parent size.

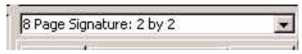
Layout Library

The Layout Library is a tool which enable you to select layout graphics that can be added to the Electronic Job Ticket.

For more information see the chapter “Estimating Tools: Layout Library”.

Alternate Signatures

Alternate signatures are used when the first display of the signature layout does not represent the desired layout for your booklet. In order to run certain layouts such as 12 page signatures, you will want to setup the job to run 3 across by 2 down instead of 2 across by 3 down.

1 Select the appropriate setup from the Alternate Signatures drop-down menu. 

Linking Booklet Components

Booklets are often comprised of several parts: a cover, text pages with different signatures, different color setups (black and white and/or color), different stocks, special inserts, reply envelopes, coupons etc.

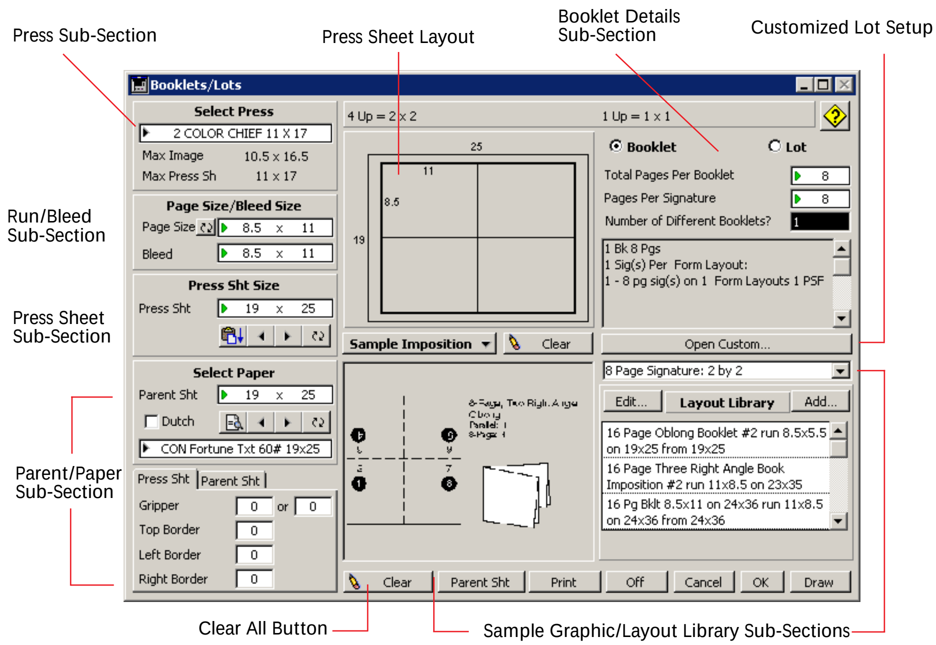
You will want to keep these items together during estimating, and later during the creation and printing of Jobs.

PrintPoint facilitates the task of keeping the components together using “Linking”.

For more information see the chapter “Estimating Tools: Linking”.

About the Screens

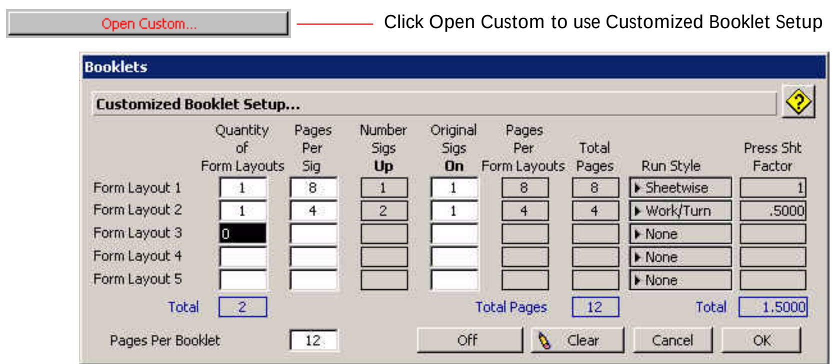
Booklets Dialog



Sub-Sections	Definition
Press Sub-Section	See Sub-sections below
Run/Bleed Sub-Section	See Sub-sections below
Press Sheet Sub-Section	See Sub-sections below
Parent/Paper Sub-Section	See Sub-sections below
Sample Graphic/Layout Library Sub-Section	See Sub-sections below
Press Sheet Layout	Diagram for layout of Run/Bleed size pieces on the Press Sheet
Booklet/Lot Sub - Section	See Sub-sections below
Clear (button)	Clears all info in the Standard Drawing Dialog
Parent Sht (button)	Click to view the Parent Sheet Drawing dialog
Print (button)	Prints the Press and Parent Sheet cutting diagrams

Sub-Sections	Definition
Off (button)	Click to remove Booklet/Lots and return to a Standard Drawing estimate
Draw (button)	Draws and Calculates the Run/Page units from the Press Sheets and the Press Sheets from the Parent Sheets.

Customized Booklets Setup Dialog

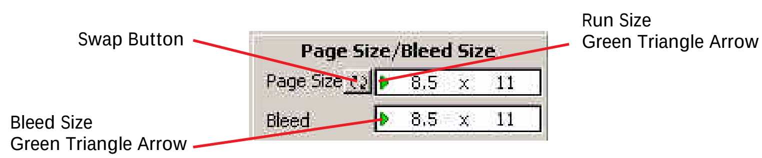


Column / Button / Option	Definition
Quantity of Form Layouts	How many of each Form Layout. The total number of form layouts appears at the bottom of the column.
Pages Per Sig	How many pages on each unique signature on the form layout.
Number Sigs UP	The number of signatures of this size that can fit on the sheet
Original Sigs ON	The number of different signatures to run on the sheet
Pages Per Form Layout	Number of Pages Per Sig multiplied by the Original Sigs ON
Total Pages Per Form Layout	Number of Pages Per Sig multiplied by the number of Form Layouts
Run Style	
Press Sheet Factor (PSF)	The number that you must multiply the actual quantity by, in order to get the correct number of press sheets.

Press Sub-Section

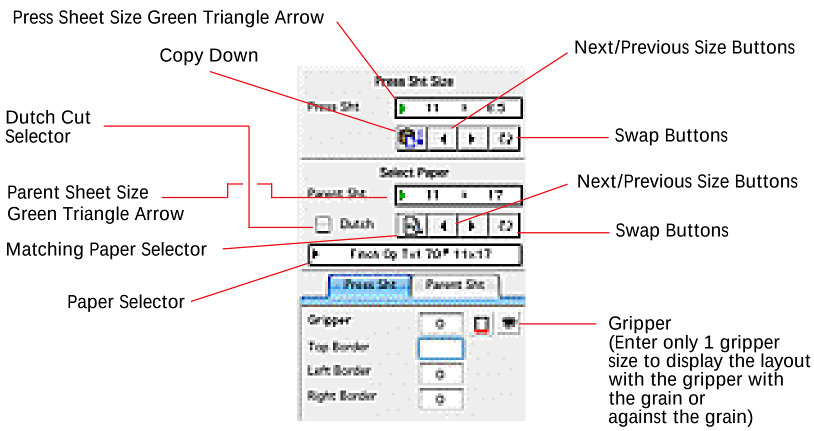
Button / Option	Definition
Press Selector (Black Triangle Button)	Opens the Press Selector Dialog
Max Image	Displays the Maximum Image for the Press
Max Press Sheet	Displays the Maximum Press Sheet size for the Press

Page Size/Bleed Size Area



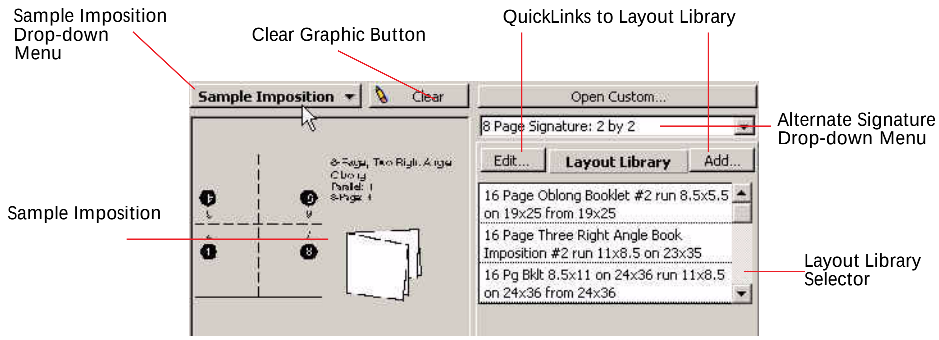
Button / Fields	Definition
Swap Button	Opens the Press Selector Dialog
Page Size (Green Triangle Button - or - manual entry)	The finished page size of each page of the booklet.
Bleed Size (Green Triangle Button - or - manual entry)	The flat/untrimmed size of the piece as it's being run before bindery

Press/Parent Sheet Area



Button / Fields	Definition
Press Sheet Size (Green Triangle Button - or - manual entry)	The size of the press sheet (manual entry or select choice list)
Parent Sheet Size (Green Triangle Button - or - manual entry)	The size of the parent sheet (manual entry or select from choice list)
Dutch Cut Selector	Place a checkmark to display a dutch cut
Copy Down (button)	Copies the Press Sheet info to the Parent Sheet info and opens the Matching Paper Selector.
Previous Size (button)	Used to select the previous paper size from your 15 standard sizes stored in the NumOut Preferences
Next Size (button)	Used to select the next paper size from your 15 standard sizes stored in the NumOut Preferences
Paper Selector (Triangle button)	Used to access the Paper Selector
Matching Paper Selector (button)	Used to access the Matching Paper Selector
Press Sheet/Parent Sheet Tabs	Used to select the Gripper and Borders of the Press and Parent Sheet.

Sample Graphic/ Layout Library Sub-Section



Column / Button / Option	Definition
Sample Imposition	Displays sample impositions and graphics
Sample Imposition Drop-down Menu	Displays a list of sample impositions and graphics
Clear Graphic (button)	Clears the Sample Graphic
Alternate Signature Drop-Down Menu	Displays various alternate signatures layouts. If you need to get 3 pages x 2 pages instead of 2 x 3, use this option.
QuickLinks to Layout Library	Used to Edit... or Add... to the Layout Library
Layout Library Selector	Select the layout for the job.

Chapter 16
Estimating Tools: Lots

OVERVIEW

The Booklets & Lots Dialog is one of PrintPoint's AGE (Advanced Graphical Environment) estimating components accessible from the WorkSheet and ShortForm. It enables you to visually layout "Lot" estimates and generate printable diagrams using the following techniques:

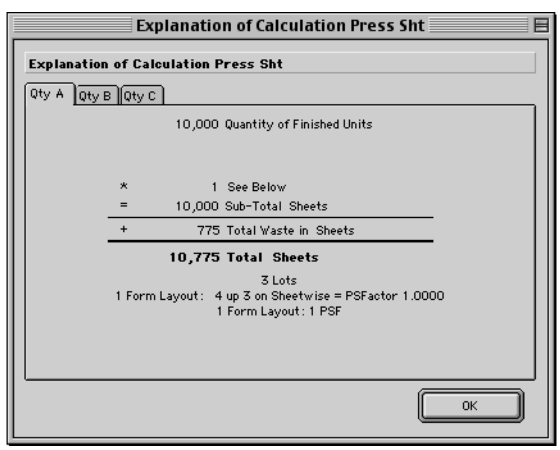
- Select and adjust press, paper, run size, bleed size, press sheet size, parent sheet sizes, grippers and borders
- Use pre-defined layouts from the Layout Library or create new layouts On-The-Fly to store in the Layout Library
- Use pre-defined sample graphics from the Graphic Library.

The Booklets & Lots Dialog is used to visually setup and layout basic or customized lot jobs for accurate estimating. By confirming the layouts and cutouts with sample graphics, you can guarantee greater accuracy and communication throughout your shop.

There are several important concepts you should understand:

1. Press Sheet Factor (PSF): In order to calculate the correct number of press sheets required for a job, PrintPoint will generate a number referred to as the Press Sheet Factor (PSF) for Lots. It will then multiply that number by the quantity to arrive at the final number of "real" press sheets.

   Example — If you run 10,000 of 3 Lots (leaving one "ghost" unused space) on the Press Sheet, the PSF will be 1 yielding 10,000 press sheets (without waste).



2. Different post-press activities are affected differently by this calculation. Some post-press activities are Press Sheet-based, while others are Quantity-based. For example, Scoring, which is often Press Sheet-based, will look at the actual number of Press Sheets that will be scored. By contrast, Collating will look at the Finished Quantity multiplied by the

Number of Press Sheets Needed. PrintPoint allows you to indicate with each post-press activity....If you uncheck the Multiply Qty by Number of Lots checkbox on the Variable Charges tab, the calculation will be based only on the Finished Quantity. The Press Sheet Factor will be ignored.

3 The Press/Ink Setup dialog box (on the WorkSheet) and the Ink/Passes dialog box (on the ShortForm) calculate the number of plates and make readies based on the number of “plate layouts” generated by the Booklets & Lots Dialog, multiplied by the number of colors used on the job and the run style applied to each layout (Sheetwise or W/T).

STEP-BY-STEP

This section includes the following topics:

- Accessing the Lots Dialog
  - From the Estimate Template and AutoStart Wizard
  - From the WorkSheet
  - From the ShortForm
- Setting Up a Lot Estimate
- Specifying a Custom Lot layout.

Accessing the Lots Dialog

From the Estimate Templates and AutoStart Wizard

1. Open a WorkSheet or ShortForm **Estimate.**
2. Select a Customer from the Customer Choice List.

   With Use Estimate Templates turned on in Preferences, the Estimate Template and AutoStart Wizard is displayed.
3. Click Lot.

   The Booklets/Lots dialog box is displayed.
4. Go to the section “Setting Up a Lot Estimate” in this chapter”.

From the WorkSheet

1. Open an existing or create a new WorkSheet estimate.
2. Click the Booklets icon. .

   PrintPoint displays the Booklets/Lots dialog.
3. Go to the section “Setting Up a Lot Estimate” in this chapter.

From the ShortForm

1. Open an existing or create a new ShortForm estimate.
2. Click the Booklets icon.

   PrintPoint displays the Booklets/Lots Dialog.
3. Go to the section “Setting Up a Lot Estimate” in this chapter.

Setting up a Lot Estimate

Once you have entered the Booklet/Lots section follow these instruction to setup the lots.

1 Select a Press from the Press Choice List.
2 Select a Number of Originals/Lots from the Number of Originals/Lots Choice List.
3 Enter a Press Sheet Size by either clicking on the Green Triangle and selecting from the choice list or by typing in the Press Sheet field.
4 Enter a Parent Sheet Size by either clicking on the Green Triangle and selecting from the choice list or by typing in the Parent Sheet field.
5 Select a Paper from the Paper Matching Selector.

NOTE

If you clicked on the Green Triangle and selected the parent sheet from the list in step 4, the Paper Matching Selector will automatically be displayed. If you typed the parent sheet size in the field you will need to click on the Black Triangle for the Paper Matching Selector to be displayed.

For more information on the Paper Matching Selector see the chapter “Estimating Tools: Paper Selector”.

6 Specify gripper or border dimensions.
7 If you choose you can select a Layout from the Layout Library.

For more information on the Layout Library see the chapter “Estimating Tools: Layout Library”.

8 Click the Draw button.
9 If you are satisfied with this layout, click OK to return to the estimate.

Specifying a Custom Lot Layout

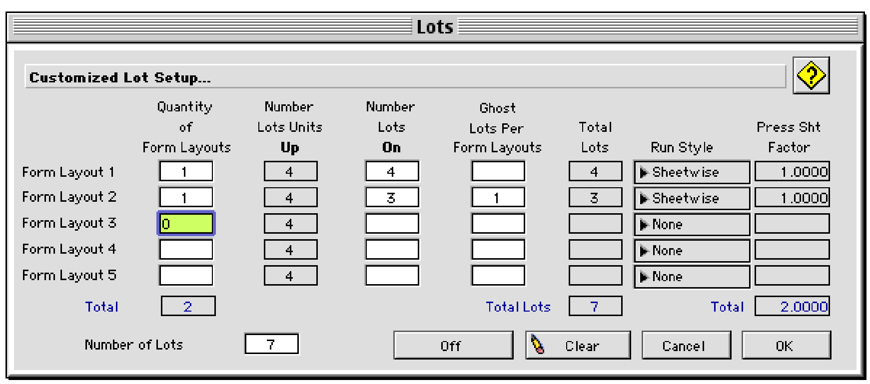
The Custom Lot Setup works similarly to the Custom Booklet Setup, with the additional ability to insert “Ghost” lots to fill layouts and force the PSF (press sheet factor) to an even number of sheets.

For this example we will be estimating (7) 8.5 x 11 lots on a 19 x 25 sheet. We will have 1 form 4 up and 1 form 3 up with one ghost.

1. Access the Lot dialog.
2. Setup the layout using the steps from the previous section.
3. Click on the Open Custom button.

   PrintPoint displays the Customized Lot Setup dialog.
4. Enter “1” in the Quantity of Form Layouts column for the Form Layout 1 row.
5. Enter “4” in the Number Lots On column.
6. Select Sheetwise form the Run Style drop-down menu for Form Layout 1.
7. Enter “1” in the Quantity of Form Layouts column for the Form Layout 2 row.
8. Enter “3” in the Number Lots On column.
9. Enter “1” in the Ghost Lots Per Form Layouts column.
10. Select Sheetwise form the Run Style drop-down menu for Form Layout 1.

   Your setup should look like this example:

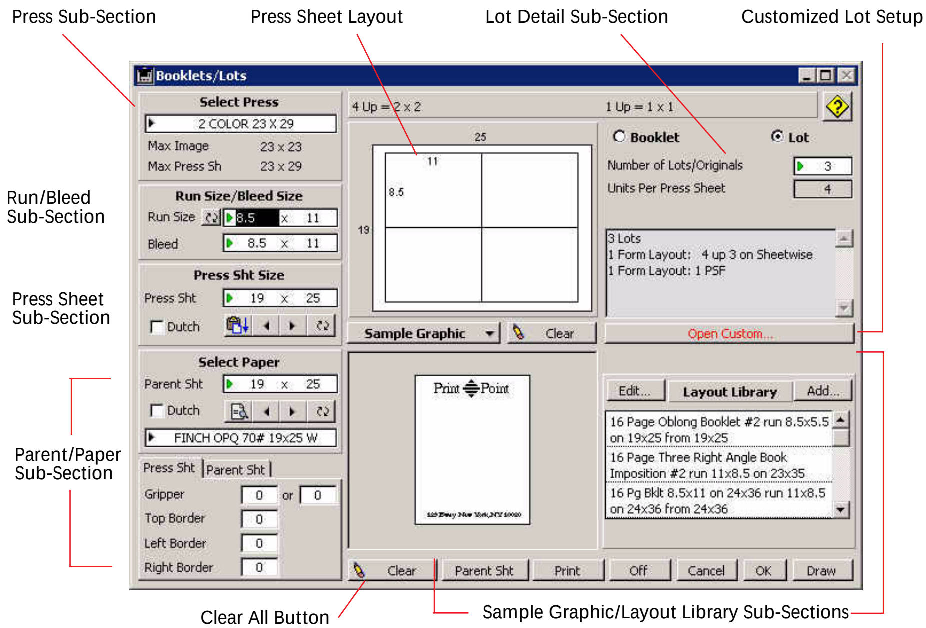


NOTE

The text of the Open Custom button will now appear in red as a reminder that you have a customized lot setup.

About the Screens

Lots Dialog



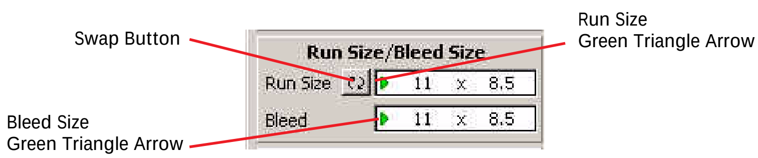
Sub-Sections	Definition
Press Sub-Section	See Sub-sections below
Run/Bleed Sub-Section	See Sub-sections below
Press Sheet Sub-Section	See Sub-sections below
Parent/Paper Sub-Section	See Sub-sections below
Sample Graphic/Layout Library Sub-Section	See Sub-sections below
Press Sheet Layout	Diagram for layout of Run/Bleed size pieces on the Press Sheet
Parent Sheet Cutout	Diagram for the cutout of the Press Sheets from the Parent Sheet
Lot Detail Sub-Section	You can enter the number of lots or click the Green Triangle to display the Number of Lots Choice List.
Clear (button)	Clears all info in the Standard Drawing Dialog
Parent Sht (button)	Click to view the Parent Sheet Drawing dialog
Print (button)	Prints the Press and Parent Sheet cutting diagrams

Sub-Sections	Definition
Off (button)	Click to remove Booklet/Lots and return to a Standard Drawing estimate
Draw (button)	Draws and Calculates the Run/Page units from the Press Sheets and the Press Sheets from the Parent Sheets.

Press Sub-Section

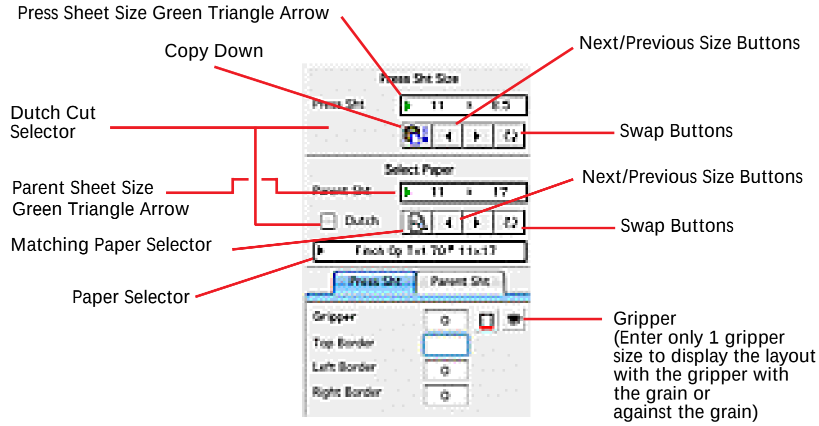
Button / Option	Definition
Press Selector (Black Triangle Button)	Opens the Press Selector Dialog
Max Image	Displays the Maximum Image for the Press
Max Press Sheet	Displays the Maximum Press Sheet size for the Press

Run Size/Bleed Size Area



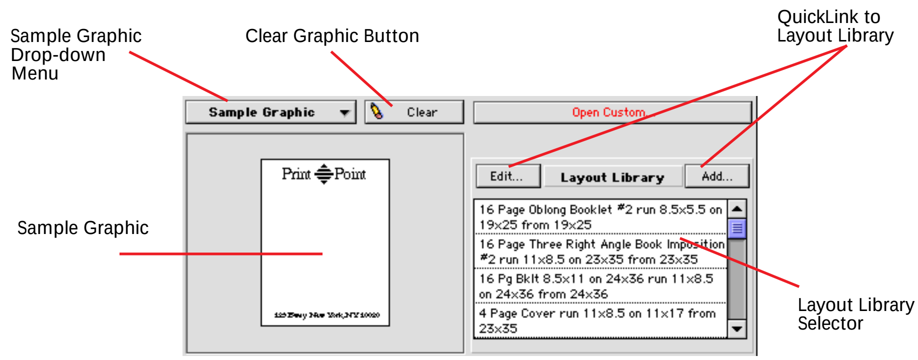
Button / Fields	Definition
Swap Button	Opens the Press Selector Dialog
Run Size (Green Triangle Button - or - manual entry)	The flat/trimmed size of the piece as it's being run before bindery
Bleed Size (Green Triangle Button - or - manual entry)	The flat/untrimmed size of the piece as it's being run before bindery

Press/Parent Sheet Area



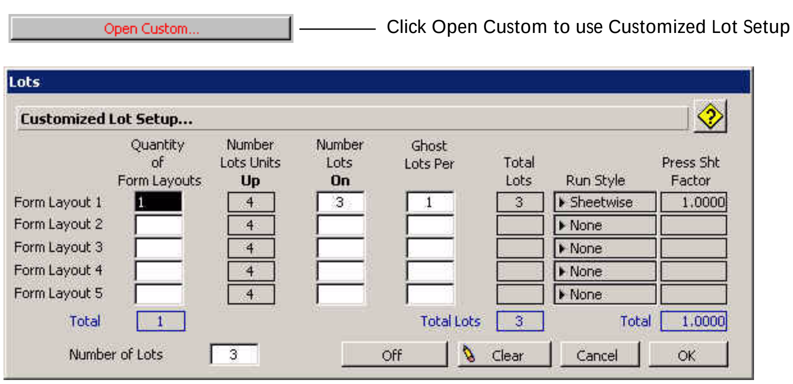
Button / Fields	Definition
Press Sheet Size (Green Triangle Button - or - manual entry)	The size of the press sheet (manual entry or select choice list)
Parent Sheet Size (Green Triangle Button - or - manual entry)	The size of the parent sheet (manual entry or select from choice list)
Dutch Cut Selector	Place a checkmark to display a dutch cut
Copy Down (button)	Copies the Press Sheet info to the Parent Sheet info and opens the Matching Paper Selector.
Previous Size (button)	Used to select the previous paper size from your 15 standard sizes stored in the NumOut Preferences
Next Size (button)	Used to select the next paper size from your 15 standard sizes stored in the NumOut Preferences
Paper Selector (Triangle button)	Used to access the Paper Selector
Matching Paper Selector (button)	Used to access the Matching Paper Selector
Press Sheet/Parent Sheet Tabs	Used to select the Gripper and Borders of the Press and Parent Sheet.

Sample Graphic/ Layout Library Sub-Section



Column / Button / Option	Definition
Sample Graphic	Displays sample graphics
Sample Graphic Drop-down Menu	Displays a list of sample graphics
Clear Graphic (button)	Clears the Sample Graphic
QuickLink to Layout Library	Used to modify or add to the Layout Library
Layout Library Selector	Select the layout for the job.

Customized Lots Setup Dialog



Column / Button / Option	Definition
Quantity of Form Layouts	How many of each Form Layout. The total number of form layouts appears at the bottom of the column
Number Lots UnitsUP	The number of units of this size that can fit on the sheet
Number of Lots ON	The number of different units to run on the sheet

Column / Button / Option	Definition
Pages Per Form Layout	Number of Pages Per Sig multiplied by the Original Sigs ON
Ghost Lots Per	Enter the number of “empty” lot positions so the number of press sheets will calculate correctly assuring that “full sheets” are used.
Total Lots	Number of lots on times the quantity of forms
Press Sheet Factor (PSF)	The number that you must multiply the actual quantity by, in order to get the correct number of press sheets

Chapter 17

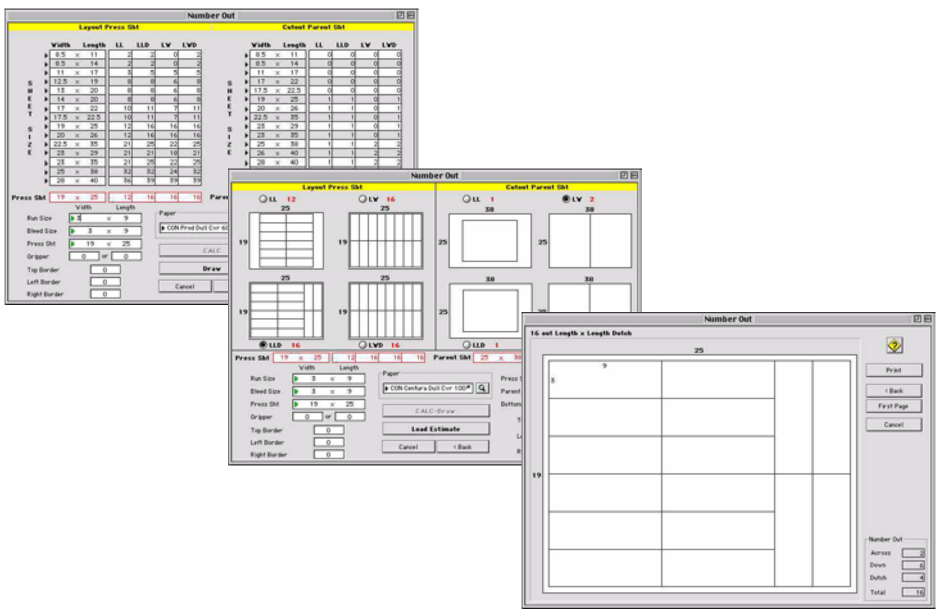
Estimating Tools: Number Out

OVERVIEW

Number Out is one of PrintPoint's AGE (Advanced Graphical Environment) estimating components. It is used to simultaneously calculate up to 128 possible cutouts and layouts (including Dutch or Monkey combination cuts) based 15 user-defined parent and press sheet sizes and one set of custom entries for the following:

- Press Sheets from Parent Sheet.
- Run Size units from Press Sheet.
- Bleed Size (allowing for step & repeat, bleed, or backtrim) units from Press Sheet.

It allows options for bleeds, grippers, and left/top/right borders.



From Number Out you can:

- Preview 4 possible layouts and 4 possible cutouts
- Print any of these layouts and cutouts
- Load an offset estimate setup (WorkSheet or ShortForm) based on the graphical previews and save them with the estimate, to be printed with the job tickets.

BEFORE YOU BEGIN

You should:	Where to Find it:
Set the Number Out Default sizes for your 15 standard Press Sheet and Parent Sheet Sizes	File Menu > Preferences > Number Out defaults

STEP-BY-STEP

TIP

Number Out can be used as a stand-alone tool to calculate press sheets layouts and parent sheets cutouts.

or

It can be used to create a new WorkSheet or ShortForm

or

It can be opened from the WorkSheet and ShortForm to suggest selections for the layout and cutout.

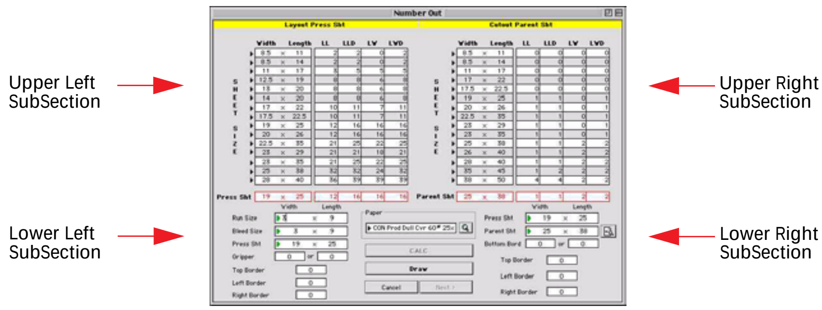
This section includes the following topic:

- Accessing Number Out
- Using Number Out
  - Setup
  - Preview
  - Selecting Paper
  - Printing
  - Creating A New WorkSheet or ShortForm
  - Loading an Existing WorkSheet or ShortForm

Accessing Number Out

1 Select Extras Menu > Number Out.

The Setup Screen of Number Out is displayed.



- The upper left subsection contains the 15 default Press Sheet sizes set in Preferences > Number Out Defaults. From this subsection you will choose a press sheet based on the calculated “number out” of run size pieces.
- The lower left subsection contains entry fields for Run, Bleed, Press Sheet, Gripper, Top Border, Left Border, and Right Border laid out on the Press Sheet.
- The upper right subsection contains 15 default Parent Sheet sizes set in Preferences > Number Out Defaults. From this subsection you will choose a parent sheet based on the calculated “number out” of press sheets.
- The lower right subsection contains entry fields for Press Sheet, Parent, Bottom Border, Top Border, Left Border, and Right Border cut out of the Parent Sheet.

Using Number Out

Using Number Out generally follows these steps:

- Setup the Run/Bleed, Press Sheet, Parent Sheet sizes (including grippers and borders)
- Preview the 8 possible layouts and cutouts
- Print the selected layout or cutout

Setup

1 In the Run Size Width field, type the width of the run size.

2 In the Run Size Length field, enter the length of the run size.

NOTE

PrintPoint will automatically fill the Bleed Size measurements if they are empty.

3 Click the Calc button.

PrintPoint calculates all possible “number out” from the press sheet sizes listed in the Layout Press Sheet area (Upper Left Subsection) and displays them in 4 columns:

Abbreviation	Definition
LL	Run Length from Press Sheet Length
LLD	Run Length x Press Sheet Length plus Dutch
LW	Run Length x Press Sheet Width
LWD	Run Length x Press Sheet Width plus Dutch

4 Review the best possible layout for this job.

5 Select a Press Sheet Size from the Layout Press Sheet area (Upper Left Subsection) by clicking on one of the Black Triangle Arrows.

PrintPoint will now calculate all possible “number out” of Press Sheets from Parents Sheets and displays them in 4 columns in the Cutout Parent Sheet area (Upper Right Subsection):

Abbreviation	Definition
LL	Press Sheet Length from Parent Sheet Length
LLD	Press Sheet Length x Parent Sheet Length plus Dutch
LW	Press Sheet Length x Parent Sheet Width
LWD	Press Sheet Length x Parent Sheet Width plus Dutch

6 Select a Parent Sheet Size from the Cutout Parent Sheet area (Upper Right Subsection) by clicking on one of the Black Triangle Arrows.

NOTE

The numbers enclosed in the red area are the current dimensions of the actual Press Sheet and Parent Sheet used to yield the number out.

7 Optional Step: You may enter the Bleed Sizes, Press Sheet Sizes, Parent Sheet Sizes directly or by using the Green Triangle Arrows.

There are times when you will need to enter sizes that are not stored in the 15 defaults for Press and Parent Sheets

8 Optional Step: Enter Grippers or Borders if required.

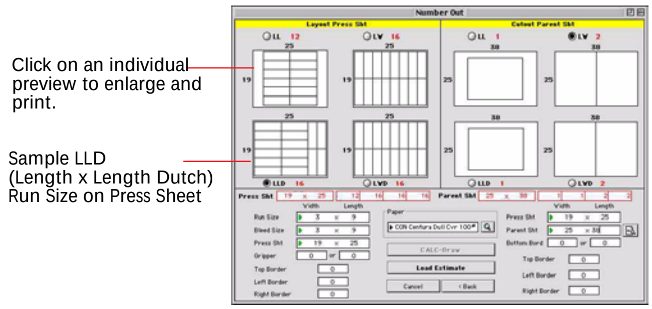
NOTE

If you enter a gripper along the length, you will get a picture depicting the gripper along the grain (grains long).

If you enter the gripper along width, the sheet will be rotated to reflect the gripper against the grain (grain short).

9 Click the Draw button.

PrintPoint hides the Setup screen and displays the Preview Screen, drawing the possible configurations you can use.



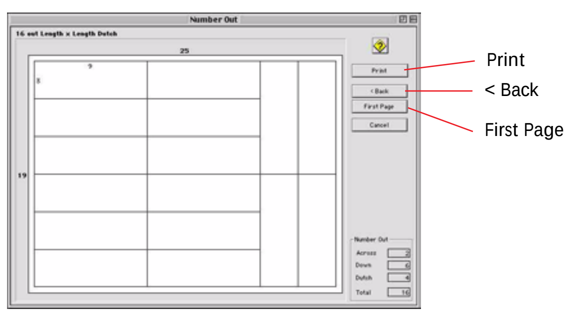
10 Optional Step: Make any changes or additional entries on this screen and click the CALC-Draw button to view your new layouts and cutouts.

Preview

1 Click on an individual preview (see graphic above) to enlarge and print.

PrintPoint will display an enlarged Print view of the selected layout/cutout with options to Print.

Printing



1 Print will send the current picture to your printer.

2 After printing, click the <Back button to return to the Preview screen to select another layout/cutout to print or select a paper.

OR

3 Click the First Page button to return to Setup screen to begin another set of selections for layout and cutout.

Selecting Paper

You can select a paper from either the Setup screen or the Preview screen.

1 Click the Paper Choice List, then choose the appropriate paper.

OR

2 Click the Paper Matching button to the right of the Parent Sheet dimensions in the lower right subsection.

Selecting a Layout and Cutout

If you will be creating or loading an estimate in the next sections, you must first select a layout and cutout for the estimate.

1 From the Layout Press Sheet area, click the appropriate radio button to select a Press Sheet layout.

2 From the Parent Sheet area, click the appropriate radio button to select a Parent Sheet cutout.

Creating A New WorkSheet or ShortForm

1 Click the New Estimate button.

PrintPoint will create a new estimate with your new layouts and cutouts.

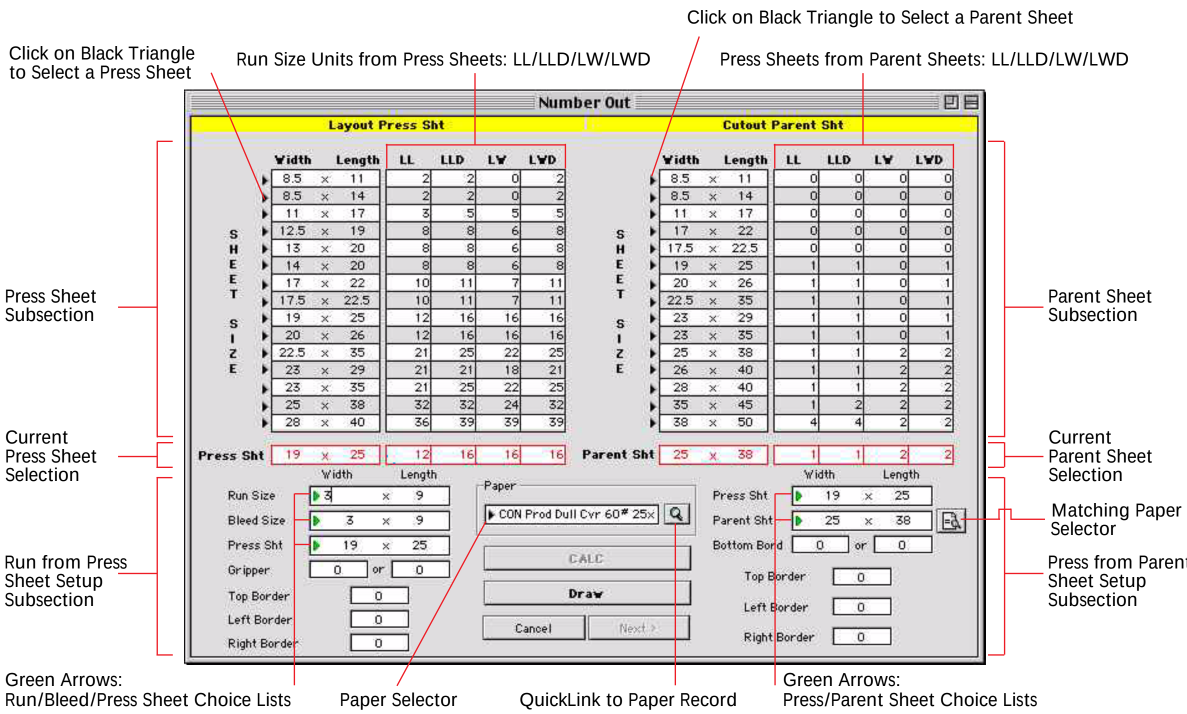
Loading an Existing WorkSheet or ShortForm

1 Click the Load Estimate button.

PrintPoint will return the previously opened estimate with your new layouts and cutouts.

About The Screens

Setup Screen

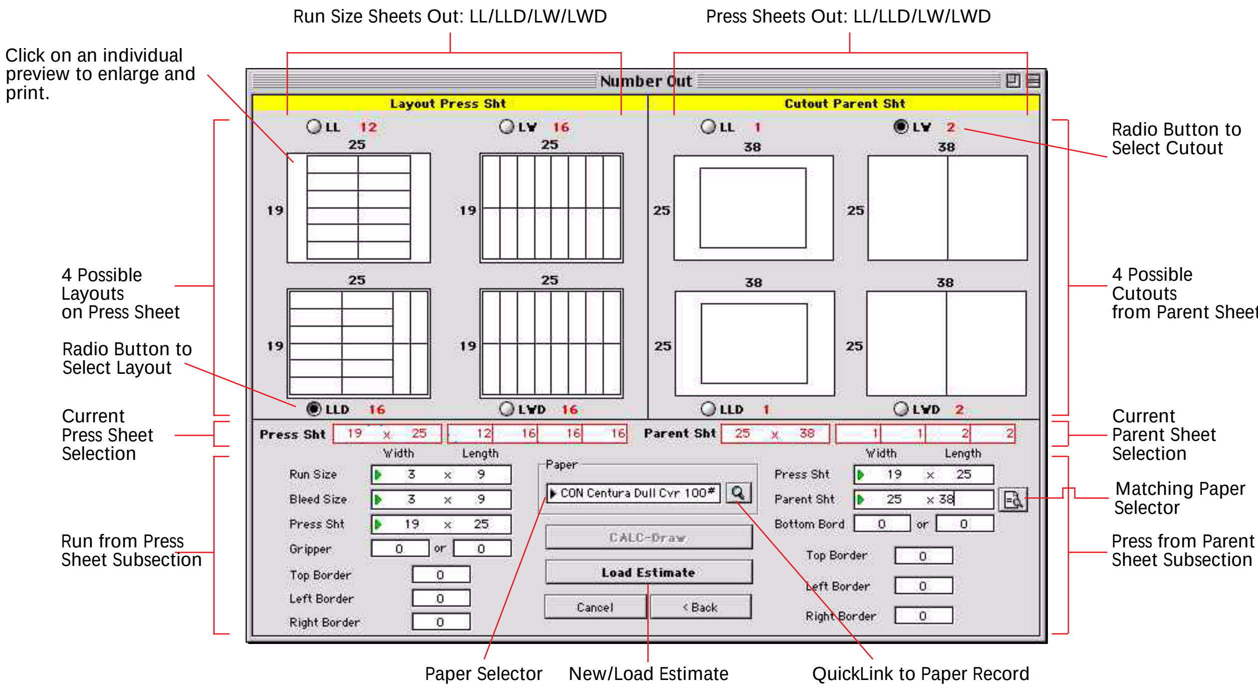


Button/Field	Definition
Layout On Press Sheet	
Press Sheet Subsection	15 Default Press Sheet sizes from Preferences
Black Triangle Arrow (buttons) to select Press Sheet	Click on a Black Triangle Arrow to select a Press Sheet The number of Press Sheets from Parent Sheets will be displayed in the Parent Sheet subsection (upper right subsection)
Run Size Units from Press Sheets: LL/LLD/LW/LWD	How many Run Size Units from Press Sheet for: a. Run Length from Press Sheet Length b. Run Length x Press Sheet Length plus Dutch c. Run Length x Press Sheet Width d. Run Length x Press Sheet Width plus Dutch

Current Press Sheet Selection	Current selection for the Press Sheet displaying number out for: LL/LLD/ LW/LWD
Run from Press Sheet Setup Subsection	Run, Bleed, Press Sheet sizes / Grippers and Borders. Option for entering gripper along the grain short or grain long dimension which in turn will rotate the graphic.
Green Triangle Arrows: Run/Bleed/ Press Sheet Choice Lists	You can click on any of the Green Triangle Arrow buttons to select from user-modifiable Choice Lists for Run Size, Bleed Size and Press Sheet Size. You can also type your entries directly into these fields.
Paper	
Paper Selector (button)	Displays Paper Selector or Paper Choice List with list of all papers and sizes.
QuickLink to Paper Record (button)	Lookup selected paper in the paper database.
Matching Paper Selector (button)	Enabled only when there is a Parent Sheet size already entered, the Paper Matching Selector will limit the range of papers to match the size of the Parent Sheet displayed.
Cutout Parent Sheet	
Parent Sheet Subsection	15 Default Parent Sheet sizes from Preferences
Black Triangle Arrow (buttons) to select Parent Sheet	Click on the Black Triangle Arrow to select a Parent Sheet for the best possible cutout of Press Sheet from Parent Sheet.
Press Sheets from Parent Sheets: LL/ LLD/LW/LWD	Current selection for the Parent Sheet displaying number out for: a. Press Sheet Length from Parent Sheet Length b. Press Sheet Length from Parent Sheet Length plus Dutch c. Press Sheet Length from Parent Sheet Width d. Press Sheet Length from Parent Sheet Width plus Dutch
Current Parent Sheet Selection	Current selection for the Parent Sheet displaying number out for: LL/LLD/ LW/LWD

Press Sheet from Parent Sheet Setup Subsection	Press Sheet, Parent Sheet and Borders. Option for entering the bottom border along the grain short or grain long dimension which in turn will rotate the graphic.
Green Triangle Arrows: Press/Parent Sheet Choice Lists	You can click on any of the Green Triangle Arrow buttons to select from user-modifiable Choice Lists for Press Sheet Size and Parent Sheet Size. You can also type your entries directly into these fields.

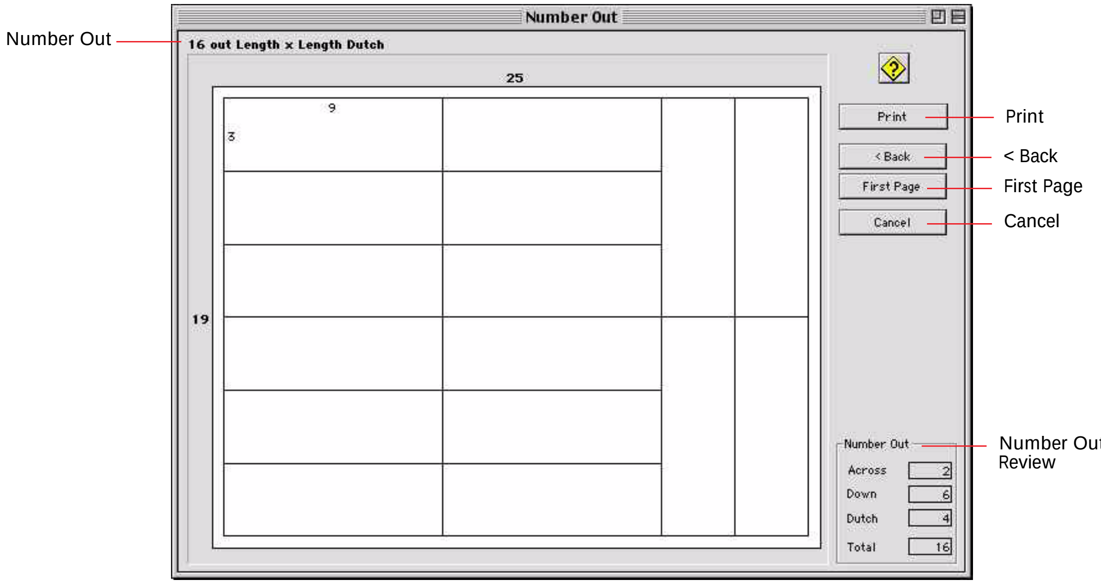
Preview Screen



Button / Option	Definition
4 Possible Layouts on Press Sheet	Click on an individual preview
Radio Button to Select Layout	If you are creating a new estimate, or loading an existing estimate you must select one of the 4 possible layouts.
Current Press Sheet Selection	Current selection for the Press Sheet displaying number out for: LL/LLD/LW/LWD
Run from Press Sheet Setup Subsection	Run, Bleed, Press Sheet sizes / Grippers and Borders. Option for entering gripper along the grain short or grain long dimension which in turn will rotate the graphic.

Button / Option	Definition
Paper Selector (button)	Displays Paper Selector or Paper Choice List with list of all papers and sizes.
New/Load Estimate (button)	This button has two enabled states: “New” and “Load”. If you have an existing estimate open, it will read “Load”, otherwise it will read “New”
QuickLink to Paper Record (button)	Lookup selected paper in the paper database.
Parent Sheet Subsection	15 Default Parent Sheet sizes from Preferences
Black Triangle Arrow (buttons) to select Parent Sheet	Click on the Black Triangle Arrow to select a Parent Sheet for the best possible cutout of Press Sheets from Parent Sheets.
Press Sheets from Parent Sheets: LL/LLD/LW/LWD	Current selection for the Parent Sheet displaying number out for: a. Press Sheet Length from Parent Sheet Length b. Press Sheet Length from Parent Sheet Length plus Dutch c. Press Sheet Length from Parent Sheet Width d. Press Sheet Length from Parent Sheet Width plus Dutch
Current Parent Sheet Selection	Current selection for the Parent Sheet displaying number out for: LL/LLD/LW/LWD
Matching Paper Selector (button)	Enabled only when there is a Parent Sheet size already entered, the Paper Matching Selector will limit the range of papers to match the size of the Parent Sheet displayed.
Press Sheet from Parent Sheet Setup Subsection	Press Sheet, Parent Sheet and Borders. Option for entering the bottom border along the grain short or grain long dimension which in turn will rotate the graphic.

Print Screen



Button / Option	Definition
Number Out	Text display of the selected layout/cutout
Print (button)	Prints the current graphic
< Back (button)	Returns to the Preview page
First Page	Returns to the Setup page
Number Out Review	Breakdown of Across/Down/Dutch and Total pieces

Chapter 18
Estimating Tools: Paper Selection

OVERVIEW

One of the most essential steps in estimating is paper selection. PrintPoint employs several options for selecting paper for each of its various estimating forms. These options include:

- Paper Selector Dialog: an advanced "drill down" listing tool using criteria such as size, weight, grade, mill, etc. to reduce the possible number of papers displayed in prior to selection
- Paper Choice List: a simple sorted Choice List of paper displaying all your paper in alphanumeric order
- Size Matching Buttons: Limits the number of papers to select from by first matching the width and length of the paper prior to the display of either the Paper Selector Dialog or the Paper Choice List.

NOTE

Large Format Estimating uses a "Media Choice List"... similar to the Paper Choice List. It is the only option available for Large Format Estimating.

TIP

It may seem obvious, but any of the techniques above will be most effective if you normalize a "standard format" for the entry of paper names in you database of paper.

Example Common formats includes Mill/Grade/Weight/Size/Color. See the example below for various Finch Opaque stocks:

FINCH OPQ 40# 23x35 W
FINCH OPQ 50# 23x35 W
FINCH OPQ 60# 23x35 W
FINCH OPQ 60# 25x38 W
FINCH OPQ 70# 19x25 W
FINCH OPQ 70# 23x29 W
FINCH OPQ 70# 23x35 W
FINCH OPQ 70# 25x38 W
FINCH OPQ 70# 28x40 W
FINCH OPQ 80# 23x35 W
FINCH OPQ 80# 28X40 W

BEFORE YOU BEGIN

You should...	Where this information is found...
Set the Paper Preferences	File Menu > Preferences > Paper
Set your User Setting for either Paper Selector or Paper Choice List	File Menu > User Settings > Choice Lists

STEP-BY-STEP

This section includes the following topics:

- Paper Selector or Paper Choice List
  - Paper Selector
  - Paper Choice List
- Adding a Paper On-The-Fly
  - New Paper
  - Clone Paper
- Selecting Paper using a ShortForm or WorkSheet Estimate
  - Standard Method
  - Matching Paper Size
- Selecting Paper using a Copy-Digital Estimate.

Paper Selector or Paper Choice List

NOTE

You can select to use either the Paper Selector or the Paper Choice List to select paper. (File Menu > User Settings > Choice Lists).

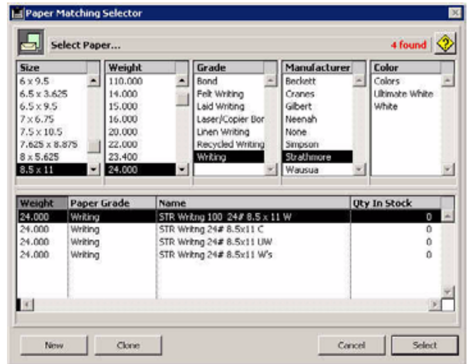
TIP

To toggle (On-The-Fly) between the Paper Selector and the Paper Choice List, hold down the Command Key (Macintosh) Control Key (Windows) while clicking a Black Arrow or QuickLink.

Paper Selector

1 Click the Black Arrow in the Paper field.

The Paper Selector is displayed listing papers according to their attributes (for example, Grade, Weight, Size, Color, and Mill).



NOTE

If the paper you require is not listed, you need to create it On-The-Fly by clicking either the New button or the Clone button.

2 In the Paper Selector, you select the paper by ‘drilling down’ through the paper attributes columns. As you click on an item in the 1st column, PrintPoint will search your paper database for all entries matching that item, and the second column will be filled with the results of the “search”. In lower subsection of the Paper Selector, the system displays a description of your selection and the quantity of paper in stock.

3 Select your paper by highlighting it and clicking the Select button. You may also make this selection by simply double-clicking the desired paper.

NOTE

You can modify the Column Order (Size, Weight, Grade...etc.) of the Paper Selector in Preferences. This setting will apply to all users. File Menu > Preferences > Paper > Paper Selection Dialog.

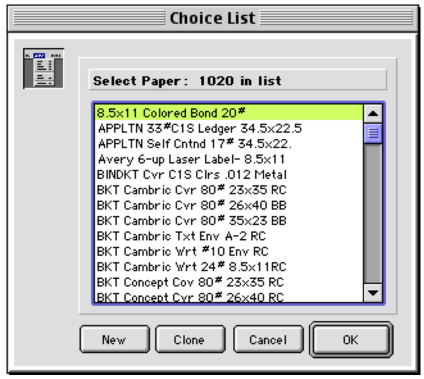
TIP

If you entered data in the Run Size, Bleed Size or Press Sht fields and you open the Paper Selector via a QuickLink, the paper attributes fields are always displayed in the following order: Size, Grade, Weight, Color, and Mill.

Paper Choice List

1 Click the Black Arrow in the Paper field.

The Paper Choice List is displayed with papers listed alphabetically.



2 Select your paper by highlighting it and clicking the OK button. You may also make this selection by simply double-clicking the desired paper.

Adding a Paper On-The-Fly

New Paper

You can add a New paper On-The-Fly from either the Paper Selector or the Paper Choice List.

1 Click the Black Arrow in the Paper field.

2 The Paper Selector Dialog BoxPaper Choice List is displayed.

3 Click the New button.

PrintPoint displays Paper Wizard Confirm dialog.

4 Click the Wizard button.

5 PrintPoint displays the Paper Wizard.

6 Follow the on-screen instructions to setup the paper.

NOTE

It is recommended that you use the Paper Wizard to setup a new paper until you become familiar enough with the program to use the standard Paper Detail Screen.

7 You will be returned to the estimate to continue estimating.

Clone Paper

You can clone an existing paper On-The-Fly from either the Paper Selector or the Paper Choice List.

1 Click the Black Arrow in the Paper field.

2 The Paper Selector Dialog BoxPaper Choice List is displayed.

3 Click the Clone button.

PrintPoint displays the Detail Screen for the paper you selected.

4 In the Paper Code field, the Paper Code will have an “*” appended. Over-type an *new paper name*, then press the Tab key.

CAUTION

You cannot have two papers with the same name so make sure you use a unique code name for the new paper.

5 In the Name for Reports text box, type the *full name of the paper as you want it to appear on customer documentation*, then press the Tab key.

6 Make changes to any information that is different from the paper you copied.

7 Click the OK button.

8 You will be returned to the estimate to continue estimating.

Selecting Paper using a ShortForm or WorkSheet Estimate

Standard Method

1 Open or create a new ShortForm or WorkSheet estimate.

2 In the Paper Section click on the Black Triangle in the paper field.

PrintPoint displays either the Paper Matching Selector or the Paper Choice List depending on you setup.

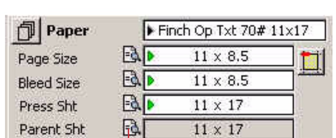
For more information see the section in this chapter “Paper Selector or Paper Choice List”.

3 Select the paper for the estimate.

Matching Paper Size

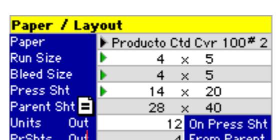
There are times when you know the size of the paper you are looking for. In these cases, there is no need to display the entire list of available paper. Using the Matching Paper Size buttons/cursor, you can limit your either the Paper Selector or the Paper Choice List to show only the desired size.

ShortForm



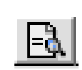
Match Paper Size Button

WorkSheet



Match Paper Size Cursor

Standard Drawing/Booklets/Lots



Match Paper Size Button

You can also use the Standard Drawing or Booklets/Lots dialogs to select paper. For more information see the chapters “Estimating Tools: Standard Drawing”, “Estimating Tools: Booklets” or “Estimating Tools: Lots”.

Selecting Paper using a Copy-Digital Estimate

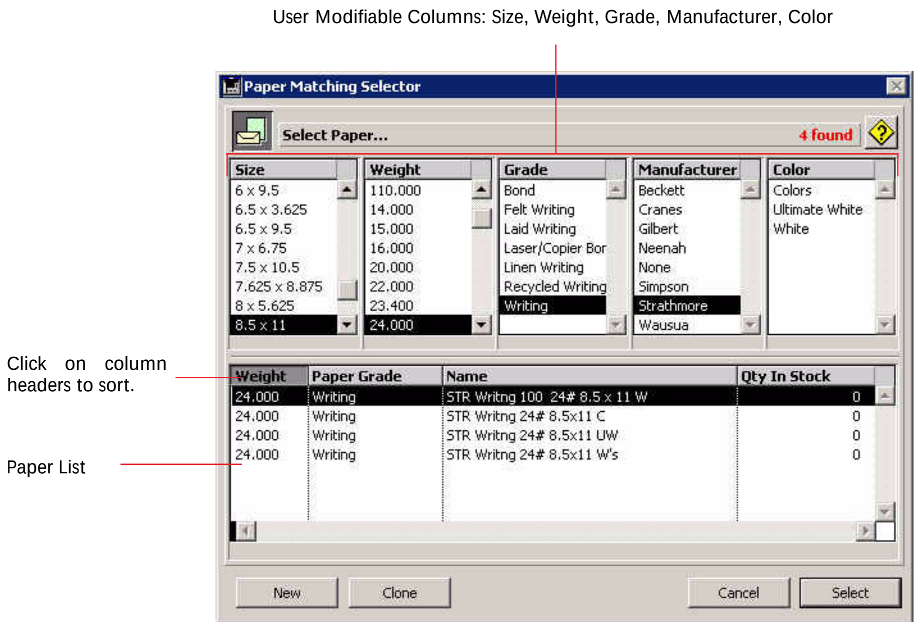
Papers can be specified as Copier Paper in the Paper Record. This will limit the number of papers that are displayed in the Paper Choice List when selecting papers when estimating Copy jobs.

1. Open or create a new Copier - Digital estimate.
2. In the Paper Section click on the Tray Tab you want to use.
3. Click the Black Triangle in the paper field.

   PrintPoint displays Paper Choice List with only Copy Papers.
4. Select the paper for the estimate.

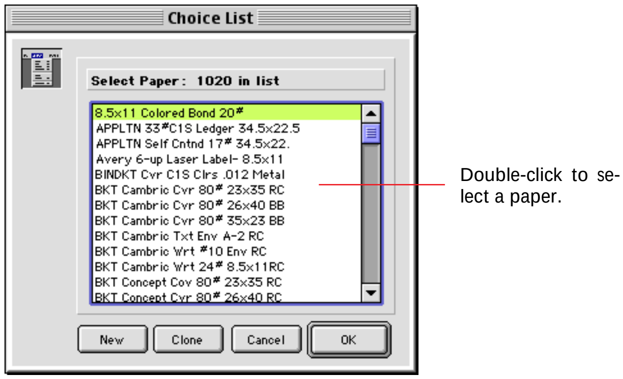
ABOUT THE SCREENS

The Paper Selector



Button / Field	Definition
Size Column	List all the available parent sheet sizes of paper in the paper database.
Weight Column	List all the available weights of paper for the selected Size.
Grade Column	List all the available grades of paper for the selected Size and Weight.
Manufacture Column	List all the available manufactures of paper for the selected Size, Weight and Grade.
Color Column	List all the available colors of paper for the selected Size, Weight, Grade and Manufactures.
Paper List	List all the available paper in the database that match the criteria from the Size, Weight, Grade, Manufacture and Color columns.
New (button)	Click to create a new paper.
Clone (button)	Click to clone the highlighted paper.

The Paper Choice List



Button / Field	Definition
Paper List	List all the available depending on the type of estimate. For offset estimates all papers will be displayed. For copy estimates, only those paper marked as Copy Paper will be displayed in the list. Standard type-ahead features are available.
New (button)	Click to create a new paper.
Clone (button)	Click to clone the highlighted paper.

Chapter 19
Estimating Tools: Ink & Run Dialog

OVERVIEW

The Ink & Run Setup Dialog is a component of the WorkSheet and ShortForm offset estimating tools used to:

- Set the inks will be used on the estimate.
- Enter the percentage of coverage for each ink if "Calculated Ink Method" is being used
- Set the Run Style (Sheetwise, Work & Turn, Work & Tumble).

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your ink preferences	File Menu > Preferences > Estimating > Ink Defaults
Set your Ink Table: Calculated Method	See the Ink Chapter: Calculated Ink Method

STEP-BY-STEP

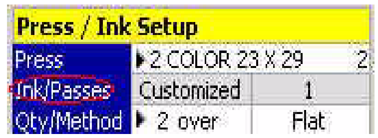
This section includes the following:

- Accessing the Ink & Run Dialog
    - From the WorkSheet
    - From the ShortForm
- Selecting Flat vs. Calculated Ink Method
- Selecting Run Style
- Selecting Inks
    - From the Ink List
    - Using the 4-Color Ink Bar Icon
    - Directly into the Ink Field
    - Adding New Inks On-The-Fly
    - Entering % of Coverage for Calculated Ink Method
    - Clearing Inks
    - Sorting Inks On-The-Fly
- Displaying the Calculated Ink Method Table

Accessing the Ink & Run Dialog

From the WorkSheet

1. Open an existing WorkSheet estimate or create a new estimate using the WorkSheet.
2. From the Press / Ink section, click on the text Ink/Passes.



From the ShortForm

1. Open an existing ShortForm estimate or create a new estimate using the ShortForm.
2. From the Press / Ink section, click on the text Ink/Passes.

Selecting Flat vs. Calculated Ink Method

1. Open an existing estimate and access the Ink & Run Setup dialog.
2. At the top of the dialog select the Calculated Method radio button.

TIP

If you would like all new estimates to begin with Calculated Ink Method:

a. Select File > Preferences > Estimating.
b. In the Ink Defaults section place a check mark in the Start New Estimates with Calculated Ink Method.

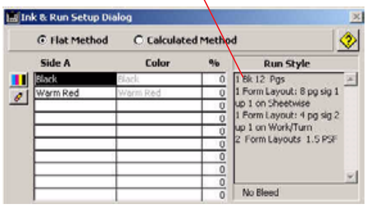
Selecting Run Style

1. Open and existing estimate and access the Ink & Run Setup dialog.
2. In the Run Style section choose the type of Run Style.

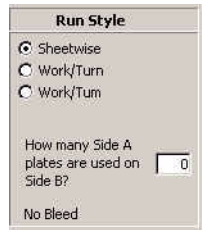
NOTE

The radio buttons for Run Style in the Ink & Run Dialog will not be displayed if you have previously customized run styles in the Booklets or Lots Custom Setup Dialogs.

Booklet / Lots View



Standard Drawing View



The radio buttons for the Run Style in the Ink & Run Dialog will not be displayed if you have previously customized run styles in the Booklets or Lots Custom Setup Dialogs

Selecting Inks

From the Ink List

1 Access the **Ink & Run Setup Dialog** (see the steps above).

2 Click on one of the inks in the **Ink List** found in the lower right quadrant of the screen.

The ink is added to the location of your "cursor. 

Using the 4-Color Ink Process Icon

If the job is a 4 color process:

1 Access the **Ink & Run Setup Dialog** (see the steps above).

2 Click on the 4-Color Ink Process button

Directly into the Ink Field

1 Access the **Ink & Run Setup Dialog** (see the steps above).

2 Type the PMS number or ink color of the ink for the job.

Adding New Inks On-The-Fly

1 Access the **Ink & Run Setup Dialog** (see the steps above).

2 Type the new PMS number or ink color into one of the available 10 "slots" for inks on Side A or Side B.

PrintPoint will display a confirm dialog asking if you want to add the new ink.

3 Click OK.

The Ink Detail Screen will be displayed.

4 Edit the new ink as necessary.

See the Ink chapter: Adding New Inks for more detail.

5 Click OK.

Entering % of Coverage for Calculated Ink Method

If you choose the Calculated Method you will need to enter a percentage of ink coverage.

1 Access the Ink & Run Setup Dialog (see the steps above).
2 In the % column, enter the percentage of ink coverage for each ink.

NOTE

If you have setup Preferences to use the Calculated Ink Method, you can set the default percentage for the process ink colors.

Clearing Inks

1 Access the Ink & Run Setup Dialog (see the steps above).
2 Click on the ink you want to remove.
3 Click on the Erase button.

The ink will be deleted from the selected inks for the job.

Sorting Inks On-The-Fly

1 Access the Ink & Run Setup Dialog dialog (see the steps above).
2 Click on the Ink List button.
PrintPoint displays the Ink Sorter Dialog.
3 Click on an ink.
4 Use the Up and/or Down buttons to sort the ink list as desired.

NOTE

Inks will appear in this list only if you have placed a check (X) in the box "Include in Estimating Ink Dialog List" in the ink record.

Displaying the Calculated Ink Method Table

You can review (but not modify) the Calculated Ink Table from the Ink & Run Dialog whenever you need to check specifications about certain inks or types of inks.

1 Access the Ink & Run Setup dialog (see the steps above).
2 Click on the Ink Table button.
PrintPoint displays the Calculated Ink Table in a review only mode.

TIP

To modify values in the Calculated Ink Table follow these steps:

a. Click on List View > Ink Table.
   PrintPoint displays the Ink Table.

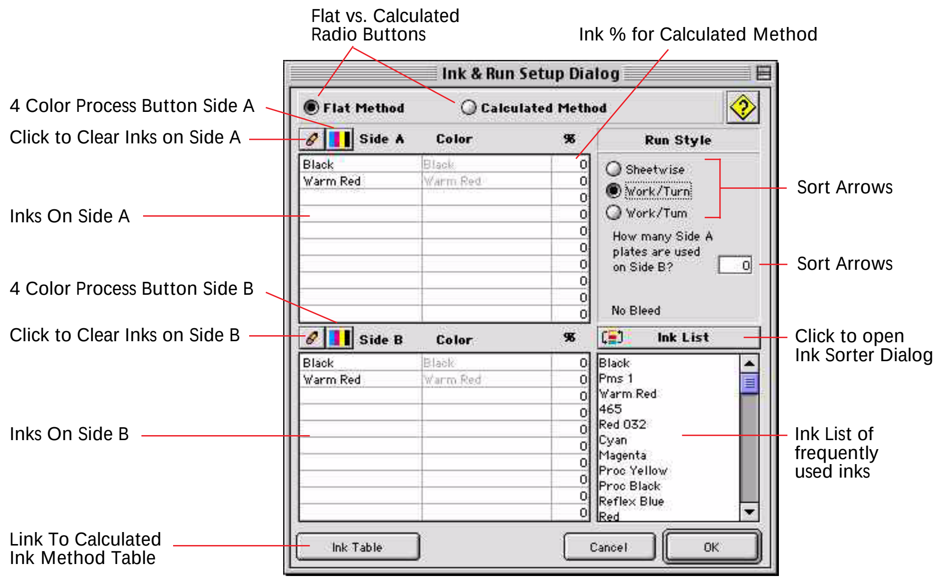
b. Edit the table as needed.

c. Click Ok.

See the Ink chapter for further detail.

ABOUT THE SCREENS

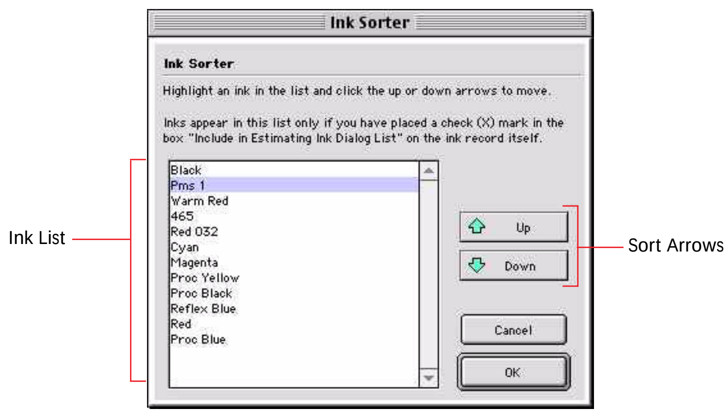
Ink & Run Setup Dialog



Button/List	Action
Flat vs. Calculated (radio buttons)	Click to choose the type of pricing method to use for the estimate.
4-Color Process (buttons)	Click to add all 4 of the process colors to the estimate (there is a button for side A and a separate button for side B).
Click to Clear (Erase) (buttons)	Click to erase all inks from the “inks On” (there is a button for side A and a separate button for side B).
Inks On Side A / B	List the inks selected for the estimate for side A and side B.
Link to Calculated Ink Method Table (button)	Click to open the Calculated Ink Table.
List of Inks Frequently Used	Shows the list of Frequently Used Inks. NOTE Inks will appear in this list only if you have placed a check (X) in the box “Include in Estimating Ink Dialog List” in the ink record.

Ink List (button)	Click to access the Ink Sorter.
Run Style Area	Used to select the Run Style. TIP The radio buttons for Run Style in the Ink & Run Dialog will not be displayed if you have previously customized run styles in the Booklets or Lots Custom Setup Dialogs. You will see the explanation of the Booklets or Lots setup instead.

Ink Sorter Dialog



Button/List	Action
Ink List	Clickable list of inks displayed in the Ink & Run Setup Dialog.
Up Arrow (button)	Moves the selected ink up in the list
Down Arrow (button)	Moves the selected ink down in the list

Chapter 20

Estimating Tools: Pre-Press

OVERVIEW

The Pre-Press subsection for the estimate is a component of all estimating forms used to:

- Select pre-press items from records stored in the Pre-Press List View
- Select pre-press items stored in the Pre-Press Table

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm, Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format
Setup your Pre-Press Table	See the chapter: Pre-Press Table
Review the Pre-Press Items chapter	See the chapter: Pre-Press Items

STEP-BY-STEP

This section includes the following topics:

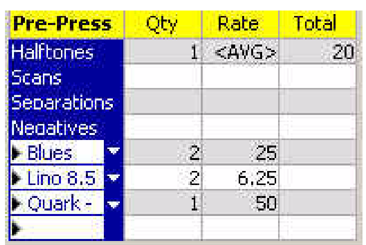
- Selecting Pre-Press from a WorkSheet Estimate
  - Selecting from the Pre-Press Table
  - Selecting from the Pre-Press Choice List
- Selecting Pre-Press from a ShortForm, Copy-Digital or Large Format Estimate
  - Selecting from the Pre-Press Table
  - Selecting from the Pre-Press Choice List
- Modifying a Pre-Press Item On-The-Fly

Selecting Pre-Press from a WorkSheet Estimate

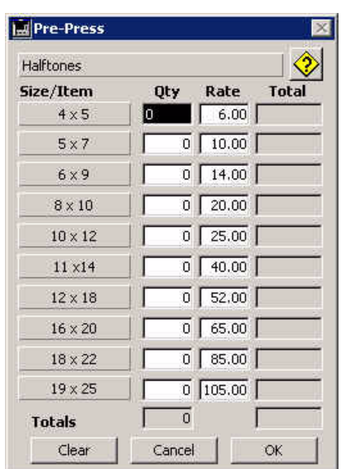
Selecting from the Pre-Press Table

1. Open or create a new WorkSheet.
2. In the Pre-Press Sub-section in the lower left corner of the screen click on one of the four Pre-Press buttons.

Pre-Press Buttons
to Pre-Press Table Items



PrintPoint displays the Pre-Press Dialog for the selected category.



3. Enter a Quantity for the desired Pre-Press item.

4 You can override the rate if necessary.

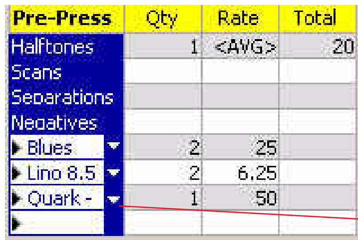
5 Click OK.

Selecting from the Pre-Press Choice List

1 Open or create a new WorkSheet.

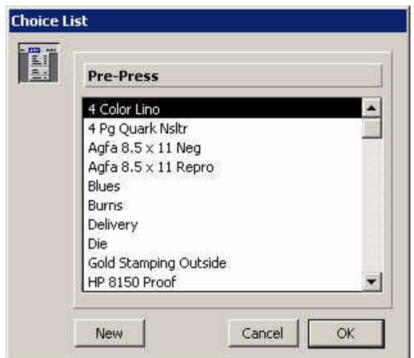
2 In the Pre-Press Section click on of the four Black Triangle buttons.

Pre-Press
Black Triangle Buttons



Drop-down menu for QuickLink
or Clearing Pre-Press Item

PrintPoint displays the Pre-Press Choice List.



3 Select the appropriate Pre-Press item.

4 Click OK.

Selecting Pre-Press from a ShortForm, Copy-Digital or Large Format Estimate

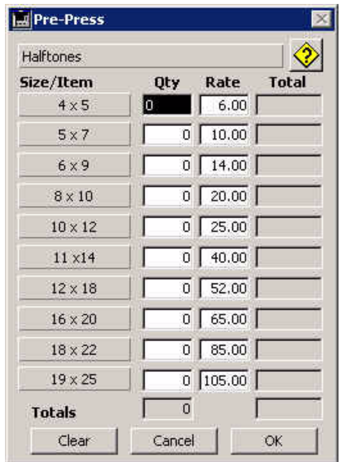
Selecting from the Pre-Press Table

1 Open or create a new ShortForm, Copy-Digital or Large Format Estimate.

2 In the Pre-Press Section click on one of the four Pre-Press buttons.

Pre-Press Buttons
to Pre-Press Table Items

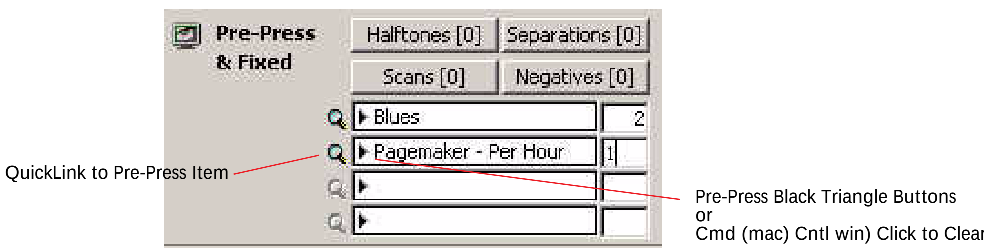
PrintPoint displays the Pre-Press Dialog for the selected category.



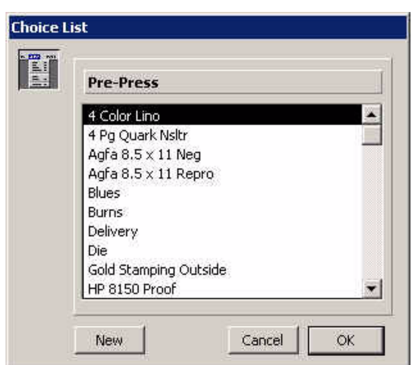
3 Enter a Quantity for the desired Pre-Press item.
4 You can override the rate if necessary.
5 Click OK.

Selecting from the Pre-Press Choice List

1 Open or create a new ShortForm, Copy-Digital or Large Format Estimate.
2 In the Pre-Press Section click on of the four Black Triangle.



PrintPoint displays the Pre-Press Choice List.

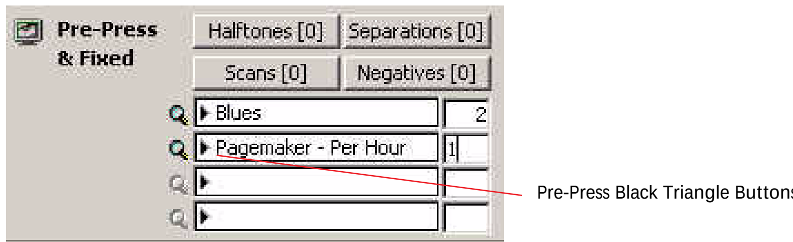


3 Select the appropriate Pre-Press item.
4 Click OK.

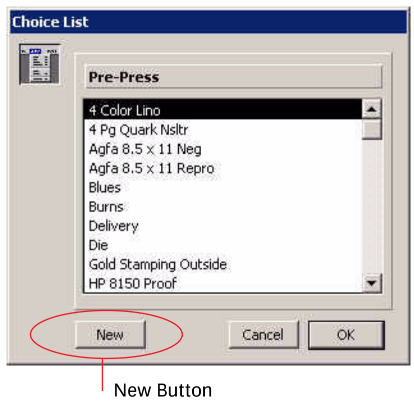
Modifying a Pre-Press Item On-The-Fly

1 Open or create a new Estimate.

2 In the Pre-Press Section click on of the four Black Triangle.



PrintPoint displays the Pre-Press Choice List.



3 Click the New button.

PrintPoint displays a “blank” new Detail Pre-Press Item screen.

4 Enter the new Pre-Press Item.

See the Pre-Press Items chapter for more information on creating a new Pre-Press Item record.

NOTE

You cannot create new Pre-Press Table items On-The-Fly. You must use the Navigator to access the Pre-Press Table.

5 Click OK to return to the estimate.

Chapter 21
Estimating Tools: Post-Press

OVERVIEW

The Post-Press subsection for the estimate is a component of all estimating forms used to:

- Select simple Post-Press Activities that require no additional input from the estimator beyond what is already setup in the Post-Press Activity
- Select Post-Press Activities that require additional information from the estimator about the job during the estimating process

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format
Set your Post-Press defaults in Preferences for the various estimating forms.	File Menu > Preferences > Post-Press Defaults
Know how to create/modify a Post-Press item that is designated as an Outside Service/Buyout.	Post-Press chapter

STEP-BY-STEP

This section includes the following topics:

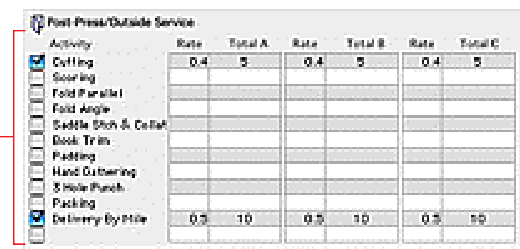
- Selecting a Post-Press Activity from an Estimate
- Select a Post-Press Activity from the Post-Press Selector Dialog

Selecting a Post-Press Activity From an Estimate

1 Open an existing or create a new estimate.

2 Find the Post-Press/Outside Service subsection of the estimate in the lower right quadrant of an estimating form.

12 possible
Post-Press Activities



3 Place a mark in the checkbox of one of the preset choices.

NOTE

If the item you selected requires additional information (i.e. “number of scores” or “number of sheets per lift/cuts per sheet”) the Post-Press Selector dialog will be displayed.

OR

4 Click directly on one of the 12 possible post-press “text labels”.

The Post-Press Selector Dialog will be displayed.

OR

5 Click on any empty post-press “place-holder”.

The Post-Press Selector Dialog will be displayed

Selecting a Post-Press Activity From the Post-Press Selector Dialog

This section includes steps for 3 example post-press activities:

- Cutting
- Scoring with customized difficulty factor and additional setup
- Custom Count

Cutting

This example is for a 23 X 35 parent sheet being cut to a 11 X 17 press sheet with a finished size of 8.5 X 11.

1 Create a new or open an existing estimate that requires cutting.

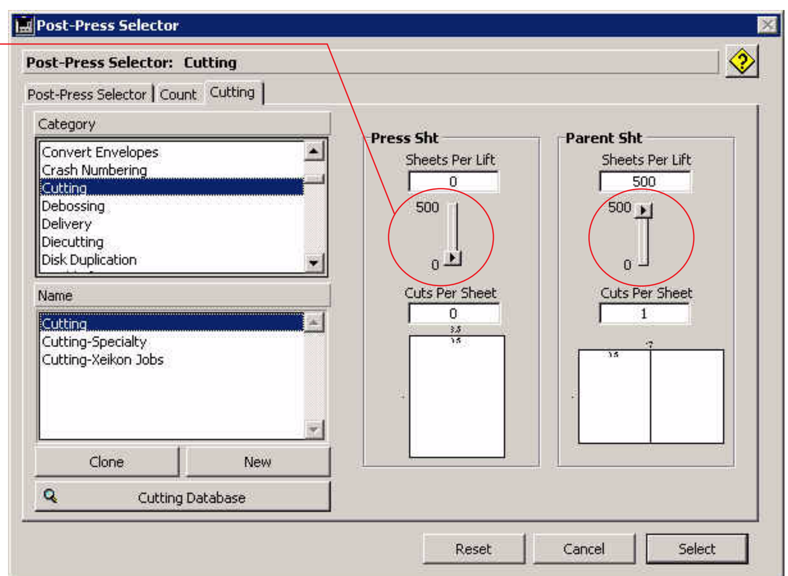
NOTE

Make sure you have created or used an estimate that has been setup using either the Booklet/Lots Dialog or Standard Drawing Dialog. You must used one of these dialogs in order to see the pictures of the Press and Parent Sheets in the Post-Press Selector: Cutting Dialog.

2 In the Post-Press section of the estimate click on the White Checkbox next to Cutting.

PrintPoint displays the Post-Press Selector: Cutting Dialog.

Default Sheet Per Lift stored with each paper record.



3 Enter the number of Sheets Per Lift for the Press Sht and Parent Sht.

NOTE
This is the number of sheets your cutter can handle with one lift.

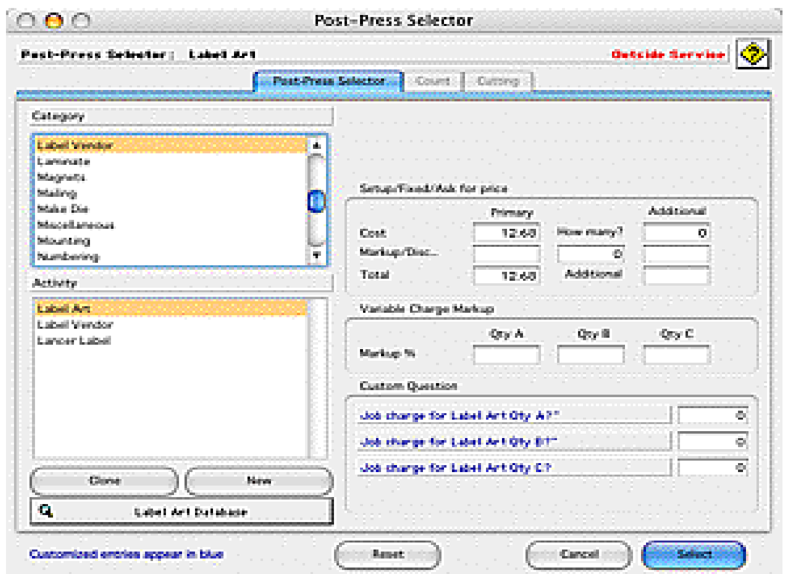
4 Enter the number of Cuts Per Sheet for the Press Sht and Parent Sht.
5 Click Select.

Scoring with customized difficulty factor and additional setup

This example is for scoring a piece that requires multiple scoring setups and added difficulty.

1 Create a new or open an existing estimate that requires scoring.
2 In the Post-Press section of the estimate click on the White Checkbox next to Scoring.

PrintPoint displays the Post-Press Selector: Scoring Dialog.



3 In the Difficulty Factor section select the appropriate difficulty factor.

NOTE
If you want the difficulty factor to apply to waste and setup you will need to check the appropriate box.

4 In the Setup/Fixed/Ask for price section enter the number of additional setups in the How Many Additional box.

5 Enter the cost for each additional setup in the Additional box.

6 Click Select.

Custom Count

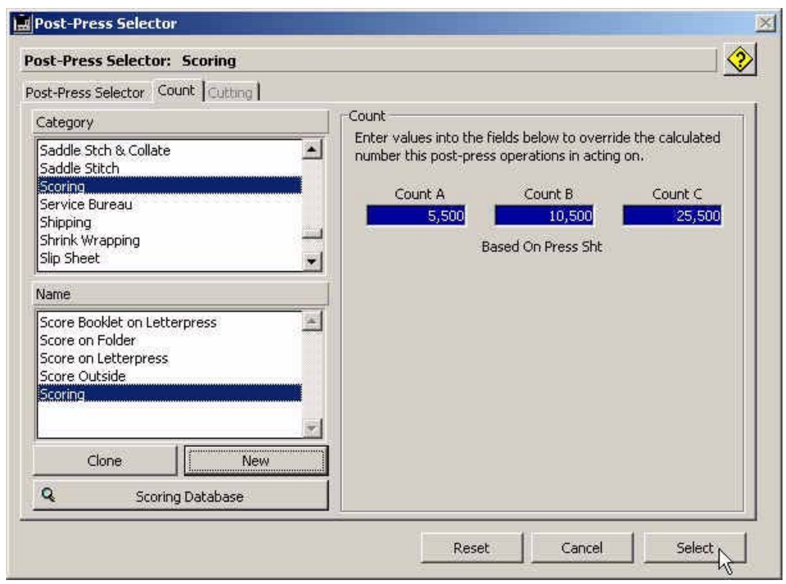
This example is for a job that requires scoring but the customer only wants part of the job to be scored. They want a price on 11000, 21,000 and 56,000 pieces but only want half of the job to be scored.

1 Create a new or open an existing estimate that requires scoring.

2 In the Post-Press subsection of the estimate click on the White Checkbox next to Scoring.

PrintPoint displays the Post-Press Selector: Scoring Dialog.

3 Click on the Count tab.

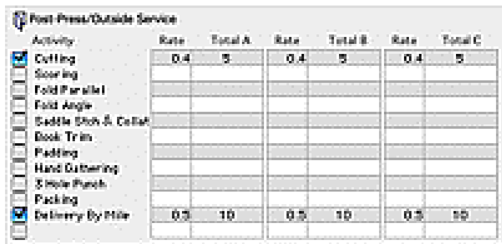


4 Enter the number of pieces to be scored.

5 Click Select.

About the Screens

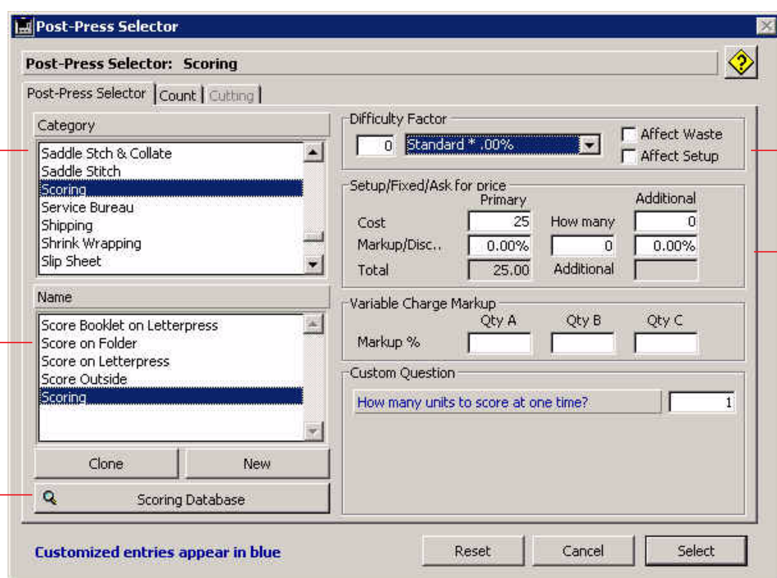
Post-Press Subsection on Estimate Screens



Column / Button / Option	Definition
Post-Press Activities	Used to select the Post-Press activity desired from the estimate screens.

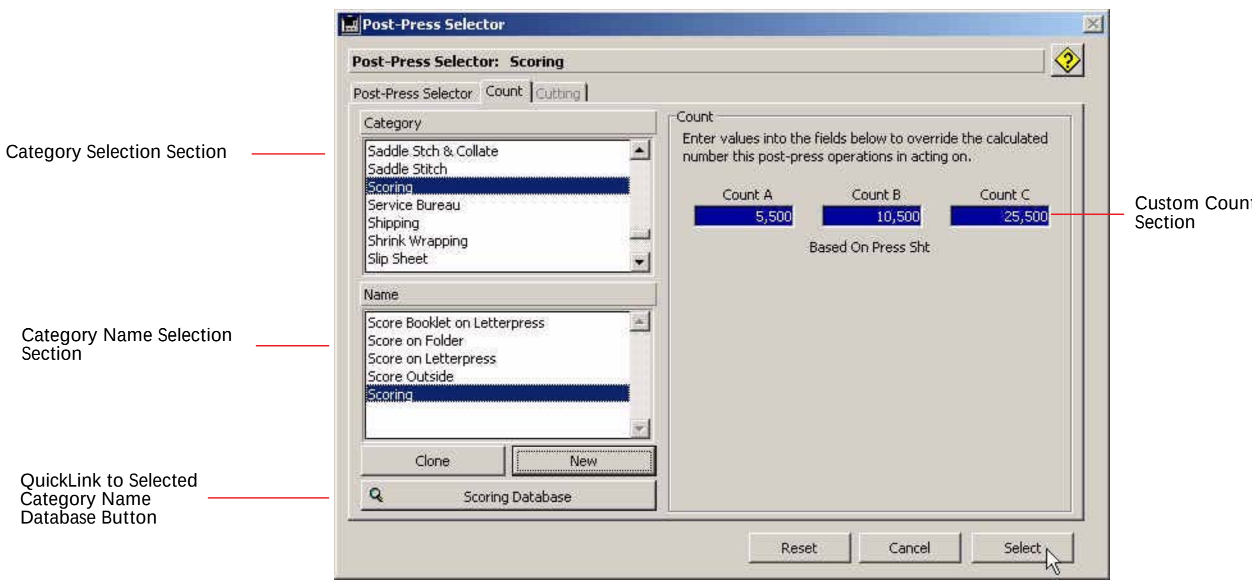
Post-Press Selector

Post-Press Selector General Tab



Column / Button / Option	Definition
Category Selection Section	Used to select the Post-Press category.
Category Name Selection Section	Used to select the Post-Press activity with-in the Post-Press category.
QuickLink to Selected Category Name Database (button)	Opens the selected database. For more information on the Post-Press Category Database, see the chapter “Post-Press”.
Difficulty Factor Section	Used to add a percentage of difficulty to the activity and provides option of adding that difficulty to the waste and Setup.
Setup/Fixed/Ask for Price Section	Provides area to add additional setups and related cost for those setups.

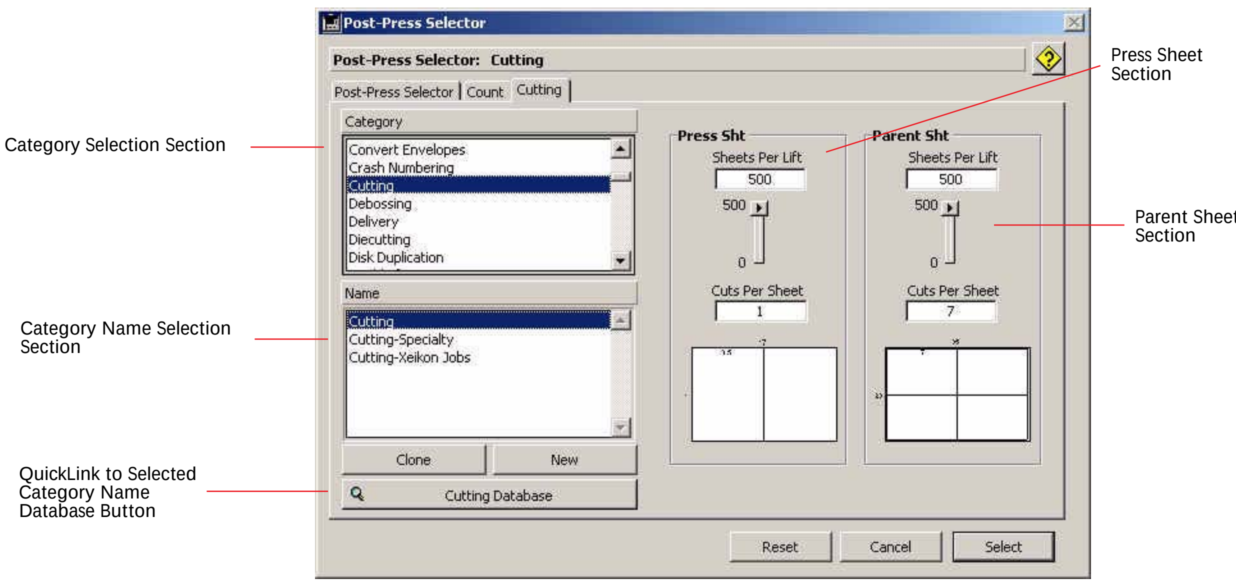
Post-Press Selector Count Tab



Column / Button / Option	Definition
Category Selection Section	Used to select the Post-Press category.
Category Name Selection Section	Used to select the Post-Press activity with-in the Post-Press category.

Column / Button / Option	Definition
QuickLink to Selected Category Name Database (button)	Opens the selected database. For more information on the Post-Press Category Database, see the chapter “Post-Press”.
Custom Count Section	Used to enter the quantity for which the Post-Press selection is to be applied to.

Post-Press Selector Cutting Tab



Column / Button / Option	Definition
Category Selection Section	Used to select the Post-Press category.
Category Name Selection Section	Used to select the Post-Press activity with-in the Post-Press category.
QuickLink to Selected Category Name Database (button)	Opens the selected database. For more information on the Post-Press Category Database, see the chapter “Post-Press”.
Press Sheet Section	Used to enter the number of cuts per Press Sheet and how many sheets can be cut per lift.
Parent Sheet Section	Used to enter the number of cuts per Parent Sheet and how many sheets can be cut per lift.

Chapter 22

Estimating Tools: Outside Services

OVERVIEW

Due to the flexibility of PrintPoint's post-press database and the common situation between variable quantities and buyouts, the Post-Press/Outside Service subsection of all estimate forms is used for selecting Outside Services.

TIP

You can also used the Pre-press/Fixed area for entering an Outside Service if the cost does not vary with quantity, but this method has less "linkage" to vendors and to the future PrintPoint Purchase Order module.

An Outside Service can be any kind of an outsourced activity, not limited to finishing/bindery/post-press. For example, you could put "Outsourced Printing" in the Post-Press/Outside Service subsection if you are not doing the printing yourself.

The Post-Press Selector is the main tool used to select and customize Outside Services.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format
Set your Post-Press defaults in Preferences for the various estimating forms.	File Menu > Preferences > Post-Press Defaults
Know how to create/modify a Post-Press item that is designated as an Outside Service/Buyout.	Post-Press chapter

STEP-BY-STEP

This section includes the following topics:

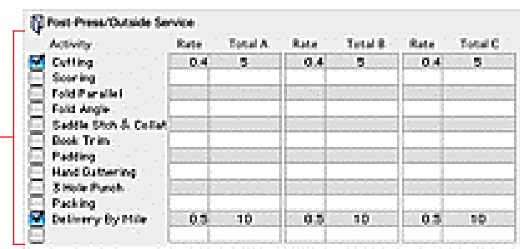
- Selecting an Outside Service from an Estimate
- Select an Outside Service from the Post-Press Selector Dialog

Selecting an Outside Service From an Estimate

1 Open an existing or create a new estimate.

2 Find the Post-Press/Outside Service subsection of the estimate in the lower right quadrant of an estimating form.

Post-Press/Outside Service Subsection (Worksheet)



12 possible Post-Press/Outside Service Activities

3 Place a mark in the checkbox of one of the preset choices.

NOTE

If the item you selected requires additional information (i.e. "number of scores" or answer to a questions such as "What is the Job Charge for Quantity A, B, C?") the Post-Press Selector dialog will be displayed.

OR

4 Click directly on one of the 12 possible post-press/outside service "text labels".

The Post-Press Selector Dialog will be displayed.

OR

5 Click on any empty post-press/outside service "place-holder".

The Post-Press Selector Dialog will be displayed

Selecting an Outside Service From the Post-Press Selector Dialog

Once you have accessed the Post-Press Selector dialog follow these steps to select the Outside Service.

For more detailed information on setting up the Post-Press/Outside service section see the chapter "Post-Press".

1 From the Category List select a category that includes the outside services.

2 Select the Outside Service item from the Activity List.

3 Enter the charge in the Custom Question field for each quantity.

The custom question can be customized for your needs. For more information see the chapter "Post-Press".

4 Enter a Variable Charge Markup if needed.

This is a markup that will be added to this service that is in addition to the overall estimate markup.

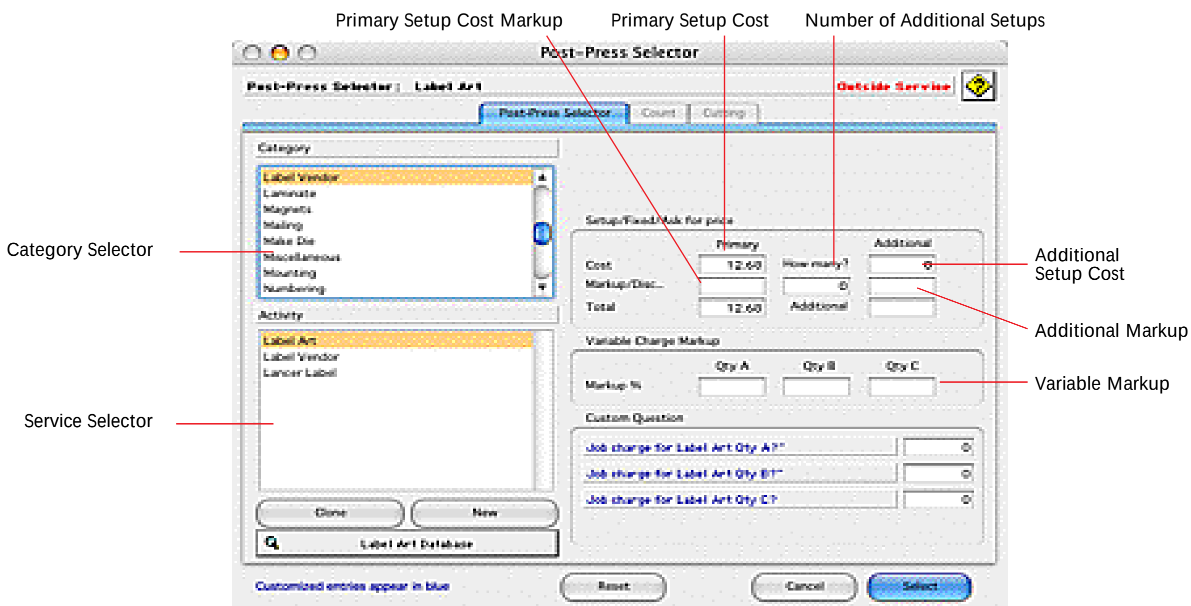
5 Enter any additional cost for setup and any additional markup to that setup.

ABOUT THE SCREENS

Post-Press Selector

Outside Services are selected directly from the estimate form if they have not additional input information during the estimating process.

If the Outside Service requires input from the estimator (such as “What is the Job Charge” for a selected quantity, then the Post-Press Selector dialog will be displayed with various options for user input.



Button / Option	Definition
Service Selector	Used to Select the specific service within the category.
Category Selector	The area where you select the Outside Service Category.
Primary Setup Cost Markup	Additional markup to be applied to the primary setup cost.
Primary Setups Cost	Used to determine how much you want to charge for each additional setup
Number of Additional Setups	Used to add cost for additional setups to the estimate total
Additional Setup Cost	Cost for each additional setup.
Additional Markup	Markup to be applied to each additional setup.

Button / Option	Definition
Variable Markup	Used to apply additional markups to the specified service based on the specific estimate.
Custom Question Section	Used to determine the cost per quantity for the outside service.
Parent Sht Sheets Per Lift	Used to specify how many parent sheets will be cut per lift
Parent Sht Cuts Per Sheet	Used to specify how many cuts will be needed per parent sheet

Chapter 23

Estimating Tools: Calc Method & Comp vs. Custom Dialog

OVERVIEW

The Calc Method & Comp vs. Custom Dialog are tools of the estimating module that allows you to review, set and reset the “customized” values for various elements of a estimate.

This tool is varies in function between the offset modules of the WorkSheet and ShortForm and the Copy/Digital and Large Format modules.

The WorkSheet and ShortForm Calc Method button gives you access to reset individual sub-sections of an estimate and to the Comp vs. Custom Dialog to control each and every element that has been customized.

The Copy and Large Format Customized button allows only the ability to “Reset the Entire Estimate back to computer generated” state.

TIP

For all estimate forms, customized values are set to inverted colors on the screen and the Calc Method button is highlighted in red.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following:

- Calc Method Drop-down Menu and Comp Vs. Custom Dialog for the WorkSheet and ShortForm
- Calc Method Button on Copy and Large Format Estimates

Calc Method Drop-down Menu and Comp Vs. Custom Dialog

Calc Method Drop-down Menu

Whenever you customize a rate or quantity on the WorkSheet or ShortForm, the Calc Method Drop-down menu changes from “Computer Generated” to “Customized”. You then have the opportunity to reset values to computer generated calculations by one of two methods:

- Select a menu item from the Calc Method Drop-down menu
- Select individual items by opening the Comp vs. Custom Dialog from the Calc Method Drop-down menu.

From the WorkSheet

1. From the center of the WorkSheet click on the Calc Method Drop-down menu.
2. Select a Sub-Totals menu item such as Reset Paper Totals or Reset Ink Totals to reset the sub-total for that section if it has been customized.

   OR
3. Select a Sub-Section menu item such as Post-Press or Pre-Press to reset that entire subsection of the estimate.

From the ShortForm

1. Click on the X-Ray > button in the upper right corner of the ShortForm Header.
2. From the left center quadrant click on the Calc Method Drop-down menu.
3. Select a Sub-Totals menu item such as Reset Paper Totals or Reset Ink Totals to reset the sub-total for that section if it has been customized.

   OR
4. Select a Sub-Section menu item such as Post-Press or Pre-Press to reset that entire subsection of the estimate.

Accessing the Comp Vs. Custom Dialog

From the WorkSheet

1. From the center of the WorkSheet click on the Calc Method Drop-down menu.
2. Select Comp Vs. Custom Dialog (the 3rd item) from the list.

From the ShortForm

1. Click on the X-Ray > button in the upper right corner of the ShortForm Header.

   The X-Ray page of the ShortForm is displayed.

2. From the left center quadrant click on the Calc Method Drop-down menu.
3. Select Comp Vs. Custom Dialog (the 3rd item) from the list.

How the Comp Vs. Custom Dialog Works

When you customize a field's value on the WorkSheet or ShortForm (including customizations to the Post-Press Selector, the fields color will be inverted and saved for future reference. When you open the Comp Vs. Custom Dialog, any field that is "checked" has been customized. You can then select from the list which items to keep as customized and which to reset to computer generated. Or, you can use the Clear All or Set All buttons to adjust all fields at once.

Locking Values for Fields

One of the lesser used features of the Comp Vs. Custom Dialog is the ability to open a non-customized estimate and "lock" some or all fields in place so that they will retain these "virtual customized" values no matter what changes you make to the estimate...now or in the future...including estimates that are cloned from the current estimate.

1. Select Comp Vs. Custom from the Calc Method Drop-down menu.

   The Comp Vs. Custom Dialog will be displayed.

2. To lock all fields, click the Set All button.
3. To lock individual fields, select the checkbox for the desired field.
4. Click OK to save your settings.

Automatic Display during On-The-Fly activities

If you make a change a database item such as customer, press, paper, etc., that may have had a custom entry on estimate, a the Comp Vs. Custom Dialog will automatically be displayed warning you that you have customized entries in place. You then have the opportunity to reset or leave as is any of the setting displayed in the dialog.

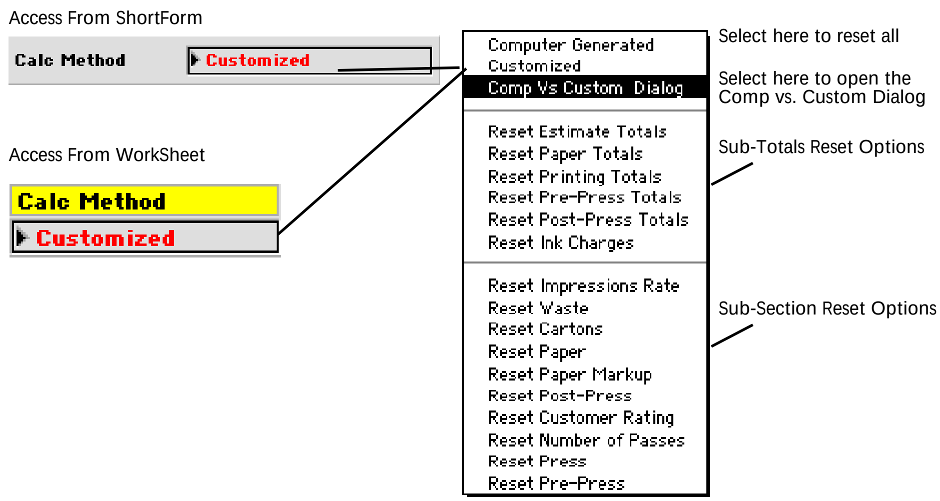
Calc Method Button for Copy and Large Format Estimates

Whenever you customize a rate or quantity on the Copy Estimate or Large Format Estimate, the Calc Method Button menu changes from "Computer Generated" to "Customized". You then have the opportunity to reset values to computer generated calculations by clicking on the button.

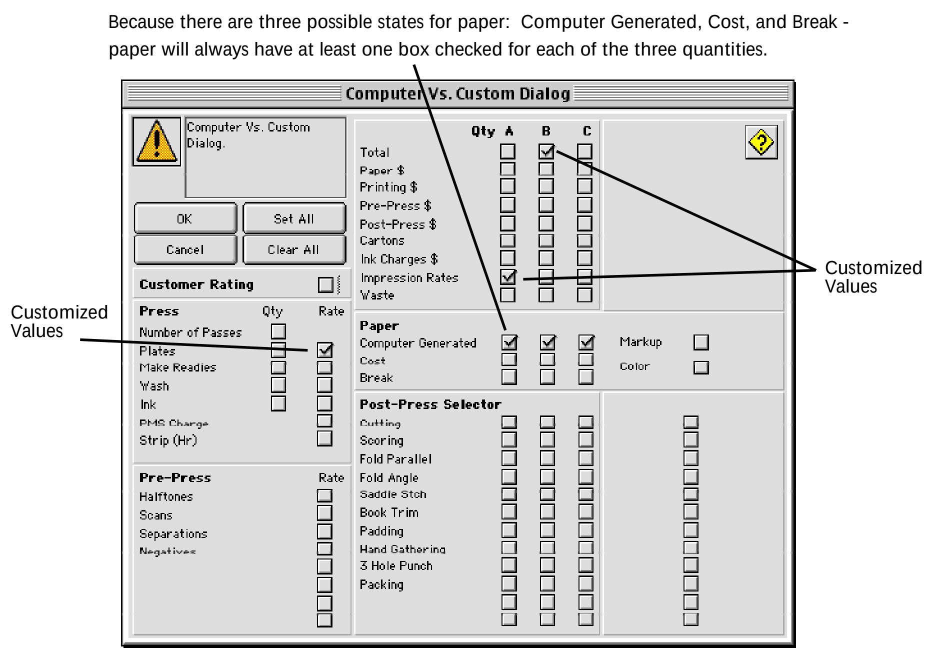
About The Screens

The Comp Vs. Custom Dialog is available from the WorkSheet directly in the middle of the screen. It is available on the X-Ray page of the ShortForm on the left hand side.

Calc Method Drop-Down Menu for WorkSheet and ShortForm

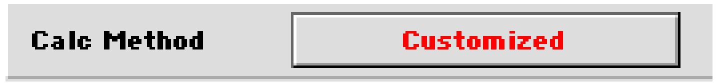


Comp Vs. Custom Dialog



Calc Method Customized Button

This style of Calc Method button is found on the Copy and Large Format Estimates. From this button you can only reset the value of the estimate to Computer Generated.



Chapter 24

Estimating Tools: Description Dialog

OVERVIEW

The Description Dialog is a key component of estimating, used by the WorkSheet, ShortForm, Copy Estimate and Large Format Estimate. From this dialog you can update and customize descriptions for the Job Ticket, Invoice, Quote and Shipping Reports.

TIP

It is highly recommended that the estimator make these customizations at the estimating stage, setting up the workflow of descriptions for later stages of quoting, invoicing and production.

Before You Begin

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm, Estimating Tools: WorkSheet, Estimating Tools: Copy-Digital, Estimating Tools: Large Format Estimating Tools: Pre-Press Only
Set your Preferences for Job Description.	File Menu > Preferences > Job Description

STEP-BY-STEP

This section includes the following topics:

- Accessing the Description Dialog
- Updating the Default Job Description
- Quote and Invoice Description
- Shipping Description

Accessing the Description Dialog

1. Click on the Desc button (found on the button bar on the right side of the screen) from any of the estimate forms (WorkSheet, ShortForm, Copy, Large Format, etc.)

   The Description Dialog is displayed.

Updating the Default Job Description

It is very common that you will make many changes to elements of an estimate during the creation a new estimate, reviewing an existing estimate or working with a clone.

Once you have calculated an estimate or saved it, the Default Job Description will be created based on the settings in File Menu > Preferences > Job Description

CAUTION

From that point forward, PrintPoint will not automatically update the Job Description, you must do this yourself.

1. Click on the Update Description button (located on the bottom left of the window).
2. When you have made all changes to your descriptions, click OK to save the modifications.

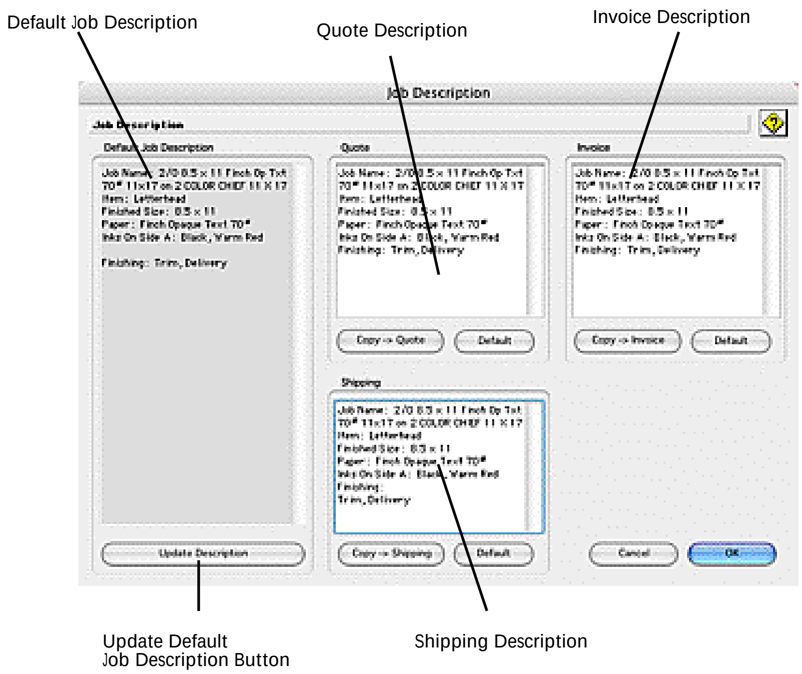
Quote & Inv. Description

1. Modify the description for Quotes & Invoices as necessary by either typing in a new description or copying the Default Job Description using the Copy button (see About The Screen below).
2. When you have made all changes to your descriptions, click OK to save the modifications.

Shipping Description

1. Modify the description for Shipping as necessary by either typing in a new description or copying the Default Job Description using the Copy button (see About The Screen below).
2. When you have made all changes to your descriptions, click OK to save the modifications.

About The Screens



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Column / Button / Option	Definition
Default Job Description (text block)	The default description for this job created by PrintPoint based on the Job Description set-up in the File Menu > Preferences > Job Description.
Update Description (button)	Used to update the default job description when any aspect of the job has been changed.
Copy (button) Quote & Inv. Description	Used to copy the Default Job Description into the Quote & Inv. Description text block.
Quote & Inv. Description (text block)	The job description that will appear on CombiQuotes and Invoices.

Column / Button / Option	Definition
Copy (button) Shipping Description	Used to copy the Default Job Description into the Shipping window.
Shipping Description (text block)	The description for Packing Slip and Delivery Receipts. This description will be copied to the Shipping Tab of the Electronic Job Ticket (Job Detail Screen) and then to the Shipping Module.

Chapter 25
Estimating Tools: Notes Dialog

OVERVIEW

The Notes Dialog is a key component of estimating, used by the WorkSheet, ShortForm, Copy Estimate and Large Format Estimate. From this dialog you can:

- Enter Estimate Notes.
- Enter Job Ticket Notes.
- Review Estimate History
- Review the Last Job Number if the current estimate is a clone of an existing job.
- Enter a custom paper or paper color to appear on your Job Ticket and Paper Purchase Order.

TIP

Once you have entered anything in the Notes Dialog, the Notes button text "Note" on the estimating forms will appear in red.

Before You Begin

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following topics:

- Accessing the Notes Dialog
- Creating/Modifying the Estimate Notes
- Creating/Modifying the Job Ticket Notes
- Reviewing the Estimate History
- Last Job Number
- Paper - Color Custom Entries

Accessing the Notes Dialog

1 Click on the Notes button located on right side of the Estimate window.

PrintPoint opens the Notes dialog.

Creating/Modifying the Estimate Notes

1. In the Estimate Notes section type any notes that pertain to this estimate.
2. To erase any existing notes use the Erase button.
3. To copy the Estimate Notes to the Job Notes section use the Copy Down button.

Creating/Modifying the Job Notes

1. In the Job Notes section type any notes that pertain to this job.
2. To erase any existing notes use the Erase button.
3. To copy the Job Notes to the Estimate Notes section use the Copy Up button.

Viewing the Estimate History

The Estimate History section is a log that keeps track of what happened to the estimate and who performed those actions. It tracks the following actions:

a. Saving the estimate.
b. Converting to a job.
c. Clone status.
d. Reprint status.

NOTE

The entries into this are a automatically done by PrintPoint but changes can be made to the History area by highlighting the existing text and retyping or you can delete the entire contents by using the History Erase button. See about the screen.

Last Job Number

When a Job is cloned or Estimate that had been turned into a Job is cloned, this area will show the previous Job Number making it easy to find and review any previous notes.

Paper - Color Custom Entries

Many users prefer not to enter every paper into their database with regards to color, size, etc. This field in the Notes Dialog can be used to enter custom colors and papers for individual estimates without having to enter the paper in the paper database.

Example — If you enter 24# Hammermill Bond 8.5 x 11 Colors as the name of the paper in the database, you can then just enter “Blue” as the color and have that print on your Estimate, Job Ticket and Paper Purchase Order.

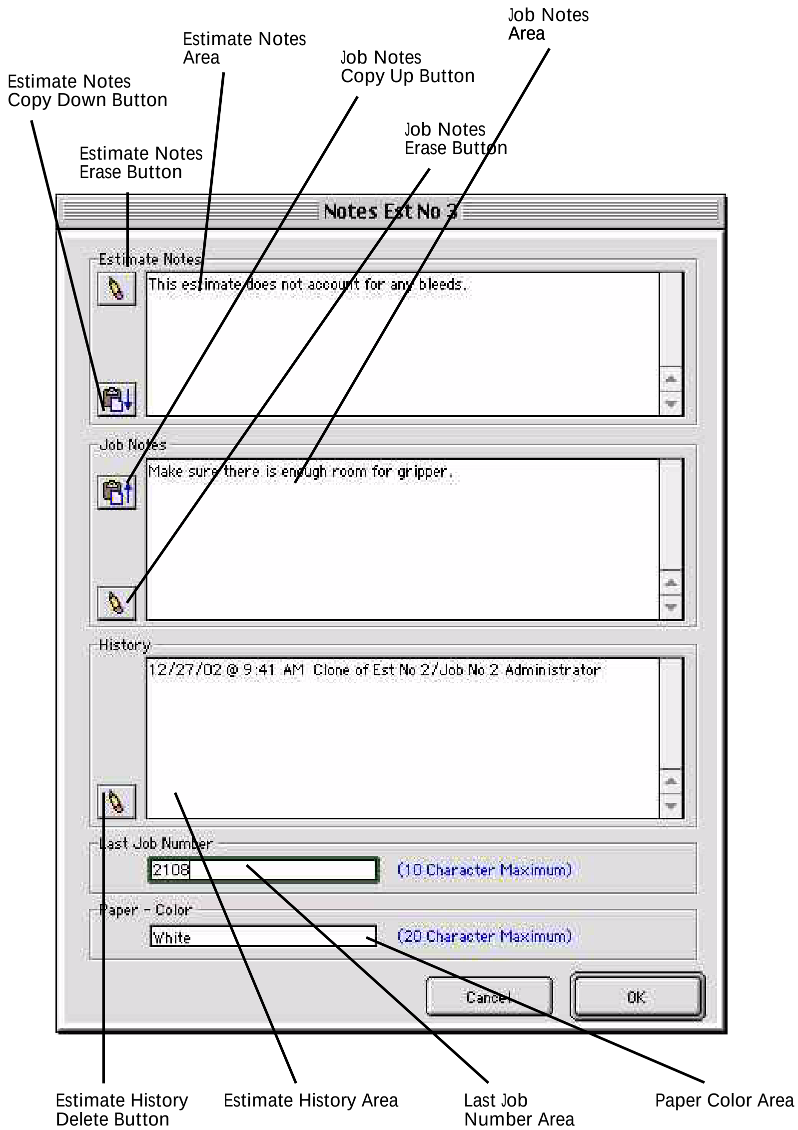
NOTE

To have this custom paper field appear on the Estimate printout or Job Ticket, you must use a SuperReport that already has it added, or create a SuperReport with this field.

This field is already available on the built-in Paper Purchase Order.

ABOUT THE SCREENS

Notes Dialog



Button / Option	Definition
Estimate Notes Erase (button)	Used to delete all text in the Estimate Notes Area.
Estimate Notes Copy Down (button)	Used to copy all of the notes in the Estimate Notes Area to the Job Notes Area.

Button / Option	Definition
Estimate Notes Area	Used to keep notes special notes necessary for the estimate.
Job Notes Erase (button)	Used to delete all text in the Job Notes Area.
Job Notes Copy Up (button)	Used to copy all of the notes in the Job Notes Area to the Estimate Notes Area.
Job Notes Area	Used to keep notes special notes necessary for the Job.
Estimate History Delete (button)	Used to delete all text in the Estimate History Area.
Job History Area	Created and updated by PrintPoint whenever a user enters, makes changes and saves the estimate.
Last Job Number Area	When a Job is cloned or Estimate that had been turned into a Job is cloned, this area will show the previous Job Number making it easy to find and review any previous notes.
Paper-Color Area	Used to enter custom papers or paper color for this estimate.

Chapter 26

Estimating Tools: Profit & Quantity Dialog

OVERVIEW

The Profit & Quantity Dialog is an estimating tool that allows review and adjust your estimates in the following ways:

- Markup or discount the estimated price of a job using percentages or by directly entering a desired profit for all three quantities of the estimate.
- Review the price per piece.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following:

- Accessing the Profit & Quantity Dialog
- Adjusting the Local Markup/Discount or Profit.

Accessing the Profit & Quantity Dialog

1. If working in a worksheet Click on the letters Qty located on right half of the estimate window just under the Totals section.

   OR

2. If working in a shortform click on the green $.

   PrintPoint opens the Profit & Quantity Dialog.

Adjusting the Local Markup/Discount or Profit

There are only two areas that can be modified in the Profit & Quantity Review dialog. The Local Markup/Disc. and the Profit/Loss areas.

Adjusting the Local Markup/Discount Fields

1. Enter a positive or negative number in the Local Markup/Disc. area to change the total cost based on a percentage. This will change the Adjusted Total area and the Profit/Loss area.

   TIP

   The customized values will have inverted colors.

2. Click the Save button
3. The Adjusted Total field for any quantity on your estimating form will display a green background if you have marked up the estimate and a red background if you have discounted the estimate.

Adjusting Profit & Loss Fields

1. Enter a monetary value for the amount of Profit/Loss for the estimate to be in the Profit/Loss area. This will change the Adjusted Total area and the Local Markup/Disc area of the Profit & Quantity Review dialog.

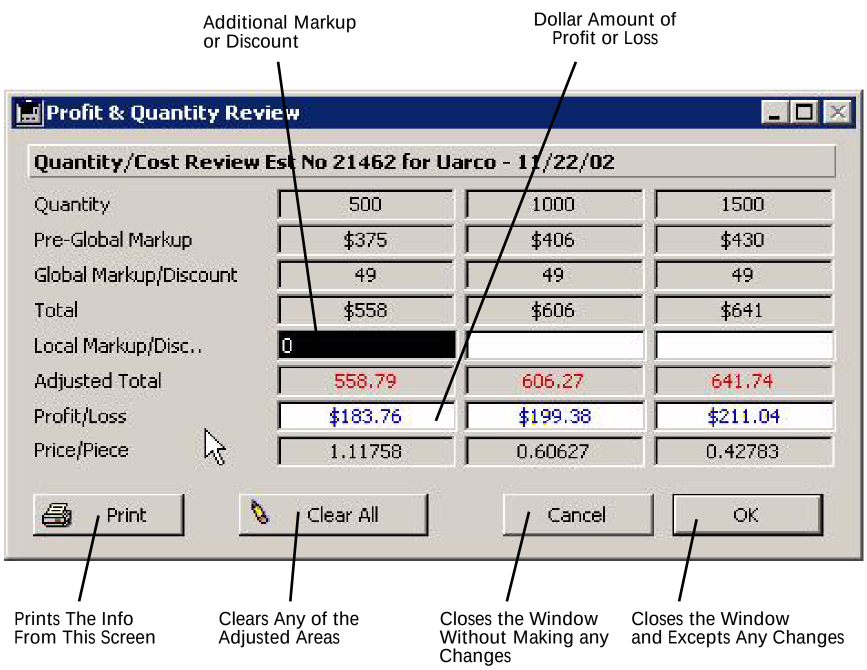
   TIP

   The customized values will have inverted colors.

2 Click the Save button

3 The Adjusted Total field for any quantity on your estimating form will display a green background if you have marked up the estimate and a red background if you have discounted the estimate.

ABOUT THE SCREENS



Button / Option	Definition
Quantity	Denotes the quantity this estimate.
Pre-Global Markup	Denotes the dollar total of this estimate prior to any markup
Global Markup/ Discount	Denotes the percentage of markup for this estimate.
Total	Denotes the dollar total of this estimate prior to any pricing modifications.
Local Markup/Disc.	Denotes any additional markup or discount applied to this estimate. This section is modifiable from this screen.
Adjusted Total	Denotes the dollar total of this estimate after Local Markup/Disc. has been applied.
Profit/Loss	Denotes the dollar amount of profit or loss of this estimate.
Price/Piece	Denotes the final dollar amount of this estimate based on a per piece basis.
Print (button)	Prints the list information from this window.

Button / Option	Definition
Clear All (button)	Resets any adjust areas in this window to their defaults.
Cancel (button)	Closes the window without applying any changes.
OK (button)	Closes the window and applies the changes,

Chapter 27
Estimating Tools: Shipping

OVERVIEW

Shipping is one of PrintPoint's key features to assist in the ease of getting a finished product to your customers. The shipping information can be setup during estimating and automatically transfers to the shipping module.

This chapter describes the following:

- Entering Shipping Information in each of the Estimate Types:
  - ShortForm
  - WorkSheet
  - Copy/Digital
  - Large Format
  - Pre-Press Only
- Entering a Shipping Description from the Estimate

BEFORE YOU BEGIN

You should...	Where this information is found...
Review the Shipping chapter to understand Shipping Preferences, Customer Shipping Defaults, Job shipping and the actual Shipping Module itself.	Later in this manual.
Setup Job Description Preference for Shippings	File > Preferences > Job Desciption
Know how to create an Estimate.	Estimating Tools: ShortForm, Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format Estimating Tools: Pre-Press Only

STEP-BY-STEP

Shipping Information for the all estimate types is entered the same way. The access and appearance for each of the estimate types may vary as described in the steps below.

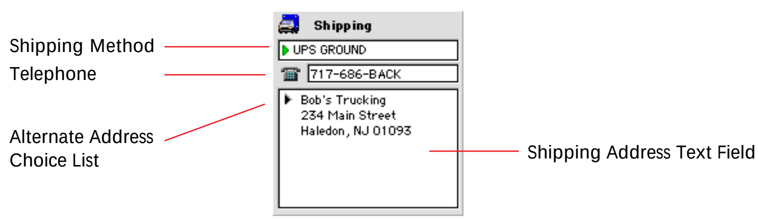
This section includes the shipping tools at the estimate level:

- The ShortForm & Large Format Estimate
- The WorkSheet Estimate
- The Copy / Digital and Pre-Press Only Estimate
- Entering Shipping Notes

ShortForm & Large Format

1 Open a ShortForm or Large Format Estimate.

2 Locate the Shipping Subsection.



3 Click the Green Arrow in the shipping section to select from the Shipping Method Choice List or type an entry directly into the field.

4 You can override the telephone number by typing in a number in the Telephone field next to the Telephone Icon.

NOTE

Various default shipping methods have default shipping addresses information attached to each of them. For instance, if you select SPECIAL INSTRUCTIONS from the Shipping Method Choice List, the Shipping Address Text Field will be filled with the words “Special Instructions”. You are expected to then enter those special instructions.

5 You can change the Shipping Address for this estimate by clicking on the Black Arrow and selecting an Alternate Shipping location from the list or by simply typing a new address into the address field.

For more information on setting up Alternate Shipping locations for a customer see the chapter on “Customers”.

The Worksheet Estimate

1 Open a WorkSheet Estimate.

2 Click the “Truck” button  to see the Shipping Information for this estimate.

PrintPoint displays the default Shipping Information for the customer.

3 Click the Green Arrow in the shipping section to select from the Shipping Method Choice List or type an entry directly into the field.

4 You can override the telephone number by typing in a information in the field provided.

NOTE

Various default shipping methods have default shipping addresses information attached to each of them. For instance, if you select SPECIAL INSTRUCTIONS from the Shipping Method Choice List, the Shipping Address Text Field will be filled with the words “Special Instructions”. You are expected to then enter those special instructions.

For more information on setting up Alternate Shipping locations for a customer see the chapter on “Customers”.

The Copy /Digital Estimate and Pre-Press Only

1 Click the "Truck" button  to see the Shipping Information for these estimate.

PrintPoint displays the default Shipping Information for the customer.

2 Click the Green Arrow to select from the Shipping Method choice list.

TIP

You can override the telephone number by clicking next to the Telephone Icon.

TIP

You can change the Shipping Address for this estimate by clicking on the Black Arrow and selecting an alternate shipping location from the list or by simply typing a new address into the address field.

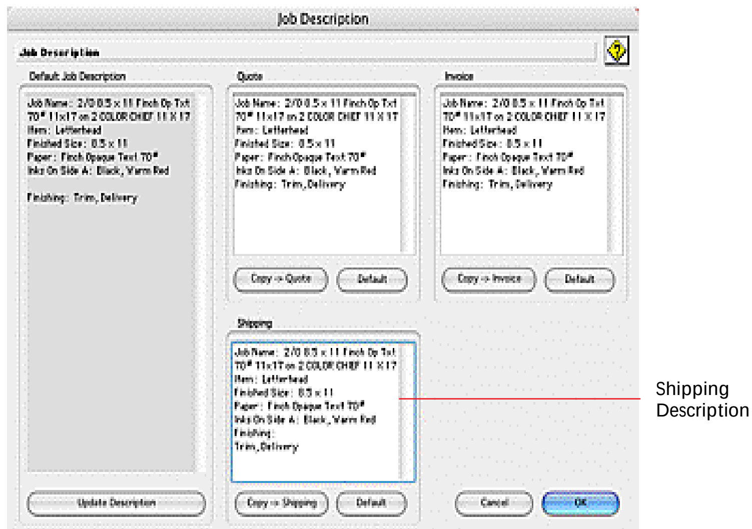
For more information on setting up Alternate Shipping locations for a customer see the chapter on "Customers".

Entering Shipping Notes from the Estimate

From each of the estimate screens you can add shipping notes by using the following technique:

1. From the estimate click on the Desc button.

   PrintPoint displays the Job Description Dialog.



2. Enter a shipping description by typing in the Shipping field

   OR

3. You can click the Copy button to copy the Default Job Description into the Shipping text box

   OR

4. Click the Default button to copy the default description (the one you setup in preferences) into the box.

NOTE

The Estimate Shipping Description will flow to the Job Shipping Description and eventually to the Shipping Description for the Shipping Module.

Chapter 28

Estimating Tools: Price Lists

OVERVIEW

PrintPoint. allows you to generate Price Lists from existing or newly created estimates and maintain books of your price lists.

NOTE

You cannot create a price list directly from the Price List List View.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following topics:

- Generating a Price List
- Categorizing Price Lists
- Printing Price Lists
  - Individual Report from the Detail Screen
  - As an Individual Report or Group of Reports from the List View
  - Printing a Price Book

Generating a Price List

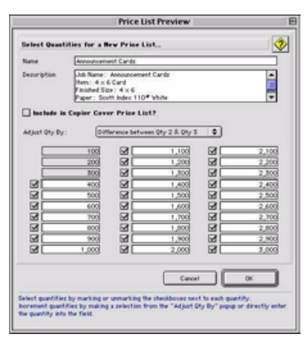
1 Open or create the estimate from which you want to generate the Price List.

CAUTION

You must fill in all 3 quantities on the estimate to generate a Price List.

2 Select Extras Button > Generate Price List.

PrintPoint displays the Price List Preview dialog.



3 Modify the Name of the Price List, if you want to.

4 Modify any line (s) of the Description of the Price List, if you want to.

NOTE

The default quantities are based on the difference between Quantity B and Quantity C on the estimate.

5 Modify the Quantity Breaks by which you want the price list to increment by directly entering values into the fields

OR

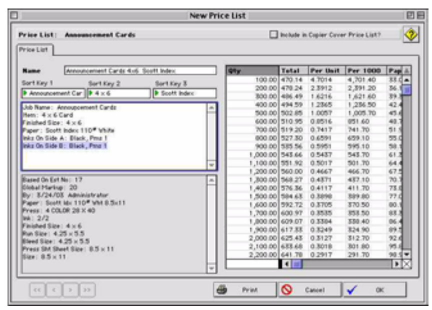
Click the Adjust Qty By drop-down menu and select from the popup list.

6 If you only want a limited number of the possible 30 quantities to appear, marking or unmarking the checkboxes next to each quantity value.

7 Click the Include in Copier Cover Price List checkbox if you want this Price List to be used by PrintPoint’s Copy/Digital Module to get a copy cover.

8 Click OK to set your generate the price list.

PrintPoint displays the Price List Screen.



9 You can make any modifications to the Name or Description and enter any values in the Sort Key 1, Sort Key 2 and/or Sort Key 3 fields.

10 For one price list you could enter “Bond” into Sort Key 1 and “CounterBook” into Sort Key 2. For a second, you could enter “8.5 x 11 24# White” into Sort Key 1 and “CounterBook” into Sort Key 2. Then when decide to print a price book, you can sort by these fields and generate a CounterBook (Sort Key 2) organized by the values in Sort Key 1.

11 Click OK to save the Price List.

CAUTION

To avoid puzzling anomalies occurring when you create a Price List you need to look out for the following:

Do not create a price list from an estimate where you have customized waste, post-press operations, paper cost or any of the variable cost areas of the estimate which are quantity dependent.

This will cause repeating price drops every 3 quantities.

Periodic price drops can be due to breakpoints in the press costs as the volume goes up at intervals the total cost will drop then begin climbing again. This is strictly an effect of volume pricing.

If you want to make sure that the breakpoints in press run do not create this problem, make sure you "customize" the "impressions" rate on the estimate before you generate the price list.

You must also be careful not to have an post-press options such as "Ask for price" or "Ask for Job Cost" items.

Categorizing Price Lists

You may use any one or all of the three Sort Key fields to display in your list view so you can organize your price lists prior to generating a book.

Printing Price Lists

PrintPoint has several options for printing your price lists:

- As an individual report from the Price List Detail Screen
- As an Individual Report or Group of Reports from the List View
- As a Price Book

Individual Report from the Detail Screen

You can print a price list from the Price List Detail Screen or from the Price List List View.

1 If you have the price list displayed in the Entry Form, click the Print button.

OR

2 Select Navigator > Price Lists.

PrintPoint displays the Price List List View.

3 Select the price list to print.

4 Click the Print button.

5 Select Detail from the pull-down menu.

As an Individual Report or Group of Reports from the List View

1 Select Navigator > Price Lists.

PrintPoint displays the Price List List View.

2 Create a subset of the Price Lists you want to print.

3 Click the Print button.

4 Select List from the pull-down menu.

Printing a Price Book

1 Select Navigator > Price Lists.

PrintPoint displays the Price List List View.

2 Create a subset of the Price Lists you want to print.

TIP

You may use one of the Sort Key fields upon which to base your Price Book.

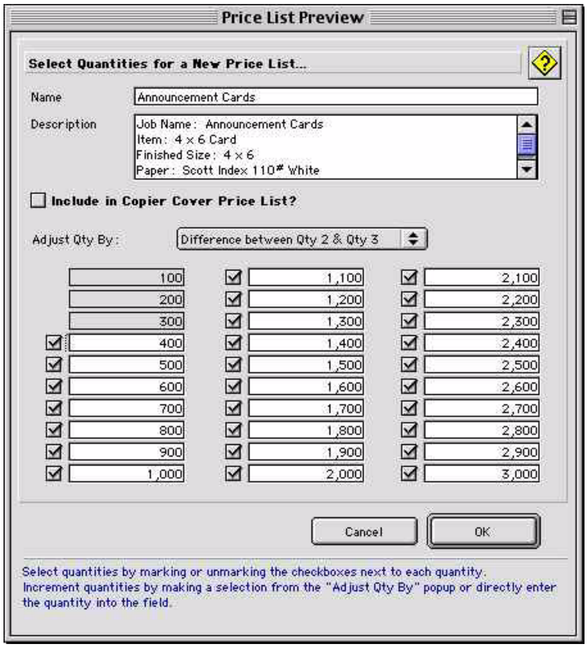
3 Sort your selection.

4 Click the Print button.

5 Select List from the pull-down menu.

ABOUT THE SCREENS

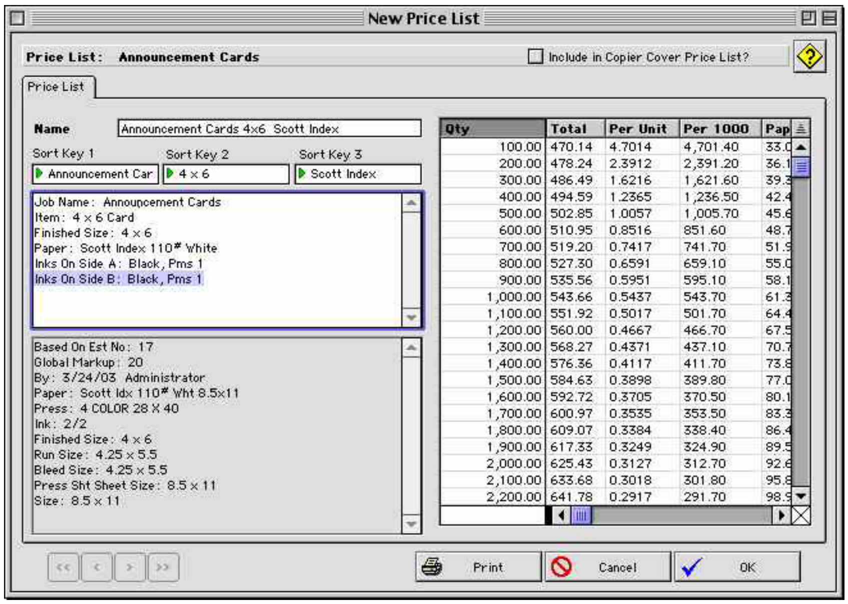
Price List Preview



Option	Description
Name	Name of price list that will appear in list view and on printed price list reports. (User modifiable)
Sort Key (1-3)	Select from a choice list or enter directly into the three fields sort criteria to keep your price lists organized. (User modifiable)
Description	Full description of what the price list contains. (User modifiable)
Estimate Info	Detail about the estimate upon which the price list was based.
Include In Copier Cover Price List (checkbox)	Checkbox used to include the price list in one of the available choices while estimating a copy job. You must own the Copy Module to use this feature.
Price List Qty	Up to 30 quantities.
Price List Total	Total price for the quantity line.
Price List Per Unit	Price per unit for the quantity line.
Price List Per 1000	Per per 1000 for the quantity line.
Price List Paper	Price for the paper component for the quantity line.

Option	Description
Price List Printing	Price for the printing component for the quantity line.
Price List Pre-Press	Price for the pre-press component for the quantity line.
Price List Post-Press	Price for the post-press component for the quantity line.

Price List Detail Screen



Option	Description
Name	Name of price list that will appear in list view and on printed price list reports. (User modifiable)
Sort Key (1-3)	Select from a choice list or enter directly into the three fields sort criteria to keep your price lists organized. (User modifiable)
Description	Full description of what the price list contains. (User modifiable)
Estimate Info	Detail about the estimate upon which the price list was based.
Include In Copier Cover Price List (checkbox)	Checkbox used to include the price list in one of the available choices while estimating a copy job. You must own the Copy Module to use this feature.
Price List Qty	Up to 30 quantities.
Price List Total	Total price for the quantity line.

Option	Description
Price List Per Unit	Price per unit for the quantity line.
Price List Per 1000	Per per 1000 for the quantity line.
Price List Paper	Price for the paper component for the quantity line.
Price List Printing	Price for the printing component for the quantity line.
Price List Pre-Press	Price for the pre-press component for the quantity line.
Price List Post-Press	Price for the post-press component for the quantity line.

Chapter 29
Estimating Tools: Cloning

OVERVIEW

PrintPoint's Cloning feature allows you to make a copy of an existing estimate for a currently opened estimate, from a highlighted estimate in the Estimate List View or from a highlighted job in the Job List View.

Cloning is a great timesaver when you want to create a new estimate that is similar to an existing estimate in your database.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm, Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format Estimating Tools: Pre-Press Only
Know how to create a job.	See the Job - Converting an Estimate to a Job chapter.

STEP-BY-STEP

This section includes the following topics:

- Cloning from the Estimate List View
- Cloning from the Job List View

Cloning from the Estimate List View

1 Select Navigator > Estimates.

PrintPoint displays the Estimates List View.

2 Highlight the estimate you want to clone.

3 Click the Clone button.

4 If you are cloning from a WorkSheet or ShortForm you can decide to create the clone using a different Estimating Layout, select that layout form the drop-down list.

The Linked Clone and Linked Cover buttons are discussed in detail in the chapter Estimate Tools: Linking

NOTE

If you are cloning a Copy Estimate or Large Format estimate, this dialog will not be displayed.

5 Click the Clone button on the dialog.

6 Update any information on the estimate screen and click Accept.

NOTE

The new estimate will have the following differences from the original:

- Estimate Date is changed to the current date
- The estimate number will be updated to the next available number.
- Paper Inventory count associated with the estimate is cleared.
- Job Date, Job Due Date, Job Number, Job Purchase Order and Job Done Status are cleared.

- The date will be updated to the current date.

NOTE

The previous job number will be saved and is available in the Estimate Notes Dialog.

Cloning from the Job List View

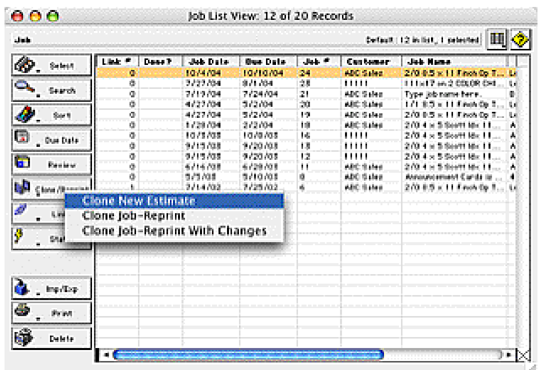
1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

2 Highlight the Job from whose base estimate you want to clone.

3 Click on the Clone/Reprint button.

4 Select Clone - New Estimate from the drop-down menu.



PrintPoint will display the new Cloned estimate.

5 Continue with the estimate as normal.

6 Click Accept to save the estimate.

PrintPoint will display a Confirm Dialog: “Do you want to update the description for Estimate No. xx before saving?”.

7 Click Update.

The Job Description Dialog will be displayed.

8 Click the Update Description button.

9 Copy or modify the descriptions as needed.

NOTE

Because this estimate has been cloned from a previous estimate and you may have made changes, you will need to verify that the Job Description is updated to the new estimate specs.

Chapter 30

Estimating Tools: Estimate Templates

OVERVIEW

Most printshops will produce multiple jobs with similar specifications. In order to speed up the process of estimating, PrintPoint enables you to save estimates as “templates”. All aspects of the original estimate are used to recreate new estimates.

TIP

An Estimate Template can only be created from an existing estimate.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an estimate.	See Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy/Digital Estimating Tools: Large Format
Understand how Estimate Templates are used by the AutoStart/Estimate Template Wizard	See Estimating Tools: AutoStart chapter

STEP-BY-STEP

This section includes the following topics:

- Creating an Estimate Template from an existing estimate.
- Modifying an Estimate Template.

Creating an Estimate Template

1 Create a new estimate or open an existing estimate.

2 Click and hold the **Extras** button. 

3 Select Create An Estimate Template from the drop-down menu.

4 Click OK to create a new estimate template.

PrintPoint displays the Estimate Template Detail screen.

See About The Screens and the end of the chapter to view the Estimate Template Detail screen.

5 Modify the Name field if desired.

6 Click on the Black Triangle Arrow and select or add a new Template Type from the Template Type Choice List.

7 Adjust the Quantity Range.

TIP

The Quantity Range is an important entry because it limits the suggested range displayed in the Estimate Template & AutoStart Wizard used when creating new estimates.

If you have set the range for a Business Card template as “250 - 1,000” you would then be aware not to use this template if the customer had just requested 5,000 business cards.

8 Click OK to save the Template.

Modifying an Estimate Template

1 Select Navigator > Templates.

The Template List View is displayed.

2 Double-click the template you wish to modify.

PrintPoint displays the Estimate Template Detail screen.

See About The Screens and the end of the chapter to view the Estimate Template Detail screen.

3 Modify the Name field if desired.

4 Click on the Black Triangle Arrow and select or add a new Template Type from the Template Type Choice List.

5 Adjust the Quantity Range.

TIP

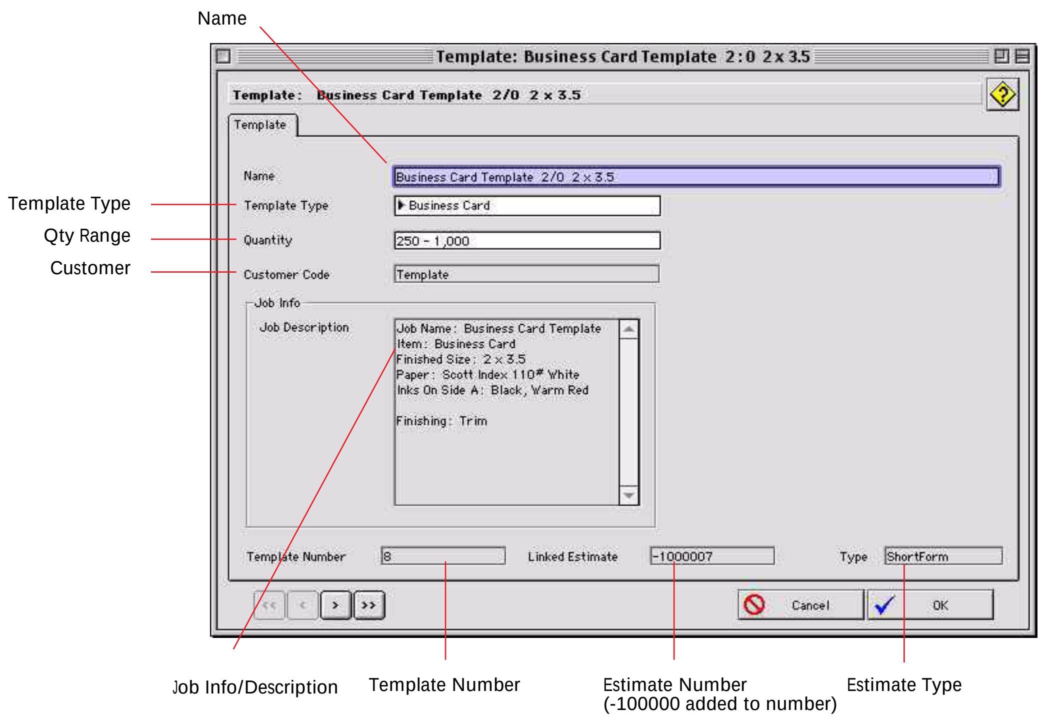
The Quantity Range is an important entry because it limits the suggested range displayed in the Estimate Template & AutoStart Wizard used when creating new estimates.

If you have set the range for a Business Card template as “250 - 1,000” you would then be aware not to use this template if the customer had just requested 5,000 business cards.

6 Click OK to save the Template.

About the Screens

Estimate Template Detail Screen



Field Name	Contents
Name Field	Used to display the Template name. This is automatically generated by PrintPoint but can be manually edited.
Template Type	Displays the type of template.
Quantity	Displays the default quantity range set for this template.
Customer	Displays the default customer set for this estimate.
Job Description	Displays the default job description for this estimate.
Template Number	Displays the number of this template.
Estimate Number	Displays the estimate number with -100000 added to the number.
Estimate Type	Displays the type of estimate used when creating this template.

Chapter 31
Estimating Tools: Linking

OVERVIEW

Linking is one of PrintPoint's key features to help related Estimates and Jobs together throughout the production process.

With Estimate Linking you can:

- Link Estimates together.
- Link Cloned Esitmates.
- Link Cover and Text.
- Search for Link Estimates.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an Estimate.	Estimating Tools: ShortForm Estimating Tools: Worksheet Estimating Tools: Copy-Digital Estimating Tools: Large Format Estimating Tools: Pre-Press Only
Know how to create a Job.	Convert an estimate to a job

STEP-BY-STEP

This section includes the following topics:

- Linking a cloned estimate.
- Linking a cloned cover estimate
- Linking estimates from the Estimate List View.
- Search for linked estimates.

TIP

To assist you to see the linked estimates, you may want to make a Custom Estimate List View which includes the Estimate Link Number field (See Chapter List View Editor for details)

Linking a Cloned Estimate

1 From the Estimate List View click Clone button.

The Layout Style and Clone Option dialog is displayed

NOTE

This kind of linking can only be used by the WorkSheet or ShortForm.

2 From the dropdown menu select Layout Style you want to use for the new cloned estimate, either WorkSheet or ShortForm

3 Click the Linked Clone button.

PrintPoint clones your estimate and opens a new estimate window ready for you to make changes to suit the new estimate. It also creates a link to the original estimate.

TIP

The Linked estimates are indicated by the Linked Estimate button becoming active. The button is located at the bottom of the buttons on the right hand side of the estimate screen and it indicates the number of linked estimates in the group.

4 Click on the Linked Estimate button

PrintPoint displays a drop-down menu of the linked estimates.

Linking a Cloned Cover Estimate

This example uses a common technique in PrintPoint to link the components of a booklet.

NOTE

This kind of linking can only be used by the WorkSheet or ShortForm.

1 Create an Estimate for the text of the book.
2 Close and Save the estimate.
1 From the Estimate List View highlight the text estimate you just created and click the Clone button.

   The Layout Style and Clone Option dialog is displayed

2 From the dropdown menu select Layout Style you want to use for the new clone cover estimate, either WorkSheet or ShortForm
3 Click the Linked Cover button.

   PrintPoint clones your estimate and opens a new estimate window ready for you to make changes to suit the cover of the booklet. It also creates a link to the original estimate.

   TIP

   The Linked estimates are indicated by the Linked Estimate button becoming active. The button is located at the bottom of the buttons on the right hand side of the estimate screen and it indicates the number of linked estimates in the group.

4 Click on the Linked Estimate button

PrintPoint displays a drop-down menu of the linked estimates.

Linking an Estimates from the Estimate List View

1 Select Navigator > Estimate.
2 PrintPoint displays the Estimate List View. Highlight the estimates you wish to link.

   TIP

   The estimates do not have to be adjacent to each other. Use the Cmd-Click (on Mac) or Ctrl-Click (On Windows) to select non-contiguous estimates.

3 Click the Links button from the button bar of your Estimate List View, and select Link Estimates from the drop-down menu

   TIP

   You can also unlink, find or sort by links from the Links button.

Search the Estimate List for Linked Estimates

1. Select Navigator > Estimate.
2. From the Estimate List View, highlight an estimate.
3. Click the Links button.
4. Select Search Links to Selected Estimate.

   PrintPoint reduces the number of estimates in the Estimate List View to display the estimates linked to the highlighted estimate.

   NOTE

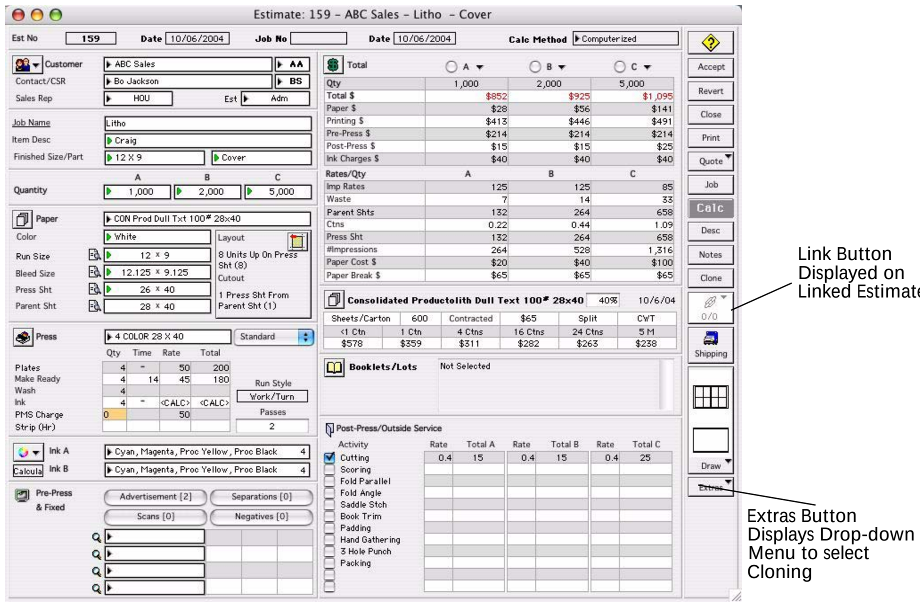
   If there was not any estimates linked the one that was highlighted, PrintPoint will display an Alert dialog that will says “The selected estimate is not linked to any other estimates”.

About the Screens

Worksheet

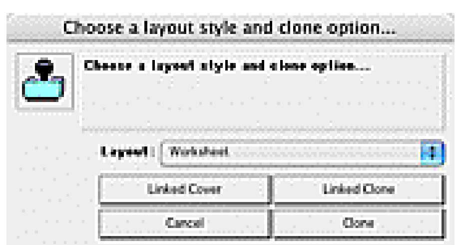
NOTE

These buttons will be the same on the Shortform, Large Format and Copier estimate windows.



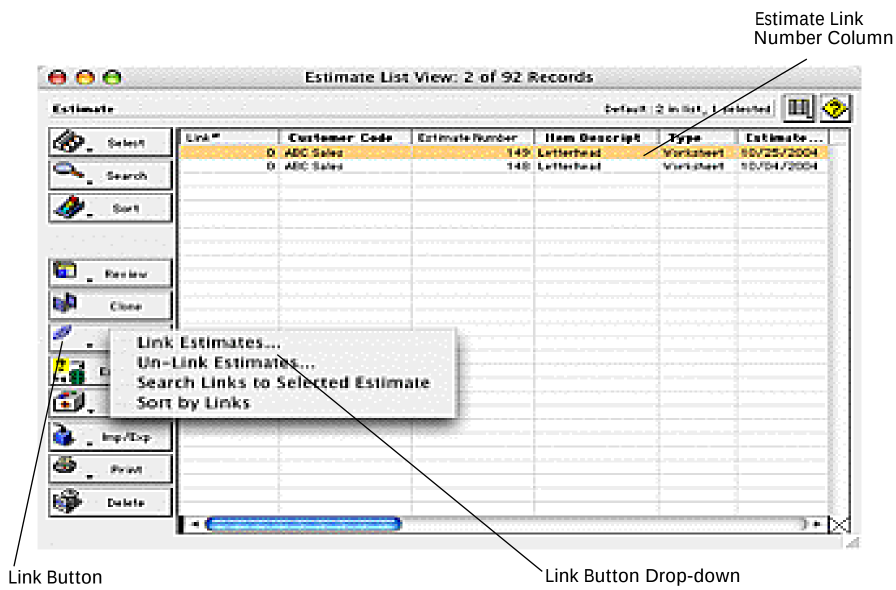
Button / Option	Definition
Extras (button)	Used to Clone and Link and estimate.
Link (button)	Shows if this estimate is linked to any others and, used to QuickLink to those linked estimates.

Extras Button Clone Dialog



Button / Option	Definition
Linked Clone (button)	Used to Clone and Link the selected estimate.
Clone (button)	Used to Clone the selected estimate without linking.
Cancel (button)	Used to Cancel the Clone and Link feature.
Layout	Used to choose the type of estimate sheet you want to use for the cloned estimate (i.e. Shortform, Worksheet, etc.).

Estimate List View



Button / Option	Definition
Link (button)	Shows if this estimate is linked to any others and, used to quicklink to those linked estimates.
Link Button Drop-down	Used to Link, Un-Link, Search by Links or Sort by Links.

Chapter 32
Graphic Library

OVERVIEW

PrintPoint's Graphic Library provides a collection of graphic illustrations of common jobs (e.g., Envelope, 16 Page Booklet) and allows the user to add additional illustrations. These graphics can be selected at estimating time, and can then be printed on the Job Ticket to minimize the risk of errors when the job is actually printed.

BEFORE YOU BEGIN

You should...	Where this information is found...
Own a drawing/illustration program.	Photoshop, Illustrator, SuperPaint, etc.
Know how to copy and paste between applications.	Basic Computer 101 techniques.

STEP-BY-STEP

This section includes the following topic:

- Adding a new Graphic library illustration
- Importing/Pasting a Non-PostScript Graphic
- Creating a PostScript/EPS image
- Pasting in a Postscript/EPS Graphic

Adding a new Graphic Library Illustration

1. Select Navigator > Graphic.

   PrintPoint displays the Graphic Library List View.
2. Click New.

   PrintPoint displays the Graphic Library Entry screen.
3. Enter a description to help you identify the graphic.

TIP

Unless this is a fixed-size object, such as a Business Card (2 x 3.5), do not include measurements. This will allow you to use the same graphic for a variety of jobs that only vary by dimension.

NOTE

PrintPoint can store and display in graphics created in a wide variety of formats including:

- Pict
- Tiff
- JPG
- GIF
- BMP
- EPS (Postscript)

TIP

For the best quality printing of graphics, create images with imbedded PostScript such as those created with vector based drawing programs such as Adobe Illustator or Freehand.

Importing/Pasting a Non-PostScript Graphic

Importing

1. Open a Graphic Library Detail screen.
2. Open any non-postscript graphic in any bitmap style drawing program or copy a graphic from another source such as the web.
3. Click the Import button.

   PrintPoint will display a standard Open File dialog.
4. Locate the graphic file.
5. Click the Open button.
6. PrintPoint will import the graphic into the Graphic field.

NOTE

The graphic will reverse it's color until you tab out of the field.

Pasting

1. Open any non-postscript graphic in any bitmap style drawing program or copy a graphic from another source such as the web.
2. Copy and save the image to the clipboard or scrapbook.
3. Return to PrintPoint and tab to the Graphic field.

NOTE

The graphic will reverse it's color until you tab out of the field.

Creating a PostScript/EPS Image

1. Open the Graphic Library Template found in the Graphic Library Folder.
2. Create your graphic to fit 449 wide x 348 high pixels.

Pasting in a Postscript/EPS Graphic

Your graphic can be pasted into PrintPoint using one of the following techniques:

Macintosh

1. Open your graphic in a drawing program like Illustrator or Freehand.
2. Option-Copy the object to the Clipboard. You must hold down the Option key while you copy the image.
3. Return to the Graphic Library Detail screen and paste you graphic into the Graphic field.

CAUTION

If this technique does not work (specifically does not print a good postscript graphic from PrintPoint) then follow these steps:

1. Save your graphics as an.eps.
2. Open Microsoft Word and create a new blank document.
3. Select Insert Menu > Picture > From File...
4. Locate your ".eps" file and insert it.
5. Highlight the graphic and copy it.
6. Return to the Graphic Library Detail screen and paste you graphic into the Graphic field.
7. If you cannot go directly to PrintPoint to paste, then paste the graphic into a scrapbook and move the scrapbook file to the computer you need so you can copy from there.

Windows

1. Open your graphic in a drawing program like Illustrator or Freehand.
2. Save your graphics as an.eps file with no preview.

CAUTION

You don't want to create a preview for the image.

3. Open Microsoft Word and import your eps graphic into MS Word. It will appear as a box with text in it describing the path to the file. You will not actually see the graphic.
4. Copy the graphic object to the clipboard.
5. Return to the Graphic Library Detail screen and paste you graphic into the Graphic field.
6. Again, you will only see the text description of the.eps file if it does not have a preview we can read.

Chapter 33
Layout Library

OVERVIEW

The Layout Library is one of the components of the offset Estimating Module used by the WorkSheet and ShortForm.

The Layout Library stores dimensions and specifications of common layouts used by the Standard Drawing and Booklets/Lots dialogs. These layouts contain information about the length, width, grippers, borders, number of pages, signatures, etc. It also allows you to attach a graphic from the Graphic Library.

The Layout Library is different from an Estimate Template because it only stores information specifically regarding the setup and dimension of a sheet or sheets and no information about quantity, ink color, pre-press, bindery, etc.

The Estimate Template is a more complete template of an estimate including every piece of information about that estimate. The Layout can only include the necessary information to correctly layout and draw the estimate setup.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup the Graphic Library	See the Graphic Library Chapter
Know how to create an Estimate.	Estimating Tools: ShortForm Estimating Tools: Worksheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following:

- Creating a New Layout From an Estimate
- Accessing the Layout List View
- Creating a New Layout From the Layout Library List View
- Cloning an Existing Layout
- Editing and Existing Layout

Creating a New Layout From an Estimate

The most common method to create a new Layout for the Layout Library is to first create an estimate and then “add” the layout from the estimate to the library.

1. Create an estimate or select an estimate that has already been created.
2. Access the Booklet/Lots or Standard Drawing area.
3. Create a layout for the estimate.
4. Locate the Layout Library List and click on the Add button.

   NOTE

   PrintPoint displays a Confirm dialog. You can click the Yes button to have the values of the estimate changed to match the Layout you build on the No button to have the estimate values remain.

   PrintPoint displays a Layout dialog.
5. Enter a Description for the layout.

TIP

You can check the Autobuild Description check box and PrintPoint will build the layout description automatically based on the layout setup.

6. Enter the Layout Dimensions.
7. Select a Press.
8. Select the Type of estimate.

   You can select from the list or type in manually.
9. Choose the type of Drawing Area to be used for the layout.
10. Select a graphic from the Graphic List.
11. Click on the Additional Information tab.

    Enter Booklet / Lots and/or gripper and border info as they apply.

Accessing the Layout List View

1. Select Navigator > Layout.

   PrintPoint displays the Layout Library List View.

Create a new Layout From the Layout Library List View

1. From the Layout Library List View click the New button.

   PrintPoint displays a Layout dialog.
2. Enter a Description for the layout.

   TIP

   You can check the Autobuild Description check box and PrintPoint will build the layout description automatically based on the layout setup.
3. Enter the Layout Dimensions.
4. Select a Press.
5. Select the Type of estimate.

   You can select from the list or type in manually.
6. Choose the type of Drawing Area to be used for the layout.
7. Select a graphic from the Graphic List.
8. Click on the Additional Information tab.
9. Enter Booklet / Lots and/or gripper and border info as they apply.

Cloning an existing Layout

1. Select a layout from the Layout Library List View.
2. Click the Clone button.

   PrintPoint clones the layout and changes the Layout List View to display only the cloned layout and the layout it was cloned from.
3. Open the cloned layout.
4. Edit the layout as needed
5. Click OK to save your changes.

Editing an Existing Layout

From the Layout Library List View

1. Select Navigator > Layout.
2. PrintPoint displays the Layout Library List View.
3. Open the layout you want to edit.
4. Edit the necessary fields.
5. Click OK to save your changes.

From a WorkSheet or ShortForm

1. Open an existing estimate or create a new estimate.
2. Open the Standard Draw Dialog or Booklets/Lots Dialogs.

   See the Estimate Tools: Standard Draw Dialog or Estimate Tools: Booklets or Estimate Tools: Lots chapters.

3. Click the Edit button.

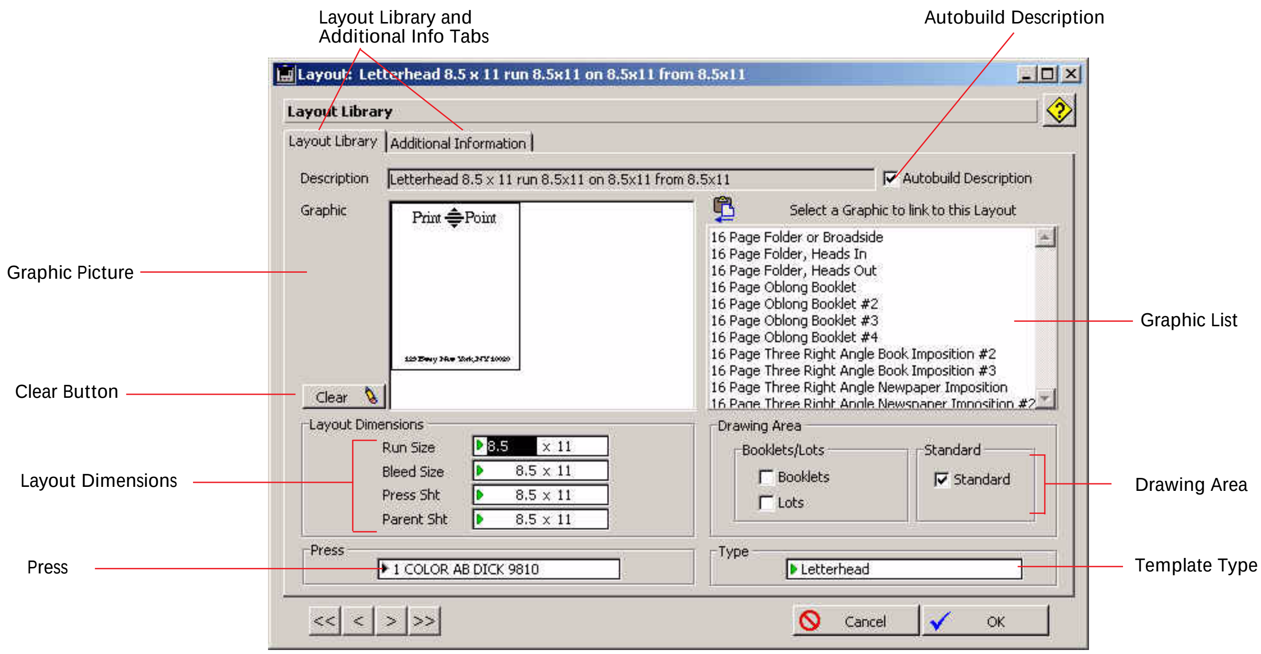
   PrintPoint displays the Layout Library Detail screen.

4. Edit the necessary fields.
5. Click OK to save your changes.

About the Screens

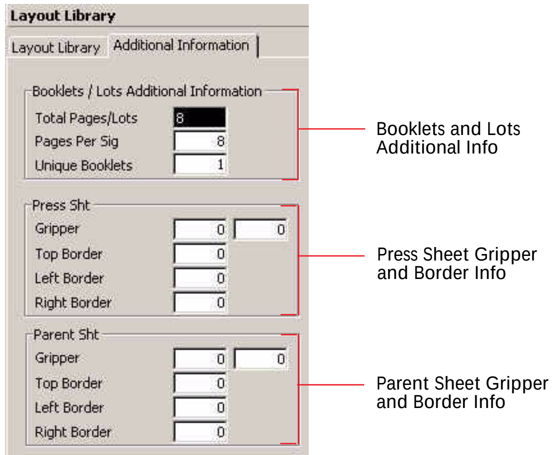
Layout Library Detail Screen

Layout Library Tab



Button/List	Action
Graphic Picture	Shows picture associated with the graphic layout.
Clear (buttons)	Click to clear the graphic picture.
Layout Dimensions	Enter Run, Bleed, Parent Sht and Press Sht info.
Press	Default press associated with the layout.
Type of Template	User created types of templates for easy sorting
Drawing Area	Used to select whether the layout is a Booklet, Lot or Standard Drawing layout.
Graphic List	List the available graphics to select for the layout.
Autobuild Description check box	Check this box to have PrintPoint automatically build the description for the layout.

Additional Information Tab



Button/List	Action
Booklets and Lots Additional Info	Use this area to add information if the layout is for a booklet or lot estimate/
Press Sheet Gripper and Border Info	Use this area to add gripper and border info for the press sheet.
Parent Sheet Gripper and Border Info	Use this area to add gripper and border info for the parent sheet.

Chapter 34
PrintPoint Mobile

OVERVIEW

PrintPoint Mobile is a stand-alone version of PrintPoint that allows you to:

- Create estimates on a separate computer such as a laptop without having to be connected to your network.
- Merge those estimates with your main database.
- Automatically sequence the imported estimates with consistent numbering in the main database.

TIP

PrintPoint Mobile can be used with another single user (stand-alone) PrintPoint system or with a multi-user (client/server) system.

BEFORE YOU BEGIN

You should...	Where this information is found...
Own a version of PrintPoint (Single User or Client/Server) with a unique serial number that retains your central database.	Call PrintPoint Customer Support if in doubt.
Own a Mobile version of PrintPoint with a unique serial number.	Call PrintPoint Customer Support if in doubt.

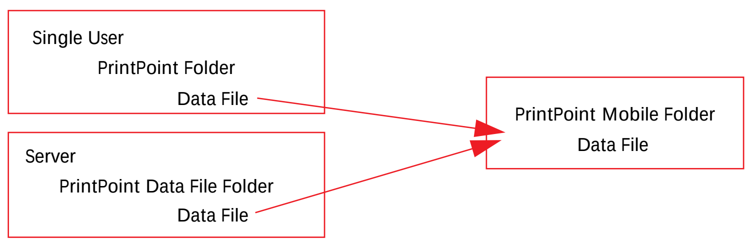
STEP-BY-STEP

This section includes the following topics:

- Copying your main data file to the PrintPoint Mobile Folder.
- Moving your estimates from Mobile back to your primary system.

Copying you Main Data File to the PrintPoint Mobile Folder

In order to begin using PrintPoint Mobile and to get the most up-to-date version of your data file onto the Mobile, you need to copy your data file from your PrintPoint Data File Folder on your Server or your PrintPoint Folder for Single User to the PrintPoint Mobile Folder on the computer that is running PrintPoint Mobile.



NOTE

You can copy the data with any form of movable media such as zip drive, jaz drive, cd-rom, or over a network.

Single-Platform

- If your environment is all Windows, copy the PrintPoint_Data.4dd and PrintPoint_Data.4dr files from the PrintPoint Folder on your computer to PrintPoint Mobile Folder on the computer that runs Mobile.
- If your environment is all Macintosh, copy the PrintPoint Data File from the PrintPoint Folder on your computer to PrintPoint Mobile Folder on the computer that runs Mobile.

Cross-Platform

Primary Computer is Macintosh

If your primary computer is Macintosh and your Mobile workstation is Windows, you need to use 4d Transporter before you move the data file.

1. Drag the PrintPoint Data File on top of 4D Transporter.
2. Choose the Mac to PC radio button.
3. Choose the Make a copy First radio button.

4 Click Move.

You will end up with two files in your folder called "PrintPoint Data File.PC" with a "PrintPoint_Data.4dd" and "PrintPoint_Data.4dr" file inside.

5 Move these two files to the PC mobile unit inside the PrintPoint Mobile Folder.

Primary Computer is Windows

If your primary workstation is Windows and your Mobile workstation is Macintosh, you need to use 4d Transporter on the Macintosh workstation after you move the data file.

1 Copy the PrintPoint.4dd and PrintPoint.4dr files from the PrintPoint Folder on your main computer (either the PrintPoint Data Folder inside the PrintPoint Server Folder > PrintPoint App Folder...or...the PrintPoint Folder) to the Macintosh workstation that holds Mobile.

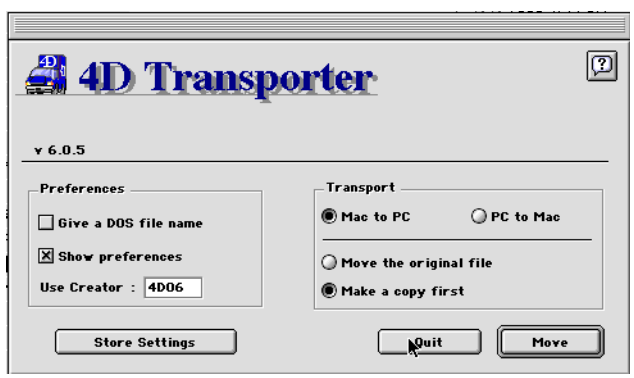
2 Drag the PrintPoint.4dd file on top of 4D Transporter.

3 Choose the PC to Mac radio button,

4 Choose the Move Original radio button.

5 Click Move.

You will end up with the a a single PrintPoint Data File in the PrintPoint folder.



Moving Estimates from Mobile to your Primary System

From PrintPoint Mobile

1 Navigator > Estimates.

2 Highlight the estimates that you want to export back to the primary system.

3 Choose Mobile Export from the Export button drop-down menu.

PrintPoint will create 2 files used for the import in the next steps.

From you Primary Computer

1 Go to Navigator > Estimates > Mobile Import on the primary machine.
2 You will be prompted to import the two files.

NOTE

New estimate numbers will be assigned upon import the retain the integrity of the main database.

E-mailing Estimates from Mobile to your Primary System

From PrintPoint Mobile

1 Navigator > Estimates.
2 Highlight the estimates that you want to export back to the primary system.
3 Choose Mobile Export from the Export button drop-down menu.

PrintPoint will create 2 files used for the import in the next steps.

1 Navigator > Estimates.
2 Choose the estimates that you want to export to the primary system.
3 Select those estimates.
4 Choose Mobile Export from the Export menu.
5 Stuff or Zip the 2 files.
6 E-mail the files as attachments to your primary computer.
7 Unstuff/UnZip them.
8 Go to Navigator > Estimates > Mobile Import on the primary machine.
9 You will be prompted to import the two files.

NOTE

New estimate numbers will be assigned upon import the retain the integrity of the main database.

Quotes

Chapter 35
Quotes: Introduction

OVERVIEW

PrintPoint Quotes are separate documents from PrintPoint Estimates. Quotes contain abbreviated "customer" versions of estimates, displaying only the information the customer needs to see for their purchasing decisions.

PrintPoint provides options for creating two styles of quotes:

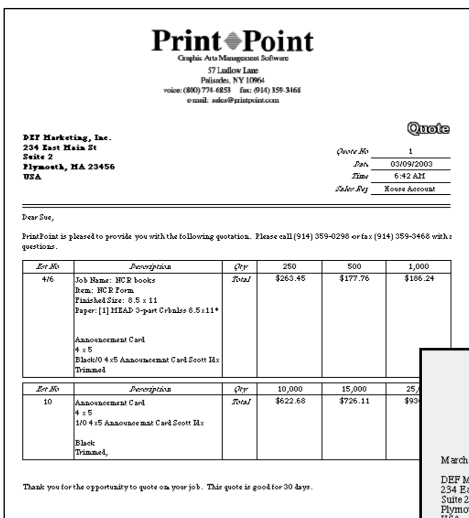
- CombiQuote (See Quotes - CombiQuote chapter)
- LetterQuote (See Quotes - LetterQuote chapter)

PrintPoint's CombiQuote allows you to combine multiple estimates in one quotation. You can either put each estimate on a separate line item or combine them on one line. Use PrintPoint's built-in quote report, or you can design your own custom quote with SuperReports.

PrintPoint's LetterQuote make use of customizable scripts and the built-in word processing to create letter formatted quotes.

PrintPoint allows you to print, fax, or e-mail quotes directly from PrintPoint to your customers.

CombiQuote


Print◆Point
Graphic Arts Management Software
57 Ludlow Lane
Palisades, NY 10964
voice: (800) 774-6853 fax: (914) 359-3468
e-mail: sales@printpoint.com

Quote

DEF Marketing, Inc.
234 East Main St
Suite 2
Plymouth, MA 23456
USA

Quote No 1
Date 03/09/2003
Time 6:42 AM
Sales Rep House Account

Dear Sue,

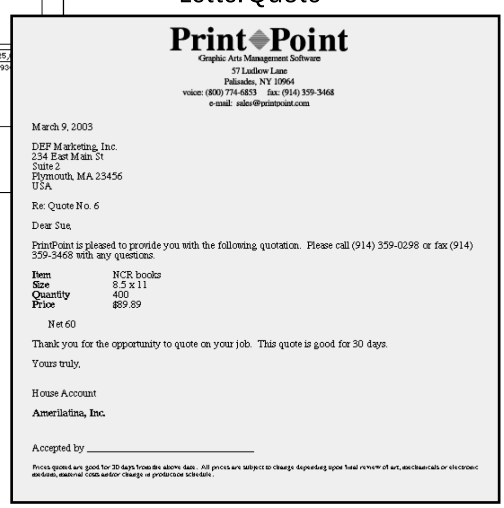
PrintPoint is pleased to provide you with the following quotation. Please call (914) 359-0298 or fax (914) 359-3468 with a questions.

Est No	*Description*	*Qty*	250	500	1,000
4/6	Job Name: NCR books Item: NCR Form Finished Size: 8.5 x 11 Paper: [1] MEAD 3-part Crbnlss 8.5x11* Announcement Card 4 x 5 Black/0 4x5 Announcemnt Card Scott Idx Trimmed	*Total*	$263.45	$177.76	$186.24

Est No	*Description*	*Qty*	10,000	15,000	25,
10	Announcement Card 4 x 5 1/0 4x5 Announcemnt Card Scott Idx Black Trimmed,	*Total*	$622.68	$726.11	$93

Thank you for the opportunity to quote on your job. This quote is good for 30 days.

LetterQuote


Print◆Point
Graphic Arts Management Software
57 Ludlow Lane
Palisades, NY 10964
voice: (800) 774-6853 fax: (914) 359-3468
e-mail: sales@printpoint.com

March 9, 2003

DEF Marketing, Inc.
234 East Main St
Suite 2
Plymouth, MA 23456
USA

Re: Quote No. 6

Dear Sue,

PrintPoint is pleased to provide you with the following quotation. Please call (914) 359-0298 or fax (914) 359-3468 with any questions.

Item NCR books
Size 8.5 x 11
Quantity 400
Price $89.89

Net 60

Thank you for the opportunity to quote on your job. This quote is good for 30 days.

Yours truly,

House Account

Amerilatina, Inc.

Accepted by ______________________

Prices quoted are good for 30 days from the above date. All prices are subject to change depending upon final review of art, mechanicals or electronic media, material costs and/or change in production schedule.

Chapter 36
Quotes: CombiQuotes

OVERVIEW

PrintPoint CombiQuote module provides two options for creating line item style quotes:

- Use PrintPoint's built-in CombiQuote.
- Design your own custom CombiQuote with SuperReports.

PrintPoint's CombiQuote allows you to combine multiple estimates in one quotation. You can mix and match any combination of quantities and you can put each estimate on a separate line item or combine several estimates (such as the components of a booklet) on one line.

You can then print, fax, or e-mail quotes directly from PrintPoint.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup your preferences for Quotes	File Menu > Preferences > Quotes
Setup estimates	Estimating Chapters

STEP-BY-STEP

This section includes the following topics:

- Creating a CombiQuote
  - From an Estimate
  - From the Quote List View
- Adding Items To a CombiQuote
- Combining multiple estimates on one line item in a CombiQuote
- Opening an existing CombiQuote from an Estimate
- Common CombiQuote functions
  - Deleting a Quote Item
  - Hiding Quantity Columns
  - Editing the Quote Description
  - Update Button
  - Editing Quote Messages
  - Printing a Grand Total
  - Faxing, E-mailing, Printing and Saving

Creating a CombiQuote

CombiQuotes are created using one of the two techniques:

- From an Estimate from an existing estimate using the Quote button and selecting the CombiQuote menu item
- From the Quote List View

NOTE

Once you have created the CombiQuote, the techniques for changing, customizing, printing, etc., are the same.

From an Estimate

1. Create a new estimate or open an existing estimate.
2. Click the Quote button on the Estimate button bar.
3. Select New CombiQuote from the drop-down menu.

   PrintPoint displays the CombiQuote screen and loads information from the estimate into the Quote Record and the 1st CombiQuote Line Item.

4. Follow the steps in the two following sections below to create either a Single Item CombiQuote or Multi Item CombiQuote.

From the Quote List View

1. Select Navigator > Quotes.

   PrintPoint displays the Quote List View.
2. Click the New button.
3. Select CombiQuote from the drop-down menu.

   The CombiQuote Detail screen is displayed.
4. Select a customer from the Customer Choice List.

   PrintPoint will load all the available default information for the customer into the Contact and Sales Rep fields.
5. PrintPoint will add the first line item to the CombiQuote.
6. The Date field contains today's date. Change the date in this field if you wish to have a different date displayed on your LetterQuote.
7. Follow the steps in the two following sections below to create either a Single Item CombiQuote or Multi Item CombiQuote.

Adding Items to a CombiQuote

1 Click the Add Item button.

TIP

You will notice the cursor blinking in the Est column for the first Quote Item. A list of available estimates for the customer is displayed in the bottom left corner of the CombiQuote screen.

NOTE

You can view additional estimates in the Available Estimates list by clicking the Show last xx estimates drop-down menu and choosing one of the other available options.

2 Enter the Estimate Number into the Est No. field by:

a. Typing the number directly into the field.

OR

b. Double-click the estimate from the Estimate List in the top right of the screen.

3 The Description, Quantity and Total can be adjusted by tabbing to the appropriate field and entering new information.

4 Add additional items by repeating steps 1-3 above.

Combining Multiple Estimates in the Same Quote Item

There are many times when you will want your customer to see only the complete total for components of an estimate. For example, if you have estimated 1,000 booklets with a separate cover and text, it is in your best interest not to break out the costs of each component. If the customer can see how much each component costs, they may attempt to bargain the overall price by telling you that a competitor has offered them a lower price for the text portion and ask you to match that. Your price for the cover was better, but they will not remind you of that (unless they are your very best friend...).

1 Click the Add Item button

Notice the cursor blinking in the Est column for the first Quote Item. In the bottom left corner of the CombiQuote screen, a list of available estimates for the customer is displayed.

NOTE

You can view additional estimates in the Available Estimates list by clicking the Show last xx estimates drop-down menu and choosing one of the other available options.

2 Enter the Estimate Numbers into the Est No. field by:

a. Typing the number directly into the field followed by a forward slash "/", and then the second estimate number. You can do this for as many estimates as you need.

b. Press Tab.

OR

c. Double-click the estimates from the Estimate List in the top right of the screen. PrintPoint will automatically insert the "/" mark and combine the estimates onto the single item.

PrintPoint combines both Estimates in the same Quote Item and calculates the Totals for each quantity.

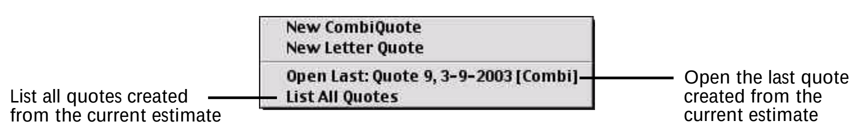
CAUTION

You should only combine Estimates on the same line if the items have been calculated for the same quantities.

Opening an existing CombiQuote from an Estimate

If you are working with an existing estimate and have made changes that will affect the quote, PrintPoint provides several options for keeping the estimate and the quote in sync.

1 Click on the Quote button, the menu will appear as follows:



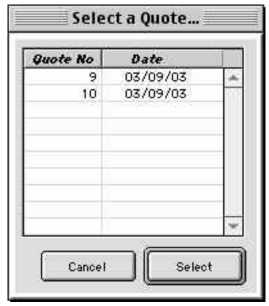
You now have the option of selecting:

- The Last Quote created from the current estimate

  OR

- List of All Quotes created from the current estimate.

  With this option PrintPoint will display a list of all quotes. Select the quote you want to work with.



The Update Quote dialog will then be presented.

You can now select to:

a. Keep quote as is to not make any changes.
b. Update quote and descriptions to revise the quote completely overriding all previous entries.
c. Update quote, keep existing descriptions if you have customized the descriptions at the quote level and have most likely only changed something in the estimate that has affected the price and not the description.

2 Make any changes to the CombiQuote using the techniques described in the following section “Common CombiQuote Functions.”

Common CombiQuote Functions

Deleting a Quote Item

1 Highlight the Quote Item to be deleted.
2 Click Delete Quote Item.

Hiding Quantity Columns

1 Click the Hide checkbox in the appropriate column to suppress the printing of specific Quantity columns.

Editing the Quote Description

1 Click the Edit Description button to edit the Quote Description.

NOTE

Change the quote description right in the Description box on the screen to print the changed description. Clicking on the Edit Description button and making changes there only changes description that appear on the screen - the quote will still print the default description.

Update Button

When you open an existing quote, if you have made changes to any of the estimates included in the CombiQuote, you can synchronize the estimate and quote lines clicking on the Update checkbox.

PrintPoint will display the following dialog:

a. Click Update to update the descriptions

OR

b. Click Keep As Is to update the prices only and leave the descriptions alone.

Editing the Quote Messages

1 Click the Quote Messages button to review or change the Salutation or Closing that appear on the quote.

NOTE

The text you see when you first open the Quote Messages box comes from the text you specified in the Quotes screen of Preferences.

2 Click Reset Salutation or Reset Closing to restore the text to the default that appears in the Preferences.

Printing a Grand Total

1 Click the Print Grand Total checkbox to include a grand total for all Estimates in the printed Quote.

NOTE

This feature is often used when the 3 quantities for a quote for each item in the quote are the same and the estimates used are part of an entire "package".

Faxing, E-mailing, Printing and Saving

1 Click Print to print.

2 Click E-mail the e-mail.

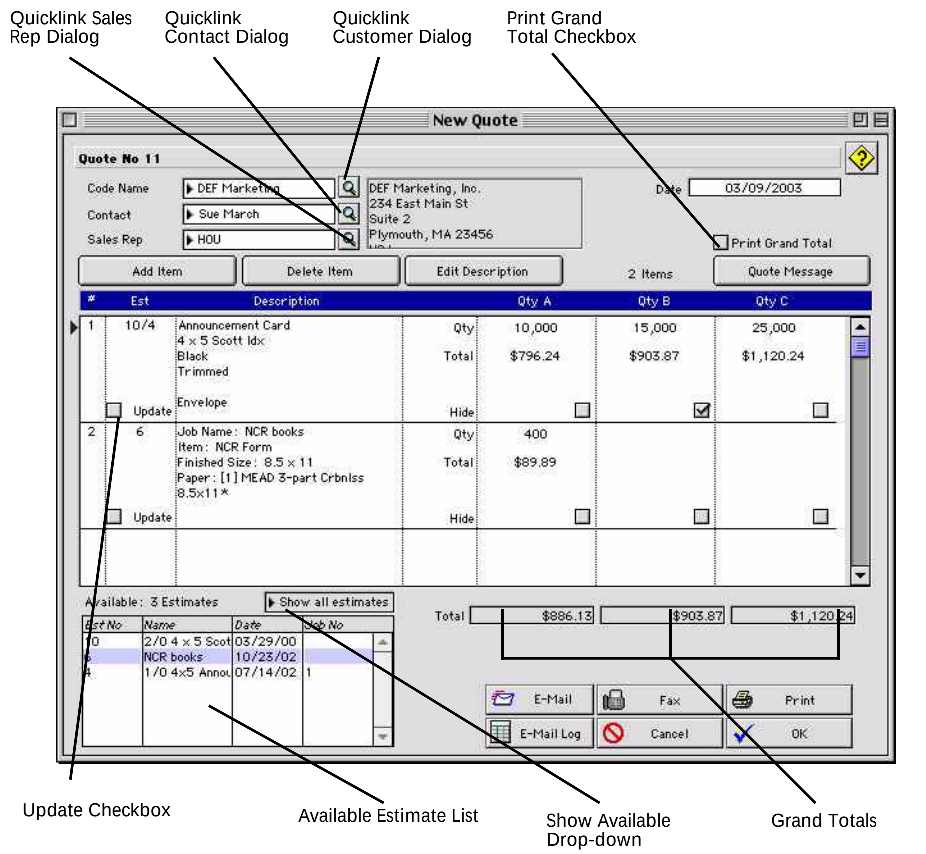
3 Click Fax to fax.

4 Click OK to save.

See the E-mailing and Faxing Chapters for more information.

ABOUT THE SCREENS

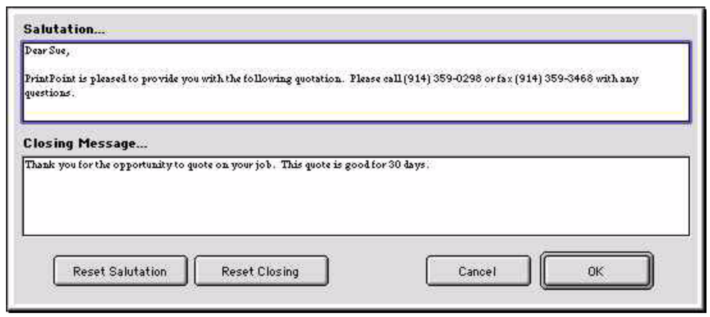
CombiQuote Detail Screen



Field Name	Contents
Quote Message (button)	Displays the Quote Message dialog (see below).
Print Grand Total (checkbox)	If marked the “Grand Total” is printed on the CombiQuote.
QuickLink Buttons	Will open the dialogs for each of the corresponding areas.
Edit Description (button)	Click to edit the job description.
Delete Item (button)	Click to delete an estimate from the quote.
Add Item (button)	Click to add and estimate to the quote
Update Checkbox	Click to update the pricing and job description.
Show Available (drop-down	Select from drop-down the amount estimates to view in the Avail Estimate List.

Field Name	Contents
Avail Estimate List	Displays the list of estimates available to add to quote.
E-Mail (button)	Click to e-mail the quote.
Fax (button)	Click to fax the quote.
Print (button)	Click to print the quote.
E-Mail Log (button)	Click to view or edit the e-mail log.
Cancel (button)	Click to cancel the quote.
OK (button)	Click to accept the quote.

Quote Message Dialog



Field Name	Contents
Reset Salutation (button)	Resets the salutation to the default.
Reset Closing (button)	Resets the closing message to the default.
Cancel (button)	Click to cancel the changes.
OK (button)	Click to accept the changes.

Chapter 37
Quotes: LetterQuotes

OVERVIEW

PrintPoint's LetterQuotes are standard "letter style" quotation created from scripts using PrintPoint's built-in word processor.

The scripts are provided with PrintPoint (stored in the "Letters" folder of your PrintPoint Folder) and can be customized for each user on your network.

You can print, fax, or e-mail LetterQuotes directly from PrintPoint to your customers.

Before You Begin

You should...	Where this information is found...
Setup your preferences for Quotes	File Menu > Preferences > Quotes
Setup estimates	Estimating Chapters

STEP-BY-STEP

This section includes the following topics:

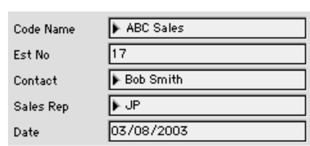
- Creating a LetterQuote
  - From an Estimate
  - From the Quote List View
- Inserting a Custom Logo
- Common LetterQuote functions
  - Opening a saved LetterQuote
  - Printing
  - Faxing
  - E-mailing.
- Scripting a LetterQuote
  - Scripting
  - Distributing a Script to All Users on the Network

Creating a LetterQuote

From an Estimate

1. Create a new estimate or open an existing estimate.
2. Click the Quote button on the Estimate button bar.
3. Select New LetterQuote from the drop-down menu.

   PrintPoint displays the LetterQuote screen and loads information from the estimate into the Quote Record and the LetterQuote word processing area.



4. You can modify the LetterQuote using standard word processing techniques. All changes you make will be saved permanently with this LetterQuote.

NOTE

PrintPoint’s LetterQuotes are built from scripts stored in the “letters” folder of your PrintPoint Folder and can be customized for each user on your network

5 You can now Fax, E-Mail, Print, Cancel or Save the LetterQuote.

See the Common LetterQuote Functions section later in the chapter for more detail.

From the Quote List View

1 Select Navigator > Quotes.

PrintPoint displays the Quote List View.

2 Click the New button.

3 Select LetterQuote from the drop-down menu.

The LetterQuote entry screen is displayed.

4 Select a customer from the Customer Choice List.

PrintPoint will load all the available default information for the customer into the Contact and Sales Rep fields.

5 Enter the Estimate Number into the Est No. field by:

a. Typing the number directly into the field.

OR

b. Double-click the estimate from the Estimate List in the top right of the screen.

NOTE

You can view additional estimates in the Estimates List by clicking the Show last xx estimates drop-down menu and choosing one of the other available options.

6 The Date field contains today's date. Change the date in this field if you wish to have a different date displayed on your LetterQuote.

Inserting a Custom Logo

Your company logo can be included in your LetterQuotes by following the directions in preferences. Often the best quality graphic will be an EPS document, however other formats such as.gif, .pict, .jpeg, can work well. You must test for yourself.

See the section Preferences > Logo in the Preferences chapter.

Common LetterQuote Functions

Opening a Saved LetterQuote

1. From the LetterQuote editor, click File menu > Open.
2. Navigate to and select the LetterQuote you want to use.
3. Click the **Open** button.

   The selected LetterQuote displays in the LetterQuote editor section of the screen.

Printing

1. Click the Print button in the LetterQuote window.

   The Print dialog displays.

2. Complete the selections and click **Print**.

Faxing

1. Click the **Fax** button in the LetterQuote window.

   The Print dialog displays.

2. Select Fax as the Destination.
3. Complete the fax information in the subsequent windows to route your LetterQuote to the correct customer.

E-mailing

1. Click the E-mail button in the LetterQuote window.

   The Confirm dialog box displays with the e-mail address you provided in the contact information for this quote.

2. Click the Send button.

   The LetterQuote is e-mailed to the customer.

TIP

Click the button to the right of the E-mail button to view the E-mail Log window with a listing of your successful and unsuccessful e-mail messages.

Scripting a LetterQuote

Scripting

PrintPoint's LetterQuotes are standard "letter style" quotation created from scripts using PrintPoint's built-in word processor.

The scripts are provided with PrintPoint (stored in the "Letters" folder of your PrintPoint Folder) and can be customized for each user on your network.

CAUTION

All tech support for this advanced area falls outside the boundary of normal tech support and is fee based

A knowledge of programming and database structures and relationships is required in order to modify the script of a LetterQuote.

The recommended editing tools are:

- BBEDIT on Macintosh (http://www.barebones.com)
- ULTRAEDIT on Windows (http://ultraedit.com)

1. Create a LetterQuote.
2. Leave the LetterQuote open in PrintPoint.
3. Navigate to the "letters" folder inside your PrintPoint Folder or PrintPoint Client Folder.
4. Open the appropriate script for the style of LetterQuote you are trying to modify.

   The following table shows the list of available scripts and their uses
   .

Letter Script	Function
approval.ltr	Author's Alterations Approval Letter (English)
approval_sp.ltr	Author's Alterations Approval Letter (Spanish)
confirm.ltr	Job Confirmation Letter (English)
confirm_sp.ltr	Job Confirmation Letter (Spanish)
Letter_PageSetup_ANZ.4W7	Page Setup (A4 Letter Windows)
Letter_PageSetup_ANZ.ltr	Page Setup (A4 Letter Macintosh)
Letter_PageSetup_US.4W7	Page Setup (US Letter Windows)
Letter_PageSetup_US.ltr	Page Setup (US Letter Macintosh)
quote_ws.ltr	LetterQuote for WorkSheet/ShortForm (US)
quote_C.ltr	LetterQuote for Copy (US)
quote_LF.ltr	LetterQuote for Large Format (US)
quote_ANZ_ws.ltr	LetterQuote for WorkSheet/ShortForm (ANZ)
quote_ANZ_C.ltr	LetterQuote for Copy (ANZ)
quote_ANZ_LF.ltr	LetterQuote for Large Format (ANZ)

Letter Script	Function
quote_sp_WS.ltr	LetterQuote for WorkSheet/ShortForm (Spanish)
quote_sp_C.ltr	LetterQuote for Copy (Spanish)
quote_sp_LF.ltr	LetterQuote for Large Format (Spanish)

5 Make all appropriate changes.
6 Save the script.
7 Return to PrintPoint and regenerate the LetterQuote by re-entering the Estimate Number.
8 Repeat steps 5 - 7 until you are satisfied with the appearance of the LetterQuote.

Distributing a Script to All Users on the Network

If you are working in a multi-user version of PrintPoint, you may want to copy the newly customized script of the LetterQuote to other users on the network.

NOTE

Remember, each user can have a customized LetterQuote, you do no need to copy one script throughout the network.

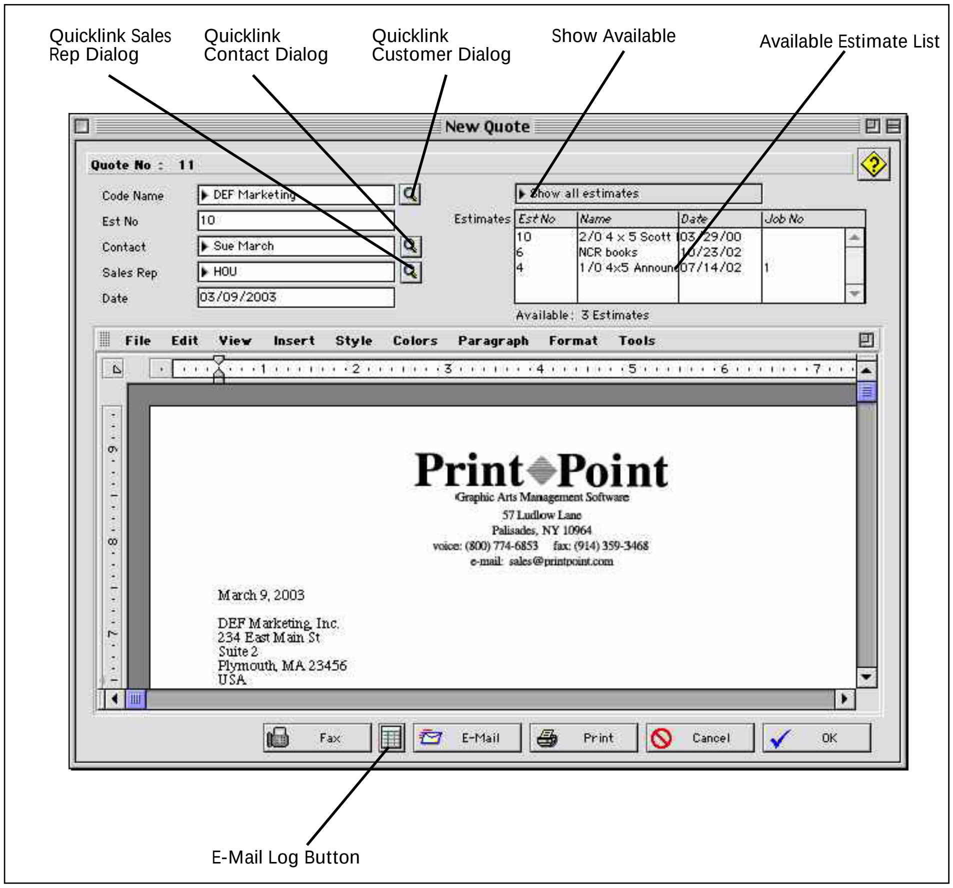
CAUTION

If you are using a customized script for each user, you must manually backup those scripts. They are *NOT* saved anywhere inside the PrintPoint database.

1 Copy the script from the machine you.
2 Transfer it over the network and place it inside the Mac4DX or Win4DX (or both for cross-platform installations) inside the PrintPoint App Folder located in the PrintPoint Server Folder.
3 Return to each of the client machines and throw away the “letters” folder.
4 Relaunch each client. When the client copies from the server, it will get a fresh copy of the new script and copy it to the letters folder.
5 Each user will not have an exact copy of the script.

ABOUT THE SCREENS

LetterQuote



Field /Button	Definition
QuickLink Buttons	Will open the dialogs for each of the corresponding areas.
Show Available (drop-down	Select from drop-down the amount estimates to view in the Avail Estimate List.
Avail Estimate List	Displays the list of estimates available to add to quote.
E-Mail (button)	Click to e-mail the quote.
Fax (button)	Click to fax the quote.
Print (button)	Click to print the quote.
E-Mail Log (button)	Click to view or edit the e-mail log.

Field /Button	Definition
Cancel (button)	Click to cancel the quote.
OK (button)	Click to accept the quote.

Jobs

Chapter 38
Jobs - Electronic Ticket: Introduction

OVERVIEW

PrintPoint's Job Module encompasses the following areas:

- Converting an Estimate into a Job
- Job List View
- Electronic Job Ticket allows the user to enter and review additional information for a job beyond what was created at the estimating level. It is divided into individual tabbed subsections:
  - Job Info (User Modifiable)
  - Creative (User Modifiable)
  - Pre-Press (User Modifiable)
  - Printing (User Modifiable)
  - Post-Press (User Modifiable)
  - Outside Service (User Modifiable)
  - Shipping (User Modifiable)
  - AAs (User Modifiable)
  - Job Cost (User Modifiable - Optional add-on module)
  - Scheduling (User Modifiable)
  - Internet (User Modifiable)
- Printing Job Tickets
- Job Reprints
- Job Linking
- Job Tracking

This following table is an overview of what is covered by each of the job chapters:

NOTE

In this section we use the default tab setting for explaination. You can modify the tab headings in the Custom Field Editor. For more information see the chapter "Custom Field Editor".

Chapter	What's Covered
Converting an Estimate To a Job	How to convert and estimate to a job from an estimate detail screen or the Estimate List View.
Job List View	This chapter discussed the functions that can be performed on Jobs in the list view...either individually or in batches.
Continued on next page...	

<table>
<tr><th>Chapter</th><th>What's Covered</th></tr>
<tr><td>Electronic Job Ticket-Job Info Tab</td><td>The Electronic Job Ticket's Job Info Tab summarizes the key Job information for the Job Ticket.

Use this tab to:
■ Record the Customer Purchase Order.
■ Define the Job Due Date and Job Due Time.
■ Set the Reorder Date.
■ Set the Current station for Job tracking and view the progress of the job.
■ Detail Production requirements through the Production Notes.
■ Add Job Notes which feed back into the estimating information.
■ Define job as rework.

From this tab you can:
■ Set the Job Number.
■ View the Sales Category analysis for this job.
■ Print the Job progress tracking log.
■ Clear the Job progress tracking log.</td></tr>
<tr><td>Electronic Job Ticket-Creative Tab</td><td>The Electronic Job Ticket's Creative Tab allows you to specify additional information on the Creative steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:
■ Select from pre-defined checkboxes aspects of the creative process.
■ Change any of the pre-defined checkboxes to appropriate information for this job only.
■ Set due dates and due times.
■ Add notes to the Electronic Job ticket relating to the creative process.</td></tr>
<tr><td>Electronic Job Ticket-Paper Tab</td><td></td></tr>
</table>

<table>
<tr><th>Chapter</th><th>What’s Covered</th></tr>
<tr><td>Electronic Job Ticket-Pre-Press</td><td>This Pre-Press Tab allows you to specify additional information on the Pre-press steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:
■ Select from pre-defined checkboxes, aspects of Pre-press
■ Change any of the pre-defined checkboxes to appropriate information for this job only
■ Set due dates and due time
■ Add notes to the electronic Job ticket relating to Pre-press</td></tr>
<tr><td>Electronic Job Ticket-Printing</td><td>This Printing Tab allows you to specify additional information on the Printing involved in the Job that can be incorporated into the printed Job Ticket.

The Printing tab displays the parent sheet cutout and press sheet layout and selected information from the Estimate relating to printing.

Use this tab to:
■ Select from pre-defined checkboxes, aspects of Printing
■ Change any of the pre-defined checkboxes to appropriate information for this job only
■ Set due dates and times
■ Add notes to the electronic Job ticket relating to Printing</td></tr>
<tr><td>Electronic Job Ticket-Post-Press</td><td>This Post-Press Tab allows you to specify additional information on the Post-press steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:
■ Select from pre-defined checkboxes, aspects of Post-press
■ Change any of the pre-defined checkboxes to appropriate information for this job only
■ Set due dates and due times
■ Add notes to the electronic Job ticket relating to Post-press</td></tr>
</table>

<table>
<tr><th>Chapter</th><th>What’s Covered</th></tr>
<tr><td>Electronic Job Ticket-Outside Services</td><td>This Outside Service Tab allows you to specify additional information on the Outside Services involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:

■ Set due date and due time.
■ Add notes to the Electronic Job ticket relating to Buyout.</td></tr>
<tr><td>Electronic Job Ticket-Shipping</td><td>The Shipping Tab allows you to specify shipping details for the Job that can will be used in the shipping documentation (see Shipping chapter).

Use this tab to:

■ Set the text for the shipping labels
■ Specify a date
■ Add shipping notes for use in the electronic and printed job tickets
■ Change the details of the Sold By
■ Change the details of the Sold To
■ Change the details of the Ship To
■ Change the shipping method
■ Change the Shipping description to be used on the shipping documentation

From this tab you can

■ View shipping records
■ View the Estimated and Actual costs of shipping
■ View the most recent Shipping date and dispatch method</td></tr>
</table>

Chapter	What's Covered
Electronic Job Ticket-AAs	This AA's Tab allows you to collect information and costs on the Authors Alterations (AAs) involved in the Job so they can be included in the invoice. Use this tab to: ■ Specify the AAs ■ Specify the quantity or time involved ■ Change the rate and markup ■ View the user who entered the AA ■ Specify who approved ■ Add notes to the electronic Job ticket relating to Aas ■ Add notes for inclusion on the invoice From this tab you can ■ View the total cost of the job including the AAs ■ Generate Approval letters to send to the client prior to making AAs ■ Quicklink to the AAs list item ■ Clear the AAs. Either all AAs or on a line by line basis

<table>
<tr><th>Chapter</th><th>What's Covered</th></tr>
<tr><td>Electronic Job Ticket-Job Cost</td><td>The Job Cost Tab displays both summary and real-time data for cost collected by the data collection module for the following areas:
Time
Material
Paper
Outside service..It provides a calculation of total costs to date and a cost vs. estimate comparison.

NOTE
Only users who have purchased the Job Costing module can view the Job Cost tab.

From this tab you can
View the production records relating to time, Materials, Paper and Outside Services
View the total cost to-date
View the Estimated total cost.</td></tr>
<tr><td>Electronic Job Ticket-Scheduling</td><td>The Scheduling Tab allows you to view and adjust the time required for a press time. This information can be used on a simple Press Schedule Report.</td></tr>
<tr><td>Electronic Job Ticket-Internet</td><td>The Internet subsection tab allows you to specify the current job station using the list of defined stations specifically "filtered" for display on your web site.

This feature differs from standard log-in of job stations by creating a second set of "virtual" stations that you would prefer your customers to view regarding the status of the jobs.</td></tr>
<tr><td>Printing Job Tickets</td><td>Printing Job Tickets is one of the key components of PrintPoint's Job module. It allows you to print the following reports:
Job Ticket
Sample Graphics and Impositions
Paper Purchase Orders
Outside Service Purchase Order
CombiTickets (a SuperReport Job Ticket with Multiple Jobs)
Custom designed SuperReport Job Tickets</td></tr>
</table>

Chapter	What's Covered
Job Reprints	Job Reprinting is one of the most important and common job functions. Rarely does a printer have a customer who does not return with the request to reprint a job exactly as the previous order or print a new job that is virtually the same with perhaps only a few changes.
Job Linking	Once your Estimates have been converted to Jobs, you can Link the Jobs to maintain the ease of locating the components of the job. This makes it easier to co-ordinate the job specifications.
Job Tracking	PrintPoint's Job Tracking allows the user to define Stations (press, bindery, pre-press, etc.) located throughout your shop, log those stations as jobs travel through these stations (logging in the time of day and user) and then print daily production reports. Additionally, Job Tracking allows the user to add Author's Alterations to jobs in progress.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your preferences for the default “Display Records Many Days Back” for the Job Review list	File Menu > Preferences > List Views
Set your preferences for the Next Job Number	File Menu > Preferences > Sequence Numbering
Set your Job preferences	File Menu > Preferences > Jobs
Set your preferences for Job Descriptions	File Menu > Preferences > Job Description
Set your preferences for Job Ticket Custom Fields and Tab Labels	File Menu > Custom Fields Editor for job tickets for Offset, Copy, and Large Format Printing
Setup your Sales Categories	Accounting Menu > Sales Categories > Edit Sales Categories See the Sales Categories chapter in this Manual for additional information
Assign equipment and processes to Sales Categories	See the applicable chapters in this Manual

Chapter 39

Jobs - Converting an Estimate To a Job

OVERVIEW

All jobs in PrintPoint begin as estimates. This is true even if you don't really estimate the job, but merely use the estimate form to setup the first level of details related to the costing of a job.

When you reach the actual Job phase, all of the estimate information for the chosen quantity is available to the job and additional information can be added for more specific production instructions that do not necessarily affect the pricing.

NOTE

Additional pricing for AAs and Shipping can be added once the job is in production.

This chapter covers the two methods of converting an estimate to a job:

- From an estimate form
- From the Estimate List View

BEFORE YOU BEGIN

You should....	Where this information is found...
Set your Job Preferences	Refer to Preferences chapter
Set your preferences for the Next Job Number	File Menu > Preferences > Sequence Numbering
Turn on Automatic Job Linking	File Menu > Preferences > Jobs

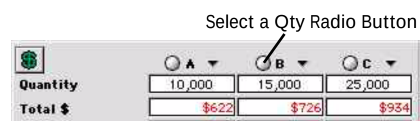
STEP-BY-STEP

This section describes the information and functions available when viewing a job:

- Converting an Estimate To a Job from an Estimate Detail Screen
- Converting an Estimate To a Job from the Estimate List View
- Converting Linked Estimates to a Job

Converting an Estimate To a Job from an Estimate Detail Screen

1. Create a new or open and existing estimate.
2. Click one of the three radio buttons next to Quantity A, B, or C to select a quantity.



3. Click the Job button.

   The Electronic Job Ticket will be displayed.
4. Refer to the Jobs - Electronic Job Ticket: Job Info chapter to continue creating the job.

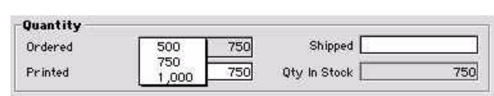
Converting an Estimate To a Job from the Estimate List View

1. Select Navigator > Estimates.

   PrintPoint displays the Estimate List View.
2. Highlight the estimate you would like to convert.

   NOTE

   You can only convert one estimate at a time.
3. PrintPoint displays the Job Info tab for newly created job.
4. Select a Quantity from the Ordered Black Triangle in the Quantity Group Box.



5. Refer to the Jobs - Electronic Job Ticket: Job Info chapter to continue creating the job.

Converting Linked Estimates to a Job

PrintPoint provides you the option of converting linked estimates to a job. This is beneficial if, for instance, you have a cover estimate and a text estimate and want them to be associated once converted to a job. PrintPoint will give each of the estimates the same job number but will add a sequence character for distinction. For example...

Estimate #	Description	Job #
20001	Booklet Cover	10001-A or 10001.1
20002	Booklet Text	10001-B or 10001.2

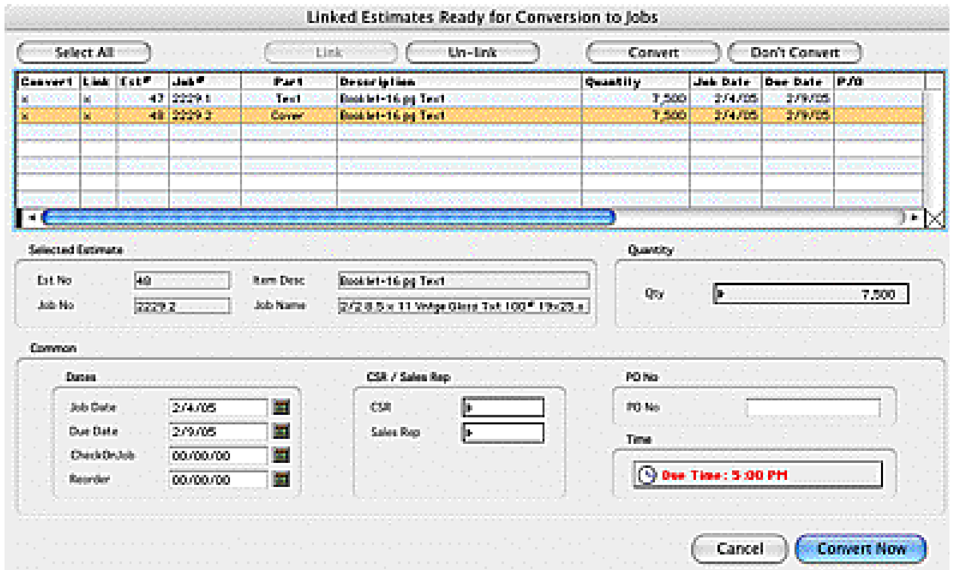
This approch will give you the opertunity to use the CombiJob Ticket and keep both parts on one ticket.

1. Create two estimates.
2. Link the two estimates (See the Linking Chapter).
3. Use of the two methods descrbed earlier in this chapter to convert one of the estimates to a job.

   PrintPoint Displays the Linked Estimates Ready for Convertion to Jobs dialog.
4. From this dialog you can choose to unlink parts, choose job quantity, job due date ect... For more information see the About the Screens at the end of this chapter.

ABOUT THE SCREENS

Linked Estimates Ready for Convertion to Jobs dialog



Field Name	Contents/Usage
Select All button	Click to select all estimates in the dialog
Link/Unlink buttons	Use to either link or unlink multiple estimates from the list
Convert/Don't Convert button	Use to either convert or not convert selected estimates to jobs
Est. No	The highlighted estimate number
Job No	The job number the estimate will have when/if converted.
Item Desc	Item Description of the highlighted estimate
Job Name	Job Name of the highlighted estimate
Qty pop-up	Click to choose the quantity for the job once the estimate is converted. These quantities are what was selected during estimating
Job Date	Date the estimate was converted to a job
Due Date	Date the job will be due
CheckOnJob	Date to set as a followup for the job
Reorder	Date to set for a reordering the job

NOTE

The Job, CheckOnJob and Reorder dates can be displayed in the To Do/Calendar

Field Name	Contents/Usage
CSR popup	Select the CSR for the job
Sales Rep popup	Select the Sales Rep for the job
PO No	Enter the customers PO Number
Time	Enter the due time for the job
Convert button	Click to convert the selected estimates to jobs

Jobs - List View

OVERVIEW

The Job List View is a list jobs in your shop. It can be setup to show only active jobs (Work In Progress) or all jobs.

NOTE

Follow these steps to display on Work In Progress:

a. File Menu > Preferences.
b. Select Jobs from the Select Menu.
c. In the Job List subsection, place a check in the Show work In Progress Only in Job List checkbox.

Additionally it gives you the ability to perform functions on individual Jobs or groups of Jobs without having to open the Electronic Job Ticket.

Functions covered in this chapter are:

- Select, Search and Sort Jobs by various criteria
- Assign and view jobs by Due Date, Station, etc.
- Assign Job Done Status
- Review the Original Estimate
- Deleting a Job

Additional functions can be performed for the Job List View and are covered in their own chapters.

- Clone or Reprint (See the “Jobs - Cloning & Reprinting” chapter)
- Estimate Review
- Link Jobs (See the “Job Linking” chapter)
- Print Job Tickets (See the “Printing Job Tickets” chapter)

BEFORE YOU BEGIN

You should....	Where this information is found...
Set your Job Preferences	Refer to Preferences chapter
Set your preferences for the default “Display Records Many Days Back” for the Job Review list	File Menu > Preferences > List Views
Setup Job Stations	Refer to Preferences chapter

STEP-BY-STEP

This section describes the information and functions available when form the Job List View:

- Search and Sort Jobs by various criteria
- Assign and view jobs by Due Date, Station, etc.
- Assign Job Done Status
- Review the Original Estimate
- Deleting a Job

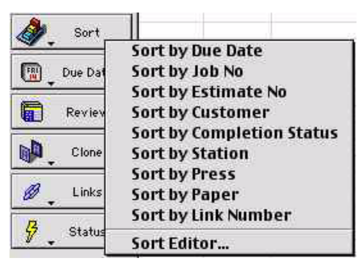
Search and Sort Jobs by various criteria

1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

From the Job List View you can use standard Selection techniques for List Views (See the PrintPoint Basics chapter > Select Button section).

The following drop-down menus are available from the Job List View buttons for Searching and Sorting.



Assign and view jobs by Due Date, Station, etc.

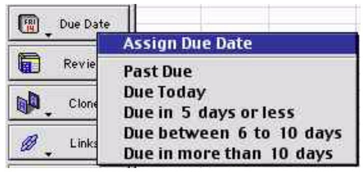
Batch Assigning a Due Date

1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

2 Create a selection of records in the Job List View.

3 Select Assign Due Date from the Due Date drop-down menu button.



4 Enter a date in the Request dialog.

All the selected jobs due dates have been updated.

Viewing Work In Progress by Due Dates

1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

2 Select on of the 5 options to display jobs that fall within the date ranges specified.

NOTE

Past Due and Due Today are fixed choice set by PrintPoint. Due in “X” days or less”, Due between “x” and “y” days and Due in more than “y” days are set in Preferences:

a. File Menu > Preferences.

b. Select Jobs from the Select Menu.

c. In the Job List subsection > Due Date Alarms > Level 1 & 2 enter dates for each of the two levels.
These dates will be reflected as shown in the menu above if you had entered 10 in the first entry and 5 in the second.

Assign Job Done Status

Job Done

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.

2. Create a selection of records in the Job List View.
3. Select Assign Job Done from the Status drop-down menu button.

All the selected jobs will be marked as Done.

NOTE

If you have set Job List View preferences to Show Only Work In Progress in Job List, the jobs will immediately be removed from the list.

Job Not Done

If you have set the option to Show Only Work In Progress in Job List in Preferences, you will most likely need to select Show All from the Select menu in order to mark a job as “Not Done”.

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.

2. Create a selection of records in the Job List View.
3. Select Assign Job Done from the Status drop-down menu button.

All the selected jobs will be marked as Not Done.

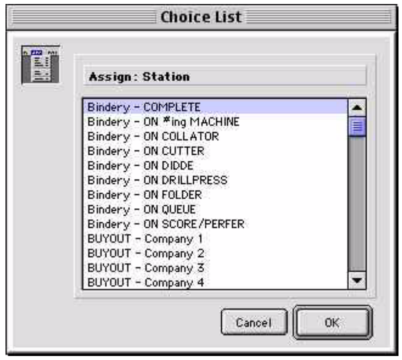
Station

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.

2. Create a selection of records in the Job List View.
3. Select Assign Station from the Status drop-down menu button.

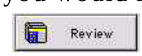
4 Select a Station from the Station Choice List.All the selected job



Stations will be updated.

Review the Original Estimate

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Highlight the job you would like to open as an estimate.
3. Click the Review 

 button.

   PrintPoint will display the appropriate Estimate Form.

Deleting a Job

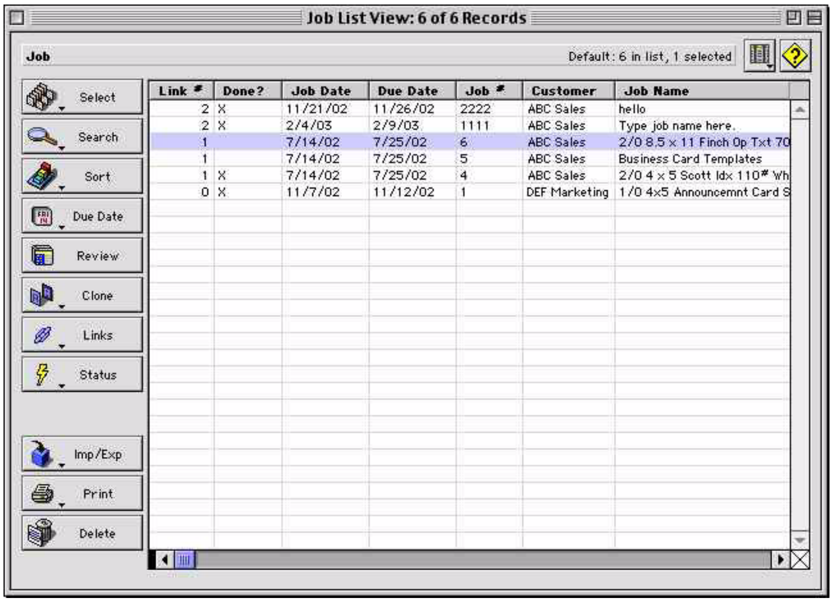
1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Highlight the job you would like to delete.
3. PrintPoint will delete the job from the Job List View. It will NOT remove the estimate, but it will clear out any of the job details that have been stored with the estimate:

   - Job Date
   - Job Due Date
   - Job Number
   - Job Done/Not Done Status
   - Inventory Used
   - Quantity Used
   - Purchase Order

About The Screens

Job List View



Chapter 40

Jobs - Electronic Ticket: Job Info

OVERVIEW

The Electronic Job Ticket's Job Info Tab summarizes the key Job information for the Job Ticket.

Use this tab to:

- Record the Customer Purchase Order.
- Define the Job Due Date and Job Due Time.
- Set the Reorder Date.
- Set the Current station for Job tracking and view the progress of the job.
- Detail Production requirements through the Production Notes.
- Add Job Notes which feed back into the estimating information.
- Define job as rework.

From this tab you can:

- Set the Job Number.
- View the Sales Category analysis for this job.
- Print the Job progress tracking log.
- Clear the Job progress tracking log.

BEFORE YOU BEGIN

You should....	Where this information is found...
Set your Preferences for Job Ticket Tab Labels and Custom Fields	Refer to Custom Fields Editor chapter
Set your Job Preferences	Refer to Preferences chapter
Set you preferences for the next job Number	Refer to Preferences chapter
Set your Job Description Preferences	Refer to Preferences chapter
Setup your Sales Categories	Refer to Sales Categories chapter
Assign equipment, materials and processes to Sales Categories	See chapters on Pre-press, Press, Copier, Large Format, Post-press, Paper, Ink as required.
Setup Job Tracking Station names	See Job Tracking chapter

STEP-BY-STEP

This section describes the information and functions available when viewing a job:

- Accessing a Job
- Contact
- Job Name
- Item Description
- Purchase Order Number
- The Job Description
- Selecting the Job Type
- Selecting a Quantity
- Quantity Printed
- Quantity Shipped
- The Job Total
- Sales Rep
- CSR
- Setting Job Dates
- Job Notes
- Production Notes
- Current Station
- Confirmation Letters
- Printing the Job Ticket
- Printing the Job Tracking Log
- Clearing the Job Tracking Log
- Setting a Job as Done (Closing a Job)
- Setting a Job as Not Done.
- Setting a Job as Invoiced
- Setting a Job as Not Invoiced
- The Sales Analysis Button

Accessing a Job

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.

Contact

The contact field shows the contact from the Estimate. To change the contact for the Electronic Job Ticket:

1. Click the black triangle

   Printpoint displays the Contact Choice List for the customer

2. Choose the new contact from the list or add a new contact On-The-Fly.(See Chapter Customers: Adding a Contact)

TIP

Any changes made on the Electronic Job Ticket will automatically be transferred back to the original estimate.

Job Name

The Job Name displayed is the name entered in the Estimate. To change the Job Name:

1. Click or tab into the Job Name field
2. Type in the ne w Job Name.

TIP

Any changes made on the Electronic Job Ticket will automatically be transferred back to the original estimate.

CAUTION

The new Job Name does not change the Job Description as displayed in the Job Description field. Nor does it change the Quote and Invoice Description.

Item Description

The Item description is the Item Description entered in the Estimate. To change the Item Description for the Electronic Job Ticket:

1. Click on the green triangle and select a Description from the choice list
2. OR type a new Description in to the field.

CAUTION

The new description does not change the Job Description as displayed in the Job Description field. Nor does it change the Quote and Invoice Description.

Purchase Order Number

1. Click on or tab into the Purchase Order Field
2. Enter the Customers Purchase Order

Selecting the Job Type

Click on one of the radio buttons to choose the type of job.

The Job Description

On conversion from the Estimate, Job Description is transferred to the Electronic Job Ticket.

This field is not editable but you can choose whether you want the Job Description as defined in the Preferences or the description as modified for the Quote and Invoice.

1. Select the desired description by clicking on the black triangle in Description label

TIP

Clicking in the Job Description area places a copy of the job description on the Clipboard where it can be pasted into other applications.

Selecting a Quantity

The Job Quantity can be selected or changed once the Electronic Job Ticket is created. To select the Job Quantity:

1. Click on the Black triangle to display a dropdown listing the quantities associate with the related estimate
2. Select the new quantity

NOTE

An Estimate can have three different quantities. The Electronic Job Ticket can be created for any one of the three and any one of the three can be selected at any time.

Entering Quantity Printed

On conversion of an Estimate into a Job, the quantity chosen for the Job is entered into the quantity Printed field. This quantity can be changed once the job is actually produced.

1. Click or Tab into the Printed field
2. Enter the actual quantity printed.

NOTE

If the quantity Ordered is changed after the Electronic Job Ticket is created, the Quantity Printed does not automatically change to reflect the new quantity Ordered. You have to change the Printed manually.

Entering Quantity Shipped

To manually adjust the quantity shipped:

1 Click or tab into the Shipped field
2 Enter the quantity shipped

NOTE
The Qty in Stock is Printed less Shipped.

NOTE
The quantity Shipped is automatically updated if you use the Shipping functions (Chapter Shipping)

NOTE
If you enter shipping details in the Shipping Tab, the quantity Shipped is automatically adjusted. (See Chapter Jobs: Shipping).

Entering the Sales Rep

On conversion of an Estimate into a Job, the Sales Rep is carried over into the job. To change the Sales Rep for a Job:

1 Click on the black triangle in the Sales Rep field
  PrintPoint displays a choice list of Sales Reps.
2 Select a Sales Rep from the choice list.

NOTE
New Sales Reps can be added On-The-Fly.

Entering the CSR

On conversion of an Estimate into a Job, the CSR (Customer Service Rep) is carried over into the job. To change the CSR for a Job:

1 Click on the black triangle in the CSR field
  PrintPoint displays a choice list of CSRs.
2 Select a CSR from the choice list.

NOTE
New CSRs can be added On-The-Fly.

Setting Job Dates

On creation of the Electronic Job Ticket, the Job Date is set to the current date and the Job Due date is set to the current date plus the default days to manufacture (set in Preferences). To change the job dates :

1 Click or tab into the date field to be changed
2 Type in the appropriate date.

Alternatively,

1 Click on the Date Icon (calendar) to the right of the date you want to change.

2 In the calendar dialog select the date you want by adjusting the months and years appropriately and then clicking on the day of the month.

Entering Job Notes

On conversion of an Estimate into a Job the Job Notes are carried over from the job Notes field in the Estimate. These notes can be changed in the Electronic Job Ticket To change the Job Notes:

1 Click in the Job Notes field and add the information required.

NOTE

The changes are reflected in the Job Notes field of the corresponding Estimate.

Entering Production Notes

1 Click in the Production Notes field.

2 Enter Production information for this job.

Entering Current Station

As the Job progresses through the manufacturing cycle, you can identify the current location of the job by its Current Station.

NOTE

The Current Station can be set automatically if the Data Collection is in place (see Data Collection: Express Setup) Or the Current station can be set from Job Tracking (see Job Tracking)

To set from the Electronic Job Ticket:

1 Click on the black triangle in the Current Station field

PrintPoint displays a choice list of Stations.

2 Select the appropriate station from the list.

The Electronic Job Ticket screen displays a log of the stations that have been recorded for the job along with the date and who logged the station.

Confirmation Letters

PrintPoint gives you the option to create a new Confirmation Letter or review existing Confirmation Letters.

Creating a Confirmation Letter

1 Click the Confirmation button at the bottom of the screen and New Confirmation Letter.

PrintPoint will open a new window displaying the Confirmation Letter

2 Check the Contact and select a new contact by clicking the black triangle if required.

3 Enter a topic in the Topic field.

4 Change the date if Required.

5 Make any desired changes to the letter.

TIP

The Confirmation Letter is displayed in a built in word processor. Any changes made to the letter will be saved when the letter is printed or sent.

6 Select the appropriate method of delivery from the buttons, E-mail, Fax or Print.

Reviewing Confirmation Letters

1 Click the Confirmation button at the bottom of the screen and Review Confirmation Letters.

PrintPoint will open a new window displaying a list of Confirmation Letters for this Job in the top section of the window and the highlighted confirmation letter in the bottom section.

CAUTION

The letter displayed is not editable. It is only available for reprinting or resending.

2 Select the desired letter by double-clicking the required letter in the upper section.

Printing the Job Ticket

1 Click the Print button.

2 Follow the printing instructions.

Printing the Job Tracking Log

PrintPoint allows you to print the log of all stations that the job has passed though during your workflow.

1 Click the Print Log button.

2 Follow the printing instructions.

Clearing the Job Tracking Log

1 Click the Clear Log button.

2 Press OK to clear the Tracking Log or Cancel.

Flagging a Job with a Re-Order Date

1 Click the Reorder Icon (calendar).

2 Select the desired Reorder Date.

Setting a Job as Done (Closing a Job)

A Job can be marked as Done from the Electronic Job Ticket screen

1. Click the Job Done checkbox
2. Change the Job Done date if required.

NOTE

Jobs can also be marked done from the Job List. (See Jobs: Introduction)

NOTE

Jobs can also be marked don when a Job is Invoiced (See Invoicing).

NOTE

Clients that use PrintPoint's Shipping normally set their jobs to Done (close their jobs) within Shipping. See the Shipping Chapter for more information.

Setting a Job as Not Done

A Job marked as Done can be re-opened Electronic Job Ticket screen.

1. Click the Job Done checkbox

NOTE

The Job Done Date will be reset to 00/00/00.

Setting a Job as Invoiced

A Job can be marked as Invoiced from the Electronic Job Ticket screen

1. Click the Invoiced checkbox
2. Change the Invoiced date if required.
3. Enter the Invoice Number

NOTE

Jobs can also be marked Invoiced when a Job is Invoiced (See Invoicing) This is the most common way to set the Invoiced checkbox.

Setting a Job as not Invoiced

A Job can be marked as Invoiced from the Electronic Job Ticket screen

1. Click the Invoiced checkbox

The Invoice date and Invoice number are removed.

CAUTION

Marking the job as not invoiced does not automatically void the invoice. An alert warns you to note the invoice number so you can void it in the invoice list.

The Sales Category Explanation Button

1. Click the Sales Category Explanation button

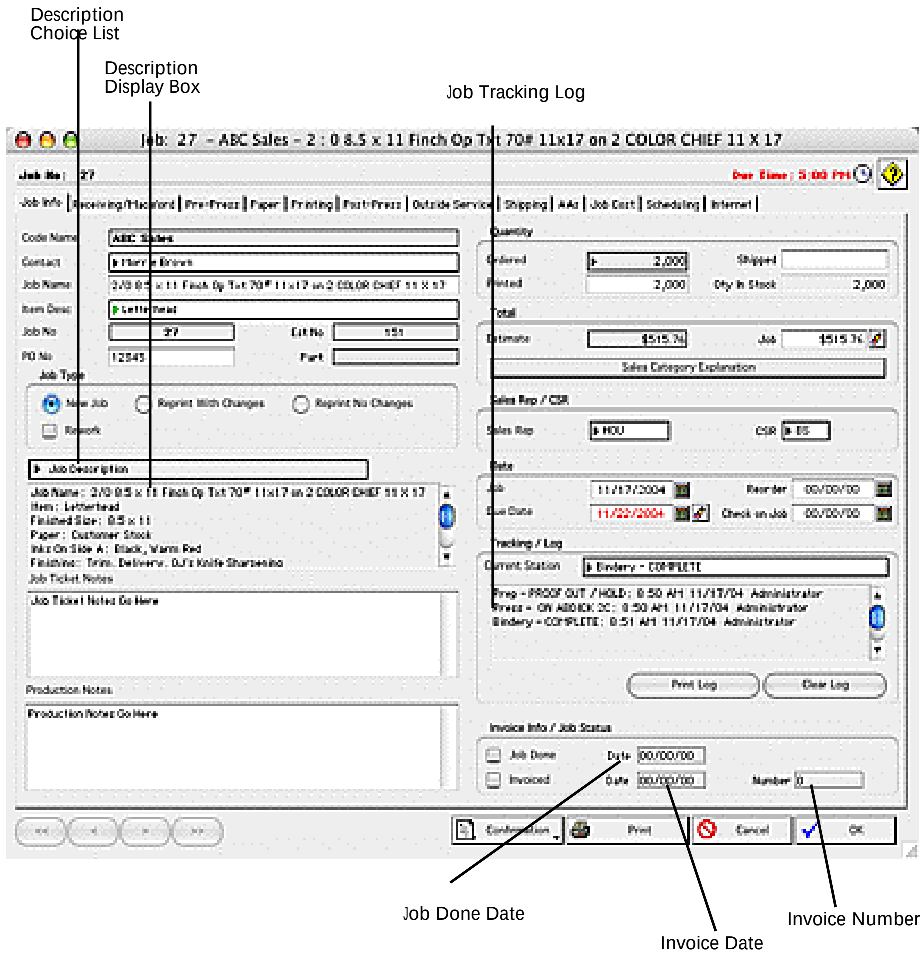
   PrintPoint displays the Sales Category Dialog with the detailed analysis for this job. See the “About The Screens” later in this chapter for the details.

About the Screens

TIP

See the chapter "Custom Fields Editor" for information on changing the labels for each tab title and field names.

Job Info Tab

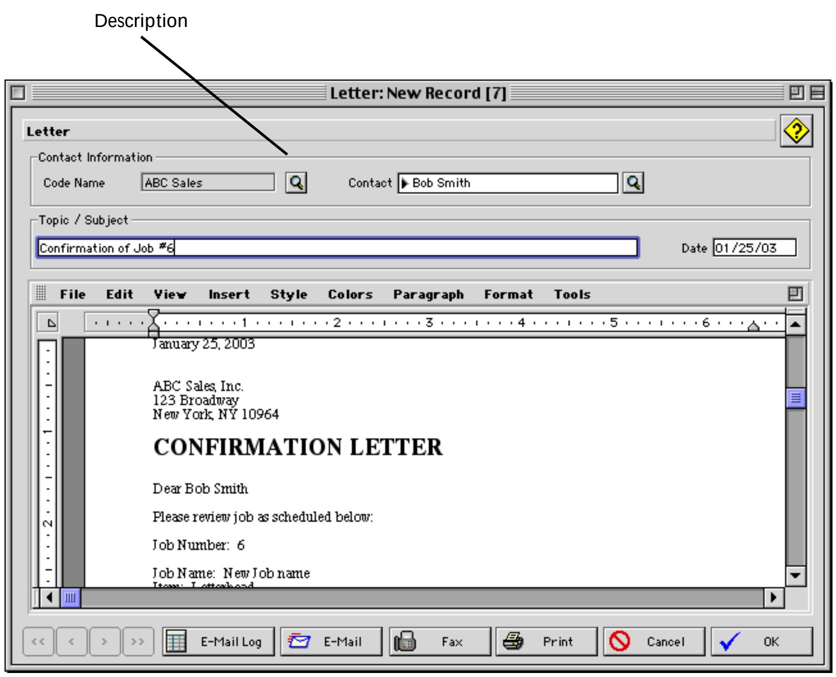


Field Name	Contents/Usage
Code Name	Name of the Customer for job
Contact	Name of Contact for job
Job Name	Name of this job
Item Desc	Item Description

Field Name	Contents/Usage
Job No	The Job Number assigned when the job was created
Est No	The Estimate Number used to create this job
PO No	Enterable field for the Purchase Order Number
Rework	Checkbox indicates whether the Job is Rework
Description Choice List	Click to select between the Job Description and the Quote and Invoice Description
Description Display Box	Displays the selected description
Job Ticket Notes	Enter notes that will appear on the job ticket
Production Notes	Enter production notes
Qty Ordered	Quantity Ordered
Qty Shipped	Displays Quantity Shipped (see Shipping chapter)
Printed	Enter the actual quantity printed. (If you override the default value, the field's color will be inverted.)
Qty In Stock	Displays the quantity in stock after shipping
Est Total $	Total $ of the estimate from which this job was created
Job Tot $ (button)	Total $ of this job (includes AA's)
	TIP Click on the button to see the Job Total Amount allocated over the Sales Categories
Sales Category Explain (button)	Provides a detailed breakdown of the Sales Categories for the job
Sales Rep	Select the Sales Rep from the Choice List
CSR	Select the Customer Service Rep from the Choice List
Job Date	Date the job was created
Due Date	Date the job is due (If you override the default value, the field's color will be inverted.)
Re-Order (date)	Click on the calendar icon and select a re-order date for this job
Current Station	Used for Job Tracking: select the current station from the Choice List
Job Tracking Log	This log is updated whenever you select the Current Station for job tracking
Print Log Button	Prints the Job Tracking Log
Clear Log Button	Clears the Job Tracking Log

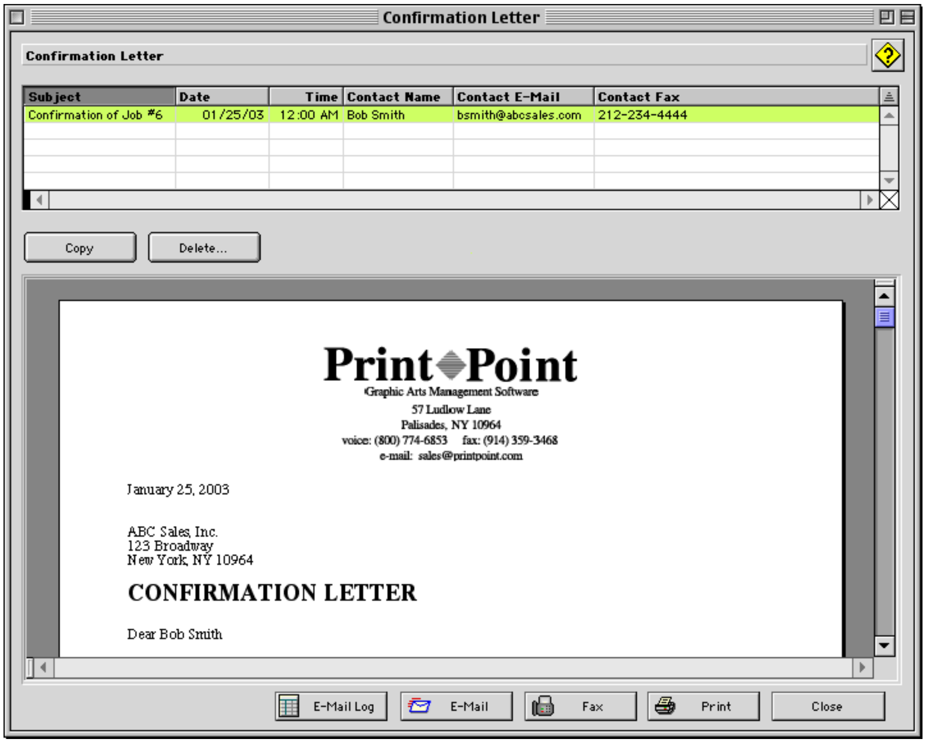
Field Name	Contents/Usage
Job Done Checkbox	Job shows as Done when marked during Shipping (see Shipping chapter)
Job Done Date	Date Job is marked as Done
Invoiced Checkbox	Checkbox shows as Invoiced when job is Invoiced (see Invoicing chapter)
Invoiced Date	Shows Invoiced Date after job is invoiced (see Invoicing chapter)
Invoice Number	Shows Invoice Number after job is invoiced (see Invoicing chapter)

Confirmation Letter



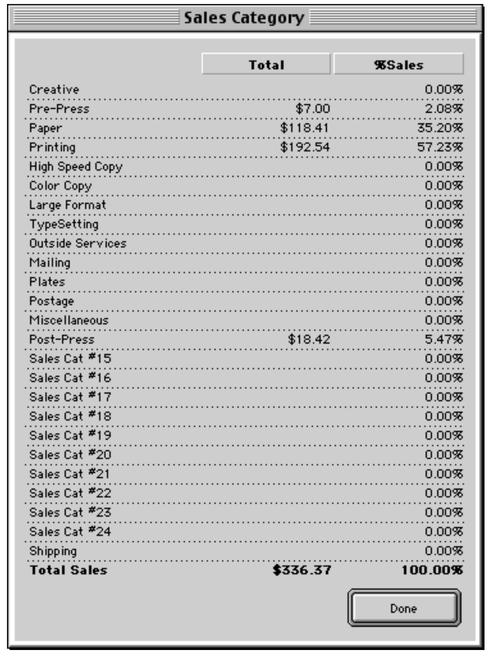
Field Name/Buttons	Contents/Usage
Code Name	Name of the Customer for job
Contact	Name of Contact for job
Job Name	Name of this job
Item Desc	Item Description
Job No	The Job Number assigned when the job was created
Est No	The Estimate Number used to create this job
PO No	Enterable field for the Purchase Order Number
Rework	Checkbox indicates whether the Job is Rework

Review Confirmation Letter Dialog



Field Name/Buttons	Contents/Usage
Code Name	Name of the Customer for job
Contact	Name of Contact for job
Job Name	Name of this job
Item Desc	Item Description
Job No	The Job Number assigned when the job was created
Est No	The Estimate Number used to create this job
PO No	Enterable field for the Purchase Order Number
Rework	Checkbox indicates whether the Job is Rework

Sales Category Explanation Dialog



Info/Buttons	Contents/Usage
Total	
% Sales	
Done (button)	Closes the dialog.

Chapter 41

Jobs - Electronic Ticket: Creative

OVERVIEW

The Electronic Job Ticket's Creative Tab allows you to specify additional information on the Creative steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:

- Select from pre-defined checkboxes aspects of the creative process.
- Change any of the pre-defined checkboxes to appropriate information for this job only.
- Set due dates and due times.
- Add notes to the Electronic Job ticket relating to the creative process.

BEFORE YOU BEGIN

You should....	Where this information is found...
Set your Preferences for Job Ticket Custom Fields and labels	Refer to Custom Fields Editor chapter

STEP-BY-STEP

This section describes the information and functions available when viewing the Creative Tab of the Electronic Job Ticket:

- Accessing the Creative Tab
- Using Checkboxes to add info to Job Ticket
- Set Creative Process Dates
- Set the Creative Due Time
- Enter Notes

Accessing the Creative Tab

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the Creative Tab.

Using Checkboxes

There are 10 checkboxes and associated labels available to provide information for the Electronic Job Ticket. Default labels are displayed when the Electronic Job Ticket is created. You can use the defaults or change the labels for this Job.

The checked items can be incorporated into a printed Job Ticket.

To use the checkboxes:

1. Click the Checkbox next to the label you want included.
2. Change the Label if required to a custom value by clicking in the label field and overtyping the default value.

NOTE

Many users enter a “Starting Value” for the labels with the expectation that the CSR for the job will enter the appropriate information in the field.

Example — If the default value in the first checkbox is “Art Recv’d by: ” ...then the expectation is that the CSR would fill in “Zip Disk or CD” after the pre-existing text. This information can then be printed on the Job Ticket.

Set Creative Process Dates

There are two due date fields available. The default values of these dates are set in the Custom Field Editor (See the Custom Field Editor Chapter).

The dates and associated labels can be incorporated into a printed Job Ticket.

To modify the dates:

1 Click on the Calendar Icon beside the date field
2 Select the month and year using the buttons at the top of the dialog and then selecting the day from the Calendar.

TIP

You can change the label for the due date by clicking in the label field and overtyping the default value. This value is saved with this job only.

Set the Creative Due Time

You can set the Due Time for completion of the Creative process.

The Time field label is set in the Custom Fields Editor (see the Custom Fields Editor chapter).

The Due Time can be incorporated into the printed Job Ticket.

1 Click on the Clock face in the header.
   PrintPoint displays a Time dialog.
2 Select the Time of day by clicking the appropriate buttons for Hours, Minutes and am/pm
3 Click the OK button to accept the time.

Enter Notes

There are two Notes areas that can be used for details associated with the Creative process. There are Custom Label fields for each text area.

The Creative Notes can be incorporated into a printed Job Ticket.

To use the Notes areas:

1 Click in the desired Notes area and type in the Creative details.

NOTE

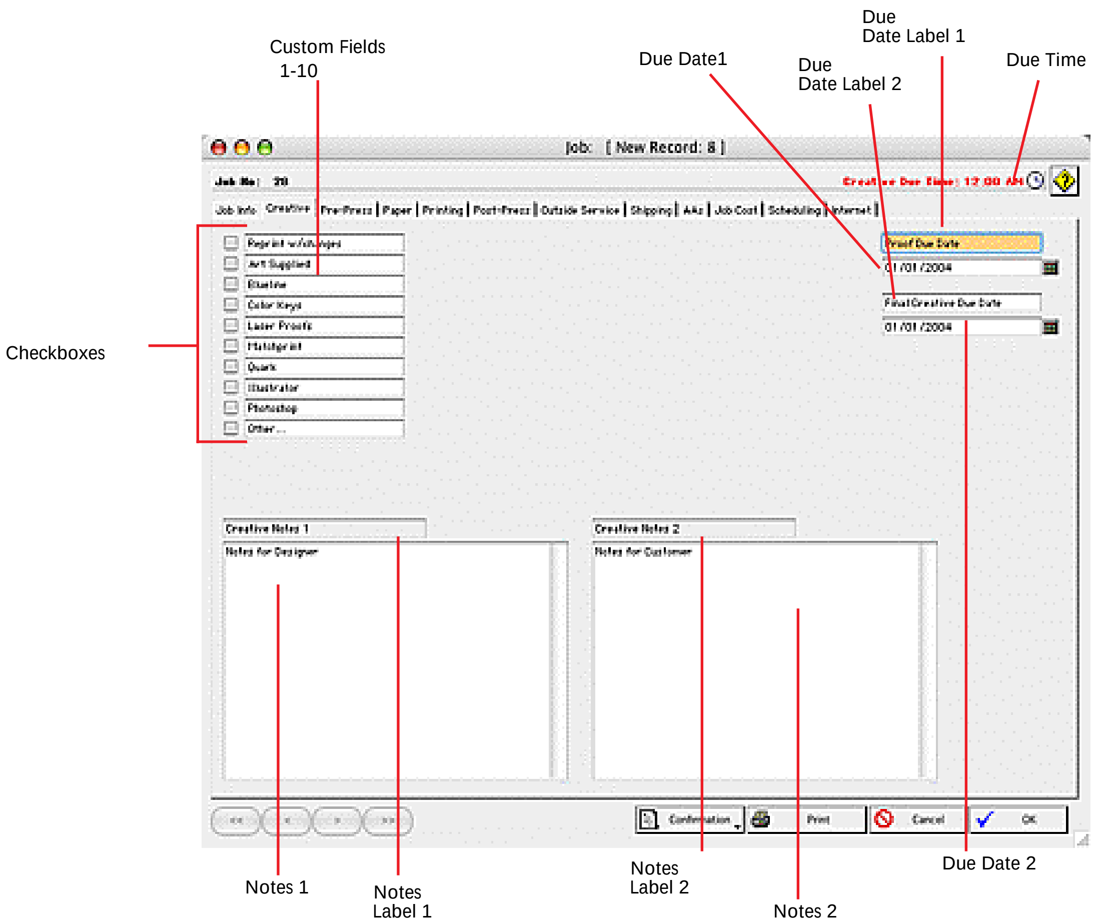
You can change the label for the Notes by clicking in the label field and overtyping the default value. This value is saved with this job only.

About The Screens

TIP

See the chapter "Custom Fields Editor" for information on changing the labels for the tab title and the field names.

Creative Tab



Field Name	Contents
Checkbox (for each of 10 Creative items)	Click to select a Creative item as entered onto the Custom Fields Tab for each applicable Job Ticket
Text Area (for each of 10 Creative items)	Displays the Creative items entered onto the Custom Fields Tab for each applicable Job Ticket. This is also a user-modifiable field.

Field Name	Contents
Creative Due Date Label-1	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Creative Due Date-1	Click on the Calendar icon to select a date
Creative Due Date Label-2	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Creative Due Date-2	Click on the Calendar icon to select a date
Creative Notes Label-1	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Creative Notes-1	Field to enter Creative notes
Creative Notes Label-2	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Creative Notes-2	Field to enter Creative notes

Chapter 42

Jobs - Electronic Ticket: Pre-Press

OVERVIEW

This Pre-Press Tab allows you to specify additional information on the Pre-press steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:

- Select from pre-defined checkboxes, aspects of Pre-press
- Change any of the pre-defined checkboxes to appropriate information for this job only
- Set due dates and due time
- Add notes to the electronic Job ticket relating to Pre-press

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your preferences for Job Ticket Custom Fields and Tab Labels	File Menu > Custom Fields Editor for job tickets for Offset, Copy, and Large Format Printing

STEP-BY-STEP

This section describes the information and functions available when viewing a the Pre-Press Tab:

- Accessing the Pre-Press Tab
- Using Checkboxes to add info to Job Ticket
- Set Pre-press Dates
- Set the Pre-press Due Time
- Enter Notes

Accessing the Pre-Press Tab

1 Select Navigator > Jobs.

PrintPoint displays the Jobs List.

2 Select and double-click the job you would like to view.

PrintPoint displays the Job Info tab for the selected job.

3 Select the Pre-Press Tab.

Using Checkboxes

There are 10 checkboxes and associated labels available to provide information for the Electronic Job Ticket. Default labels are displayed when the Electronic Job Ticket is created. You can use the defaults or change the labels for this Job.

The checked items can be incorporated into a printed Job Ticket.

To use the checkboxes:

1 Click the Checkbox next to the label you want included.

2 Change the Label if required to a custom value by clicking in the label field and overtyping the default value.

NOTE

Many users enter a “Starting Value” for the labels with the expectation that the CSR for the job will enter the appropriate information in the field.

Example — If the default value in the first checkbox is “Plates Stored: ”...then the expectation is that the CSR would fill in “Bin 300” after the pre-existing text. This information can then be printed on the Job Ticket.

Set Pre-Press Dates

There are two date fields available. The default values of these dates are set in the Custom Field Editor (See the Custom Field Editor Chapter).

The dates and associated labels can be incorporated into a printed Job Ticket.

To modify the dates:

1. Click on the Calendar Icon beside the date field you want to set
2. Select the month and year using the buttons at the top of the dialog and then selecting the day from the Calendar.

TIP

You can change the label for the due date by clicking in the label field and overtyping the default value. This value is saved with this job only.

Set the Pre-press Due Time

You can set the Due Time for the completion of Pre-press activities.

The default value for the Time field label is set in the Custom Fields Editor (see the Custom Fields Editor chapter).

The Time can be incorporated into the printed Job Ticket.

1. Click on the Clock face in the header

   PrintPoint displays a Time dialog.
2. Select the Time of day by clicking the appropriate buttons for Hours, Minutes and am/pm
3. Click the OK button to accept the time.

Enter Notes

There are two Notes areas that can be used for details associated with the Pre-Press activities. There are Custom Label fields for each text area.

The Pre-Press Notes can be incorporated into a printed Job Ticket.

To use the Notes areas:

1. Click in the desired Notes area and type in the Pre-Press details.

NOTE

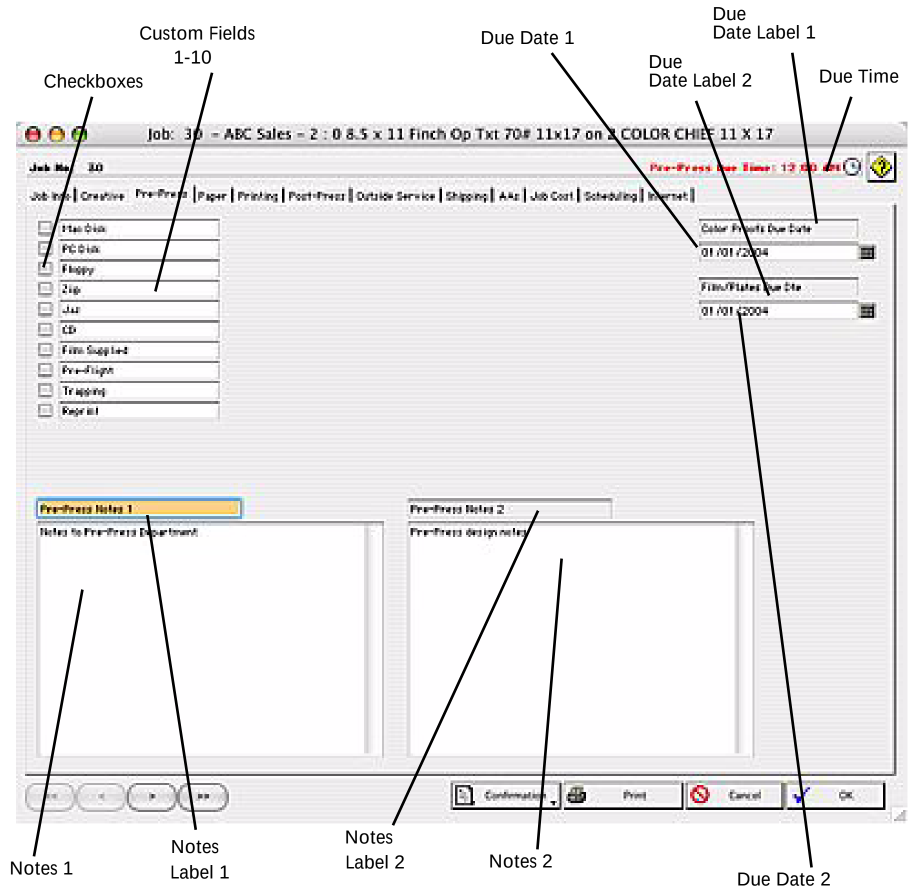
You can change the label for the Notes by clicking in the label field and overtyping the default value. This value is saved with this job only.

About The Screens

TIP

See the chapter "Custom Fields Editor" for information on changing the labels for the tab title and field names.

Pre-Press Tab



Field Name	Contents
Checkbox (for each of 10 Pre-Press items)	Click to select a Pre-Press item as entered onto the Custom Fields Tab for each applicable Job Ticket
Text Area (for each of 10 Pre-Press items)	Displays the Pre-Press items entered onto the Custom Fields Tab for each applicable Job Ticket
Pre-Press Due Date Label-1	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Pre-Press Due Date-1	Click on the Calendar icon to select a date
Pre-Press Due Date Label-2	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Pre-Press Due Date-2	Click on the Calendar icon to select a date
Pre-Press Notes Label-1	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Pre-Press Notes-1	Field to enter Pre-Press notes
Pre-Press Notes Label-2	Displays the label entered onto the Custom Fields Tab for each applicable Job Ticket
Pre-Press Notes-2	Field to enter Pre-Press notes

Chapter 43

Jobs - Electronic Ticket: Printing Tab

OVERVIEW

This Printing Tab allows you to specify additional information on the Printing involved in the Job that can be incorporated into the printed Job Ticket.

The Printing tab displays the parent sheet cutout and press sheet layout and selected information from the Estimate relating to printing.

Use this tab to:

- Select from pre-defined checkboxes, aspects of Printing
- Change any of the pre-defined checkboxes to appropriate information for this job only
- Set due dates and times
- Add notes to the electronic Job ticket relating to Printing

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your preferences for Job Ticket Custom Fields and Tab Labels	File Menu > Custom Fields Editor for job tickets for Offset, Copy, and Large Format Printing

STEP-BY-STEP

This section describes the information and functions available when viewing a job:

- Accessing the Printing Tab
- Using Checkboxes to add info to Job Ticket
- Set Press Dates
- Set the Press Due Time
- Enter Notes
- Viewing the cutting diagrams
- Viewing certain information from the Estimate

Accessing the Printing Tab

1. Select Navigator > Jobs.

   PrintPoint displays the Jobs List.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the Printing tab.

Using Checkboxes

There are 10 checkboxes and associated labels available to provide information for the Electronic Job Ticket. Default labels are displayed when the Electronic Job Ticket is created. You can use the defaults or change the labels for this Job.

The checked items can be incorporated into a printed Job Ticket.

To use the checkboxes:

1. Click the Checkbox next to the label you want included.
2. Change the label if required to a custom value by clicking in the label field and overtyping the default value.

Set Press Dates

There are two date fields available. The default meaning of these dates are set in the Custom Field Editor (See Before You Begin).

The dates and associated labels can be incorporated into a printed Job Ticket.

To use the dates:

1. Click on the Calendar Icon beside the date field you want to set

   Printpoint displays a Calendar dialog
2. Select the month and year using the buttons at the top of the dialog and then selecting the day from the Calendar.
3. Change the label if required to a custom value by clicking in the label field and overtyping the default value.

Set the Press Due Time

You can set the Time of day for a predefined action in the Printing.

The Time field label is set in the Custom Fields editor (see Before You Begin).

The Time can be incorporated into the printed Job Ticket.

1. Click on the Clock face in the header

   PrintPoint displays a Time dialog.
2. Select the Time of day by clicking the appropriate buttons for Hours, Minutes and am/pm
3. Click the OK button to accept the time.

Enter Notes

There are two Notes areas that can be used for details associated with the Printing. There are Custom Label fields for each text area.

The Pre-press Notes can be incorporated into a printed Job Ticket.

To use the Notes areas:

1. Click in the Notes area you want to use and type in the Printing details.
2. Click in the Custom label field and overtype the label if required

Viewing the cutting diagrams

PrintPoint displays the Layout and the Cutout diagrams for the paper specified for the job. These diagrams can be incorporated into the printed Job Ticket.

TIP

The diagrams will only appear if you have viewed the Cutting layouts or used the Booklets dialog while creating the Estimate.

Viewing certain information from the Estimate

Incorporated in the Printing tab is information about:

- Press
- Number of Impressions
- Waste
- Inks
- Paper name
- Number of press sheets
- Number of Parent Sheets
- Number of cartons (or millpaks)

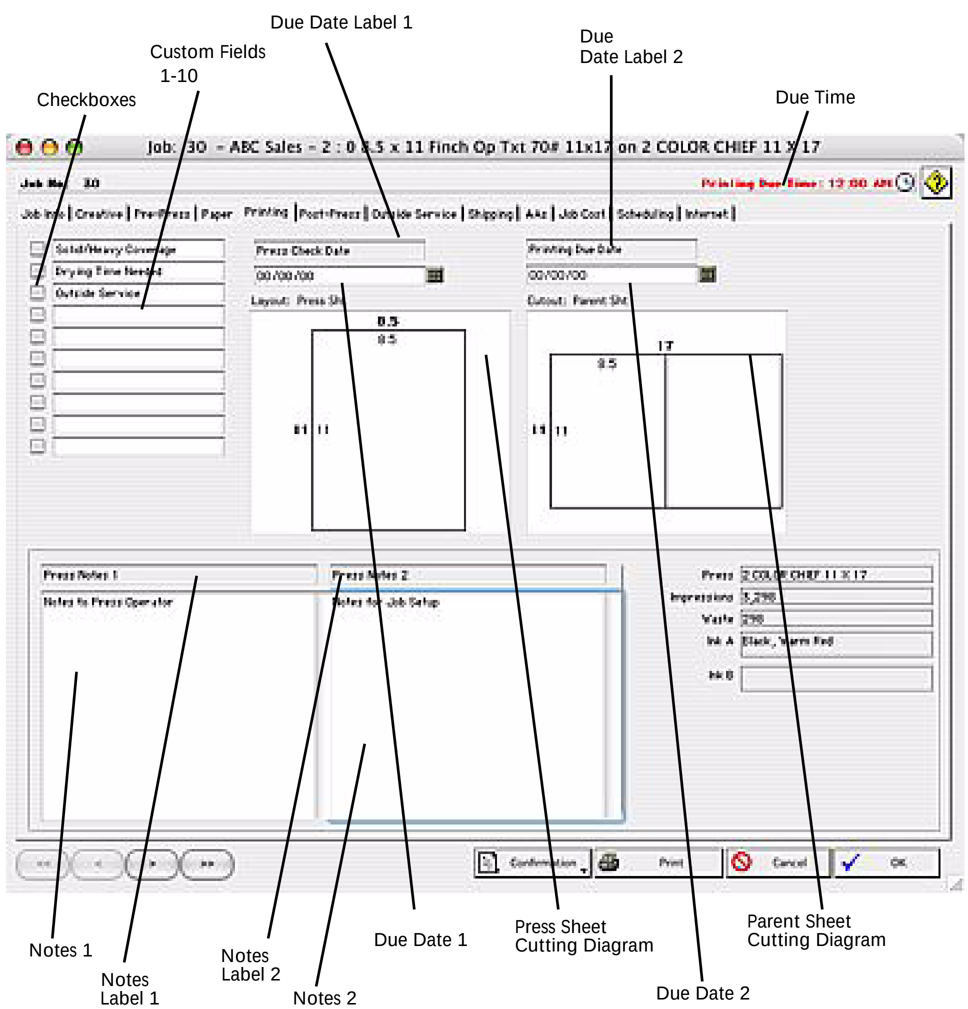
This information is presented here to reduce the need to return to the Estimate when creating or viewing an Electronic Job Ticket.

ABOUT THE SCREENS

TIP

See the chapter "Custom Fields Editor" for information on changing the labels for each tab and the names.

Printing Tab



Field Name	Contents
Checkbox (for each of 10 Printing items)	Click to select a Printing item as entered onto the Custom Fields and More Custom Fields Tabs for each applicable Job Ticket
Text Area (for each of 10 Printing items)	Displays the Printing items entered onto the Custom and More Custom Fields Tabs for each applicable Job Ticket
Due Date Label-1	Displays the label entered onto the Custom and More Custom Fields Tabs for each applicable Job Ticket. Example: Printing Due Date 1
Printing Due Date-1	Click on the Calendar icon to select a date
Printing Due Date Label-2	Displays the label entered onto the Custom and More Custom Fields Tabs for each applicable Job Ticket
Printing Due Date-2	Click on the Calendar icon to select a date
Graphical Layout for the Press Sheet	Press Sheet cutting diagram from the estimate
Graphical Layout for the Parent Sheet	Parent Sheet cutting diagram from the estimate
Printing Notes Label-1	Displays the label entered onto the Custom and More Custom Fields Tabs for each applicable Job Ticket
Printing Notes-1	Field to enter Printing notes
Printing Notes Label-2	Displays the label entered onto the Custom and More Custom Fields Tabs for each applicable Job Ticket
Printing Notes-2	Field to enter Printing notes
Estimate Info	Information from the Estimate for the specified quantity reflecting: Press, Impressions, Waste, Inks, Paper, Press Sheets, Parents Sheets and Cartons.

Chapter 44

Jobs - Electronic Ticket: Post Press

OVERVIEW

This Post-Press Tab allows you to specify additional information on the Post-press steps involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:

- Select from pre-defined checkboxes, aspects of Post-press
- Change any of the pre-defined checkboxes to appropriate information for this job only
- Set due dates and due times
- Add notes to the electronic Job ticket relating to Post-press

Before You Begin

You should...	Where this information is found...
Set your preferences for Job Ticket Custom Fields and Tab Labels	File Menu > Custom Fields Editor for job tickets for Offset, Copy, and Large Format Printing

STEP-BY-STEP

This section describes the information and functions available when viewing a the Post-Press Tab:

- Accessing the Post-Press Tab
- Using Checkboxes to add info to Job Ticket
- Set Post-Press Dates
- Set the Post-Press Due Time
- Enter Notes

Accessing the Post-Press Tab

1. Select **Navigator > Jobs.**

   PrintPoint displays the Jobs List.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the Post-Press Tab

Using Checkboxes

There are 10 checkboxes and associated labels available to provide information for the Electronic Job Ticket. Default labels are displayed when the Electronic Job Ticket is created. You can use the defaults or change the labels for this Job.

The checked items can be incorporated into a printed Job Ticket.

To use the checkboxes:

1. Click the **Checkbox** next to the label you want included.
2. Change the Label if required to a custom value by clicking in the label field and overtyping the default value.

NOTE

Many users enter a “Starting Value” for the labels with the expectation that the CSR for the job will enter the appropriate information in the field.

Example If the default value in the first checkbox is “# Staples”...then the expectation is that the CSR would fill in “3” after the pre-existing text. This information can then be printed on the Job Ticket.

Set Post-Press Dates

There are two due date fields available. The default values of these dates are set in the Custom Field Editor (See the Custom Field Editor Chapter).

The dates and associated labels can be incorporated into a printed Job Ticket.

To modify the dates:

1 Click on the Calendar Icon beside the date field
2 Select the month and year using the buttons at the top of the dialog and then selecting the day from the Calendar.

NOTE

You can change the label for the due date by clicking in the label field and overtyping the default value. This value is saved with this job only.

Set the Post-Press Due Time

You can set the Due Time for the completion of Post-Press activities.

The default value for the Time field label is set in the Custom Fields Editor (see the Custom Fields Editor chapter).

The Due Time can be incorporated into the printed Job Ticket.

1 Click on the Clock face in the header

   PrintPoint displays a Time dialog.
2 Select the Time of day by clicking the appropriate buttons for Hours, Minutes and am/pm
3 Click the OK button to accept the time.

Enter Notes

There are two Notes areas that can be used for details associated with the Post-Press activities. There are Custom Label fields for each text area.

The Post-Press Notes can be incorporated into a printed Job Ticket.

To use the Notes areas:

1 Click in the desired Notes area and type in the Post-Press details.

NOTE

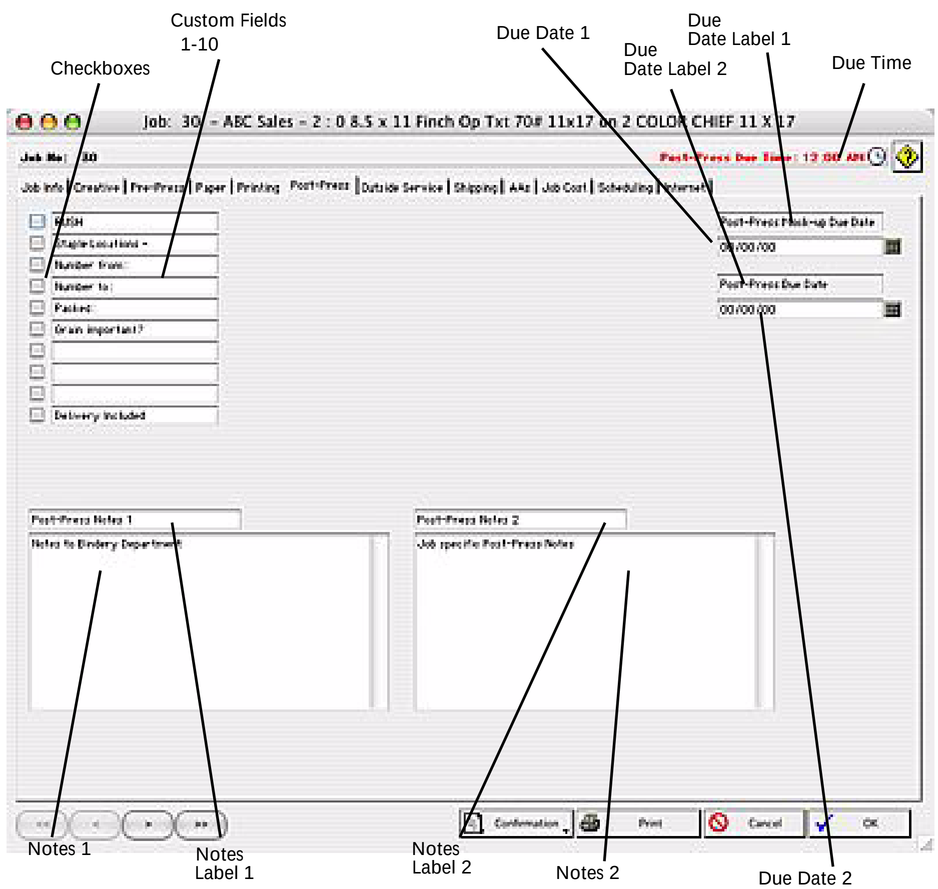
You can change the label for the Notes by clicking in the label field and overtyping the default value. This value is saved with this job only.

ABOUT THE SCREENS

TIP

See the chapter "Custom Fields Editor" for information on changing the labels for tab titles and the Custom Fields /Label names.

Post-Press Tab



Post-Press Tab

Field Name	Contents
Checkbox (for each of 10 Post-Press items)	Click to select a Finishing (Post-Press) item as entered onto the More Custom Fields Tab for each applicable Job Ticket
Text Area (for each of 10 Post-Press items)	Displays the Finishing (Post-Press) items entered onto the More Custom Fields Tab for each applicable Job Ticket
Post-Press Due Date Label-1	Displays the label entered onto the More Custom Fields Tab for each applicable Job Ticket
Post-Press Due Date-1	Click on the Calendar icon to select a date
Post-Press Due Date Label-2	Displays the label entered onto the More Custom Fields Tab for each applicable Job Ticket
Post-Press Due Date-2	Click on the Calendar icon to select a date
Post-Press Notes Label-1	Displays the label entered onto the More Custom Fields Tab for each applicable Job Ticket
Post-Press Notes-1	Field to enter Post-Press notes
Post-Press Notes Label-2	Displays the label entered onto the More Custom Fields Tab for each applicable Job Ticket
Post-Press Notes-2	Field to enter Post-Press notes

Chapter 45

Jobs - Electronic Ticket: Outside Services

OVERVIEW

This Outside Service Tab allows you to specify additional information on the Outside Services involved in the Job that can be incorporated into the printed Job Ticket.

Use this tab to:

- Set due date and due time.
- Add notes to the Electronic Job ticket relating to Buyout.

NOTE

Definition: Outside Service refers to services purchased (buyouts) from an external vendor or another division of your company. Examples of this includes printing, bookmaking or lamination from a specialist laminating company.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your preferences for Job Ticket Custom Fields and Tab Labels	File Menu > Custom Fields Editor for job tickets for Offset, Copy, and Large Format Printing

STEP-BY-STEP

This section describes the information and functions available when viewing the Outside Services Tab:

- Accessing the Outside Services Tab
- Set Outside Service Date
- Set the Outside Service Due Time
- Enter Notes
- Purchase Orders
  - Creating a Purchase Order
  - Editing a Purchase Order
  - Voiding a Purchase Order

Accessing the Outside Services Tab

1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

2 Double-click the job you would like to open.

PrintPoint displays the Job Info tab for the selected job.

3 Select the Outside Service Tab.

Set Outside Service Due Date

Outside Services has one due date field to set. The date and associated label can be incorporated into a printed Job Ticket.

TIP

The default “Label” for this date is set in the Custom Field Editor (See the Custom Field Editor Chapter).

To enter a due date:

1. Click on the Calendar Icon beside the date field.
2. Select the month and year using the buttons at the top of the dialog and then selecting the day from the Calendar.

TIP

You can change the label for the due date by clicking in the label field and overtyping the default value. This value is saved with this job only.

Set the Outside Service Due Time

You can set the Due Time of day for a predefined action in the Outside Service activities.

TIP

The default “Label” for this due time is set in the Custom Field Editor (See the Custom Field Editor Chapter).

The Time can be incorporated into the printed Job Ticket.

1. Click on the Clock face in the header of the Electronic Job Ticket

   PrintPoint displays a Time Dialog.
2. Select the Time of day by clicking the appropriate buttons for Hours, Minutes and Am/Pm.
3. Click the OK button to accept the time.

Enter Notes

The Notes area can be used for details associated with the Outside Service activities. There are Custom Label field for the text area.

The Outside Service Notes can be incorporated into a printed Job Ticket.

To use the Notes areas:

1. Click in the Notes area and type in the Post-Press details.

TIP

You can change the label for Notes by clicking in the label field and overtyping the default value. This value is saved with this job only.

Purchase Orders

NOTE

Any Purchase Order created from the Job > Oustide Service Tab will be associated to that job. To create a General Purchase Order that is not associated with a job, create it from the Purchase Order List View. For more information see the “Purchase Order” chapter.

Creating a Purchase Order

NOTE

If the job requires an outside service that requires a PO, it will be displayed in the Outside Supply Required box.

1. Access the Job > Outside Service tab.
2. Double click on the service requiring the Purchase Order.

   The Purchase Order Entry screen is displayed
3. Enter the Quantity.
4. Enter the Rate.
5. Enter the Units.
6. Edit the Description as needed.
7. Click Print or Email as desired.
8. Click OK.

Editing a Purchase Order

1. Access the Job > Outside Service tab
2. Highlight the PO requiring editing and click the Edit button.

   The Purchase Order Entry screen is displayed
3. Edit the the PO as needed
4. Click Print or Email as desired

1 Click OK

Voiding a Purchase Order

1. Access the Job > Outside Service tab
2. Highlight the PO want to Void.
3. Click the Void button.

ABOUT THE SCREENS

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for each tab and the names.

Outside Service Tab

Field Name	Contents
Buyout Title	Displays the default label set in the Custom Fields Editor.Can be customized for each job directly on the screen.
Buyout Due Date Title	Displays the default label set in the Custom Fields Editor. Can be customized for each job directly on the screen.

Field Name	Contents
Buyout Due Date	Click on the Calendar icon to select a date
Notes	Enter notes regarding details of the buyout/outside service from the vendor.
PO From Estimate	Purchase orders generated form the PostPress/ Ouside Service area of the Estimate
PO From Est. Detail	A quick detail view of the PO generated from the estimate
Additional PO’s	Purchase orders created from the Outside Service Tab

Chapter 46

Jobs - Electronic Ticket: Shipping

OVERVIEW

The Shipping Tab allows you to specify shipping details for the Job that can will be used in the shipping documentation (see Shipping chapter).

Use this tab to:

- Set the text for the shipping labels
- Specify a date
- Add shipping notes for use in the electronic and printed job tickets
- Change the details of the Sold By
- Change the details of the Sold To
- Change the details of the Ship To
- Change the shipping method
- Change the Shipping description to be used on the shipping documentation

From this tab you can

- View shipping records
- View the Estimated and Actual costs of shipping
- View the most recent Shipping date and dispatch method

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your Preferences for Job Ticket Custom labels for Shipping Due Date and Due Time titles	Refer to Custom Fields Editor chapter
Set your Preferences for Shipping	Refer to the Preferences Chapter

STEP-BY-STEP

This section describes the information and functions available when viewing the Shipping tab:

- Accessing the Shipping tab
- Selecting the Sold By Address
- Selecting the Sold To Address
- Setting the Date
- Setting the Time
- Selecting the 3rd Party Purchase Order
- Selecting the Ship To Address
- Selecting/Modifying the Shipping labels
- Ship Description
- Ship Notes
- Ship Records
- Shipping Costs
- Shipping Status

Accessing the Shipping tab

1. Select Navigator > Jobs.
   PrintPoint displays the Job List View.
2. Double-click the job you would like to open.
   PrintPoint displays the Job Info tab for the selected job.
3. Select the Shipping tab.

Selecting the Sold By Address

PrintPoint offers several options for the Sold by field.

You can:

- Use the default setting established in Preferences
- Choose to use information in the Job Notes
- Use the Customer's Address
- Use the Customized Return Address set in the Customers record
- Manually enter a Sold by

To choose the Sold By:

1. Click the Black triangle next to the Sold to label
2. Choose the appropriate Sold to from the list

   PrintPoint fills in the details from the source selected.
3. To manually enter a Sold by address, click in the Sold by area and overtype the existing information.

Selecting the Sold To Address

The Sold To Address is obtained from the Customer records. You can change the Sold To by

1. Clicking in the Sold To area.
2. Overtyping the existing information.

   OR
3. Selecting an alteritive address from the Additional Address List.

Setting the Date

The Date field can be defined to suit your business, commonly set to an intended Ship Date.

NOTE

The Date Field Label (and therefore the meaning of this date field) is by default set in the Custom Field Editor (See Before You Begin).

The dates and associated labels can be incorporated into a printed Job Ticket.

1. Click the Calendar Icon next to the date field.

   PrintPoint displays a Calendar Dialog.
2. Click on the approriate buttons to set the date.
3. Click OK to accept the date.

   OPTIONS
4. You can override the label to a custom value by clicking in the label field and overtyping the default value. This is helpful is you need to indicate that this date field has a non-standard function for this particular job.

Setting the Time

You can set the Time of day for a predefined action in the Shipping process.

NOTE

The Time field label is set in the Custom Fields editor (see Before You Begin).

The Time can be incorporated into the printed Job Ticket.

1. Click on the Clock face in the header .

   PrintPoint displays a Time dialog.

2 Select the Time of day by clicking the appropriate buttons for Hours, Minutes and am/pm.
3 Click the OK button to accept the time.

Selecting the 3rd Party Purchase Order

On occasion you may need to show a different Purchase Order on the Shipping documents for a Job. For example if you are manufacturing for a print broker who needs to have his customer's purchase order on the documentation.

1 Click or tab into the 3rd Party PO field.
2 Enter the purchase order information.

Selecting the Ship To Address

The Ship To Address is obtained from the Customer record. You can change the Ship To Address by:

- Selecting from a list of addresses.
- Manually overtyping the existing information.

1 Click in the Ship To area.
2 Click on the desired address in the Additional Address List.

Selecting/Modifying the Shipping labels

The Labels text fields set up the default labels for Shipping. See the Chapter Shipping.

1 Click in the label text area you want to set.
2 Type in the information you want to appear on a label.

TIP

You can use the additional address list to enter the desired address. (See Ship to above).

TIP

You can also include other information besides an address in the label.

Ship Description

The Shipping Description is the description set in the Estimate. The Shipping description can be edited in the Electronic Job Ticket.

The Ship Description is used for the Dispatch docket and Delivery Receipt

1 Click or tab into the Ship Description field.
2 Overtype the existing information

Ship Notes

Ship notes can be included on the Dispatch docket or Delivery Receipt to convey special instructions for the delivery.

1 Click or tab into the Ship Notes text area
2 Enter the Ship information required

Ship Records

The Shipping records are stored by PrintPoint so you can keep track of where, when and how product has been shipped along with the individual costs of shipping.

1 Click the Ship Records button

PrintPoint displays the Shipping History dialog

NOTE

The Shipping History information comes from two sources, the Shipping entry screen and from manual entry into the Shipping History dialog.

2 To add a new Shipping record, click the Add Shipping button

PrintPoint prepares a new Shipping entry and positions the cursor in the Qty Shipped field.

3 Enter the Qty Shipped

The Qty in Stock is reduced by the Qty Shipped and is displayed along with the Shipped, Ordered and Printed quantities.

4 Tab into the Price field

5 Enter the cost of the shipping

6 Tab into the Via field

7 Enter the shipping method

8 Tab into the Tracking field and enter any tracking information.

TIP

The tracking information is after the couriers tracking code or barcode, but you can enter any text.

9 Click OK to save the Shipping information and return to the Electronic Job Ticket.

Shipping costs

The Estimated shipping cost from the Estimate is displayed along with the Actual cost.

The Actual cost is derived from the Shipping Records and can be manually changed.

1 Click or tab into the Actual field

2 Type in the Actual cost of shipping.

Shipping Status

If the product has been shipped using the Shipping dialog (see Chapter Shipping) then the last shipment date is automatically entered into the Status: Last section of the Electronic Job Ticket. The Ship Date can be over-ridden by an entry here.

1 Click or tab into the Ship Date field

2 Type in the desired date

The Shipped By / Time field is a manual entry

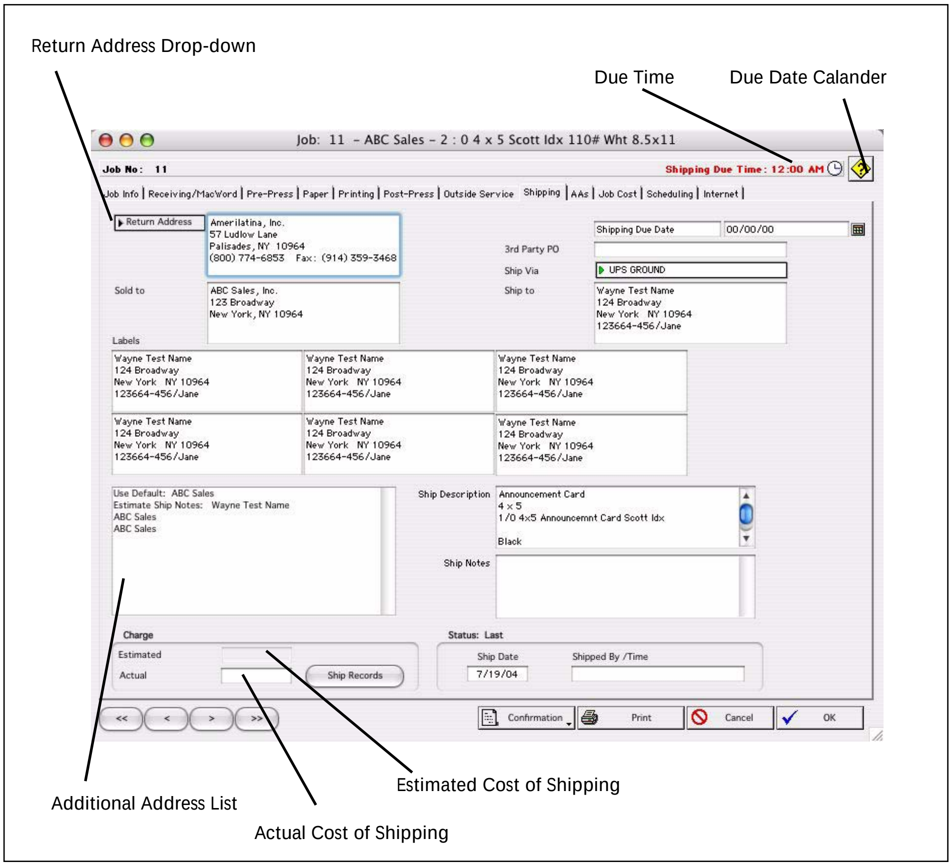
1. Click or tab into the Shipped By / Time field
2. Type in the desired information.

ABOUT THE SCREENS

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for the tab title and field names.

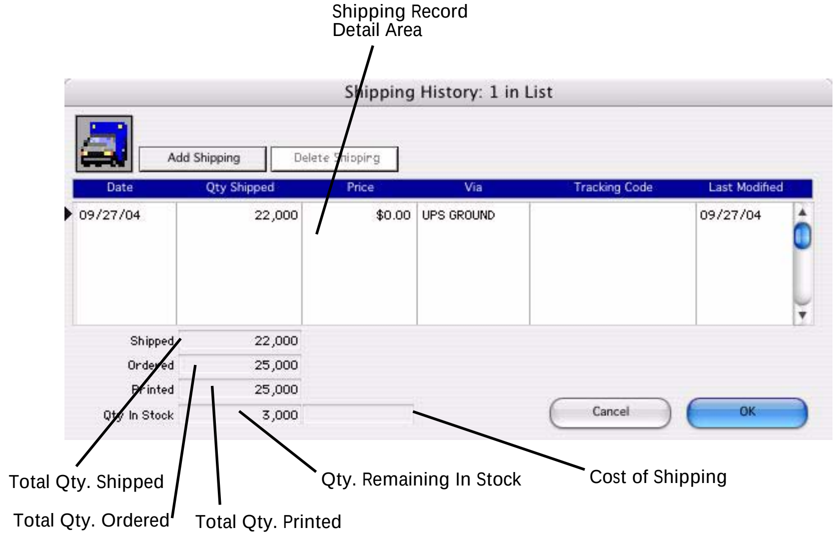
Shipping Tab



Field Name	Contents
Return Address Drop-down Menu	Click to select from (1) address entered into Job (Ticket) Notes field on Job Info Tab, (2) the Company Name and Address in Preferences, (3) the Customer ‘s address, or (4) Customized Return Address to enter another specific address
Sold-by Address	Displays address selected above
Sold-to Address	Displays address of customer the job was sold to

Field Name	Contents
Shipping Due Date Title	Displays the label entered onto the More Custom Fields Tabs for each applicable Job Ticket
Shipping Due Date	Click on the Calendar icon to select a date
3rd Party PO	Enter a 3rd Party Purchase Order method
Ship Via	Click to select a Shipping Method from the Choice List to override the default method for the customer
Ship-to Address	Displays location where the job will be shipped
(6) Shipping Labels	Displays labels for 6 locations to which the job will be shipped
Shipping Description	Shipping Description from the Estimate Notes Dialog.
Shipping Notes	Enterable field for information about additional shipping locations
Shipping: Estimate Charge	Picks up any shipping charges from the estimate. In order for these charges to appear as part of the Estimated Charge, they would have to have been "categorized" in the Sales Category of the Estimated Item.
Shipping: Actual Charge	Total of all shipping records created from the Shipping Module or directly entered into the Shipping History Dialog.
Ship Records (button)	Displays the Shipping Records History Dialog containing all the Shipping history including: Date, Quantity, Price, Via, Tracking Code, Last Modified. The information in this dialog can be created from the Shipping Module or directly entered into this dialog.
Ship Date	Displays when marked during Shipping (see Shipping chapter)
Shipped by/Date'/Time	Displays when marked during Shipping (see Shipping chapter)

Ship Records Dialog



Field Name	Contents
Shipping Record Detail Area	Detailed view of the shipping history for this job.
Delete Shipping (button)	Used to delete a shipping record.
Add Shipping (button)	Used to add a shipping record.
Total Qty. Shipped	Displays total qty shipped.
Total Qty. Ordered	Displays total qty ordered.
Total Qty. Printed	Displays total qty printed.
Qty. Remaining in Stock	Displays the qty remaining in stock.
Cost of Shipping	Displays the total cost of shipping.

Chapter 47

Jobs - Electronic Ticket: Authors Alterations

OVERVIEW

This AA's Tab allows you to collect information and costs on the Authors Alterations (AAs) involved in the Job so they can be included in the invoice.

This chapter deals with the actual use of AA's during the Job workflow. Because AA's can be edited/added On-The-Fly while creating/editing a job, we also cover that subject in this chapter.

Further information about the AAs database can be found in the AAs chapter

Use this tab to:

- Specify the AAs
- Specify the quantity or time involved
- Change the rate and markup
- View the user who entered the AA
- Specify who approved
- Add notes to the electronic Job ticket relating to Aas
- Add notes for inclusion on the invoice

From this tab you can

- View the total cost of the job including the AAs
- Generate Approval letters to send to the client prior to making AAs
- Quicklink to the AAs list item
- Clear the AAs. Either all AAs or on a line by line basis

Before You Begin

You should...	Where this information is found...
Set your Preferences for AAs	File Menu > Preferences > Authors Alterations

STEP-BY-STEP

This section describes the information and functions available when viewing the AAs tab.

The AAs tab provides the entry point for changes made to the Job after the Job has been estimated, quoted and agreed by the customer.

- Accessing the AAs tab
- Adding an AA
- QuickLink to AAs Database
- Deleting an AA
- AA Approval Letter
- AAs Notes
- Inv Desc
- Scripting an Approval Letter

Accessing the AAs tab

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the AAs tab.

NOTE

PrintPoint will display a warning if the job has already been invoiced.

Adding an AA

The AAs tab section provides for the capture of up to 10 AAs.

1. Click on the Black triangle In the AA column

   PrintPoint displays a Choice List of AAs.

   NOTE

   If the required AA is not in the list you can add it On-The-Fly.
2. Double-click the AA or select the AA and click the OK button.

   If a rate and Markup are specified for the AA these fields will be filled in for you. The Rate Basis is displayed for information.

3 Enter the Quantity of the AA.

PrintPoint adds the sub-total to the Estimated Total, increasing or decreasing (if the AA was a negative amount) to the Job Total.

TIP

You can override the default rate, markup, Sub-Total, and Entry Name and Time for the AA.If the Rate and Markup are empty, enter the appropriate values

4 The Log In is automatically set if you are using Passwords (see Chapter Users and Passwords) but can be set manually by typing it in.

5 When the AA is approved, you can type in the name of the person approving.

QuickLink to AAs Database

1 Click the Magnifying Glass Icon on the left of the AA field

PrintPoint displays the AAs database

Further information about the AAs database can be found in the AAs chapter

Deleting an AA

1 Click the Eraser Icon on the Left of the QuickLink icon

PrintPoint clears the single line of Alteration.

TIP

To Clear all the Alterations click the Clear AAs button

AA Approval Letter

Obtaining confirmation that you should proceed with an AA is important for good customer relations. It also makes it easier to recover the cost of alterations due to customer defined changes.

PrintPoint provides a confirmation letter which details the alteration and may include cost information depending on your set up in Preferences. (see Chapter Preferences) The letter provides a place for customer sign off.

To Create a new letter:

1 Click the AA Approval Letter button > New Approval Letter

PrintPoint displays the Approval letter with the basic details.

CAUTION

PrintPoint will not build the Approval letter unless there is a Contact

2 Enter the Topic / Subject

This is so you can identify the particular Approval letter amongst the other approval letters for this job.

3 Modify whatever you need. PrintPoint will save all changes and keep the letter on file as modified.

4 When you are satisfied with the letter you can E-mail, Fax or Print the letter (your available options depend on your setup in Preferences and User Settings see Chapter Preferences and Chapter User Settings)

5 Click OK to return to the Electronic Job Ticket

To Review Approval Letters

1 Click the AA Approval Letters > Review Approval Letters

PrintPoint displays a list of Approval Letters

2 Select the Approval Letter you want to review from the list

Printpoint Displays the selected letter in the lower section of the screen.

NOTE

The letter is not modifiable. It is a record of communications with the customer.

3 The Approval Letter can be deleted by clicking the Delete button.

4 You can re-send the Approval Letter or reprint it by choosing the appropriate button.

5 You can copy the Approval Letter to an other recipient by clicking the Copy button

6 To check whether you have already e-mailed the letter, click the E-Mail Log button.

7 Click the Close button to return to the Electronic Job Ticket.

AAs Notes

AAs notes an be incorporated into a printed Job Ticket.

1 Click in the AAs Notes area

2 Enter the Notes information.

Inv Desc

The Inv Desc area is automatically constructed from the information entered in the alteration fields in a format defined in Preferences > Authors Alteration.

If the Preference is set to include costs and rate basis these this information will be included in the description for the invoice.

The Inv Desc information can be altered as required and the information will appear on the Invoice.

1 Click in the Inv Desc area.

2 Adjust the description as necessary.

Scripting an Approval Letter

A knowledge of programming and database structures and relationships is required in order to script (build) an Approval Letter.

Scripted reports can be opened in WordPad or Word. The recommended editing tools are:

- BBEDIT on Macintosh (http://www.barebones.com)
- ULTRAEDIT on Windows (http://ultraedit.com)

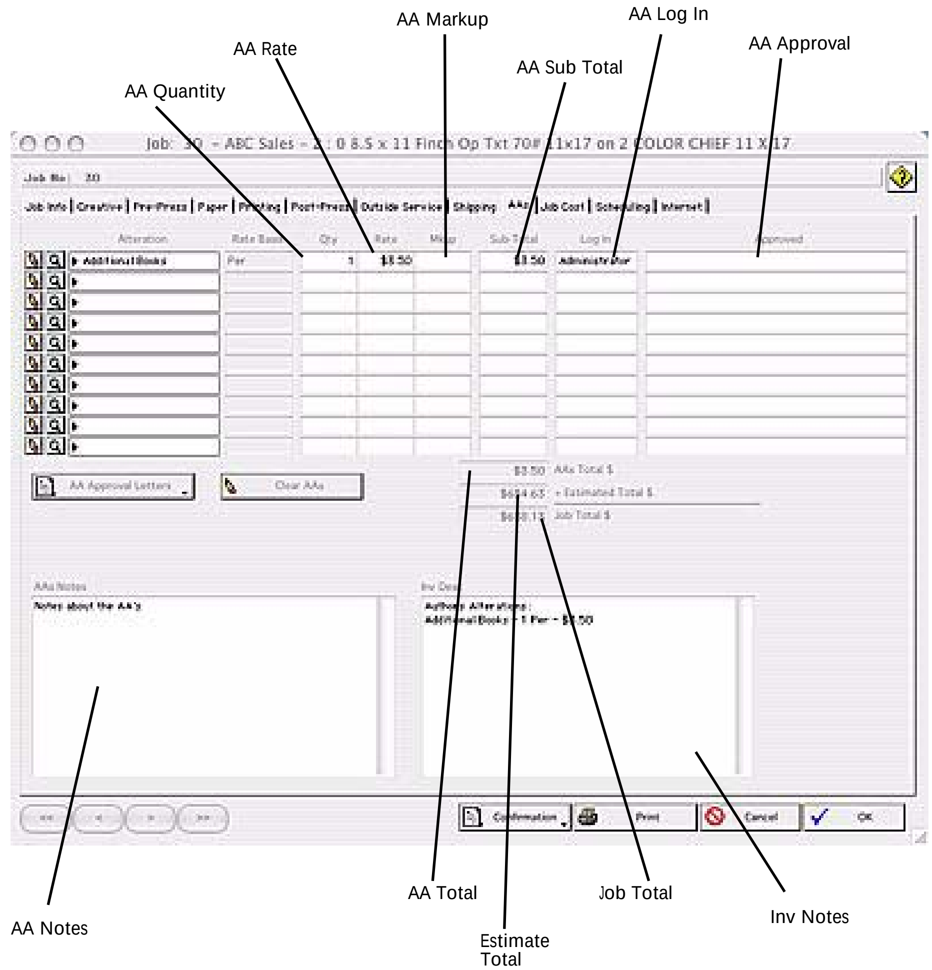
All tech support for this advanced area falls outside the boundary of normal tech support and is fee based.

ABOUT THE SCREENS

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for the AA’s tab.

AA’s Tab



Field Name	Contents
Eraser Icon	Click to erase the AA information on that specific line
Magnifying Glass Icon	Click to lookup or change the specific AA database item

Field Name	Contents
Alteration (for each of 10 AA's)	Displays the Authors Alteration (see AA chapter)
Rate Basis (for each of 10 AA's)	Displays the Rate Basis for the AA
Qty (for each of 10 AA's)	Displays the Quantity of the selected AA
Rate (for each of 10 AA's)	Displays the Rate for the selected AA
Mkup (for each of 10 AA's)	Displays the Markup for the selected AA
Sub-Total (for each of 10 AA's)	Displays the Total $, including Markup, for the selected AA
Log In (for each of 10 AA's)	Displays the Username of the person who made the entry
Approved (for each of 10 AA's)	Displays the name of the person who approved the AA
AA Approval Letters Button	Print a new AA Approval letter or review all AA Approval letters
Clear AA's Button	Erase all AA information
AA's Total	Total $ amount of the AA's
Estimated Total	Total $ from the estimate
Job Total	Total $ of the AA's + Total $ from the estimate
AA's Notes	Enterable field for AA notes
Inv Desc	Displays AA information to be used when invoicing the job

Chapter 48

Jobs - Electronic Ticket: Job Costing

OVERVIEW

The Job Cost Tab displays both summary and real-time data for cost collected by the data collection module for the following areas:

- Time
- Material
- Paper
- Outside service.

.It provides a calculation of total costs to date and a cost vs. estimate comparison.

NOTE

Only users who have purchased the Job Costing module can view the Job Cost tab.

From this tab you can

- View the production records relating to time, Materials, Paper and Outside Services
- View the total cost to-date
- View the Estimated total cost.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup data the collection module	Refer to the Data Collection Chapters of this manual.

STEP-BY-STEP

This section describes how to:

- Access the Job Cost Tab
- View the data records relating to time, Materials, Paper and Outside Services
- View the total "real-time" cost to-date
- View the Estimated total cost.

Accessing the Job Cost Tab

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the Job Cost Tab.

Viewing Data Records

To view any collected data for any of the 4 following areas:

- Time
- Material
- Paper
- Outside service.

1. Click on the appropriate tab.
2. Scroll left <-> right to see more columns if necessary
3. Scroll up and down to view more records if required.

View the total "real-time" cost to-date

1. Click on the Update Totals button on the top of the right subsection of the screen.

   NOTE

   Notice that the Last Updated Date will reflect the current date.

View the Estimated total cost

The estimated total appears at the bottom of the right subsection of the screen. Here you will be able to see in "real-time" what the job was estimated at versus what it actually cost.

ABOUT THE SCREENS

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for tab titles.

Job Cost Tab

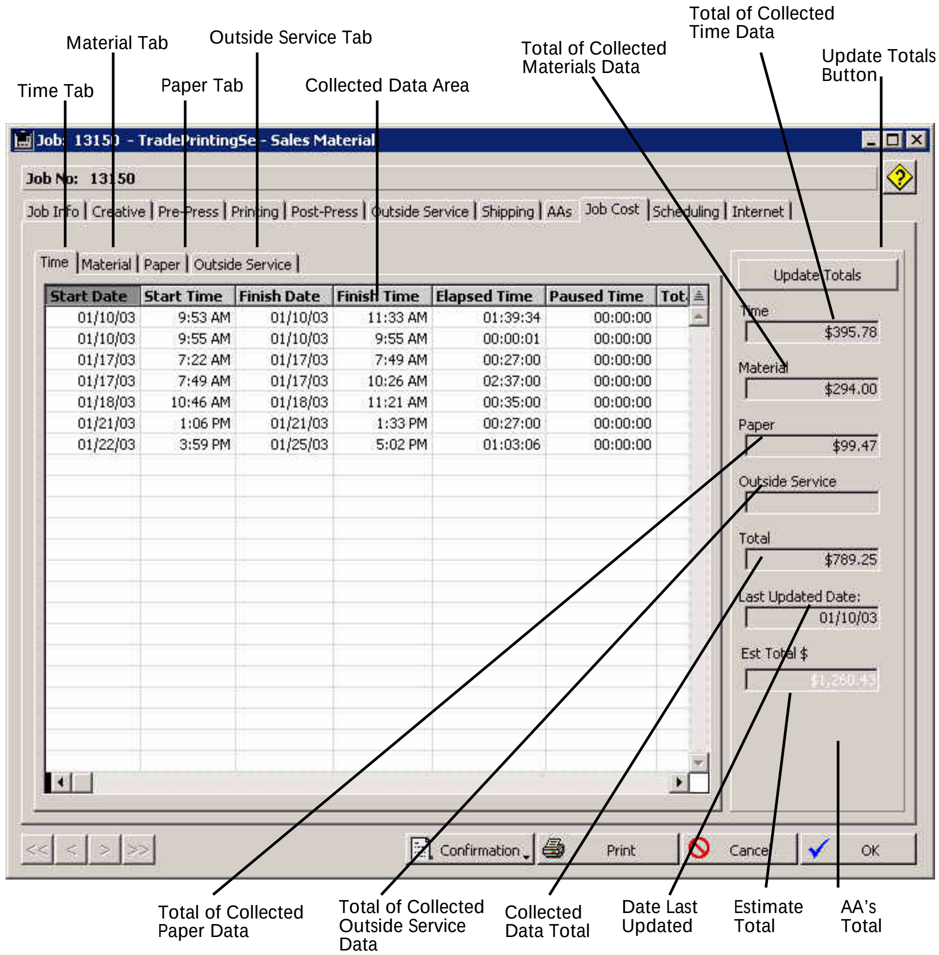
The Job Cost Tab is comprised of several tabbed subsections: Time, Material, Paper and Outside Services. Each tab contains specific information about a part of the job.

TIP

See the section “Viewing and Updating Real Time Job Costing Information from the Electronic Job Ticket” in the Data Collection/Job Costing Chapter for more information.

Screen snapshots begin on the next page.

Time Tab



Column/Field/Button	Definition
Start Date and Time (column)	Date and time an operation was started.
Finish Date and Time (column)	Date and time an operation was stopped.
Elapsed Time (calculated) (column)	Amount of time spent on an operation.
Paused Time (column)	Amount of time operation was paused.
Total Time Cost (Dollar Amount (column)	Total of time multiplied by hourly rate.
Operation (Name (column)	Name of the operation.
Production Count (column)	Number of pieces produced from an operation
Employe (column)	Employee number.
Charge Code (Normal/Rework/AA (column)	Type of charge.
Chargeable/Non-Chargeable (column)	Denotes if operation was chargable.

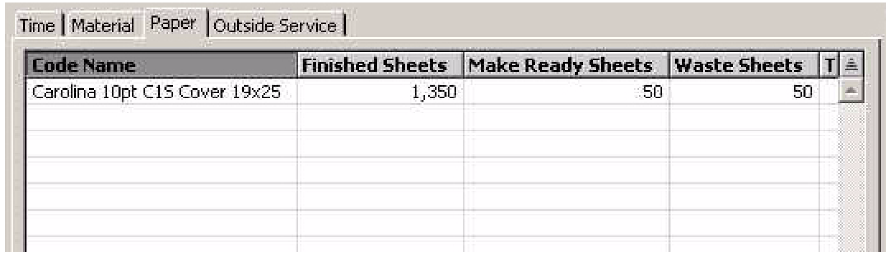
Column/Field/Button	Definition
Note (column)	Note written by employee.
Update Totals (button)	Click to update job costing totals.
Time Subtotal (field)	Total (in dollars) of time spent on job from all operations.
Material Subtotal (field)	Total Material cost of the job of all operations.
Paper Subtotal (field)	Total cost of all papers for the job.
Outside Service Subtotal (field)	Total cost of all outside services for the job.
Total Cost (field)	Total cost of all operations, material and services collected for the job.
Last Updated Date (field)	Date the totals were last updated.
Estimated Total (field)	Dollar amount estimated for the job.

Material Tab

Code	Name	Count	Total	Code	Charge	Notes
16 X 20	16 X 20 Negative	5.00	$195.00	Normal	X	
16 X 20	16 X 20 Negative	1.00	$39.00	AA	X	Customer Chan
GTO	GTO Plates	5.00	$50.00	Normal	X	
GTO	GTO Plates	1.00	$10.00	AA	X	Metalic Plate

Column/Field/Button	Definition
Material Code	Material code number.
Material Name	Name of material.
Count (number used)	Total number of pieces for the material.
Total (Dollar Amount)	Dollar amount of the collected material.
Charge Code (Normal/Rework/AA (column)	Type of charge.
Chargeable/Non-Chargeable (column)	Denotes if operation was chargable.
Note (column)	Note written by employee.

Paper Tab



Column/Field/Button	Definition
(Paper) Code Name	Code name of paper
Finished Sheets	Number of sheets used to make count on the job.
Make Ready Sheets	Number of sheets used for make ready.
Waste Sheets	Number of sheets wasted.
Total Sheets	Total sheets of Finished, Make Ready, Waste, and Overs.
Over Sheets	Number of sheets for overs.
Cost per M	Per thousand cost of paper.
Total (Dollar Amount)	Total dollar amount of paper used for the job.
Charge Code (Normal/Rework/AA (column)	Type of charge.
Chargeable/Non-Chargeable (column)	Denotes if operation was chargable.
Note (column)	Note written by employee.

Outside Service Tab

Column/Field/Button	Definition
Service Name	Name of service being performed.
Supplier	Name of the vendor used for the performed service.
Employee Number	Number of the employee.
Quantity	Number of finished pieces.
Unit Cost	Cost per each piece.
Per (Unit of Measure)	Type of unit... per m, per each.
Total	Total cost of service.
Service Date	Date service was finished.
Charge Code (Normal/Rework/AA (column)	Type of charge.
Chargeable/Non-Chargeable (column)	Denotes if operation was chargable.
Note (column)	Note written by employee.

Chapter 49

Jobs - Electronic Ticket: Scheduling

OVERVIEW

The Scheduling Tab allows you to view and adjust the time required for a press time. This information can be used on a simple Press Schedule Report.

TIP

If your version of PrintPoint did not come with the Press_Schedule.4qr Quick Report, you can download a copy from PrintPoint Central.

BEFORE YOU BEGIN

You should...	Where this information is found...
Create or download a copy of a press schedule report.	Inside your PrintPoint database if you purchased the program after March 1, 2003 or from PrintPoint Central under the QuickReports Section (SuperReports, QuickReports, Import Export Scripts, Letter Scripts and Graphic Library > QuickReports)

STEP-BY-STEP

This section describes the information and functions for Job Scheduling:

- Accessing the Scheduling Tab
- Customizing the Press Time

Accessing The Schedule Tab

1. Select Navigator > Jobs.
   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.
   PrintPoint displays the Job Info tab for the selected job.
3. Select the Scheduling Tab.

Customizing the Press Time

The Scheduling Tab displays the Estimated Press Hours (Value calculated by the total number of impressions divided by the number of impressions per hour for the selected press) press time and has a field for user entry of Customized Press Hours.

By default, the Customized Press Hours are copied from the Estimated Press Hours upon the conversion of an estimate into a job. If you customized the calculated value, the field's color will be inverted.

The Customized Hours represent the number of hours predicted on the press by the production coordinator as opposed to the values predicted by the Estimator.

1. When the Scheduling Tab is selected, the Adjusted Hours field is automatically selected.
2. Over-type the displayed hours to make a change.

NOTE

This value will appear on any Press Schedule Reports.

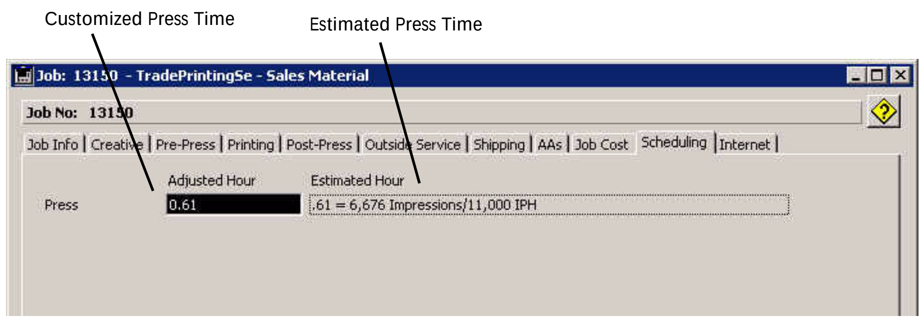
About The Screens

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for tab titles and field names.

Scheduling Tab

PrintPoint’s scheduling by time only allows you to report data on the estimated or manually adjusted Press Time. This information can be displayed in a QuickReport and printed daily.



Field Name	Contents
Customized Press Time	Copied from the Estimated Press Time. If you customized the calculated value, the field’s color will be inverted.
Estimate Press Time	Value calculated by the total number of impressions divided by the number of impressions per hour for the selected press.

Chapter 50

Jobs - Electronic Ticket: Internet

OVERVIEW

The Internet subsection tab allows you to specify the current job station using the list of defined stations specifically "filtered" for display on your web site.

This feature differs from standard log-in of job stations by creating a second set of "virtual" stations that you would prefer your customers to view regarding the status of the jobs.

Example — You want them to see that their job is ON PRESS so they will feel confident that it is seriously in production and will be delivered as expected. You do NOT want them to see that the job is really ON HOLD ON PRESS due to some technical issues you are having. This information is private to you, since you are sure that it will not impede your ability to deliver the job on time.

BEFORE YOU BEGIN

You should....	Where this information is found...
Set-up your list of stations to be used for Internet web site display. TIP You can also add these stations On-The-Fly.	Refer to List Editor chapter

STEP-BY-STEP

This section describes the information and functions available when viewing the Internet Tab of the Electronic Job Ticket:

- Accessing the Internet Tab
- Changing the Internet Station for the Job

Accessing the Internet Tab

1. Select Navigator > Jobs.

   PrintPoint displays the Job List View.
2. Select and double-click the job you would like to view.

   PrintPoint displays the Job Info tab for the selected job.
3. Select the Internet Tab.

Changing the Internet Station for the Job

1. Click the Green Triangle to display the Internet Stations Choice List.
2. Select the station and click OK.

   OR
3. Type the station directly into the field.

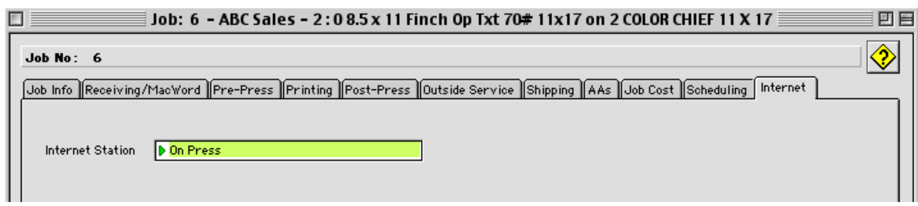
ABOUT THE SCREENS

TIP

See the chapter “Custom Fields Editor” for information on changing the tab title.

Internet Tab

PrintPoint allows you to enter a station that can be used to export to a data file to merge with your internet web site. Using QuickReports, you can create a file using the PrintPoint’s QuickReport Editor to send various columns to a tab delimited file (See the QuickReports chapter) that will include Customer, Job Name, Due Date, Internet Station, etc.



Field Name	Contents
Internet Station	Click to select the Internet Station from the Choice List.

Chapter 51
Jobs - Printing Job Tickets

OVERVIEW

Printing Job Tickets is one of the key components of PrintPoint's Job module. It allows you to print the following reports:

- Job Ticket
- Sample Graphics and Impositions
- Paper Purchase Orders
- CombiTickets (a SuperReport Job Ticket with Multiple Jobs)
- Custom designed SuperReport Job Tickets

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create an Estimate.	Estimating Tools: ShortForm Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format
Know how to create a Job.	See the Job - Converting an Estimate to a Job chapter.

STEP-BY-STEP

This section includes the following topics:

- Accessing the Job List View
- Show Print Dialogs
- Printing a Job Ticket
  - From the Job List View
  - From the Electronic Job Ticket
- Printing a CombiTicket
  - From the Job List View
  - From the Electronic Job Ticket
- Printing a SuperReport Job Ticket
- Previewing Job Tickets

Accessing the Job List View

1. Select Navigator > Jobs.
2. PrintPoint displays the Job List View.

Show Print Dialogs

When printing Job Tickets, you have the option of showing the print dialogs or suppressing them.

The advantage to showing them is that you can easily direct a specific report to a specific printer and to control the print preview directly from the Print Setup dialog box.

TIP

When printing Job Tickets from the Job List View, you can batch print multiple jobs and control the number of copies for each of the three possible reports (Jot Ticket, Graphics and Paper PO) from one dialog.

To turn on Show Print Dialogs:

1. Place a check in the File Menu > Preferences > Jobs > Show Print Dialogs for Job Ticket, Graphics, and Paper PO when printing checkbox.

Printing a Job Ticket

From the Job List View

1. From the Job List View highlight the job for which you want to produce a job ticket.
2. Click the Print button.
3. Select Job Tickets from the drop-down menu.

   PrintPoint displays the Print dialog.
4. Click Print.

   OPTIONS
5. If you have previously set the Print Job Pictures checkbox in Preferences (File Menu > Preferences > Jobs) PrintPoint will displays the Print Layout & Cutout Now confirm dialog.
6. Click OK.

   PrintPoint displays the Print Setup dialog.
7. Select the appropriate printer and click OK.

   OPTIONS
8. If you have previously set the Print Paper PO with Job Ticket checkbox in Preferences (File Menu > Preferences > Paper) PrintPoint displays the Paper Purchase Order confirm dialog.
9. Click OK.

   PrintPoint displays the Print Setup dialog.
10. Select the appropriate printer and click OK.

From the Electronic Job Ticket

1. From the Job List View open a job.
2. Click the Print button.

   PrintPoint displays the Print dialog.
3. Click Print.
4. Click Print.

   OPTIONS
5. If you have previously set the Print Job Pictures checkbox in Preferences (File Menu > Preferences > Jobs) PrintPoint will displays the Print Layout & Cutout Now confirm dialog.
6. Click OK.

   PrintPoint displays the Print Setup dialog.
7. Select the appropriate printer and click OK.

   OPTIONS

8 If you have previously set the Print Paper PO with Job Ticket checkbox in Preferences (File Menu > Preferences > Paper) PrintPoint displays the Paper Purchase Order confirm dialog.

9 Click OK.

PrintPoint displays the Print Setup dialog.

10 Select the appropriate printer and click OK.

Printing a CombiTicket

The CombiTicket is a tool that you can use to print multiple jobs on one job ticket. Before you can do this, you must first setup a CombiTicket and set the preferences (File Menu > Preferences > SuperReports > CombiTicket).

For more information, see the chapters “Preferences” and “SuperReport Editor”.

1 From the Job List View highlight the jobs for which you want to produce a combijob ticket.

2 Click the Print button.

3 Select CombiTicket from the drop-down menu.

PrintPoint displays the Print dialog.

4 Click Print.

OPTIONS

5 If you have previously set the Print Job Pictures checkbox in Preferences (File Menu > Preferences > Jobs) PrintPoint will displays the Print Layout & Cutout Now confirm dialog.

6 Click OK.

PrintPoint displays the Print Setup dialog.

7 Select the appropriate printer and click OK.

OPTIONS

8 If you have previously set the Print Paper PO with Job Ticket checkbox in Preferences (File Menu > Preferences > Paper) PrintPoint displays the Paper Purchase Order confirm dialog.

9 Click OK.

PrintPoint displays the Print Setup dialog.

10 Select the appropriate printer and click OK.

Previewing Job Tickets

Print Preview with Standard Job Tickets

You can preview any report inside of PrintPoint (including Job Tickets) by selecting the Print Preview checkbox found in the Print Dialog.

- If using a PC this will appear in the lower left corner of the Print Dialog.
- If using a Mac, you must select PrintPoint from the “General” drop-down menu and then select the checkbox.

CAUTION

You must have the Show Print Dialogs option turned on in preferences in order to be able to select the preview option.

Place a check in the File Menu > Preferences > Jobs > Show Print Dialogs for Job Ticket, Graphics, and Paper PO when printing checkbox

Print Preview with SuperReport Job Tickets

If you have created a custom SuperReport Job Ticket or SuperReport CombiTicket, you can Preview the report using the following technique:

- If using a PC, hold down the CTRL key when you click Print.
- If using a MAC, hold down the Command key when you click Print.

Make sure you continue to hold down the CTRL or Cmd keys until you have clicked all the OK and Print buttons.

Chapter 52
Jobs - Reprinting

OVERVIEW

Job Reprinting is one of the most important and common job functions. Rarely does a printer have a customer who does not return with the request to reprint a job exactly as the previous order or print a new job that is virtually the same with perhaps only a few changes.

You can also clone an Estimate from the Job List View. See the Estimating Tools: Cloning chapter.

BEFORE YOU BEGIN

You should...	Where this information is found...
Know how to create a Job.	See the Job - Converting an Estimate to a Job chapter.

STEP-BY-STEP

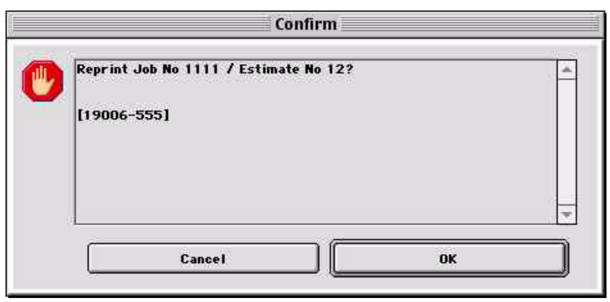
This section includes the following topics:

- Job Cloning - Reprinting

Job Cloning - Reprinting

1 Select Navigator > Jobs.
   PrintPoint displays the Job List View.
2 Highlight the job you would like to reprint.
3 Click the Clone button.
4 Select Clone Job-Reprint from the drop-down menu.

5 The Reprint Confirmation dialog will be displayed:



6 Click OK.

NOTE

PrintPoint will automatically create a New Estimate in the background and open a New Electronic Job Ticket.

7 Make any changes including:
   - New Purchase Order
   - New Due Date
   - New Re-order Date
   - Etc.
8 Follow normal job procedures to put this job into production.

Chapter 53
Jobs - Linking

OVERVIEW

Once your Estimates have been converted to Jobs, you can link the Jobs to maintain the ease of locating the components of the job. This makes it easier to co-ordinate the job specifications.

Before You Begin

You should...	Where this information is found...
Know how to create an Estimate.	Estimating Tools: ShortForm Estimating Tools: Worksheet Estimating Tools: Copy-Digital Estimating Tools: Large Format
Know how to convert an Estimate into a Job.	See the chatper: Jobs - Converting an Estimate Into a Job

STEP-BY-STEP

This section includes the following topics:

- Linking Jobs
- Viewing Linked Jobs from the Electronic Job Ticket
- Search the Job List for Linked Jobs

Linking Jobs

TIP

To assist you to see the linked jobs, you may want to make a Custom Job List View which includes the Job Link Number field. (See Chapter List View Editor for details)

1 From the Job List View, highlight the jobs you want to link.
2 Click the Links button and select Link Jobs from the drop-down menu.

TIP

You can also unlink, find by link or sort by links from the Links button.

Viewing Linked Jobs from the Electronic Job Ticket

1 Open a linked job Electronic Job Ticket from the Job List View

The Links button on the Electronic Job Ticket will be active and the sequence number of the job in the number of links, i.e. 1 of 3

2 Click the Links button and select one of the linked Jobs from the drop-down menu

PrintPoint opens the selected Job.

Search the Job List for Linked Jobs

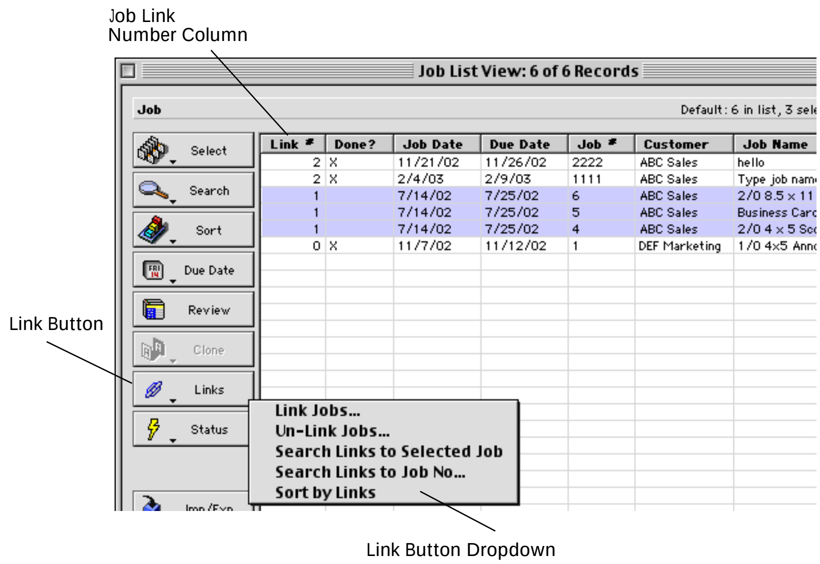
1 From the Job List, click to highlight a job.
2 Click the Links button.
3 Select Search Links to Selected Job.

PrintPoint changes the Job List View to display the Jobs linked to the one that was highlighted.

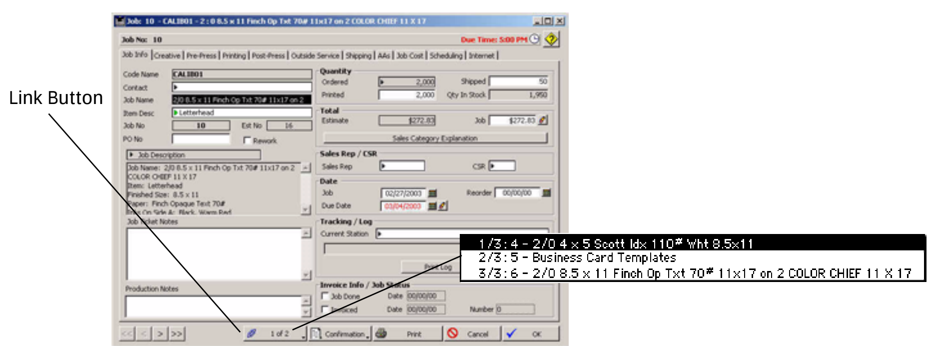
NOTE

If there was not any jobs linked the one that was highlighted, PrintPoint will display an Alert dialog that will says “The selected job is not linked to any other jobs”.

About The Screens



Button / Option	Definition
Link (button)	Displays the Link Drop-down button.
Link Button Drop-down	Used to Link, Un-Link, Search Links to Selected Job, Search Links to Job Number or Sort by Links.



Button / Option	Definition
Link (button)	Shows if this job is linked to any others and, used to QuickLink to those linked jobs.

Chapter 54
Job - Tracking and AAs

OVERVIEW

PrintPoint's Job Tracking allows the user to define Stations (press, bindery, pre-press, etc.) located throughout your shop, log those stations as jobs travel through these stations (logging in the time of day and user) and then print daily production reports.

Additionally, Job Tracking allows the user to add Author's Alterations to jobs in progress.

CAUTION

This module is built-in to PrintPoint and is not to be confused with the Job Costing/Data Collection (an optional PrintPoint module) includes Job Station Tracking.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup your list of Job Tracking Stations	File Menu > List Editor > Job Station or Add Job Stations On-The-Fly
Setup AA's	List View Menu > AAs

STEP-BY-STEP

This section includes the following topics:

- Accessing the Job-Track List View
- Updating a job with Job Tracking
- Printing the Job Tracking Log
- Clearing the Job Tracking Log
- Accessing the AAs tab
- Adding an AA
- Deleting an AA

Accessing the Job-Tracking List View

1. From the Navigator, click the Tracking/AAs button.

   PrintPoint displays the Tracking-Job List View.

Updating the Job Tracking Station

1. From the Job-Tracking List View, highlight the job and double-click it.
2. Click on the black triange arrow in the Current Station field.
3. Select the current station from the Choice List and press OK.

   PrintPoint updates the Current Station with the selection.

Printing the Job Tracking Log

1. From the Job-Tracking List View, highlight the job and double-click it.
2. Click the Print Log button.

TIP

PrintPoint updates the Job Tracking Log with the selected station, the time and date, and the username.

Clearing the Job Tracking Log

1. From the Job-Tracking List View, highlight the job and double-click it.
2. Click the Clear Log button.

Accessing the AAs tab

1. From the Job-Tracking List View, highlight the job and double-click it.
2. Select the AAs tab.

NOTE

PrintPoint will display a warning if the job has already been invoiced.

Adding an AA

1 Click on the Black triangle In the AA column

PrintPoint displays a Choice List of AAs.

NOTE

If the required AA is not in the list you can add it On-The-Fly.

2 Double-click the AA or select the AA and click the OK button.

3 Enter the Quantity of the AA.

PrintPoint adds the sub-total to the Estimated Total, increasing or decreasing (if the AA was a negative amount) to the Job Total.

TIP

The Rate, Markup, Sub-Total, and Entry Name and Time for the AA is user modifiable. If the Rate and Markup are empty, enter the appropriate values

4 The Log In is automatically set if you are using Passwords (see Chapter Users and Passwords) but can be set manually by typing it in.

5 When the AA is approved, you can type in the name of the person approving.

Deleting an AA

1 Click the Eraser Icon on the Left of the QuickLink icon

PrintPoint clears the single line of Alteration.

TIP

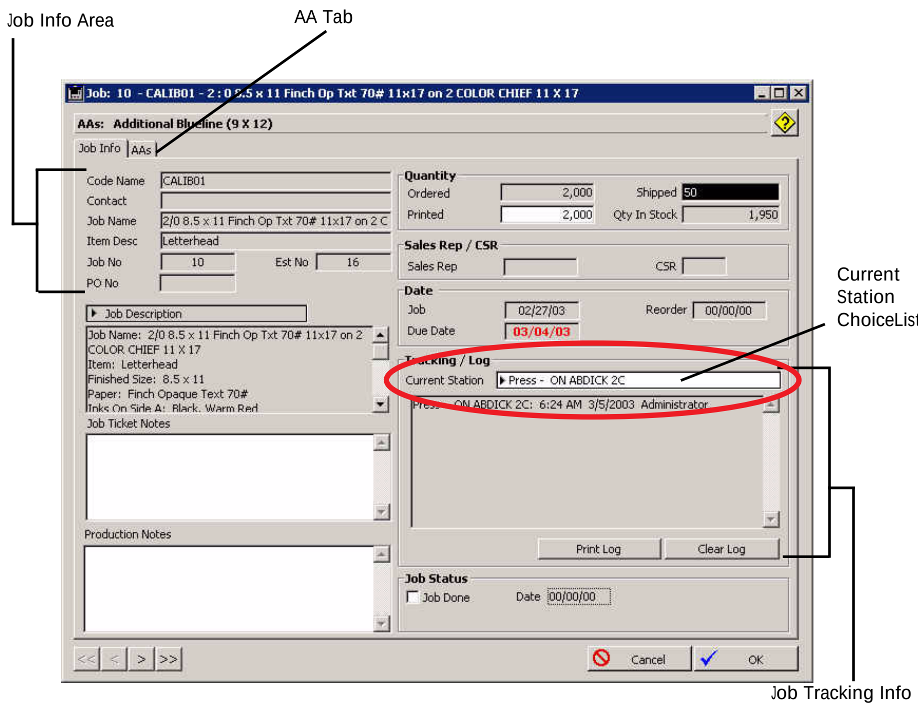
To Clear all the Alterations click the Clear AAs button

About The Screens

The Job Tracking screen is divided into the following tabbed subsections:

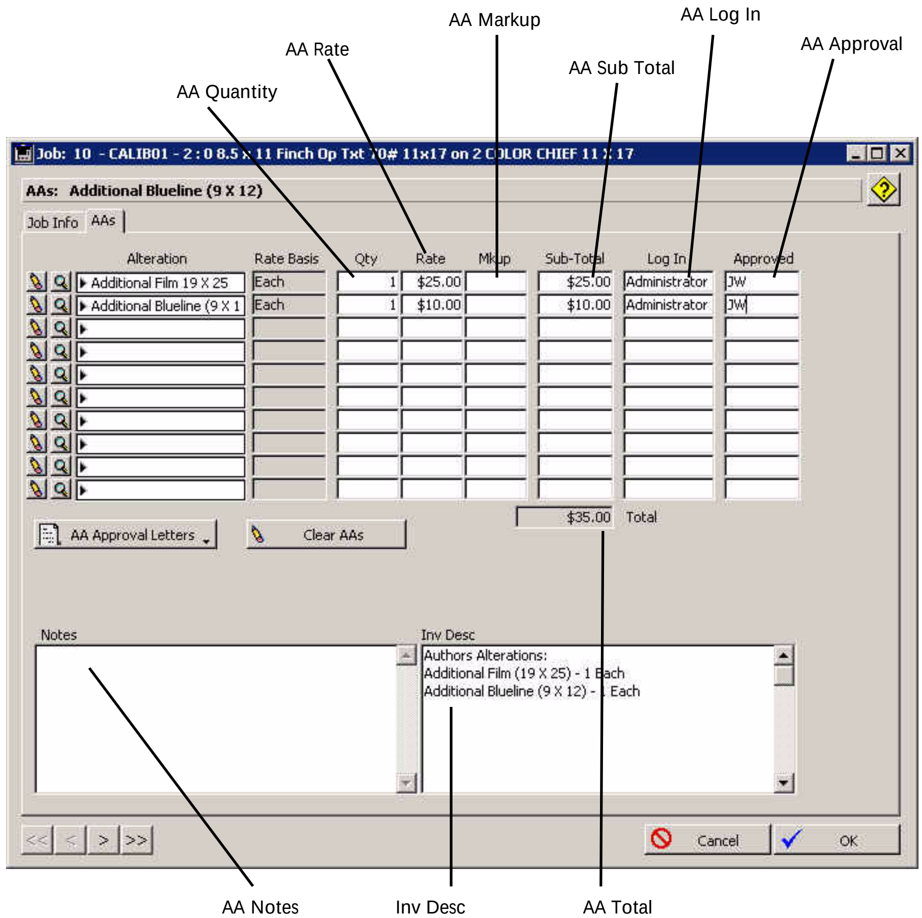
- Tracking
- AAs

Tracking



Field Name	Contents
Job Info Area	Displays the general job information
AA Tab	Click to access the AA information area
Job Tracking Info	Displays the Current Station and Job Tracking History
Print Log (button)	Click to Print the Job Tracking Log
Clear Log (button)	Click to Clear the Job Tracking History
Current Station ChoiceList	Select the Current Station from a ChoiceList and the field will displays the Current Station of the job

AAs



Field Name	Contents
Eraser Icon	Click to erase the AA information on that specific line
Magnifying Glass Icon	Click to lookup or change the specific AA database item
Alteration (for each of 10 AA’s)	Displays the Authors Alteration (see AA chapter)
Rate Basis (for each of 10 AA’s)	Displays the Rate Basis for the AA
Qty (for each of 10 AA’s)	Displays the Quantity of the selected AA
Rate (for each of 10 AA’s)	Displays the Rate for the selected AA
Mkup (for each of 10 AA’s)	Displays the Markup for the selected AA
Sub-Total (for each of 10 AA’s)	Displays the Total $, including Markup, for the selected AA
Log In (for each of 10 AA’s)	Displays the Username of the person who made the entry

Field Name	Contents
Approved (for each of 10 AA's)	Displays the name of the person who approved the AA
AA Approval Letters Button	Print a new AA Approval letter or review all AA Approval letters
Clear AA's Button	Erase all AA information
AA's Total	Total $ amount of the AA's
AA's Notes	Enterable field for AA notes
Inv Desc	Displays AA information to be used when invoicing the job

Shipping

Chapter 55
Shipping

Overview

PrintPoint's Shipping module allows you to automate the process of printing Packing Slips, Delivery Receipts and Shipping Labels as well as marking jobs a completed and keeping track of your shipments. You can use the information stored with your jobs or directly enter and customize the content and style of the reports on a shipment by shipment basis.

This chapter describes the following:

- Setting up preferences, customers and shipping address prior to shipping
- The actual shipping process
- Post-shipping activities

Before You Begin

You should...	Where...
Make sure you have the shipping reports that came with PrintPoint. All reports for shipping are SuperReports and are customizable. See the chapter: Customizing Shipping SuperReports. NOTE Not all older users have these reports stored in their database	a Navigator > Shipping b Select a Customer for the choice list c Click the Report Editor button 4. You should see “Delivery Receipt.srp”, “Packing Slip.srp”, “Label 1 Up.srp” and “Label 6 Up.srp” NOTE If you don’t have these reports loaded, check out PrintPoint Central in the link titled: “SuperReport, QuickReports ...”) or Call Tech Support for help.

STEP-BY-STEP

This section covers the following:

- Setting Up Shipping Preferences
- Customer Shipping Defaults
- Shipping On Estimates
- Shipping On Electronic Job Tickets
- Shipping
  - a. Accessing the Shipping List View
  - a. Accessing the Shipping Screen
  - b. Adding a Job
  - c. Deleting a Job
  - d. Printing Multiple or Single Documents
  - e. Setting Up Shipping Reports & Labels
  - f. Printing the Reports & Labels
  - g. Marking a job as Done (closing a Job)
  - h. Reprinting a Shipping Document
- Post-shipping Activities
- Customizing Shipping Reports

Setting Up Shipping Preferences

Accessing Shipping Preferences

1. Select File Menu > Preferences.
2. Select Shipping from the Select dropdown list.

Customer Shipping Defaults

Before you begin estimating, you should setup defaults for shipping stored with each customer record. You can setup the following:

- Accessing Customer Shipping
- Entering Shipping Information
- Custom Return Address
- Additional Shipping Locations

Accessing Shipping Defaults for Customers

1. Select Navigator > Customers

   PrintPoint will display the Customer List View.

2 Double-click a customer.

PrintPoint will display the Customer Detail screen.

Entering Shipping Information

1 Click on the Shipping Tab.

2 Enter the shipping information as described in the table below:

OR

Click the Copy Address to Shipping button to copy the customer name, address...from the mailing address on the Customer tab of the Customer Screen.

Fields	Description
Copy Address to Shipping (button)	Button used for copying the Customer Name, Address1, Address2, etc. to Shipping.
Via	Click to select a Shipping Method from the Choice List (setup in Preferences > Shipping)
Acct No	Enter an account number here if the if the selected shipping method requires one.
Name	The customer's Ship-to Name.
Address & Address	Two lines for entering the customer's address. Each line allows 50 Alphanumeric characters.
City	The customer's city - 25 characters.
State	The customer's state - 20 characters.
Zip	The customer's zip code. The zip code has a limit of 10 characters including "-".
Country	The customer's country. The country has a limit of 80 characters including "-".
Attention	Enter the name of the person authorized to accept shipments.
Custom Return Address	Enter Name and Address information if you wish to print a custom return address on shipping documents.
Additional Shipping Locations	Displays a list of additional shipping locations for this customer.
Add...(button)	Click to add a new shipping location.
Delete...(button)	Click to delete the selected shipping location from the list.

Custom Return Address

1 From the Shipping tab enter a Custom Return Address by manually typing the info in the field provided.

This field can be used later by the Return Address drop-down in Shipping.

Additional Shipping Locations

Adding an Additional Shipping Location

1. Place you cursor in the first Addition Shipping Locations field.
2. Click the Add button.
3. Type the shipping address in the field.
4. Add as many additional shipping locations as you would like but following these steps.

Deleting an Additional Shipping Location

1. From the Shipping tab place you cursor in the Addition Shipping Location field where the address information you want to delete is located.
2. Click the Delete button.

Shipping On Estimates

NOTE

In the Short Form, WorkSheet and Large Format estimate window there is a Shipping section that is modifiable from the estimate window. On the Copy-Digital estimate window, there is a Shipping button that accesses the shipping section for modifying.

In all estimating windows, shipping is broken into the following three (3) sub-sections:

- How you want the product shipped.
- The contact phone number.
- The ship to address.

1. Click on the green list icon and select how you want the product shipped. Or, manually type the information into the field.
2. Verify/edit the contact phone number.
3. Click on the black list icon and select which shipping address you want the product shipped to. This info comes from the Additional Shipping Locations area from the Customer Detail View > Shipping tab. Or, manually type the information into the field.

Shipping On Electronic Job Tickets

1 From the Electronic Job Ticket window select the Shipping tab.

See the chapter: Jobs - Electronic Ticket: Shipping for detailed description on this feature

Shipping

PrintPoint uses information from the Shipping Preferences, Customer Shipping information, and information that was stored for the job(s) that are being shipped. PrintPoint also allows you to modify some of this information when you ship a job.

This section describes the following:

- Accessing the Shipping List View
- Accessing the Shipping Screen & Selecting a Customer
- Adding a Job
- Deleting a Job
- Printing Multiple or Single Documents
- Setting Up Shipping Reports & Labels
- Printing the Reports & Labels
- Marking a job as Done (closing a Job)
- Reprinting a Shipping Document

Accessing the Shipping List View

1 From the Navigator > Daily tab, click the Shipping button.

The Shipping List View is displayed.

NOTE

The Shipping List View is historical view your shipping records.

Accessing the Shipping Screen & Selecting a Customer

1 From the Shipping List View, click the New button.

2 From the Customers Choice List, select the customer name.

PrintPoint fills in the customer's Address, Default Ship-to Address, displays a list of the Jobs In Progress, and inserts the current date in the Ship Date field.

Shipping a Job

Create the appropriate shipping documents that go with the job when it is shipped to your customer. PrintPoint automatically picks up shipping information stored for the Customer.

1 In the Job No. column, type the Job Number or double-click the job in the Jobs In Progress list in the upper right corner of the screen.

PrintPoint enters the amount ordered in the Ordered column, displays the Qty in Stock and Description and puts your cursor in the Shipped column.

2 Enter the quantity to be Shipped.

3 In the Description column, you can change the description of the job.

Adding A Job

PrintPoint allows you to combine multiple jobs on a shipment.

1 Click on the Add Job button.

PrintPoint adds another line item to the screen and places the cursor in the Job No. column.

2 Enter the Job Number of the job you wish to add and follow the steps above.

Deleting A Job

You may want to delete a job that you have already entered onto the Shipping screen.

1 Select the job you wish to delete by clicking on the job in the Job Number column.

2 Click on the Delete Job button to delete the selected job.

Printing Multiple or Single Documents

PrintPoint gives you the option to print either Multiple Receipts/Packing Slips with one job on each, or One Receipt/Packing Slip with one or multiple jobs on it.

1 Click the Multiple Receipts/Slips with One Job Each radio button if you want to print one receipt/slip for each job

OR

Click the One Receipt/Slip with One or Multiple Jobs radio button if you want to print one receipt/slip with several jobs on it.

Choosing Shipping Reports and Labels

1 Click the Reports/Labels/Charges button.

Setting Up Reports

NOTE

PrintPoint uses the Shipping Preferences to determine whether you want to print a Packing Slip and/or Delivery Receipt, and which specific form(s) to print. If you wish to override the default, select which report(s) you want to print for this job from the Reports to Print, Delivery, and Pack Slip drop down lists.

1 Verify/Edit the information on the screen and change anything that is incorrect.

NOTE

If the Ship To Address is incorrect, you can either type in the new address or position your cursor in the Ship To box and highlight the correct address from the Additional Shipping Locations list.

Setting up Labels

1 Click the Labels Tab.

NOTE

PrintPoint uses the Shipping Preferences to determine which specific label to print. If you wish to override the default, select which label you want to print for this job from the Label Dropdown Lists.

2 Verify the shipping address for the label(s).

NOTE

If the Ship To Address is incorrect, you can either type in the new address or position your cursor in the first label and highlight the correct address in the Additional Shipping Locations list.

Adding Shipping a Shipping Charge

1 Click on the Charge tab.
2 Enter the amount to charge for shipping.
3 Click the OK button.

The Shipping Screen re-displays.

Print Shipping Documents

1 Otherwise, click on the Print button to print your documents.

Marking a Job as Done

PrintPoint allows you to mark a job as done when you ship the job. Jobs that are done appear on the Electronic Job Ticket on the Job Info tab with a mark in the Job Done checkbox, and, from the Shipping tab, show the Ship Date and Shipped by/Time.

1 To mark the job as done and print the documents, click on the Print & Mark Job Done button.

Reprinting a Shipping Document

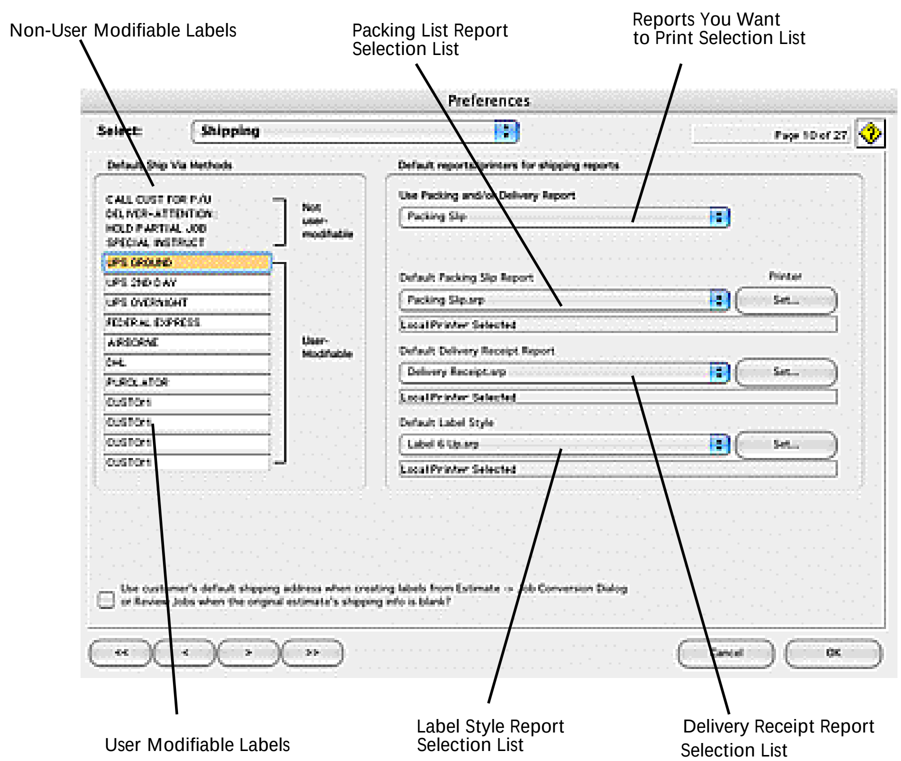
1 From the Shipping List View, double click on the shipping document you wish to reprint.

The shipping screen is displayed.

2 Click on the Print button.

About The Screens

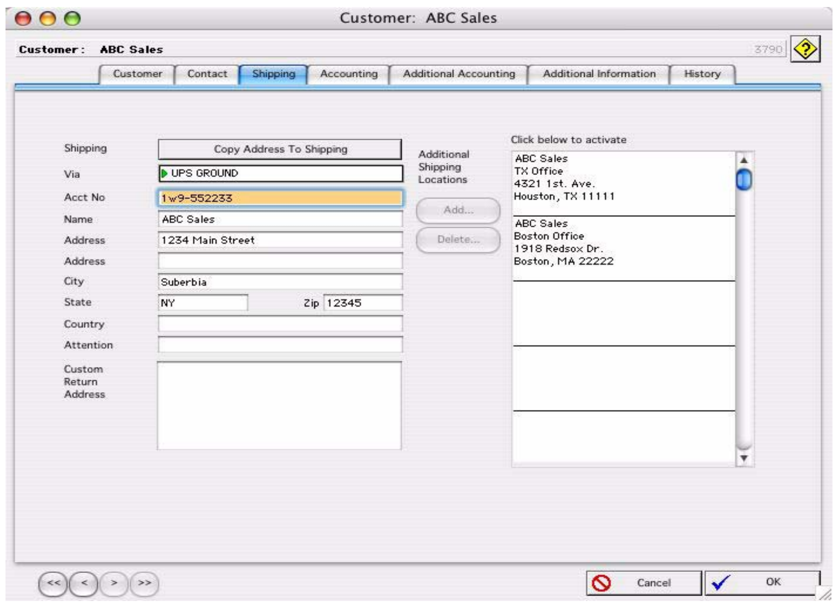
Shipping Preferences



Column / Button / Option	Definition
Non-User Modifiable Labels	Labels that show in the Shipping List that are not modifiable.
User Modifiable Labels	Labels that show in the Shipping List that are modifiable.
Reports You Want to Print List	Selects the default type of report you want to print.
Packing List Report Selection	Selects the default report name you want to print.

Column / Button / Option	Definition
Delivery Receipt Report Selection	Selects the default report name you want to print.
Label Report Selection	Selects the default report name you want to print.

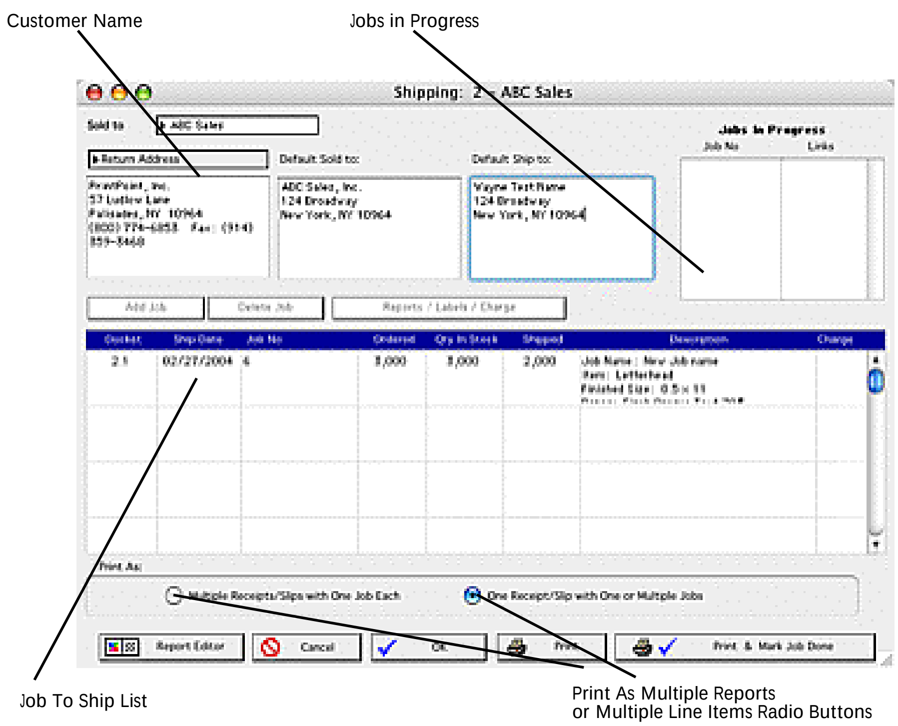
Customer Defaults



Option	Description
Copy Address to Shipping (button)	Button used for copying the Customer Name, Address1, Address2, etc. to Shipping.
Via (button)	Click to select a Shipping Method from the Choice List (setup in Preferences > Shipping)
Acct No	Enter an account number here if the if the selected shipping method requires one.
Name	The customer's Ship-to Name.
Address & Address	Two lines for entering the customer's address. Each line allows 50 Alphanumeric characters.
City	The customer's city - 25 characters.
State	The customer's state - 20 characters.

Option	Description
Zip	The customer’s zip code. The zip code has a limit of 10 characters including “-”.
Attention	Enter the name of the person authorized to accept shipments.

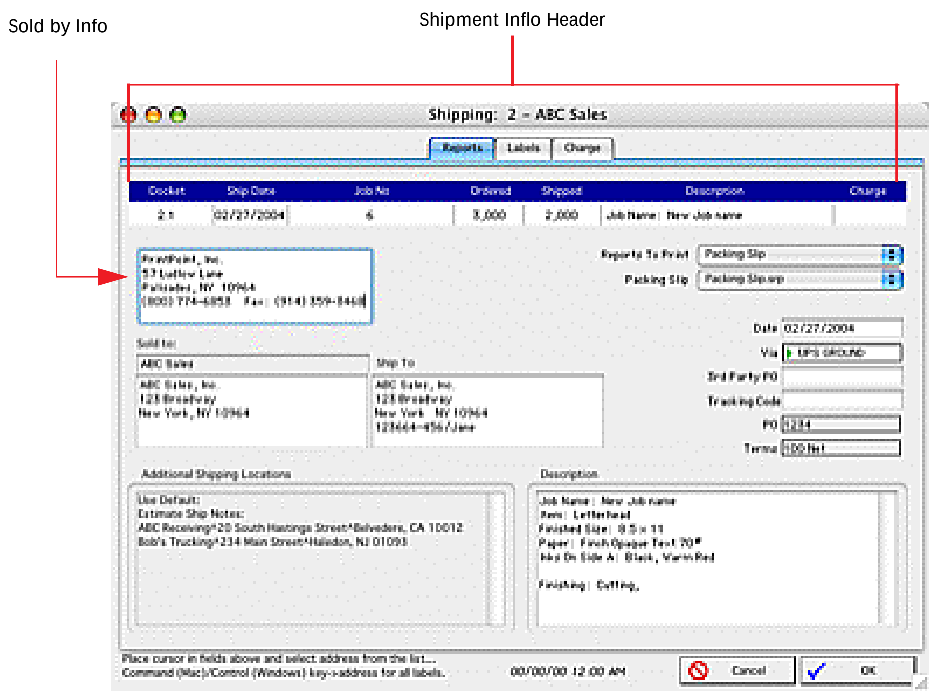
Shipping Dialog



Column / Button / Option	Definition
Customer Name	Selected from the Customer List.
Jobs is Progress Window	List all available jobs for the selected customer which are ready for shipping.
Report Editor (button)	Quicklink to the **Report Editor**.
Shipping List	List of jobs to be shipped.

Column / Button / Option	Definition
Print (button)	Prints the selected reports but does not mark the job complete.
Print & Mark Job Done (button)	Prints the selected reports and marks the job complete.
Add Job (button)	Adds another job to the shipping list for printing.
Delete Job (button)	Deletes a job from the Shipping List
Reports/Labels/Charge (button)	Quicklink to the Reports/Labels/Charge tabs.

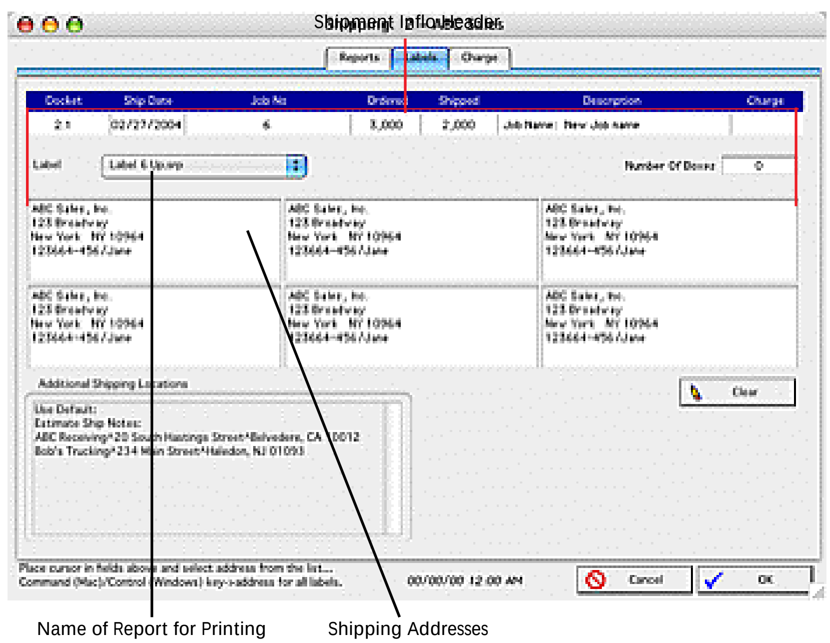
Report Tab



Column / Button / Option	Definition
Return Address Dropdown	Select the from the drop
Shipment Info Header	Displays the information about the job you have selected for shipping.
Sold by Info	Information that will print in the sold by information on the delivery receipt/packing slip.
Reports to print	List the report that are selected to print.
Delivery Receipt	List the name of the delivery report.
Packing Slip	List the name of the packing slip report.
Date of the Reports	User modifiable. The date that will print on the reports.

Column / Button / Option	Definition
Via	List the mean by which the job will be delivered.
3rd Party PO	Enter the PO number for any 3rd party information.
Tracking Code	Enter a UPS, Fed Ex...tracking code.
PO	PrintPoint enters this info from the job ticket window.
Terms	PrintPoint enters this info from the customer accounting window.
Additional Shipping Locations	Entered in the customer shipping window. Use this to select additional shipping addresses.

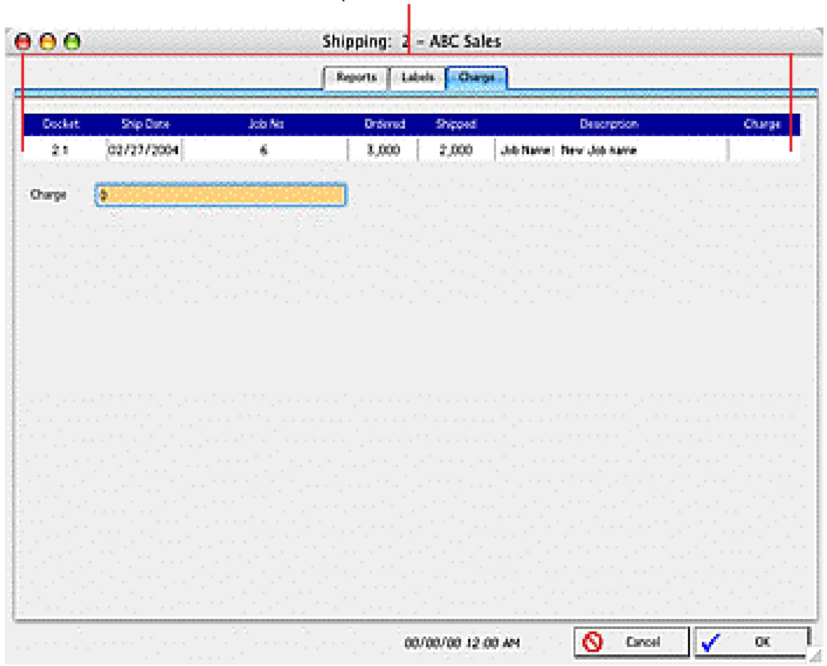
Labels Tab



Column / Button / Option	Definition
Name of Report for Printing	The name of the label report.
Number of Boxes	Enter the number of boxes required to ship the item.
Shipment Info Header	Displays the information about the job you have selected for shipping.
Shipping Addresses	Address where job is to be shipped.

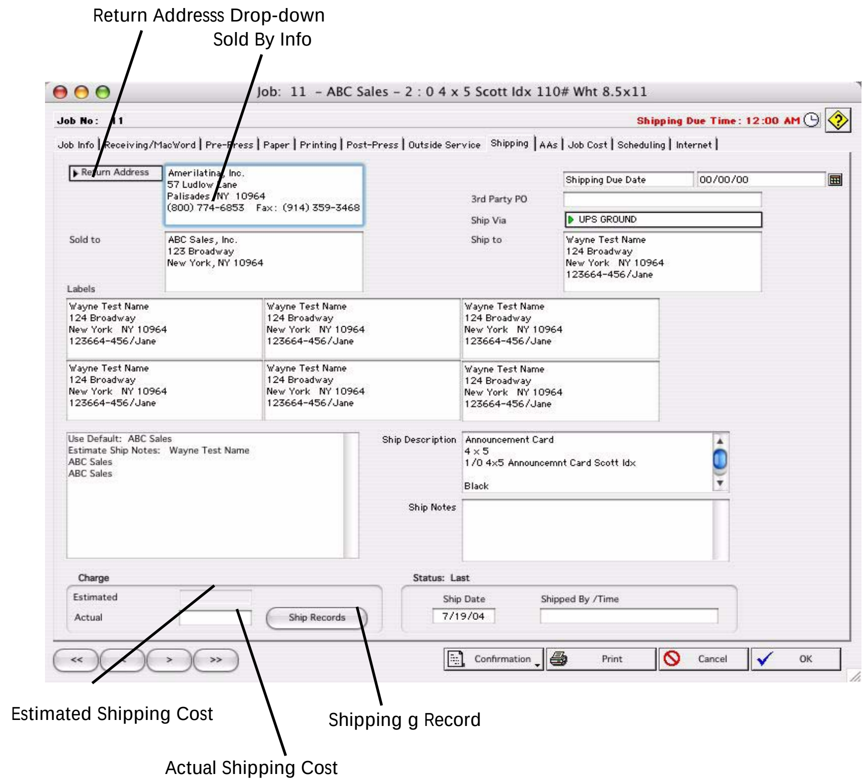
Charge Tab

Shipment Inflo Header



Column / Button / Option	Definition
Charge	List the amount that will be applied to the job for the shipping cost.
Shipment Info Header	Displays the information about the job you have selected for shipping.

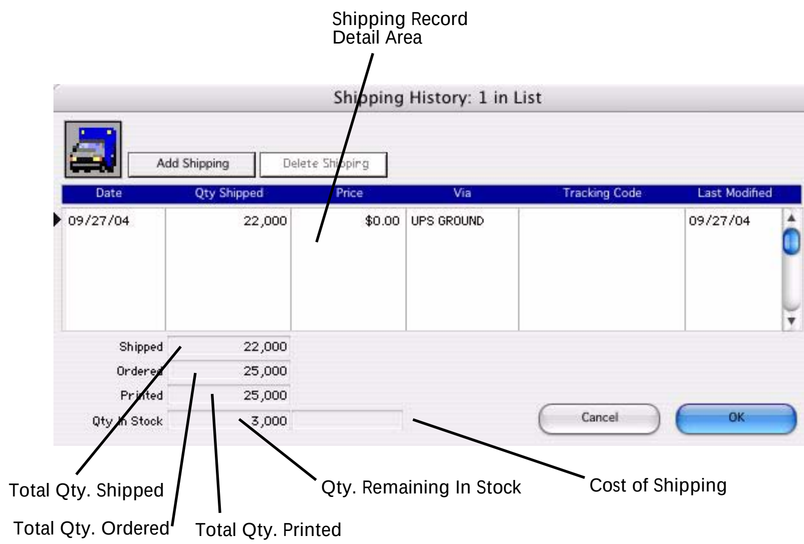
Job Ticket Shipping Tab



Field Name	Contents
Return Address Drop Down Menu	Click to select from (1) address entered into Job (Ticket) Notes field on Job Info Tab, (2) the Company Name and Address in Preferences, (3) the Customer ‘s address, or (4) Customized Return Address to enter another specific address
Sold-by Address	Displays address selected above
Sold-to Address	Displays address of customer the job was sold to
Shipping Due Date Title	Displays the label entered onto the More Custom Fields Tabs for each applicable Job Ticket
Shipping Due Date	Click on the Calendar icon to select a date
3rd Party PO	Enter a 3rd Party Purchase Order method
Ship Via	Click to select a Shipping Method from the Choice List to override the default method for the customer
Ship-to Address	Displays location where the job will be shipped
(6) Shipping Labels	Displays labels for 6 locations to which the job will be shipped

Shipping Description	Shipping Description from the Estimate Notes Dialog.
Shipping Notes	Enterable field for information about additional shipping locations
Shipping: Estimate Charge	Picks up any shipping charges from the estimate. In order for these charges to appear as part of the Estimated Charge, they would have to have been “categorized” in the Sales Category of the Estimated Item.
Shipping: Actual Charge	Total of all shipping records created from the Shipping Module or directly entered into the Shipping History Dialog.
Ship Records Button/Dialog	Displays the Shipping Records History Dialog containing all the Shipping history including: Date, Quantity, Price, Via, Tracking Code, Last Modified. The information in this dialog can be created from the Shipping Module or directly entered into this dialog.
Ship Date	Displays when marked during Shipping (see Shipping chapter)
Shipped by/Date‘/Time	Displays when marked during Shipping (see Shipping chapter)

Ship Records Dialog



Accounting

Chapter 56
Invoicing

OVERVIEW

PrintPoint's Invoice Module allows you to quickly create invoices that conform to your company standards—without typing the same information over and over again. You set your preferences once and PrintPoint goes to work assembling information from your customers, estimates, jobs, and other preferences.

Employing a standard Invoice Entry/Detail screen, you simply enter a customer code and job number and PrintPoint does the rest.

Invoicing can be exported to several major accounting packages including AccountEdge, QuickBooks for Windows and Peachtree For Windows.

You can combine multiple jobs together as one line on the invoice or change the job description so that the customer does not see all of the background details you had on the job ticket.

Some of the timesaving features include:

- Faxing an invoice directly to your customer from the Invoice Detail Screen or the Invoice Review List
- Printing one or more copies of invoice
- Printing several invoices at one time
- Marking one or more invoices as paid
- Voiding one or more invoices
- Exporting invoices to your office accounting package
- Adding the charges for AAs on an invoice and reviewing the charges before you finalize the invoice.

NOTE

You do not have to create a job to create an invoice.

BEFORE YOU BEGIN

You should...	Where...
Set your invoicing preferences	File Menu > Preferences > Invoices
Set your accounting link preferences if you plan to export invoices to an accounting package	File Menu > Preferences > Accounting Links
Set your invoice numbering preferences	File Menu > Preferences > Sequence Numbering
Set up the customer information	Navigator > Customers > Customer Review > Customer Detail Screen
Set up the accounting information for the customer	Navigator > Customers > Customer Review > Customer Detail Screen > Accounting Tabs

STEP-BY-STEP

This section includes:

- Creating an Invoice For an Existing Customer
- Creating an Invoice For a Walk-in Customer without an Existing Job
- Invoice Functions/Options
- Printing Invoices
- Searching for Invoices
- Voiding Invoices
- Marking Invoices as Paid or Unpaid
- Viewing Invoice Totals
- Exporting Invoices to your Accounting System

Creating an Invoice For An Existing Customer

1 Select Navigator > Invoices.

PrintPoint displays the Invoice List View.

2 Click the New button.

The Invoice Detail screen is displayed.

3 Select a customer from the Customer Choice List.

PrintPoint displays a list of jobs to be invoiced and fills in the all fields that have been previously configured for invoicing and will add the first line item to the invoice.

4 Double-click the job to invoice in the Available Jobs Lists

OR

Type the Job Number in the Job Number column of the line item and press the tab key.

PrintPoint fills in the information about the job and calculates the total amount of the invoice for you.

NOTE

PrintPoint will display a warning if the Job you entered does not belong to the selected customer if the Job total does not equal the Estimate Total.

See the chapter Authors Alterations: AAs on Invoices for more information.

5 Continue creating the invoice in the next section: Invoice Functions/ Options.

Creating an Invoice For a Walk-in Customer without an Existing Job

1 Select Navigator > Invoices.

PrintPoint displays the Invoice List View.

2 Click the New button.

The Invoice Detail screen is displayed.

3 Select a customer called “Walk-in” or create a new one On-The-Fly from the Customer Choice List.

4 Enter the Customer’s Real Name in the Customer Name Field to the right of the Customer Code field (already Walk-In).

TIP

This is the name you can use in the future to look up the invoice by Customer. Remember all your Walk-In customers will have the same Customer Code.

You may want to add the Customer Name column to your Invoice List View if you have lots of walk-in customers.

5 Enter the Customer’s Address in the Address field below the Customer Name field.

6 Click on the Additional Information button to enter the Walk-In customer’s telephone and fax.

7 Because there are not jobs on file for the customer “Walk-In” you can skip the Job Number field and just fill in the Qty, Description and Price for the selected line item.

8 Continue creating the invoice in the next section: Invoice Functions/ Options.

Invoice Functions/Options

The following invoice options are described below:

- Changing a Line Item Description
- Adding Another Line Item
- Combining Multiple Jobs as One Line Item
- Deleting a Line Item
- Reviewing AAs
- Changing the Invoice Date
- Changing the Sales Rep
- Changing the Terms of the Sale
- Changing the Due Date
- Changing the Purchase Order Number
- Changing the Message the Customer Sees
- Changing the Shipping Method (Ship Via)
- Changing the Delivery Address
- Changing the Customer's Name
- Changing the Customer's Address
- Changing the Government Invoice Number
- Changing the Telephone Number
- Changing the Fax Number
- Changing the Notes about the invoice
- Entering Shipping Charges.

Changing a Line Item Description

1. Click the Item Number column for the line item to change.
2. Click the Edit Description button.

   PrintPoint displays the Edit Description dialog in a WSYWIG (What You See Is What You Get) view.
3. Edit the description, then click the OK button.

   The description now looks the way it will print on the invoice.
4. Repeat these steps for each line item description you want to change.

Adding Another Line Item

1. Click the Add Item button.
2. Double-click the job to invoice in the Available Jobs Lists

   OR

   Type the Job Number in the Job Number column of the line item and press the tab key.
3. Repeat step 1 and step 2 for each line item you want to add.

Combining Multiple Jobs as One Line Item

1 Double-click the each job from in the Available Jobs Lists

OR

Type multiple Job Numbers into the Job Number column of the line item separated by a forward slash (/).

2 Press the Tab key.

NOTE

You can combine as many jobs into one line item as needed.

3 Repeat step 1 and step 2 for each job you want to combine.

Deleting a Line Item

1 Click the Job Number column for the line item you want to delete.

2 Click the Delete Item button.

3 Repeat step 1 and step 2 for each line item you want to delete.

Reviewing AAs

1 Click the Item Number column (#) for the job whose AAs you want to review.

2 Click the Review AAs button.

The Review AAs Screen displays.

3 Review the charges for the AAs.

4 Click the OK button

The Invoice Detail Screen displays.

See the AAs On Invoices section in the Authors Alterations chapter.

Changing the Invoice Date

CAUTION

PrintPoint automatically recalculates the due date (based on settings stored with each customer's record) if you manually change the invoice date. You can reset the due date directly if necessary.

1 Position the cursor in the Date field

2 Type the new date in MM/DD/YYYY format

Changing the Sales Rep

1 Select a Sales Rep from the drop-down Sales Rep Choice List.

Changing the Terms of the Sale

1 Select a Term from the drop-down Terms Choice List.

NOTE

PrintPoint recalculates the due date for you.

Changing the Due Date

1 Position the cursor in the Due Date field

2 Type the new date in MM/DD/YYYY format

OR

Select a term from the drop-down Terms Choice List. Based on the Invoice Date and the Terms, PrintPoint recalculates the due date for you.

Changing the Purchase Order Number

1 In the PO No field, type the purchase order number that you want printed on the final invoice. If this information was originally entered on the Estimate, PrintPoint automatically inserts this information for you.

NOTE

If you have multiple jobs with multiple purchase order numbers, PrintPoint adds them to this field.

TIP

If you add multiple jobs on a line, PrintPoint automatically saves their respective Purchase Order numbers with the line. Every Purchase Order will be listed if you choose to print them on a report for that invoice. You may want to use this number later on a report.

Changing the Message the Customer Sees

1 In the Message field, edit the message. If you want to change the message used for all of your invoices, go to Preferences > Invoices.

Changing the Shipping Method (Ship Via)

1 In the Ship Via field, type the words you want printed on the invoice

OR

2 Select a Shipping Method from the Shipping Method drop-down menu.

TIP

To change the Ship Via back to the one stored in the customer's record, click the Reset button.

Changing the Delivery Address

1. In the Ship To field, type the delivery address you want printed on the invoice. Changing the address on the invoice does not change the address on the shipping label.

TIP

To change the address back to the one stored in the customer's record, click the Reset button.

Changing the Customer's Name

1. Type the Customer Name you want printed on the invoice in the field to the right of the selected Customer Name.

Changing the Customer's Address

1. Type the Customer Address you want printed on the invoice in the field to the right of the selected Customer's Address.

Changing Government Invoice Number

1. Select the Additional Information button.

   PrintPoint displays Customer information and notes about the invoice.
2. Enter the Government Invoice Number.

Changing Customer's Telephone Number

1. Select the Additional Information button.

   PrintPoint displays Customer information and notes about the invoice.
2. Enter the Telephone Number.

Changing Customer's Fax Number

1. Select the Additional Information button.

   PrintPoint displays Customer information and notes about the invoice.
2. Enter the Fax Number.

Changing Notes about the Invoice

1. Select the Additional Information button.

   PrintPoint displays Customer information and notes about the invoice.
2. Enter the Notes.

Entering Shipping Charges & Taxable Status

1. In the Shipping field, type the shipping charges you want printed on the invoice.
2. Place a check in the Tax checkbox field if you want the shipping to be taxed.

Printing Invoices

Printing Invoices from the Invoice List View

1. Display the Invoice List View.
2. Highlight the invoices you want to print.
3. Click the PRINT button, then select INVOICES.

4 Print the invoices.

Printing an Invoice from the Invoice Detail Screen

1 Select the invoice you want to print.
2 Click the Print button.
3 Print the invoice.

Searching for Invoices

PrintPoint provides many search facilities to make it easy and quick to search for and then display invoices.

The following search options are described below:

- Invoice by Invoice Number
- Invoices by Customer
- By Customer Match
- By Job No.
- By Description
- By Line Item Amount
- Paid Invoices
- Open Invoices
- Exported Invoices
- Not Exported Invoices
- By Date Range
- Search Editor

1 Select Navigator > Invoices
PrintPoint displays the Invoice List View.
2 Click the Search button.

Search for an Invoice by Invoice Number

1 Select Search by Invoice No from the drop-down menu.
2 Type the Invoice Number into the search dialog.
3 Click the OK button.
The Invoice Detail Screen for the selected invoice displays.

Search for Invoices by Customer

1 Select Search by Customer from the drop-down menu.
PrintPoint displays the Customer Choice List.
2 Select the Customer from the Customer Choice List.
The Invoice List View displays a list of invoices for the selected customer.

Search for Invoices by Customer Match

1. From the Invoice List View, highlight an invoice for the Customer for which you want to display all invoices.
2. Select Search Customer Match from the drop-down menu.

   The Invoice List View displays all invoices for the selected customer.

Search for an Invoice by Job Number

1. Select Search by Job No from the drop-down menu.
2. Type the *number of the job* for which you are searching.
3. Click the OK button.

   The Invoice List View displays a list of invoices with the job number you entered.

Search for an Invoice by Job Description

1. Select Search by Description from the drop-down menu.
2. Type *one or more words* used to describe the job for the customer.
3. Click the OK button.

   The Invoice List View displays a list of invoices that have a description that matches what you entered.

Search for an Invoice by Line Item Amount

1. Select Search by Line Item Amount from the drop-down menu.
2. Type *the dollar amount* you are searching for, including the decimal and the numbers to the right of the decimal point.
3. Click the OK button.

   The Invoice List View displays a list of invoices that have the dollar amount that you entered.

Search for Invoices that have been Paid

1. Select Search Paid from the drop-down menu.

   If there is only one match, PrintPoint displays the Invoice Detail Screen for that invoice. If there is more than one match, the Invoice List View displays a list of invoices that have been marked as “Paid”.

Search for Invoices that are Open

1. Select Search Open from the drop-down menu.

   PrintPoint displays a list of all unpaid invoices.

Search for Invoices Exported to an Accounting System

1. Select Search Exported from the drop-down menu.

   PrintPoint displays all the invoices that were exported to your accounting system.

Search for Invoices Not Exported to an Accounting System

1. Select Search Not Exported from the drop-down menu.

   PrintPoint displays all the invoices that have not been exported to your accounting system.

Search by Date Range

1. Select Search by Date Range from the drop-down menu.

   PrintPoint displays a list of all invoices for the specified date range.

Search Editor

1. Select Search Editor from the drop-down menu.

   PrintPoint displays a list of all available fields so that you can specify your own search parameters.

Voiding Invoices

The following procedure allows you to void an invoice (changing the line items and invoice totals to zero).

CAUTION

You get two chances to make sure you ***really*** want to void the selected invoice. Once you answer “yes” to the second prompt, the invoice is voided and you cannot change that status.

1. Select Navigator > Invoices

   PrintPoint displays the Invoice List View.
2. Highlight the invoice you want to void.
3. Click the Void button.
4. At the system prompt, click the Yes button.
5. Carefully read the second prompt and make sure that you are really ready to void the selected invoice(s).
6. Click the Yes button.

   The invoice is marked Void and you can still view it, but you can no longer make changes to it.

Marking Invoices as Paid or Unpaid

PrintPoint allows you to mark invoices as Paid, and to mark them Unpaid if they were previously marked Paid. PrintPoint can therefore keep track of customers’ Total Billing and Accounts Receivable, and track then against the customer’s Credit Limit.

Marking Invoices as Paid

1. Select Navigator > Invoices

   PrintPoint displays the Invoice List View.
2. Highlight the invoice(s) you want to mark as paid.
3. Click the Paid button, then select Mark Paid from the drop-down menu.

Marking Invoices as Unpaid

1. Select Navigator > Invoices
2. PrintPoint displays the Invoice List View.

3 Highlight the invoices you want to mark as unpaid.
4 Click the Paid button, then select Mark Unpaid from the drop-down menu

Viewing Invoice Totals

PrintPoint allows you to easily view the following amounts for any group of selected invoices. The amounts available for viewing are:

- Invoice Items
- Sales Tax
- Shipping
- Total Sales
- Accounts Receivable

1 Select Navigator > Invoices
   PrintPoint displays the Invoice List View.
2 Highlight the invoices that you want to total.
3 Click the Total button.
   PrintPoint calculates the total for the currently highlighted invoices.
4 Click the OK button when you have reviewed the total.

Exporting Invoices to your Accounting System

Invoicing can be exported to several major accounting packages including AccountEdge, QuickBooks for Windows and Peachtree For Windows.

See the specific chapters for your accounting package.

NOTE

If you have a custom package, contact Tech Support for help in exporting your invoices.

Marking Invoices as Not Exported

For all exporting, there will be times when you will want to reset exported invoices so they can be exported again.

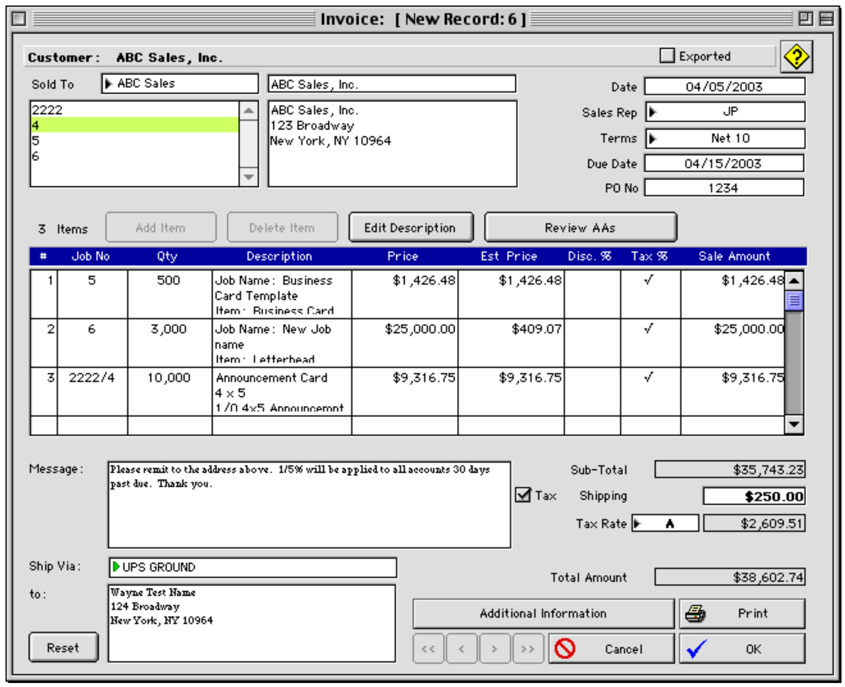
1 elect Navigator > Invoices
   PrintPoint displays the Invoice List View.
2 Highlight the invoices that you want to mark as Not Exported.

3. Click the Export button.
4. Select Mark Invoices as Not Exported from the drop-down menu.

   PrintPoint removes the exported flag from the invoice and removed the word “exported” from the Invoice List View Invoice Number column.

ABOUT THE SCREENS

Invoice Detail

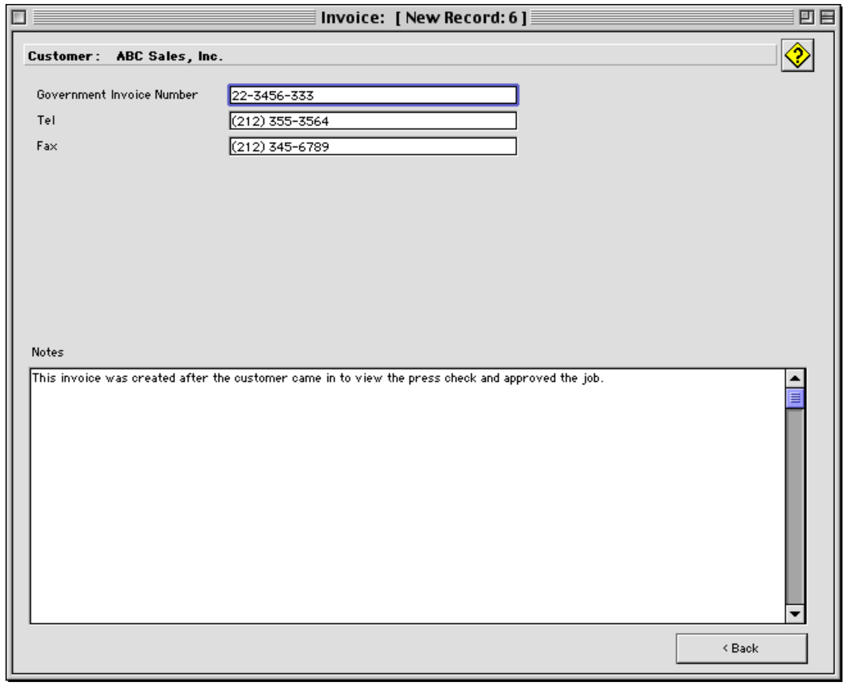


Option	Description
Invoice Number	Displays the invoice number. If the invoice has been exported the word “exported” will be appended to the name.
Exported (checkbox)	This checkbox will be have a check in it if the invoice has been exported. You can change the status of the invoice to “un-exported” if you decide you need to export it again.
Sold To (Choice List)	Black Triangle Arrow button that will display the Customer Code Choice List.
Available Jobs To Invoice List	Based on settings in Preferences, this list will commonly show completed jobs ready to invoice. You can double-click a job in this list to enter into a invoice line item.

Option	Description
Customer Name	When you select the Customer Code from the Sold To field the corresponding Customer Name will be displayed in this field. Used primarily for invoices for walk-in customers where you do not want to add the customer to the database. Use this field later on to search for the invoice by customer name and not customer code.
Customer Billing Address	When you select the Customer Code from the Sold To field the corresponding Billing Address will be displayed in this text box. You can override this if necessary.
Date	Automatic current date the invoice is created. You can override this date manually TIP The automatic date is picked up from the server in client/server mode unless you have set the preference to read the clients date. Setting the preference to read the client's date is often used when you are creating many invoices on a date after which you would like the invoice to "appear" to have been created. Set the date on your client machine back to the desired date and set your preference (File Menu > Preferences > Invoices > Invoice Date From Client checkbox). Remember to reset the date when you are completed invoicing. CAUTION PrintPoint automatically recalculates the due date (based on settings stored with each customer's record) if you manually change the invoice date. You can reset the due date directly if necessary.
Sales Rep	Automatically picked up from the Job, but can be overridden by selecting a different Sales Rep from the Sales Rep Choice List
Terms	Automatically picked up from the Customer, but can be overridden by selecting a different Term from the Terms Choice List

Option	Description
Due Date	PrintPoint automatically recalculates the due date (based on settings stored with each customer's record) if you manually change the invoice date. You can reset the due date directly if necessary.
Purchase Order	Automatically picked up from the Job, but can be overridden. If there are multiple jobs on the invoice, the PO field will be filled with all the POs.
Invoice Line Items	Each invoice can have multiple jobs. You can put a separate job on each line or combine jobs together by inserting a " / " between the job numbers.
Add Item (button)	Click to add a line item to the invoice.
Delete Item (button)	Click to delete a line item from the invoice.
Edit Description (button)	Click to edit the description in a WYSIWYG dialog.
Review AAs (button)	If the estimate total and job total do not agree you have the opportunity to review the possibility of AAs and make sure the approvals have been signed.
Message	Closing message to the invoice.
Sub-Total	Sub-total of all the line items (sale amounts)
Tax (checkbox)	Place a check in the checkbox if you want shipping/ freight to be taxed
Shipping	The actual shipping charge. This amount will be automatically filled with values from the job(s) on the line items or you can enter a value yourself.
Tax Code (Rate)	The tax code used by various accounting packages.
Tax Amount	The total tax applied to the invoice.
2nd Level Tax	If you have separate 2nd Level taxes such as GST and PST setup in Preferences, this field will appear on the invoice.
Total Amount	Grand total for the invoice.
Additional Information (button)	Displayed the second detail page of the invoice containing other options.
Ship Via	Automatically picked up from the Customer, but can be overridden by selecting a different method from the Ship Via Choice List or directly typing an entry.
Ship To	Automatically picked up from the Customer, but can be overridden.
Reset (button)	Reset the Ship Via and Ship To address to the customer defaults.

Invoice Additional Info



Option	Description
Government Invoice Number	Used by various countries where pre-issued invoices numbers are used. This field and label can be modified in the Language and Structure Editors for any customizable purpose.
Tel	Telephone number of a walk-in customer
Fax	Fax number of a walk-in customer
Notes	Any notes for this invoice.

Chapter 57
Chargebacks

OVERVIEW

PrintPoint's Chargeback System allows you to:

- Select jobs that were completed for any or all of your customers
- Designate a date range.
- Print a report and/or create a file which contains the chargeback information.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your Chargeback preferences	File Menu > Preferences > Chargebacks
Setup custom fields for your Customers	File Menu > Custom Fields Editor
Understand how to customize your Chargeback Print Reports	See SuperReport Chapter and the SuperReport Folder inside your Reports Folder NOTE There will be more about this in this Chargebacks chapter
Understand how to customize your Chargeback Export Files	See QuickReports Chapter and the QuickReports Folder inside your Reports Folder NOTE There will be more about this in this Chargebacks chapter

STEP-BY-STEP

This section includes the following:

- Setting up Chargebacks - the Theory
- Accessing and Using the Chargeback Editor
- Editing the Reports

Setting Up Chargebacks - the Theory

PrintPoint's Custom Fields Editor lets you define your organization's corporate structure, and then assign identifying characteristics to each of your customers. For example, the structure might be composed of State, County, City, Division, Region, and District, and a specific customer might be as follows:

- State = Ohio
- County = Manchester
- City = Columbus
- Division = AA
- Region = North
- District = 125.

PrintPoint's Chargeback Reporting is extremely flexible. Using SuperReports to customize the "Chargeback_Detail.srp" and "Chargeback_Summary.srp" reports, you can include customized information to pass along to the accounting division. In kind, using QuickReports, you can easily modify the built-in exporting by customizing the "Chargeback_Detail.4qr" and "Chargeback_Summary.4qr".

Accessing and Using the Chargeback Editor

1. Select Accounting Menu > Chargebacks...

   PrintPoint displays the Chargeback Editor screen.

TIP

See About The Screens section below for a description of each field.

2. Enter a Date Range.
3. Select an individual customer by highlighting the customer in the Available Customer List and clicking the Append button.
4. Select either a Detail or Summary report.

5 Select to either Print or Export the report.

6 Click Print or Preview if you have selected to print the report

OR

7 Click Export to export the report.

Editing the Reports

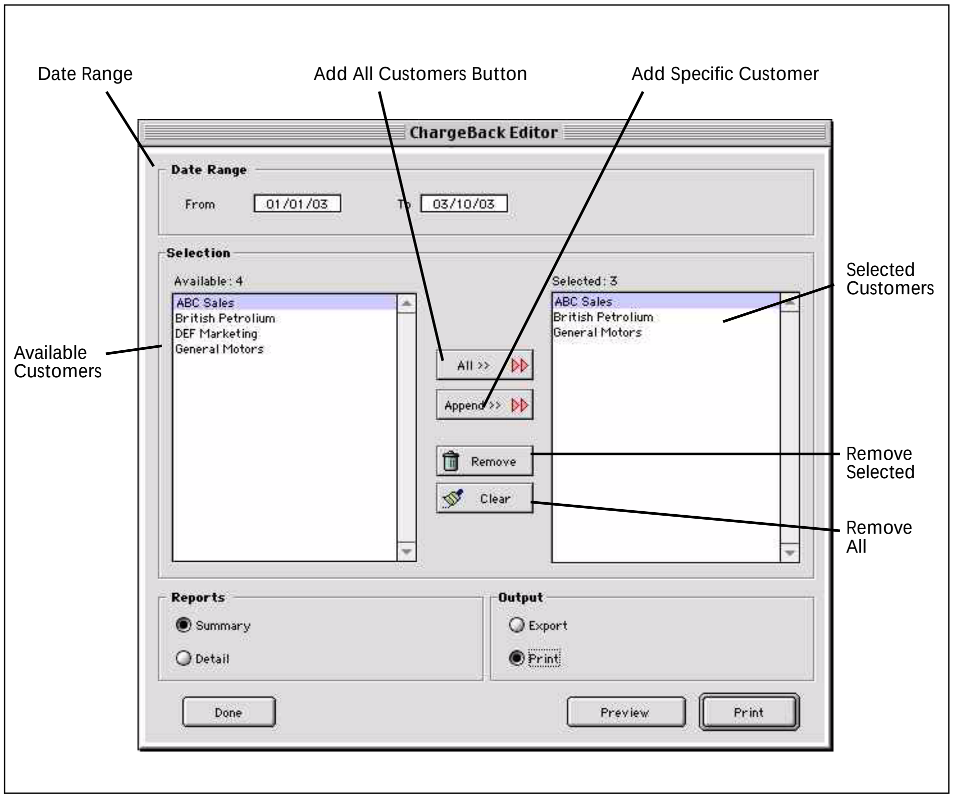
If you choose to modify the print reports, PrintPoint will use the SuperReports: Chargeback_Detail.srp or Chargeback_Summary.srp. To edit these report, please use the Report Manager from the Job List View. The reports are stored in the following path: PrintPoint 4.5 (Client) Folder > Reports > SuperReports.

If you choose to modify an export file, PrintPoint will use the QuickReports: Chargeback_Detail.4qr or Chargeback_Summary.4qr. To edit these report, please use the Report Manager from the Job List View. The reports are stored in the following path: PrintPoint 4.5 (Client) Folder > Reports > Quick Reports.

TIP

PrintPoint knows to “Export” the QuickReport because the Print Destination in the QuickReport Editor has been set to a “Disk File” and not a printer.

About The Screens



<table>
<tr><th>Field Name</th><th>Contents/Usage</th></tr>
<tr><td>Date Range from</td><td>Enter the From Date for the period for which you want to select the jobs to report

Example Enter 07/19/01 to start the selection of jobs from that date

NOTE
PrintPoint defaults to today’s date</td></tr>
<tr><td>Date Range to</td><td>Enter the To Date for the period for which you want to select the jobs to report

NOTE
PrintPoint defaults to today’s date</td></tr>
<tr><td>Selection (list)</td><td>PrintPoint displays the customer table</td></tr>
</table>

Field Name	Contents/Usage
Available	PrintPoint displays the number of customers in the table
Selected (list)	When customers are selected, PrintPoint displays those that are selected, and shows the number of customers selected
All >>	Click to select all customers
Append >>	Click to select specific customers
Remove	Click to remove specific customers from the Selected list
Clear	Click to remove all customers from the Selected list
Reports - Summary	Click the radio button to select a Summary Chargeback report
Reports - Detail	Click the radio button to select a Detail Chargeback report
Output - Export	Click the radio button to export a file
Output - Print	Click the radio button to Print the Chargeback Report
Done	Click to leave the Chargeback Editor
Preview	Click to Preview the report
Export	Click to Export the file

Chapter 58
Sales Categories

OVERVIEW

PrintPoint allows you to setup 25 Sales Categories to separate different areas (equipment and processes) within your shop. Examples of Sales Categories include Prep, Pre-Press, High Speed Printing, Mailing, Graphics, and Outside Services. PrintPoint then automatically allocates sales over these various categories.

You can then easily generate Sales Category (Sales Summary) Reports by Time Period for All Jobs, Completed Jobs, or Invoiced Jobs, and/or see the breakdown by Sales Categories for any specific job.

STEP-BY-STEP

This section includes the following topics:

- The Sales Category Dialog
  - Accessing the Sales Category Dialog
  - Creating a Sales Category
  - Changing a Sales Category
- Assigning Sales Categories to the Database
- Viewing the Sales Categories for a Specific Job
- Printing Sales Category Reports.

Sales Category Dialog

Accessing the Sales Category Dialog

1. Select Accounting Menu > Edit Sales Categories...

   PrintPoint displays the Edit Sales Category screen.

Creating a Sales Category

1. Select Accounting Menu > Edit Sales Categories...

   PrintPoint displays the Edit Sales Category screen.
2. Double-click the next available (unused) Sales Category.

   TIP

   Sales Category Reports print in Sales Category Number sequence
3. Enter the Name of the Category into the Name field.
4. Enter the Account Number of the Category, if desired.
5. Enter the Description of the Category, if desired.

   PrintPoint automatically inserts the Date, Time, and User Name of the entry.
6. Designate equipment or processes from the Pre-Press Table that should be included in this Sales Category.
7. Designate equipment or processes from Pre-Press that should be included in this Sales Category.
8. Designate Press equipment that should be included in this Sales Category.
9. Designate Copy equipment that should be included in this Sales Category.
10. Designate Large Format equipment or processes that should be included in this Sales Category.

11 Designate equipment or processes from Post-Press or Outside Services that should be included in this Sales Category.

TIP

See the applicable chapter in this Manual for directions on assigning equipment or processes to Sales Categories.

Changing a Sales Category

1. Select Accounting Menu > Sales Categories.
2. Select Edit Sales Categories from the dropdown list.

   PrintPoint displays the Edit Sales Category screen.
3. Select and double-click the Sales Category you want to change.
4. Enter the Name of the Category into the Name field.
5. Enter the Account Number of the Category, if applicable.
6. Enter the Description of the Category, if applicable.

   PrintPoint automatically inserts the Date, Time, and User Name of the changed entry.
7. Designate equipment or processes from the Pre-Press Table that should be included in this Sales Category.
8. Designate equipment or processes from Pre-Press that should be included in this Sales Category.
9. Designate Press equipment that should be included in this Sales Category.
10. Designate Copy equipment that should be included in this Sales Category.
11. Designate Large Format equipment or processes that should be included in this Sales Category.
12. Designate equipment or processes from Post-Press or Outside Services that should be included in this Sales Category.

TIP

See the applicable chapter in this Manual for directions on assigning equipment or processes to Sales Categories.

Assigning Sales Categories to the Database

Printing Sales Category Reports

1. Select Accounting Menu > Sales Categories.
2. Select Sales Category Reports from the dropdown list.

   PrintPoint displays the Sales Category Report screen.
3. Select the Date Range for which you want to generate the report.

   NOTE

   PrintPoint defaults to Current Date for both the From and To dates
4. Click the radio button to select which jobs you want included in the report:
   - All Jobs
   - Completed Jobs
   - Invoiced Jobs
5. Click the Calculate button.

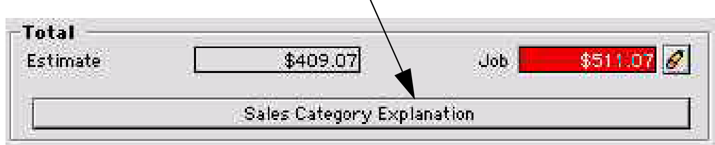
   PrintPoint displays the Number of Jobs Selected, The Total for each Sales Category, and the % of Total Sales for each Sales Category.
6. Click Print to print the report.

Viewing the Sales Categories for a Specific Job

1. Select **Navigator > Jobs.**

   PrintPoint displays the Job List View.
2. Double-click the job you would like to view.

   PrintPoint displays the Job Info tab of the selected job.
3. Click the Sales Category Explanation button.

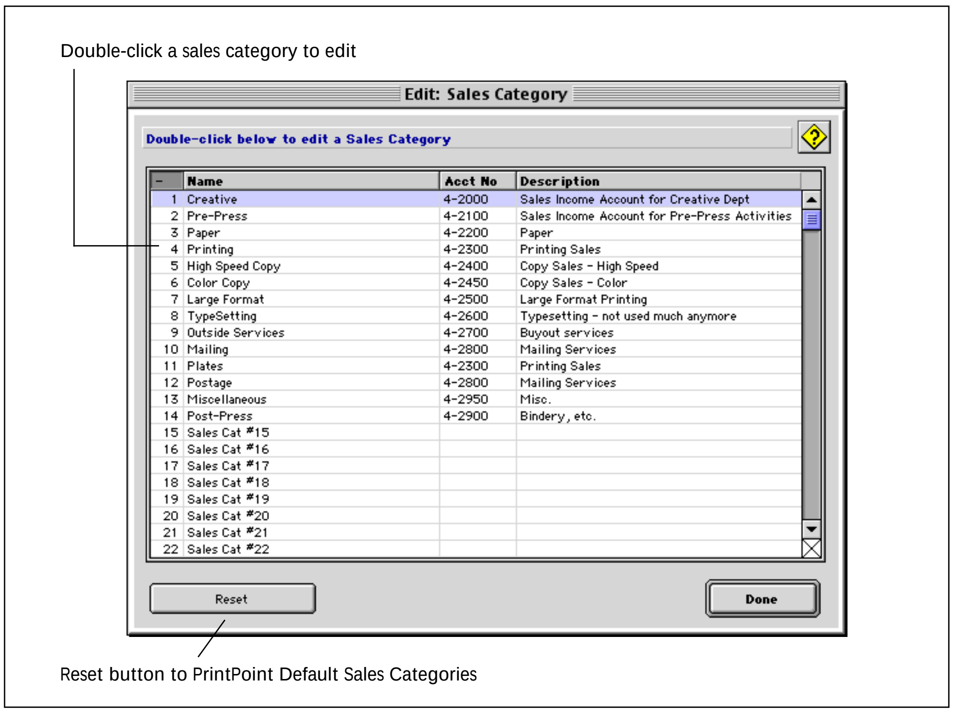


PrintPoint displays the Sales Category Report dialog with the detailed analysis for this job. See the “About The Screens” later in this chapter for the details.

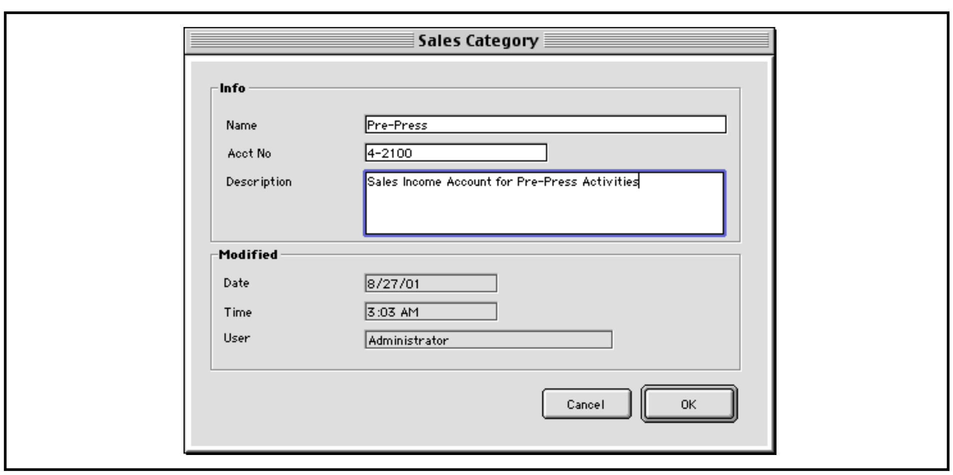
ABOUT THE SCREENS

- Sales Category Dialog
- Sales Category Editing Dialog
- Sales Category Reports Dialog
- Sales Categories Explanation Job

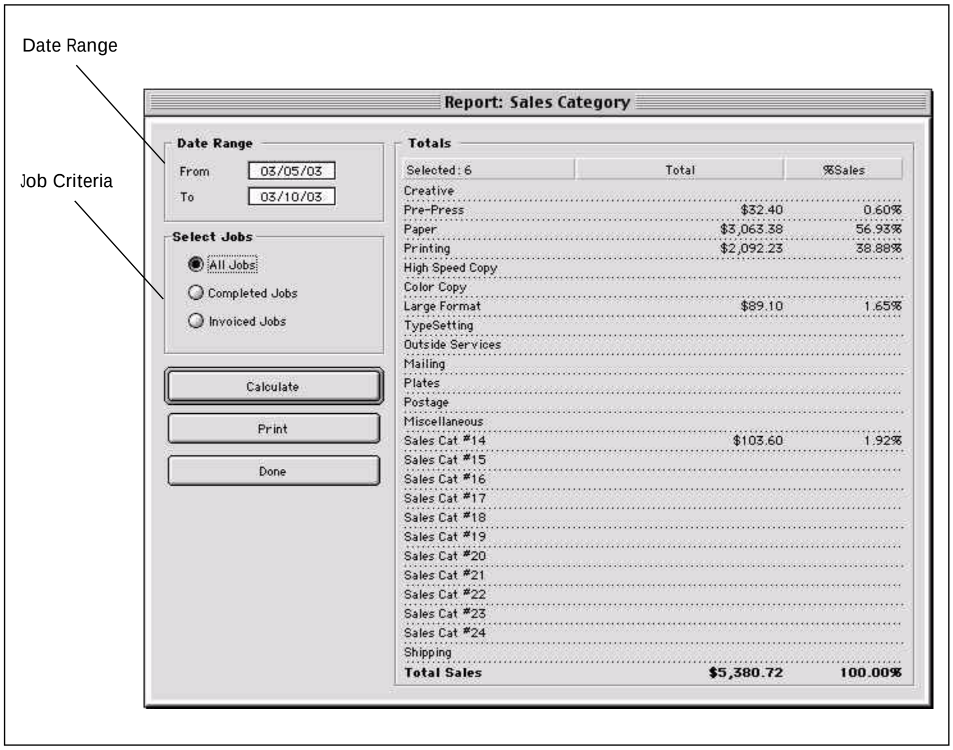
Sales Category Dialog



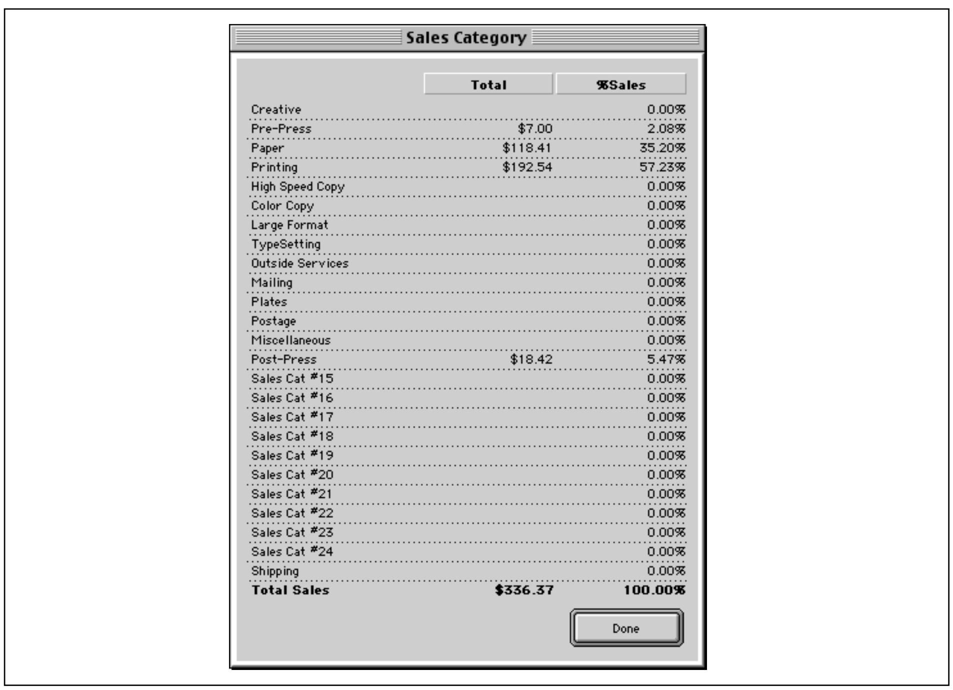
Sales Category Add/ Edit Dialog



Sales Category Reports Dialog



Sales Category Explanation Dialog from Job Info Tab



Info/Buttons	Contents/Usage
Total	Total Sales
% Sales	Percentage of Total Sales
Done (button)	Closes the dialog.

Chapter 59
Sales Reps & Commissions

OVERVIEW

PrintPoint allows you to setup and maintain a database of your Sales Representatives and automatically maintains sales and commission statistics including the Sales Rep's Jobs Won/Lost Ratio.

BEFORE YOU BEGIN

You should...	Where this information is found...
Decide on a 3 digit code for each of your sales reps	Abbreviate of their first, last and middle names.

STEP-BY-STEP

This section includes the following topics:

- Adding a new Sales Rep
- Reviewing a Sales Rep
- Sales Rep Statistics
  - Reviewing Statistics
  - Updating Statistics
- Viewing or Changing the Commission Rate for a Specific Job.

Adding a New Sales Rep

1. Accounting Menu > New Sales Rep.

   PrintPoint displays the Sales Rep Detail screen.
2. Enter information into fields as necessary.

Reviewing a Sales Rep

1. Accounting Menu > Sales Rep List View.

   PrintPoint displays the Sales Rep List View.
2. Select the Sales Rep you wish to review and double-click.

   PrintPoint displays the Sales Rep Detail screen.
3. Review the Sales Rep's address and other fixed information.

Sales Rep's Statistics

Reviewing Statistics

1. Accounting Menu > Sales Rep List View.

   PrintPoint displays the Sales Rep List View.
2. Select the Sales Rep you wish to review and double-click.

   PrintPoint displays the Sales Rep Detail screen.
3. Click on the Sales Rep's Statistics Tab.
4. PrintPoint displays the:
   - Comm %
   - Total Sales
   - Date Range - From Date
   - Date Range - To Date
   - Commissions
   - Hit/Miss %
   - Jobs Won
   - Jobs Estimated
   - Last Updated Date

Updating Statistics

1. Accounting Menu > Sales Rep List View.

   PrintPoint displays the Sales Rep List View.
2. Select the Sales Rep you wish to review and double-click.

   PrintPoint displays the Sales Rep Detail screen.
3. Click on the Sales Rep's Statistics Tab.
4. Click on the (From Date) Calendar icon to select the Start Date of the Date Range.
5. Click on the (To Date) Calendar icon to select the Finish Date of the Date Range.
6. Click on the Update Statistics button to update the statistics for this Sales Rep.

   PrintPoint will display a list of all job belonging to that sales rep and update the Hit/Miss %, Jobs Won & Lost and Last Updated Date

NOTE

PrintPoint will stored the Last Update to display in the List View.

CAUTION

Keep in mind that if you have deleted estimates that did not become jobs or have multiple estimates for each job, the Hit/Miss Ratio will not be completely accurate.

Viewing or Changing the Commission Rate for a Specific Job

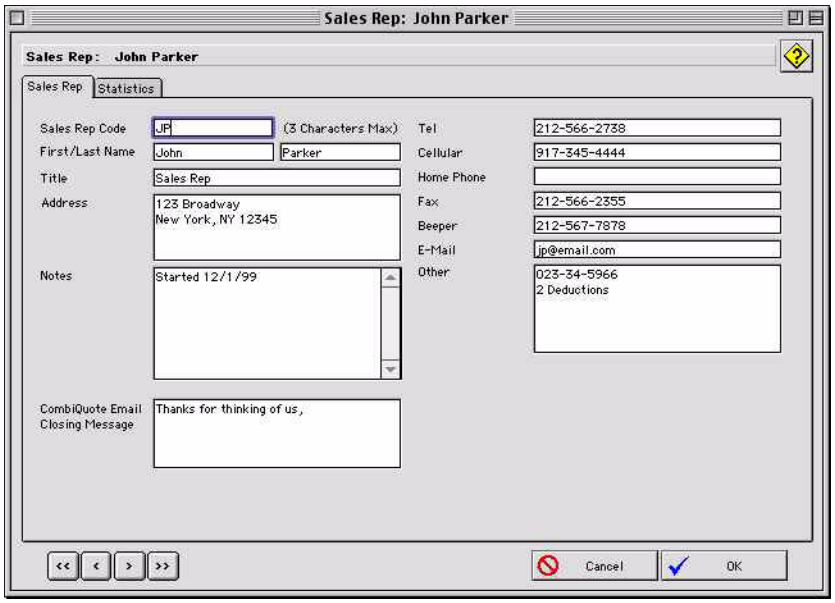
1. Accounting Menu > Sales Commission Review.
2. PrintPoint displays the Commissions List View.
3. Double-click the job for which you would like to review or change the commission.

   PrintPoint displays the Sales Rep Commissions Screen which shows the commission details for a specific job.
4. Change the Commission % as required.

ABOUT THE SCREENS

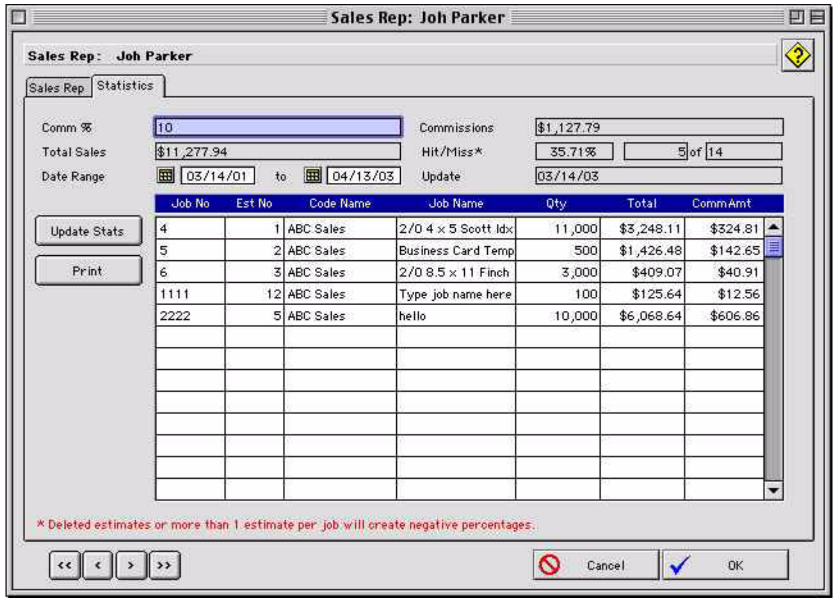
Sales Rep Detail Screen

Sales Rep Tab



Field	Usage
Sales Rep Code	2 or 3 characters code to identify the Sales Rep
First Name	First name that appears on reports.
Last Name	Last name that appears on reports.
Title	Self-explanatory text field - used for Quote Letters and SuperReports
Address	Self-explanatory text field - scroll up and down as needed
Notes	Text field for miscellaneous notes
Telephone	Self-explanatory - not pre-formatted
Cellular	Self-explanatory - not pre-formatted
Home Phone	Self-explanatory - not pre-formatted
Fax	Self-explanatory - not pre-formatted
Beeper	Self-explanatory - not pre-formatted
E-mail	Self-explanatory - not pre-formatted
Other	Self-explanatory - not pre-formatted

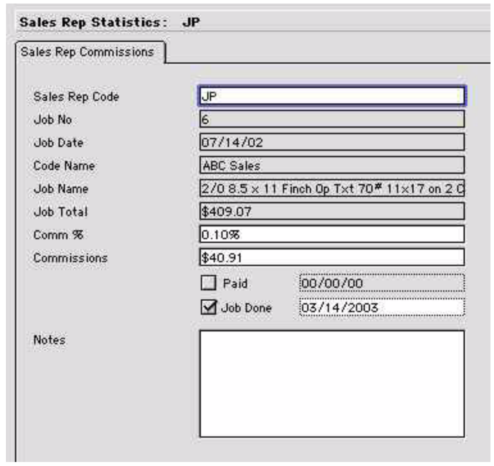
Statistics Tab



Field	Usage
Comm %	PrintPoint will calculate the Sales Rep's commission based on this % of the Total Job Amount
Total Sales	Total Sales $ for this Sales Rep for the selected Date Range
Date Range - From Date	Click on the Calendar icon to select the Start Date of the Date Range
Date Range - To Date	Click on the Calendar icon to select the Start Date of the Date Range
Commissions	Total commissions for the selected Date Range
Hit/Miss %	Ratio of Jobs Won to Total Estimates
Jobs Won	Number of Jobs this Sales Rep Won in the designated time frame.
Jobs Estimated	Count of all of this Sales Rep's estimates.
Update (date)	PrintPoint enters the Date when statistics are updated.
Update Stats (button)	Click on this button to update the statistics for this Sales Rep.
Print (button)	Click on this button to print the statistics for this Sales Rep.
Table of Jobs Won:	
Job No	Job Number
Est No	Estimate Number
Code Name	Customer Number

Field	Usage
Job Name	Job Name
Qty	Job Quantity
Total	Total Job Amount
CommAmt	Commission Amount

Sales Rep Commissions Screen



Field	Usage
Sales Rep Code	Self-explanatory
Job No	Job Number
Job Date	self-explanatory
Code Name	Customer Number
Job Name	Self-explanatory
Job Total	Total Job Amount
Comm %	PrintPoint will calculate the Sales Rep's commission based on this % of the Total Job Amount
Commissions	Amount of commission calculated
Paid (checkbox)	Click if the commission has been paid on this job
Paid (date)	Indicates the date on which the Paid checkbox was clicked
Done (checkbox)	Click if the customer has paid for this job
Notes	Text field for miscellaneous notes

Chapter 60
Terms

OVERVIEW

PrintPoint' Terms Dialog allows you to setup and maintain a table of payable Terms (example: Net 30 days). Customers are then assigned a term, which is ten transferred to the invoices.

STEP-BY-STEP

This section describes maintaining the Terms:

- The Terms Dialog
  - Accessing the Terms Dialog
  - Adding a new Term
  - Deleting a Term
  - Editing a Term
- Selecting Terms at the Customer Detail Screen
- Batch Assigning Terms for groups of Customers

The Terms Dialog

Accessing the Terms Dialog

1. Select Accounting Menu > Terms.

   PrintPoint displays the Terms Dialog.

Adding a Term

1. Click the Add button.
2. Enter the Description for the Term.
3. Enter the Number of Days for the Term.
4. Click the OK button to Accept or click the Cancel button.

Deleting a Term

1. Select the item you wish to delete.
2. Click the Delete button and confirm.

Editing a Term

1. Select the Term you wish to edit.
2. Click the Edit button.
3. Change the information you wish to modify.
4. Click the OK button to Accept or click the Cancel button.

Selecting Terms at the Customer Detail Screen

1. Select the Navigator > Customers.

   PrintPoint displays the Customer List View.
2. Double click on the customer you want to edit.

   PrintPoint displays the Customer Detail Screen.

3 Select the Accounting tab.

4 Click on the Black Triangle Arrow for the terms field and select the term from the Terms Choice List.

Batch Assigning Terms for groups of Customers

1 From the Customer List View highlight the customers you want to assign terms.

2 Click on the Assign button.

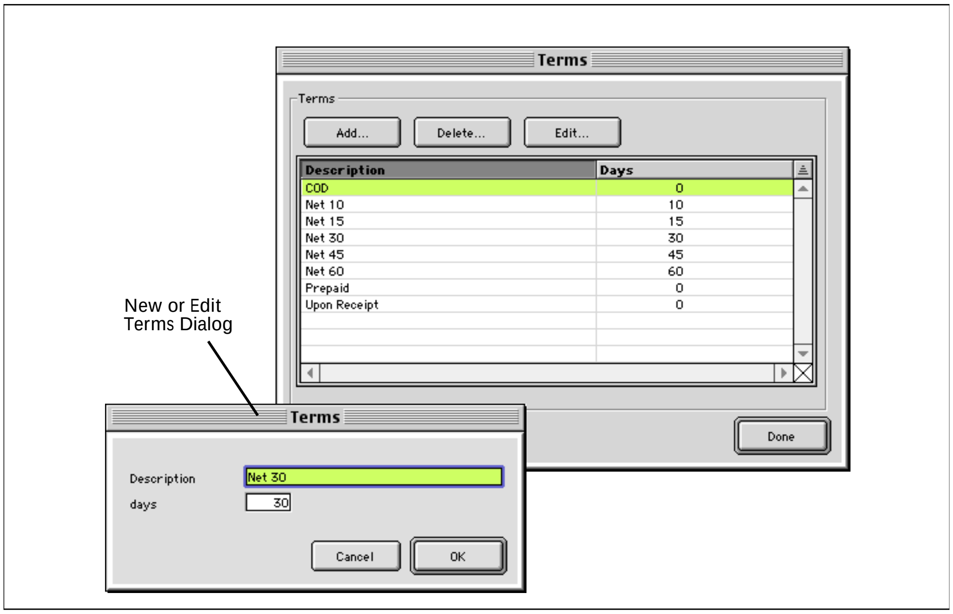
3 Select Terms from the drop-down menu.

4 From the Terms Choice List select the appropriate term.

About the Screens

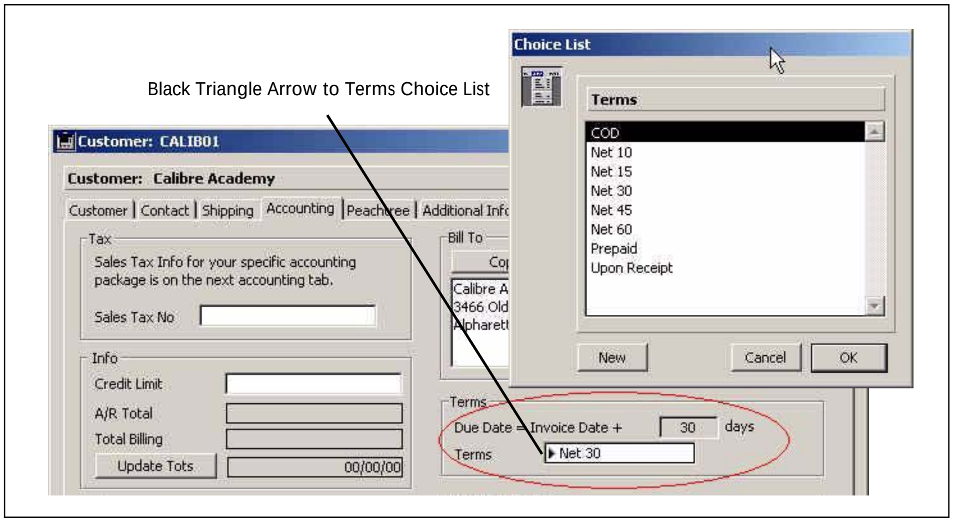
- Terms Dialog
- Customer Detail Screen
- Customer List View

Terms Dialog

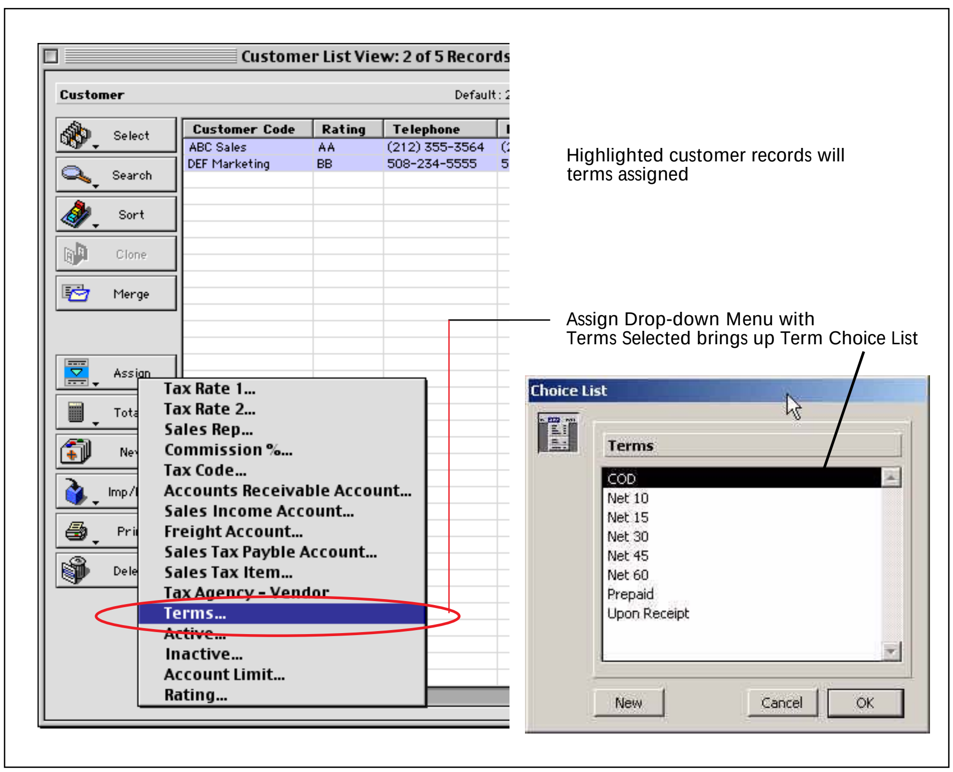


Option / Button	Description / Function
Add (button)	Select to Add a Term
Delete (button)	Select to Delete a Term
Edit (button)	Select to Edit a Term

Customer Detail Screen



Customer List View



Chapter 61
AccountEdge: Integration

OVERVIEW

PrintPoint provides tools to export invoices created in PrintPoint to MYOB/AccountEdge accounting for Windows and Macintosh as well as importing and exporting customers back and forth between the two programs.

This chapter addresses the settings required in each program to help you successfully integrate your PrintPoint management system with MYOB/AccountEdge.

If you have already been working with MYOB/AccountEdge and are a new PrintPoint customer you can export your customers from MYOB/AccountEdge to PrintPoint. See the chapter - AccountEdge: Importing Customers From AccountEdge.

Conversely, if you are an existing PrintPoint user and new to MYOB/AccountEdge, you can setup your MYOB/AccountEdge customers by exporting from PrintPoint to MYOB/AccountEdge. See the chapter - AccountEdge: Exporting Customers To AccountEdge.

NOTE

If you have been using both programs independently, contact PrintPoint Tech Support for help integrating existing data.

Once you have setup the initial “link” between the two programs, you should add new customers and invoices in PrintPoint. During the exporting of invoices from PrintPoint to MYOB/AccountEdge, you PrintPoint will also create a customer file of all customers who have not yet been imported into MYOB/AccountEdge.

CAUTION

It is critical that the Co/Name in MYOB AccountEdge is matched to PrintPoint's “Report Name” and the remainder of the fields with asterisks are filled in and matching.

Additional Reference

After you have finished the procedures in this chapter, please review the following chapters for a complete picture of your integration with MYOB/AccountEdge:

- AccountEdge: Importing Customers from AccountEdge
- AccountEdge: Exporting Customers to AccountEdge
- AccountEdge: Sales Tax Settings
- AccountEdge: Exporting Invoices To AccountEdge

BEFORE YOU BEGIN

You should...	Where this information is found...
Make sure you are using MYOB/ AccountEdge for Windows or Macintosh.	Open your MYOB/AccountEdge software and choose Help Menu > About...
Check your version number.PrintPoint only supports MYOB Version 11/ AccountEdge 2 or higher.	Open your MYOB AccountEdge software and choose Help Menu > About...

STEP-BY-STEP

This section includes the following topics:

- What to do in MYOB/AccountEdge
  - Setting Up the MYOB/AccountEdge Customer List
  - Setting up Required Accounts on the MYOB/AccountEdge Chart of Accounts
  - Setting up the MYOB/AccountEdge Tax Code
  - Setting Up MYOB/AccountEdge Customers with a Tax Item
  - Setting up the MYOB/AccountEdge Vendor List
- What to do in PrintPoint
  - Setting PrintPoint Preferences
    - a. Set the PrintPoint Accounting Package Linking
    - b. Set the Default G/L Account Names/Numbers for New Customers
    - c. Set Other Defaults for New Customers
    - d. Set the Customer Import & Export Defaults
    - e. Setting Tax Labels on Invoices
    - f. Saving Preferences
  - Sales Tax Settings
  - Updating existing PrintPoint Customers

What do to in MYOB/AccountEdge

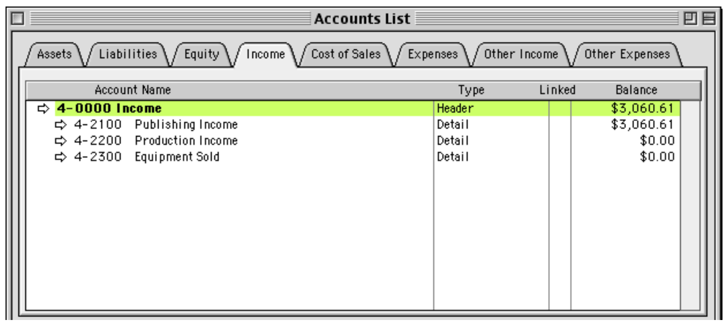
Setting Up the MYOB/AccountEdge Customer List

It is not necessary to “pre-setup” your MYOB/AccountEdge Customer List. Once you have set your PrintPoint Accounting Preferences to contain the appropriate Default General Ledger Account Names, the Tax Code, and the Tax Rate to synchronize with MYOB/AccountEdge (see details below), PrintPoint will “send” MYOB/AccountEdge all the information that is required to setup new customers in MYOB/AccountEdge whenever invoices are exported.

Setting Up Required Accounts on the MYOB/AccountEdge Chart of Accounts

The following Chart of Account must be setup in MYOB/AccountEdge to be able to import invoice information from PrintPoint:

- Sales Income Account



1 Accessed from MYOB/AccountEdge > Lists > Accounts > Income Tab.

NOTE

Of course, you will normally setup all your other accounts as well, otherwise MYOB/AccountEdge itself will not function properly.

Setting Up the MYOB/AccountEdge Tax Codes

Tax Codes (s) identify the “jurisdiction (s)” for which sales tax is calculated. At least one Tax Code must be setup in the Tax Code List in MYOB/AccountEdge.

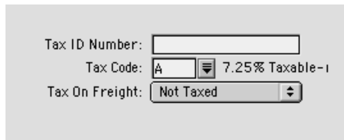
The sample Tax Code List Screen below displays the item “A” which is the name for the tax that will be charged as Sales Tax for Rockland/Orange County, and also displays the tax rate of 7.25%.

1 Accessed from MYOB/AccountEdge > List Menu > Tax Codes.

Setting Up MYOB/AccountEdge Customers with a Tax Item

Each customer in MYOB/AccountEdge needs to be setup with the appropriate Tax Code.

- The sample MYOB/AccountEdge Customer Card below displays a customer that has been setup with "A" as the Tax Code. Sales Tax charged on invoices for this customer will be allocated to Rockland/Orange County.



What to do in PrintPoint

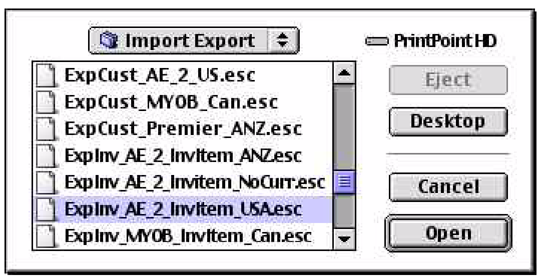
Setting PrintPoint Preferences

Set the PrintPoint Account Package Linking Preferences

1. Select File Menu > Preferences > Accounting Links from the Select drop down menu.
2. Choose MYOB from the Link Accounting To drop- down menu.
3. Click the Choose Script for Exporting Invoices button.

   PrintPoint will display the following Alert dialog:

4. Click OK.
5. PrintPoint will display the following Open File Dialog:

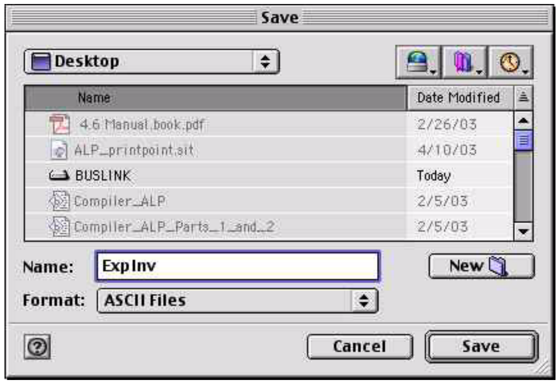


6. Click the Save Name & Location of Exported Invoice File button.

   PrintPoint will display the following Alert dialog:

7 Click OK.

PrintPoint will display a Save As dialog:



8 Type “ExpInv” into the File name field.

9 Click the Save button.

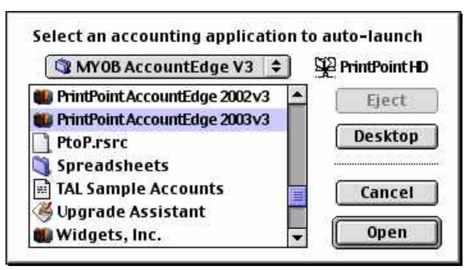
OPTIONS

If you would like PrintPoint to automatically launch MYOB/AccountEdge after you have exported your invoices from PrintPoint, follow the steps 7 - 10.

Otherwise, skip to step 11.

10 Click the Launch Path to Accounting Program button.

PrintPoint will display the Select Accounting Application dialog:



11 Locate and select your version of MYOB/AccountEdge DataFile.

12 Click the Open button.

13 Place a check in the Autolaunch accounting program on export checkbox.

TIP

You can always disable the autolaunch be unchecking this option.

Set the Default G/L Account Names/Numbers for New Customers

When you create new customers in PrintPoint, the entries you create here in PrintPoint preferences will be used as defaults for each new customer. You can override these defaults on a customer by customer basis. The first group is the Chart of Accounts (General Ledger) defaults.

14 Locate the Default G/L Account Names...section at the bottom of the screen and enter the following names from your MYOB/AccountEdge Chart of Accounts:

- Sales Income

NOTE

These names must exactly match the names that appear in the MYOB/ AccountEdge Chart of Accounts.

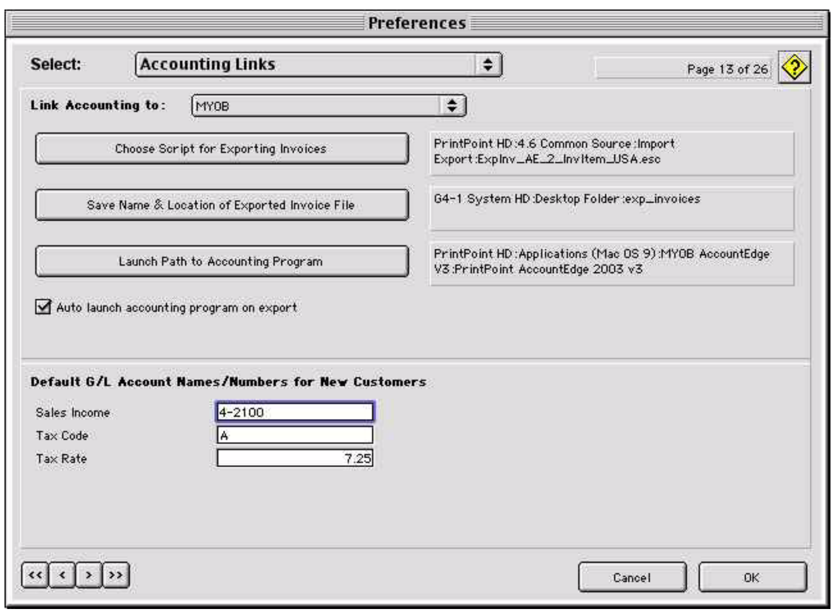
Set Other Defaults for New Customers

In addition to the Chart of Account (General Ledger) defaults there are several other defaults you will need to enter. The entries must exactly match the names that appear in the MYOB/AccountEdge

15 Enter the default Tax Code from your MYOB/AccountEdge Tax Code List.

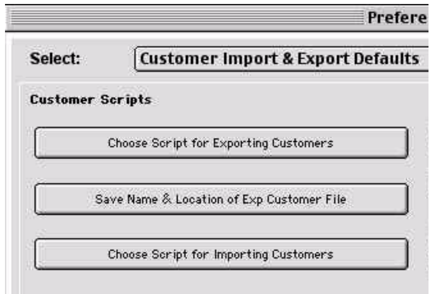
16 Enter the default matching Tax Rate for the Tax Code above.

Your PrintPoint Accounting Links Preferences screen should look similar to this:



Set the Customer Import & Export Defaults

17 Select Customer Import & Export Defaults from the Select drop-down at the top of the Preferences screen.

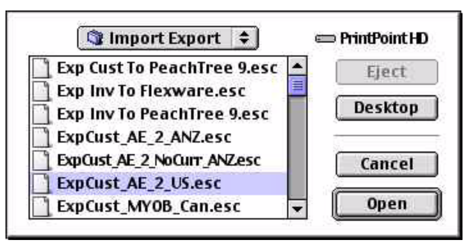


18 Click on the Choose Script for Exporting Customers button.

PrintPoint will display the following Alert dialog:

19 Click OK.

PrintPoint will display an Open File dialog:

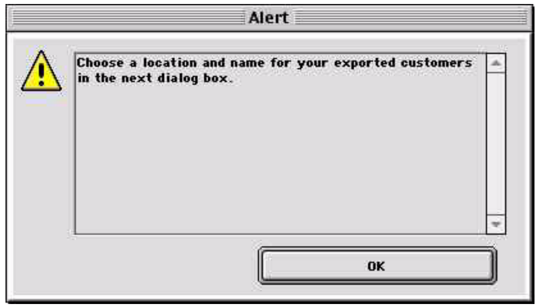


20 Select the Export Customer to AccountEdge script for your territory and version.

21 Click Open.

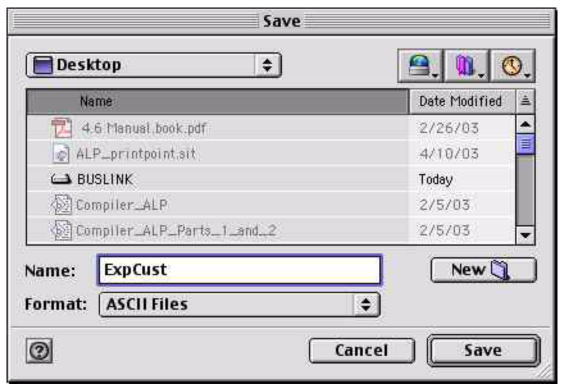
22 Click on the Save Name & Location of Exp Customer File button.

PrintPoint will display the following Alert dialog:



23 Click OK.

PrintPoint will display a Save As dialog:



24 Type “ExpCust” into the File name field.

Save the file to a location that you will remember later when your are importing into MYOB/AccountEdge.

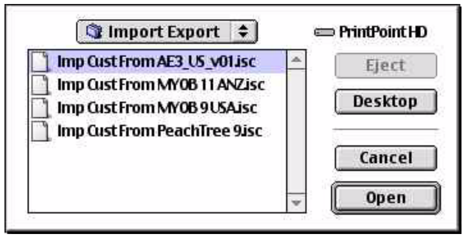
25 Click the Save button.

26 Click on the Choose Script for Importing Customers button.

PrintPoint will display the following Alert dialog:

27 Click OK.

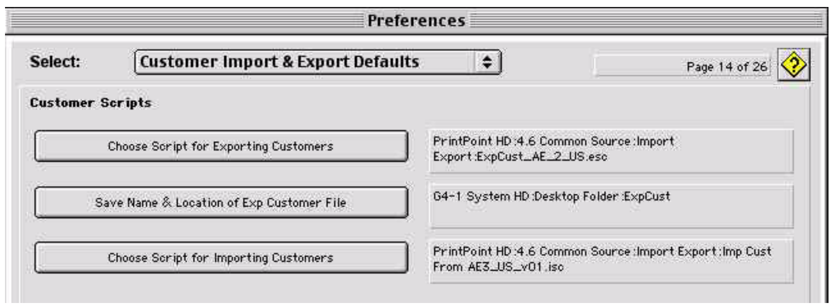
PrintPoint will display an Open File dialog:



28 Select the Import Customers from AccountEdge script for your territory and version.

29 Click Open.

Your PrintPoint Customer Import & Export Defaults Preference screen should look similar to this:



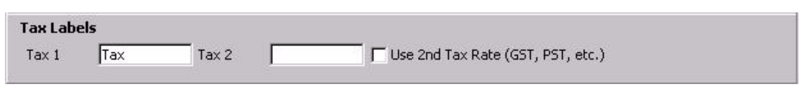
Setting Tax Labels on Invoices

PrintPoint allows you to define your own labels for up to 2 taxes that will appear on invoices.

The label is the name that will appear on the customer records and invoices describing the tax percentage that will actually be applied to invoice items. The word “Tax” would be sufficient in many cases, where the words “GST” and “PST” in Canada would be more appropriate.

30 Select Invoices from the Select drop-down at the top of the Preferences screen.

31 Enter labels for Tax 1.



32 If a 2nd level tax is to be used, enter the label for Tax 2 and select the checkbox titled Use 2nd Tax Rate.

Saving Preferences

Once you have completed the steps above you need to save preferences.

33 Click the OK button at the bottom of the Preferences screen.

Sales Tax Settings

Before you can proceed to the next steps, you must setup your Sales Taxes inside of PrintPoint to match what you have already created in MYOB/AccountEdge in the previous steps in this chapter.

Refer to the chapter - MYOB/AccountEdge: Sales Tax Settings for detailed instruction on setting up your Sales Taxes in PrintPoint.

Updating Existing PrintPoint Customers

If you have been using PrintPoint and a now beginning to use MYOB/ AccountEdge, you can batch update your existing customers with the defaults setup in the previous sections.

CAUTION

You must have setup your Sales Tax Settings in the previous section before continuing.

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

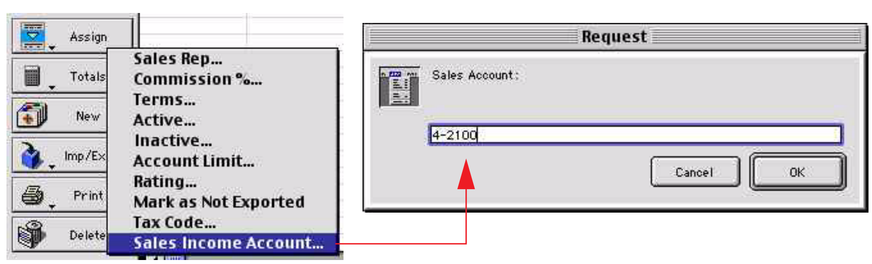
2 To confirm the steps below, it is recommended that you create a custom list view to show the columns for the fields being assigned.

See the chapter - List View Editor for detailed instructions.

3 Select the customers for which you want to assign the General Ledger Account Names.

4 Click the Assign button.

5 Select Sales Income Account... from the drop-down menu.



The default Sales Income Account name will be displayed. You can override this if necessary.

6 Click OK.

7 Repeat Steps 3-6 for Tax Codes, Terms, etc.

Chapter 62

AccountEdge: Importing Customers from AccountEdge

OVERVIEW

PrintPoint has excellent tools to assist you in importing customers created in MYOB/AccountEdge for Windows or Macintosh into PrintPoint.This chapter will teach you how to:

- Export your customers out of MYOB/AccountEdge
- Import those customers into PrintPoint.
- Make any specific changes to those customers once they have been successfully imported into PrintPoint.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the AccountEdge Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customers out of MYOB/AccountEdge
- Importing Customers into PrintPoint
- Post-processing customers after importing

Exporting Customers out of MYOB/AccountEdge

1 From the File Menu > Export Data > Cards > Customer Cards.
2 In the Export File dialog.
3 Select Tab Delimited as Export File Format.
4 Select First Record is Data Record from popup.
5 Click Continue.
6 In the Export Data dialog click Match All.

TIP

If you choose to select a specific group of customers you can use MYOB's selection criteria prior to exporting.

7 Click Export.
8 In the Save dialog save as MYOB_Customers.

Importing Customers into PrintPoint

CAUTION

Make a backup of your PrintPoint data.

1 In the Customer List View click the Imp/Exp button.
2 Select Import from MYOB from the pull-down menu.

PrintPoint displays a confirm dialog, "Make sure you have a backup of your data file before importing."

3 Click Continue if you have a backup or Cancel to stop the import so you can create a backup.

A dialog is displayed asking you to select your customer file to import in the next dialog.

4 Click OK.

PrintPoint displays a file browser dialog.

5 Select the MYOB_Customers file created in the export steps above.

6 Click OK to import the records.

Post-processing customers after importing

Adjusting the Customer Ratings

All customers, when imported into PrintPoint, are given a BB rating. If you would like to change the ratings for any of your imported customers, see the chapter on Customers for instructions on batch assigning the customer rating to groups of customers.

Setting Preferences for New Customers

If you intend to use PrintPoint's invoice module and then export those invoices to AccountEdge, see Preferences > Accounting Links: Default G/L Account Names/Numbers for new Customers.

Sales Tax Settings

If you intend to use PrintPoint's invoice module and then export those invoices to AccountEdge, see the following two chapters: "AccountEdge: Sales Tax Settings" and "Customers" for details on Sales Tax Settings.

Chapter 63

AccountEdge: Exporting Customers to AccountEdge

OVERVIEW

This chapter will help you export your customers from PrintPoint and then import those customers into MYOB/AccountEdge v2 or higher.

We recommend the entry of new customers first in PrintPoint and then, prior to exporting invoices, export the customer records to MYOB/AccountEdge.

PrintPoint has excellent exporting tools to help you in this two-step process. You will first need to prepare and export the data from PrintPoint. Once that step is completed, you will import the data into MYOB/AccountEdge.

NOTE

MYOB/AccountEdge uses the Customer Name as the key to all information stored in MYOB/AccountEdge. Therefore it is essential that the field Name for Reports in PrintPoint exactly match the Customer Name in MYOB. Generally you will not have to worry about this if you enter your customers into PrintPoint first.

BEFORE YOU BEGIN

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You should...	Where this information is found...
Read the AccountEdge Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customers from PrintPoint
- Importing Customer into MYOB.

Exporting Customers from PrintPoint

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

2 From the Customer List View, select the customers you want to export to MYOB AccountEdge

3 In the Customer List View click the Imp/Exp button.

4 Select Export to MYOB from the pull-down menu.

A “Confirm” dialog is displayed specifying the number of customer records to be exported. (PrintPoint keeps track of whether a customer has been exported).

5 Click Export.

An “Export complete” dialog is displayed at the end of the export.

6 Click OK.

Importing Customers into MYOB

1 Select File Menu > Import Data > Cards > Customer Cards in MYOB.

2 From the Import File dialog set the following:

a. Import File Format: Tab-delimited

b. First Record is: Data Record

c. Duplicate Records: should is Update Existing Record

3 Click Continue.

4 Select the current import file that PrintPoint just created.

5 Click Open.

6 Click Match All.

7 Click Import.

Chapter 64

AccountEdge: Sales Tax Settings

OVERVIEW

If you have set up PrintPoint to link to MYOB/AcountEdge in preferences, the Sales Tax Settings Dialog is used to create codes for Sales Tax Codes and Consolidated Tax Codes to parallel the tax settings in MYOB/AccountEdge. These codes are by PrintPoint's customers, during invoice transactions and subsequent exporting of invoices to the accounting package you have selected.

TIP

If you do not intend to link to any accounting programs, you do not need to use this area of PrintPoint. You will be able to enter sales tax codes. rates, etc., directly into customers and invoices.

Sales Tax Definitions

Each of the three accounting packages uses different terms to refer to similar sales tax concepts. The table below presents the definition in the left hand column and the term used by each of the packages in the appropriate column to the right.

Definition	MYOB	Where This Information is Found in MYOB...
A individual sales tax rate	Sales Tax	List Menu > Tax Codes
A number of sales taxes which are applicable to a transaction and which are combined together as a single rate	Consolidated	List Menu > Tax Codes

BEFORE YOU BEGIN

You should...	Where this information is found...
Collect your accounting information regarding sales tax codes, rates, authorities, vendors, etc.	In your MYOB/AccountEdge under the List Menu > Tax Codes.
Read the AccountEdge Integration chapter.	In this manual.

STEP-BY-STEP

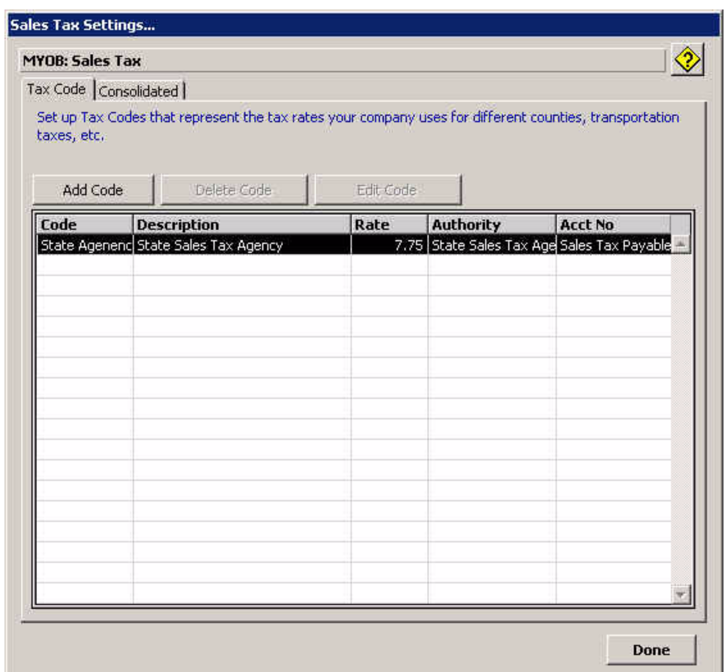
This section includes the following topics:

- Accessing the Sales Tax Settings Dialog
- Setting Up Tax Codes
  - Sales Tax Codes - Adding
  - Sales Tax Codes - Editing
  - Sales Tax Codes - Deleting
  - Consolidated Tax Codes - Adding
  - Consolidated Tax Codes - Adding
  - Consolidated Tax Codes - Editing

Accessing the Sales Tax Settings Dialog

1 Accounting Menu > Sales Tax Settings.

PrintPoint displays the Sales Tax Settings Dialog.



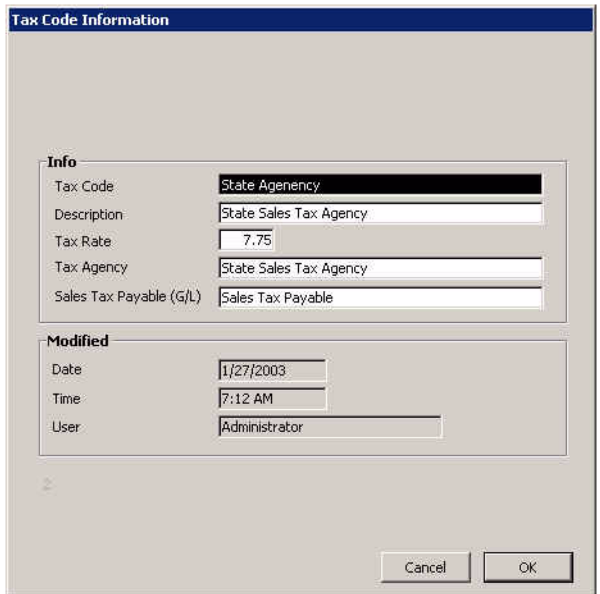
Setting Up Sales Taxes

Adding a Sales Tax Code

1 Select the Tax Code tab in the Sales Tax Settings Dialog.

2 Click the Add Code button.

PrintPoint displays the Tax Code dialog.



TIP

You enter data tax code information in the Info section of the Tax Code dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3 Complete the fields in the Tax Code dialog as follows.

a. In the Tax Code field, type the ID for the sales tax, e.g., Gwinnett.
b. In the Description field, type a brief description for the sales tax, e.g., Sales tax for Gwinnett County.
c. In the Tax Rate field, type applicable rate for the sales tax, e.g., 5 or 3.5.
d. In the Authority field, type the name of the agency levying the sales tax, e.g., Georgia Revenue Office.

4 Click the OK button.

5 Repeat steps 2 and 4 for each sales tax code to want to add.

6 Click Done.

Editing a Sales Tax Code

1 Select the Tax Code tab in the Sales Tax Settings Dialog.

2 Select the sales tax record you want to edit.

3. Click the Edit Code button.

   PrintPoint displays the Tax Code Information dialog, showing sales tax data currently recorded on the database.
4. In the Info fields, overtype the current data as relevant and click the OK button.
5. Click Done.

NOTE

If the edited item is part of a consolidated group, PrintPoint automatically updates the consolidated group record.

Deleting a Sales Tax Code

1. From the Sales Tax Settings Dialog, select the Tax Code tab.
2. Select the sales tax record you want to delete.
3. Click the Delete Code button.

NOTE

If the tax code is used in a consolidated tax group, PrintPoint displays an Alert message. You will need to delete the tax code from the consolidated tax group (see below) before you can complete this procedure.

4. Click the Delete button in the Confirm dialog.
5. Click the Done button to close the Sales Tax Settings Dialog.

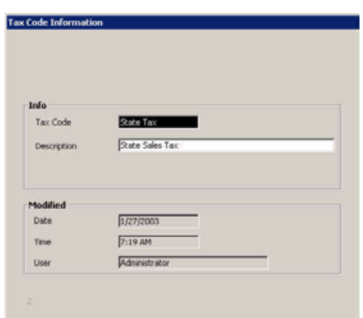
Adding a Consolidated Tax Group

If certain taxes are always levied in a jurisdiction, use this procedure to combine the relevant taxes into a uniquely identified consolidated group.
This is a three-stage process.

- You first create the individual tax codes. See Adding a Sales Tax Code above.
- You then set up a unique ID for the consolidated tax group. See below.
- Finally, you add the individual sales tax codes to the consolidated group. See Adding a Sales Tax Code to a Consolidated Tax Group below.

1. From the Sales Tax Settings Dialog, select the Consolidated tab.
2. Click the Add Consolidated button.

   PrintPoint displays the Consolidated Tax dialog.



TIP

You enter data in the Info section of the Consolidated Tax dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3 Complete the fields in the Consolidated Tax dialog as follows.

   a. a In the Tax Code field, type the alphanumeric code for the consolidated group, e.g., GAGWINN.
   b. In the Description field, type a brief description for the consolidated group, e.g., Gwinnett County, Georgia.

4 Add the individual sales tax codes as described in Adding a Sales Tax Code to a Consolidated Tax Group below

Editing a Consolidated Group

Use this procedure to change the ID or description of the consolidated group without affecting the status of the individual sales tax codes in the group.

NOTE

You cannot edit the individual sales tax codes from here. To do that, see Editing a Sales Tax Code above. PrintPoint will then update the consolidated group record.

1 From the Sales Tax Settings Dialog, select the Consolidated tab.

2 Select the record for the consolidated group you want to edit.

   In the bottom half of the dialog, PrintPoint displays the sales tax codes associated with the consolidated group.

3 Click the Edit Consolidated button.

4 Overtype the Tax Code and/or Description fields as appropriate and click the OK button.

5 Click the Done button to close the Sales Tax Settings Dialog.

Adding a Sales Tax Code to a Consolidated Tax Group

1 From the Sales Tax Settings Dialog, select the Consolidated tab.

2 Select the consolidated tax group to which you want to add individual sales tax codes.

3 Click the Add Code button in the bottom half of the dialog.

   PrintPoint displays the Choose a Tax Code Choice List, showing the sales tax codes available for selection.

4 Select a sales tax code and click the OK button.

5 Repeat steps 1 to 4 for each sales tax code you want to add to the consolidated group.

NOTE

The Total at the bottom of the dialog shows the consolidated tax rate.

6 Click the Done button to close the Sales Tax Settings Dialog.

Deleting an Individual Code from a Consolidated Tax Group

1 From the Sales Tax Settings Dialog, select the Consolidated tab.

2 Select the record for the consolidated group from which you want to delete a sales tax code.

In the bottom half of the dialog, PrintPoint displays the sales tax codes associated with the consolidated group.

3 Select the sales tax code and click the Delete Code button.

4 Click the Delete button in the Confirm dialog.

5 5 Click the Done button to close the Sales Tax Settings Dialog.

Deleting a Consolidated Tax Group

1 From the Sales Tax Settings Dialog, select the Consolidated tab.

2 Select the consolidated record you want to delete.

3 Click the Delete Consolidated button in the Confirm dialog.

4 Click the Delete button.

NOTE

The sales tax codes that were associated with the consolidated group are not deleted from the database.

5 Click the Done button to close the Sales Tax Settings Dialog.

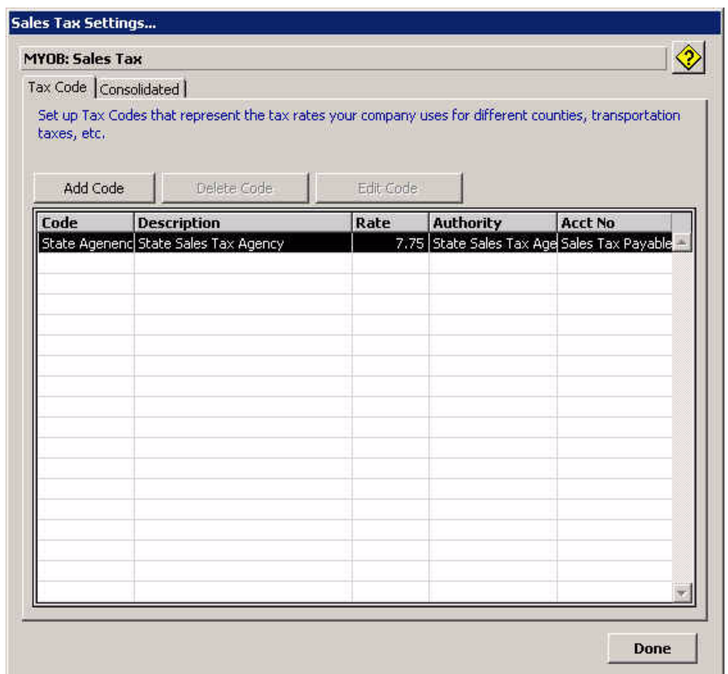
ABOUT THE SCREENS

For the most part, the screens in PrintPoint attempt to mimic the screens in your individual accounting package.

Sales Tax Settings Dialog

Tax Code Tab

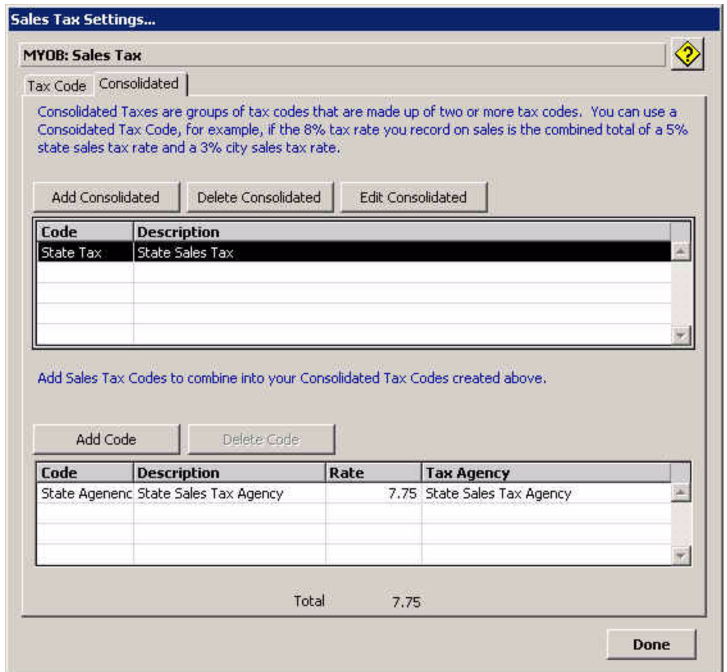
This screen displays details of the tax codes currently recorded on the PrintPoint database.



Column Title	Description
Code	ID of the sales tax
Description	Brief description of the sales tax
Rate	Rate of sales tax levied
Authority	Name of the agency levying the tax
Acct No	(Not used)

Consolidated Tab

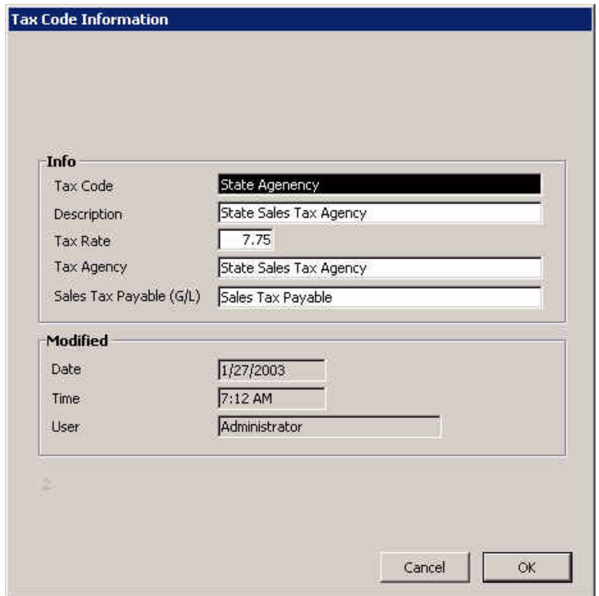
This screen displays details of the combinations of sales taxes relating to different jurisdictions currently recorded on the PrintPoint database.



Column Title	Description
Code	Unique ID for a group of the consolidated tax codes
Description	Brief description of a group of consolidated tax codes
Code	ID of a sales tax
Description	Brief description of a sales tax
Rate	Rate of sales tax levied
Tax Agency	Name of the agency levying the tax
Total	The sum of the individual tax rates in the consolidated group

Tax Code Add/Edit Dialogs

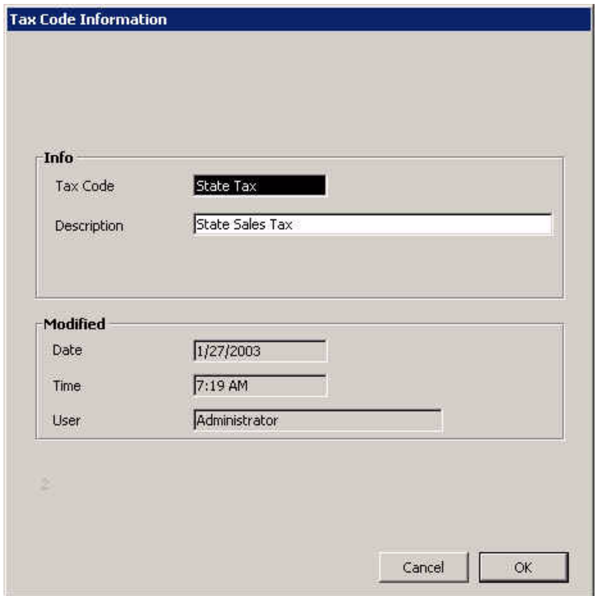
The screens on which you add or edit tax code data have the same fields.



Field	Description
Tax Code	ID of the sales tax
Description	Brief description of the sales tax
Tax Rate	Rate of sales tax levied
Tax Agency	Name of the agency levying the tax
Sales Tax Payable (GL)	(Not used)
Date	System date on which the data was saved to the database
Time	System time at which the data was saved to the database
User	Name/ID of the person who entered the data

Consolidated Tax Entry/Edit Dialogs

The screens on which you add or edit consolidate tax group data have the same fields.



Column Title	Description
Tax Code	Unique ID of the consolidated tax group of tax codes
Description	Brief description of the consolidated tax group
Modified section	See Tax Code Add/Edit Dialogs above

Chapter 65

AccountEdge: Exporting Invoices To AccountEdge

OVERVIEW

PrintPoint will allow you to export invoices created in PrintPoint to MYOB/AccountEdge accounting for Windows and Macintosh. In order to complete the export process you will have to make sure that the information in PrintPoint and MYOB/AccountEdge are well synchronized.

TIP

At the same time that PrintPoint exports invoice information, it will also export information on new customers to MYOB/AccountEdge. If you enter all the customer information into PrintPoint first, you will not have to re-key it into MYOB/AccountEdge. Once a customer has been exported. It will not be exported again. Any changes made to the customer in PrintPoint after the customer has been exported must be manually updated in MYOB/AccountEdge.

This chapter will teach you how to:

- Export your Invoices out of PrintPoint
- Import those Invoices into MYOB/AccountEdge.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the AccountEdge Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Invoices from PrintPoint
- Importing Invoices in MYOB AccountEdge

Exporting Invoices from PrintPoint

1. From the Invoice Review list, select the invoices you want to export to MYOB AccountEdge
2. Click the Imp/Exp button.
3. Select Export to MYOB from the pull-down menu.

   PrintPoint displays a dialog box which shows the invoices to be exported.
4. Click OK to export the records.

Importing Invoices in MYOB AccountEdge

1. Select File Menu > Import Data > Sales > Service Sales in MYOB AccountEdge
2. Make sure the radio buttons are set to “Tab-delimited” and “Data Record”.
3. Click Continue.
4. Select the current import file that PrintPoint just created.
5. Click “Match All”.
6. Click “Import”.

NOTE

If there is a problem importing, MYOB AccountEdge will create a log file indicating what the problem is.

Chapter 66
Peachtree: Integration

OVERVIEW

PrintPoint provides tools to export invoices created in PrintPoint to Peachtree Complete Accounting for Windows as well as importing and exporting customers back and forth between the two programs.

This chapter addresses the settings required in each program to help you successfully integrate your PrintPoint management system with Peachtree.

If you have already been working with Peachtree and are a new PrintPoint customer you can export your customers from Peachtree to PrintPoint. See the chapter - Peachtree: Importing Customers From Peachtree.

Conversely, if you are an existing PrintPoint user and new to Peachtree, you can setup your Peachtree customers by exporting from PrintPoint to Peachtree. See the chapter - Peachtree: Exporting Customers To Peachtree.

CAUTION

If you have been using both programs independently, contact PrintPoint Tech Support for help integrating existing data.

Once you have setup the initial “link” between the two programs, you should add new customers and invoices in PrintPoint. During the exporting of invoices from PrintPoint to Peachtree, your new customers will automatically be moved into Peachtree.

Additional Reference

After you have finished the procedures in this chapter, please review the following chapters for a complete picture of your integration with Peachtree:

- Peachtree: Importing Customers from Peachtree
- Peachtree: Exporting Customers to Peachtree
- Peachtree: Sales Tax Settings
- Peachtree: Exporting Invoices To Peachtree

BEFORE YOU BEGIN

You should...	Where this information is found...
Make sure you are using Peachtree Complete Accounting for Windows. PrintPoint does not support exporting to any other version of Peachtree software.	Open your Peachtree accounting software and choose Help Menu > About...
Check your version number.PrintPoint only supports version Peachtree 2002 Release 9.0. or higher.	Open your Peachtree accounting software and choose Help Menu > About...

STEP-BY-STEP

This section includes the following topics:

- What to do in Peachtree
  - Setting up the Peachtree Customer List
  - Setting up Required Accounts on the Peachtree Chart of Accounts
  - Setting up the Peachtree Sales Tax Codes and Authorities
  - Setting up Peachtree Customers with a Tax Code
  - Setting up Peachtree Item Tax Type
  - Setting up a Peachtree Tax Vendor
  - Setting up Custom Field Defaults in Peachtree
  - Creating the Peachtree To PrintPoint Customer Export Script
  - Creating the Peachtree From PrintPoint Customer Export Script
  - Creating the PrintPoint From Peachtree Invoice Import Script
- What to do in PrintPoint
  - Setting PrintPoint Preferences
    a. Set the PrintPoint Accounting Package Linking
    b. Set the Default G/L Account Names/Numbers for New Customers
    c. Set Other Defaults for New Customers
    d. Set the Customer Import & Export Defaults
    e. Setting Tax Labels on Invoices
    f. Saving Preferences
  - Sales Tax Settings
  - Updating existing PrintPoint Customers

What to do in Peachtree

Setting Up the Peachtree Customer List

It is not necessary to "pre-setup" your Peachtree Customer List. Once you have set your PrintPoint Accounting Preferences to contain the appropriate Default General Ledger Account Names, the Tax Codes, and the Tax Vendor to synchronize with Peachtree (see details below), PrintPoint will "send" Peachtree all the information that is required to setup new customers in Peachtree whenever invoices are exported.

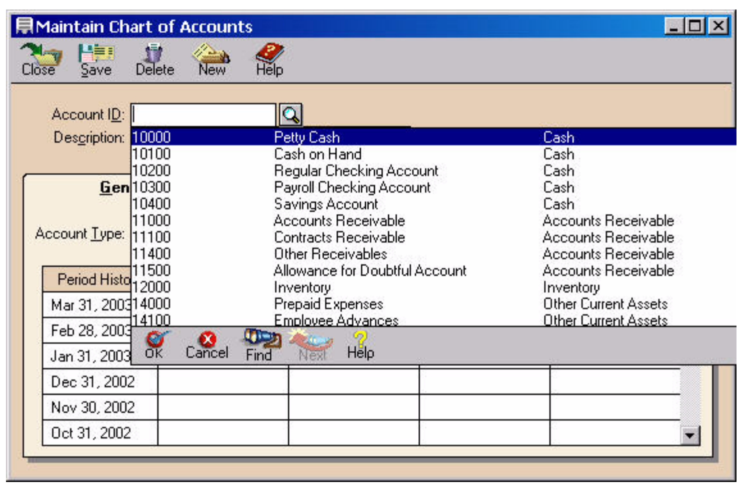
Setting Up Required Accounts on the Peachtree Chart of Accounts

The following must be setup in Peachtree to be able to import invoice information from PrintPoint:

- 4 default account names must be setup in the Chart of Accounts.
  - Accounts Receivable Account
  - Sales Income Account
  - Freight Account
  - Sales Tax Payable Account

1 Select Maintain Menu > Chart of Accounts...

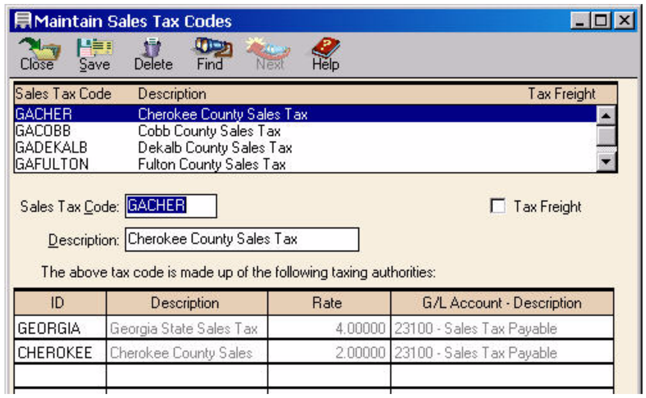
The Chart of Accounts Dialog is displayed:



Setting up the Peachtree Sales Tax Codes and Authorities

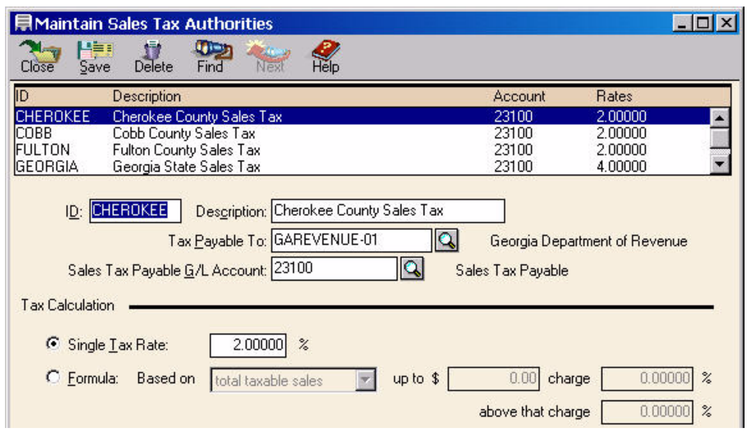
1 Select Maintain Menu > Sales Taxes > Sales Tax Codes...

The Maintain Sales Tax Codes Dialog is displayed:



1 Select Maintain Menu > Sales Taxes > Sales Tax Authorities...

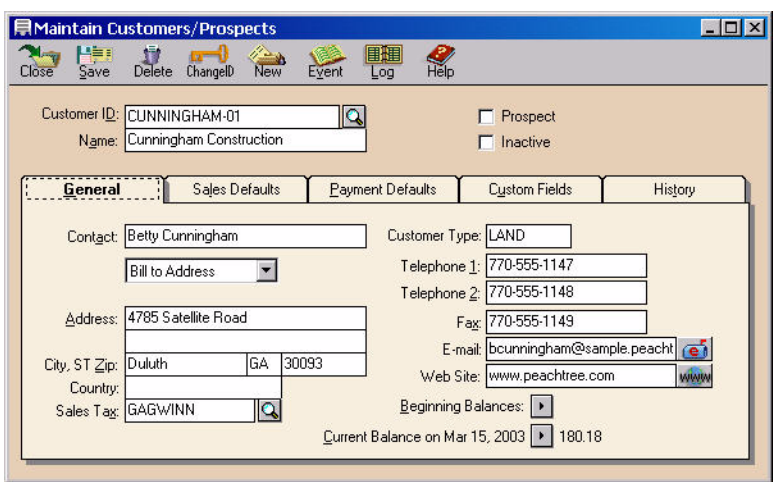
The Maintain Sales Tax Authorities Dialog is displayed:



Setting up Peachtree Customers with a Tax Code

1 Select Maintain Menu > Customers/Prospects...

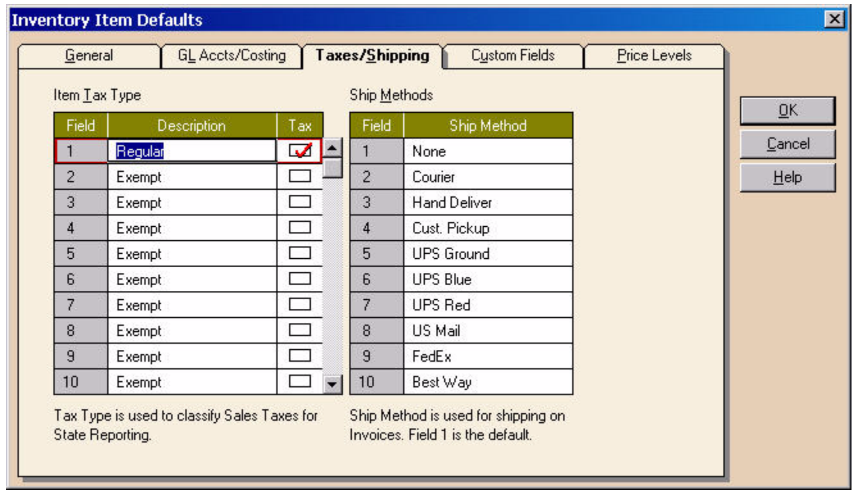
The Maintain Customers/Prospects Dialog is displayed:



Setting up Peachtree Item Tax Type

1 Select Maintain Menu > Default Information > Inventory Items > Taxes/Shipping Tab > Item Tax Type List

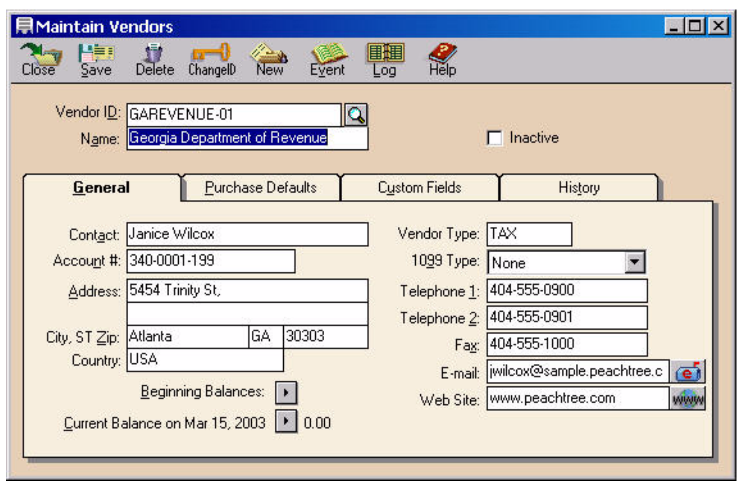
The Inventory Items Defaults Dialog is displayed:



Setting up a Peachtree Tax Vendor

1 Select Maintain Menu > Customers/Prospects...

The Maintain Vendors Dialog is displayed:

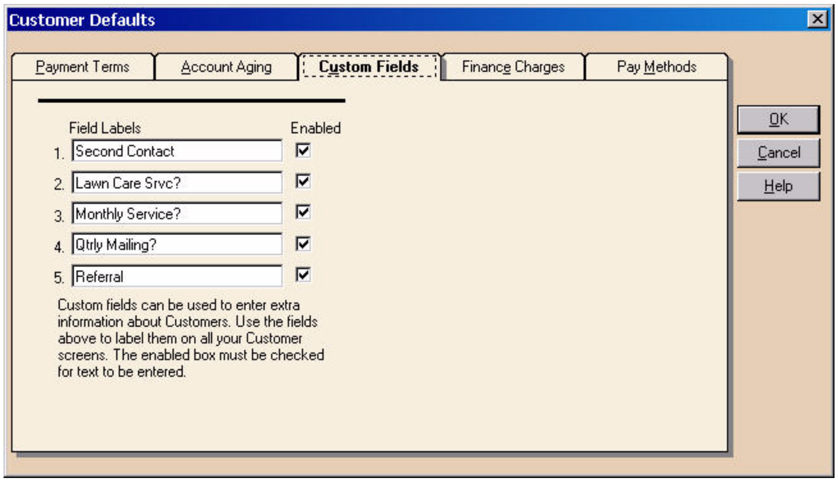


Setting up Custom Field Defaults In Peachtree

Because the script used by PrintPoint for importing is pre-defined for you, it is important that you make sure that all the Custom Fields are turned on inside of Peachtree. This must be done, even if you don't use the Custom Fields.

1 Select Maintain Menu > Default Information > Customers...

The Customer Defaults Dialog is displayed.



2 Click on the Custom Fields Tab.

3 Place a check mark in the Enable Box and Name all Field Labels.

NOTE

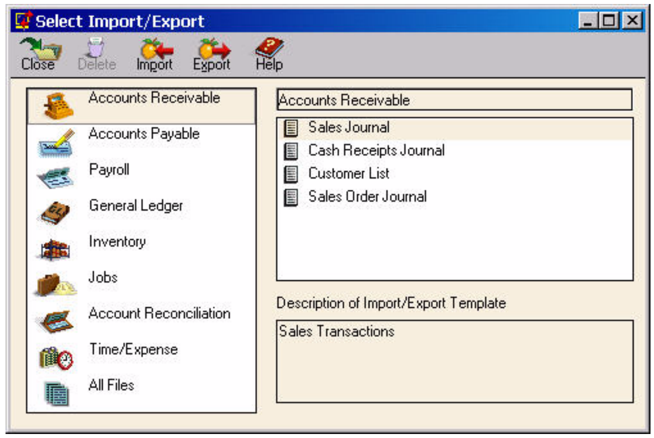
These Fields can be labeled anything you would like. If you do not use these labels, they can be named Label 1, Label 2...

Creating the Peachtree To PrintPoint Customer Export Script

You will only have to create the script the very first time you export. After the first export, follow the steps in the following section "Exporting Customers Out of Peachtree."

1 Select File Menu > Select Import/Export.

Peachtree displays the Select Import/Export Dialog.

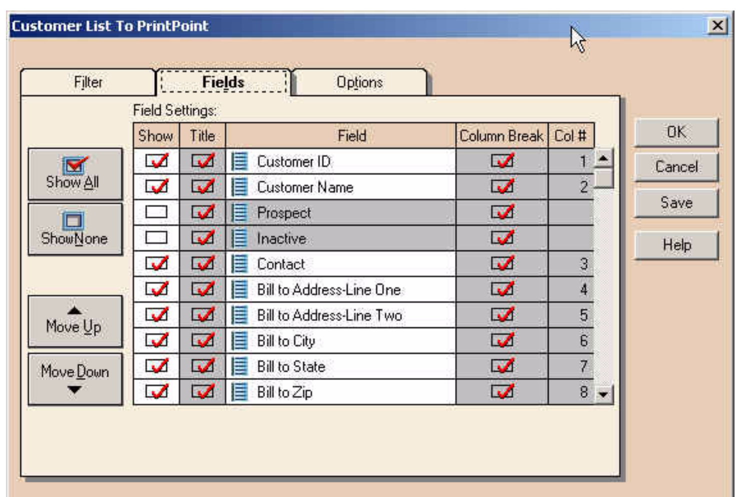


2 Click on Accounts Receivable from the list on the left side of the dialog.

3 Click on Customer List from the list n the right side of the dialog.

4 Click the Export button in the toolbar at the top of the dialog.

The Customer List Export Dialog is displayed.



5 Click the Fields tab.

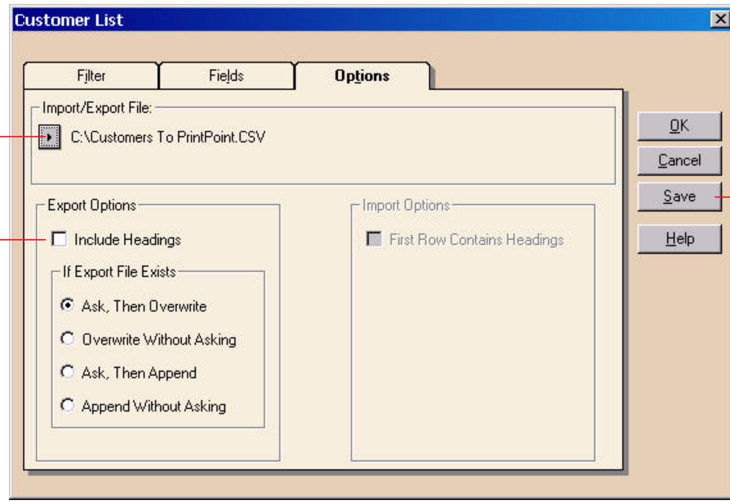
6 Click the Show None button.

7 Place a check in the Show Column for the following fields and do NOT change the order of the fields:

Field Number	Customer ID
1	Customer ID
2	Customer Name
3	Contact
4	Bill to Address-Line One
5	Bill to Address-Line Two
6	Bill to City
7	Bill to State
8	Bill to Zip
9	Bill to Country
10	Bill to Sales Tax Code
11	Ship to Name 1
12	Ship to Address 1-Line One
13	Ship to Address 1-Line Two
14	Ship to City 1
15	Ship to State 1
16	Ship to Zip code 1
17	Ship to Country 1
18	Ship to Sales Tax Code 1
19	Telephone 1
20	Fax Number
21	Customer E-mail
22	Sales Representative ID
23	G/L Sales Account
24	Resale Number
25	Credit Limit
26	Custom Field 1 (your name may vary)
27	Custom Field 2 (your name may vary)
28	Custom Field 3 (your name may vary)
29	Custom Field 4 (your name may vary)
30	Custom Field 5 (your name may vary)
31	Customer Web Site (at the very end)

8 Select the Options Tab.

The Customer List Options Tab will be displayed:



9 In the Import/Export File: group box click on the triangle button to select the location where you will save your exported customer file.

10 Name the file "Customers_To_PrintPoint".

11 Click the Open button. The file will be save as a ".csv" (comma separated value) file.

NOTE

Do NOT check the Include Headings option.

12 Click Save.

13 In the Save As dialog save the script you just created as "Customer List To PrintPoint" and enter a Description such as "This script save the fields and filename for exporting customers to PrintPoint."

14 Click Save to the Customer List dialog box.

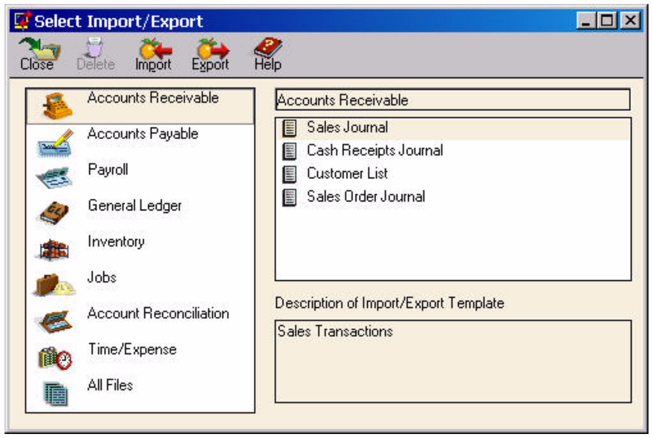
15 Click Cancel to leave the export setup.

Creating the Peachtree From PrintPoint Customer Import Script

The steps to create the customer import script are almost identical to creating the export script. Read all the steps carefully, noting the difference between the import and export options.

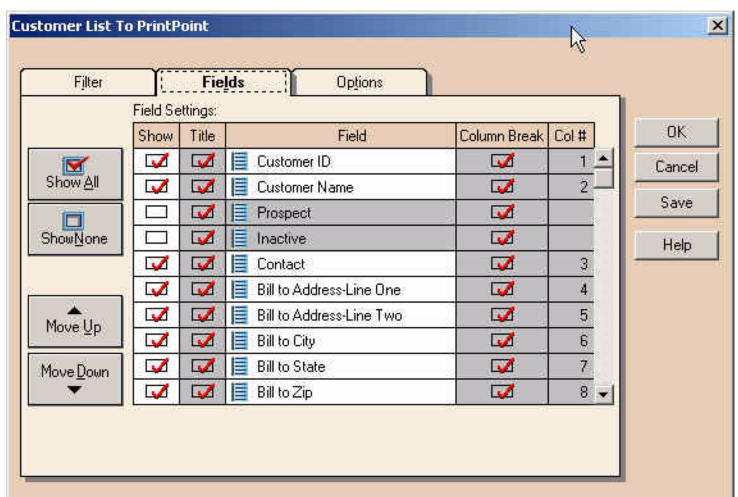
1. Select File Menu > Select Import/Export.

   Peachtree displays the Select Import/Export Dialog.



2. Click on Accounts Receivable from the list on the left side of the dialog.
3. Click on Customer List from the list n the right side of the dialog.
4. Click the Import button in the toolbar at the top of the dialog.

   The Customer List Import Dialog is displayed.

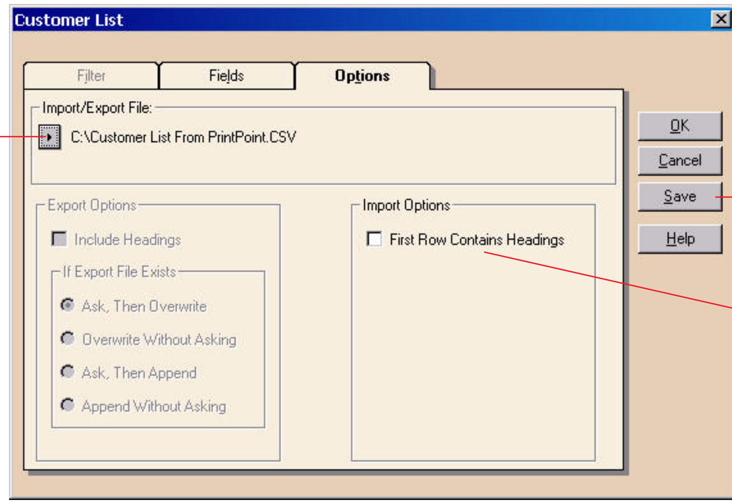


5. Click the Fields tab.
6. Click the Show None button.
7. Place a check in the Show Column for the following fields and do NOT change the order of the fields:

Field Number	Customer ID
1	Customer ID
2	Customer Name
3	Contact
4	Bill to Address-Line One
5	Bill to Address-Line Two
6	Bill to City
7	Bill to State
8	Bill to Zip
9	Bill to Country
10	Bill to Sales Tax Code
11	Ship to Name 1
12	Ship to Address 1-Line One
13	Ship to Address 1-Line Two
14	Ship to City 1
15	Ship to State 1
16	Ship to Zip code 1
17	Ship to Country 1
18	Ship to Sales Tax Code 1
19	Telephone 1
20	Fax Number
21	Customer E-mail
22	Sales Representative ID
23	G/L Sales Account
24	Resale Number
25	Credit Limit
26	Custom Field 1 (your name may vary)
27	Custom Field 2 (your name may vary)
28	Custom Field 3 (your name may vary)
29	Custom Field 4 (your name may vary)
30	Custom Field 5 (your name may vary)
31	Customer Web Site (at the very end)

8 Select the Options Tab.

The Customer List Options Tab will be displayed:

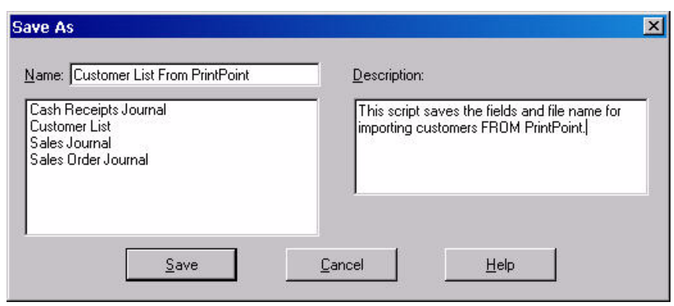


9 In the Import/Export File: group box click on the triangle button to select the location where you will save your imported customer file.

10 Name the file "Customers_From_PrintPoint".

11 Click the Open button. The file will be save as a ".csv" (comma separated value) file.

12 Click Save.



13 In the Save As dialog save the script you just created as "Customer List From PrintPoint" and enter a Description such as "This script save the fields and filename for importing customers FROM PrintPoint."

14 Click Save to the Customer List dialog box.

15 Click Cancel to leave the export setup.

Creating the Peachtree From PrintPoint Invoice Import Script

Graphics have been omitted from this section due to the extreme similarity to the steps in creating the import customer steps in the preceding sections.

1. Select File Menu > Select Import/Export in Peachtree Accounting for Windows

   The Select Import/Export dialog is displayed.
2. Click on Accounts Receivable list on the left side of the screen.
3. Select Sales Journal from the list on the right side of the screen.
4. Click the Import button.

   The Sales Journal dialog is displayed.
5. Click the Field tab.
6. Click the Show None button.
7. Place a check in the Show Column for the following fields:

Field No.	Peachtree Field Name
1	Customer ID
2	Invoice #
3	Date
4	Customer PO
5	Ship Via
6	Date Due
7	Displayed Terms
8	Sales Representative ID
9	Accounts Receivable Account
10	Sales Tax Code
11	Number of Distributions
12	Quantity
13	Description
14	G/L Account
15	Tax Type
16	Amount
17	Sales Tax Authority

8. Select the Options Tab

9 In the Import/Export File: area click on the button to select the import file you created in the Export Invoices to Peachtree chapter.

NOTE

Do not check the Include Headings option.

10 Click Save.

11 In the Save As dialog save the script you just created as “Import Invoices from PrintPoint”, enter a Description such as “This script imports the fields and filename for invoices from PrintPoint.”.

12 Click Save.

13 Click OK to import your invoices.

The next time you import invoices, you will not have to setup the field and filenames, you will simply select the “Import Invoices from PrintPoint” script, click the Import button...and click OK.

What to do in PrintPoint

Setting PrintPoint Preferences

Set the PrintPoint Accounting Package Linking Preferences

1 Select File Menu > Preferences > Accounting Links from the Select drop down menu.

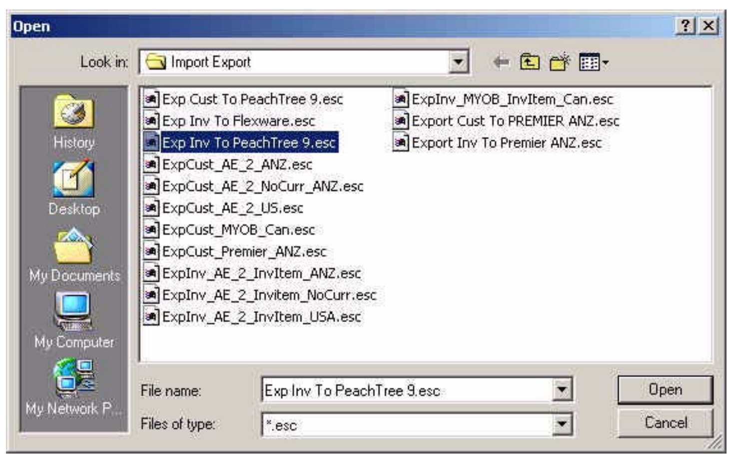
2 Choose Peachtree Complete for Windows from the Link Accounting To drop- down menu.

3 Click the Choose Script for Exporting Invoices button.

PrintPoint will display the following Alert dialog:

4 Click OK.

5 PrintPoint will display the following Open File Dialog:

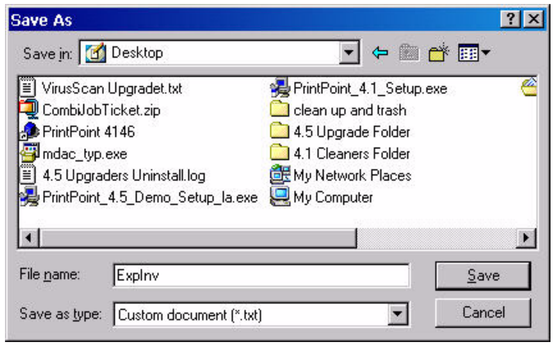


6 Click on the Save Name & Location of Exported Invoice File button.

PrintPoint will display the following Alert dialog:

7 Click OK.

PrintPoint will display a Save As dialog:



8 Type “ExpInv” into the File name field.

9 Click the Save button.

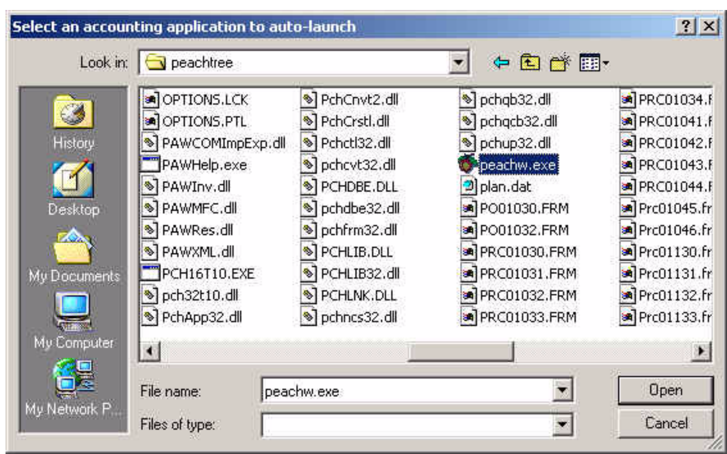
OPTIONS

If you would like PrintPoint to automatically launch Peachtree after you have exported your invoices from PrintPoint, follow the steps 7 - 11.

Otherwise, skip to step 12.

10 Click the Launch Path to Accounting Program button.

PrintPoint will display the Select Accounting Application dialog:



11 Locate and select your version of Peachtree (most likely in the following location: “C:\peachW\peachw.exe”.

12 Select peachw.exe.

CAUTION

Auto Launch option must have the ".exe" attached to the Peachtree file. You cannot select your datafile for Peachtree. You must select the application itself.

13 Click the Open button.

14 Place a check in the Autolaunch accounting program on export checkbox.

TIP

You can always disable the autolaunch be unchecking this option.

Set the Default G/L Account Names/Numbers for New Customers

When you create new customers in PrintPoint, the entries you create here in PrintPoint preferences will be used as defaults for each new customer. You can override these defaults on a customer by customer basis. The first group is the Chart of Accounts (General Ledger) defaults.

15 Locate the Default G/L Account Names...section at the bottom of the screen and enter the following names from your Peachtree Chart of Accounts:

- Accounts Receivable
- Sales Income
- Freight
- Sales Tax Payable

NOTE

These names must exactly match the names that appear in the Peachtree Chart of Accounts.

Set Other Defaults for New Customers

In addition to the Chart of Account (General Ledger) defaults there are several other defaults you will need to enter. The entries must exactly match the names that appear in the Peachtree

16 Enter the default Sales Tax Code from your Peachtree Tax Code List.

17 Enter the default matching Tax Rate for the Sales Tax Code above.

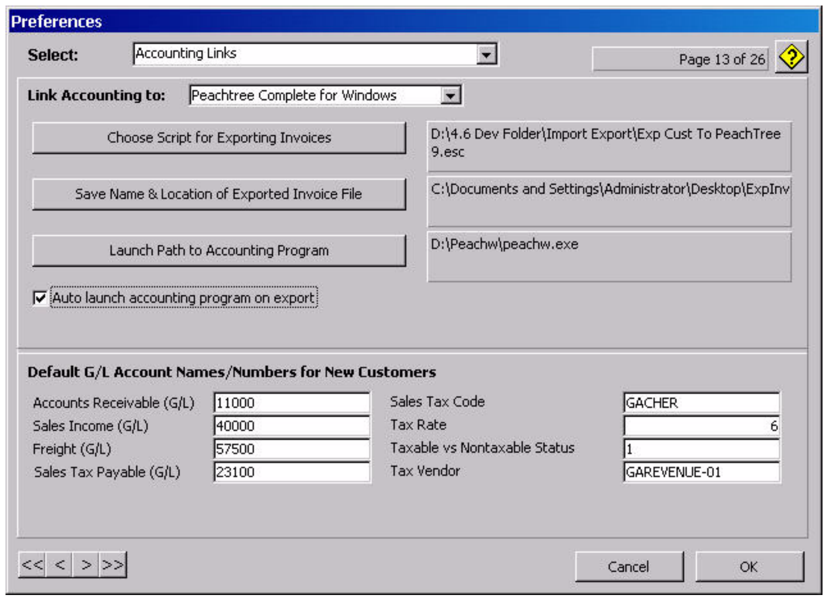
18 Enter the default Taxable vs Non-taxable Status for invoice line items to match the Tax Item you selected above.

NOTE

PrintPoint helps you automate this step (normally a manual step in Peachtree) by defaulting the Taxable or Non-taxable status of the invoice items. Your entry will most likely “1” or “2”.

19 Enter the default Tax Vendor from your Peachtree Vendor List.

Your PrintPoint Accounting Links Preferences screen should look similar to this:



Set the Customer Import & Export Defaults

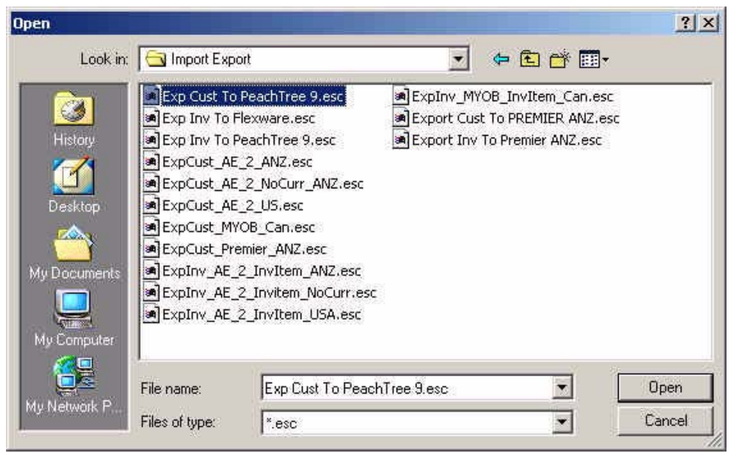
20 Select Customer Import & Export Defaults from the Select drop-down at the top of the Preferences screen.

21 Click on the Choose Script for Exporting Customers button.

PrintPoint will display the following Alert dialog:

22 Click OK.

PrintPoint will display an Open File dialog:

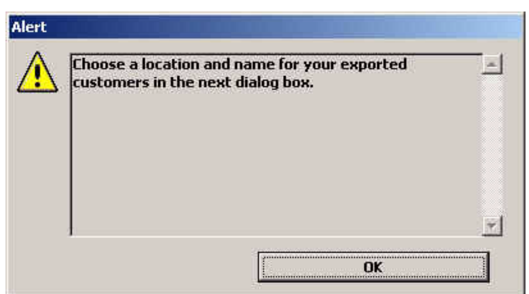


23 Select the Export Customer to Peachtree script for your territory and version.

24 Click Open.

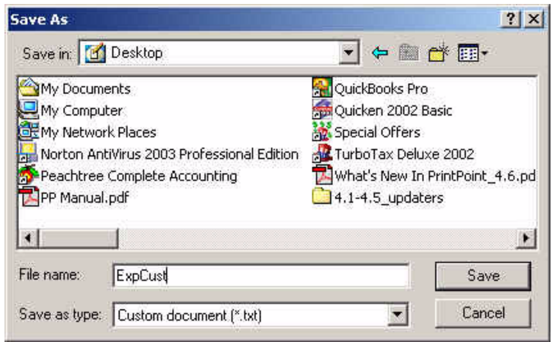
25 Click on the Save Name & Location of Exp Customer File button.

PrintPoint will display the following Alert dialog:



26 Click OK.

PrintPoint will display a Save As dialog:



27 Type “ExpCust” into the File name field.

Save the file to a location that you will remember later when your are importing into Peachtree.

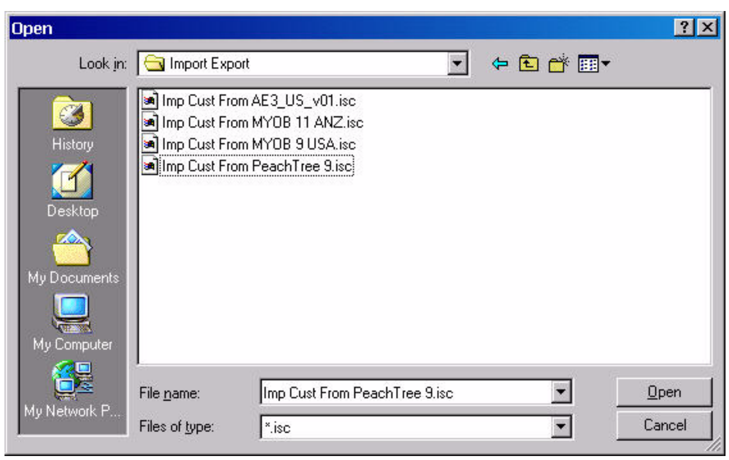
28 Click the Save button.

29 Click on the Choose Script for Importing Customers button.

PrintPoint will display the following Alert dialog:

30 Click OK.

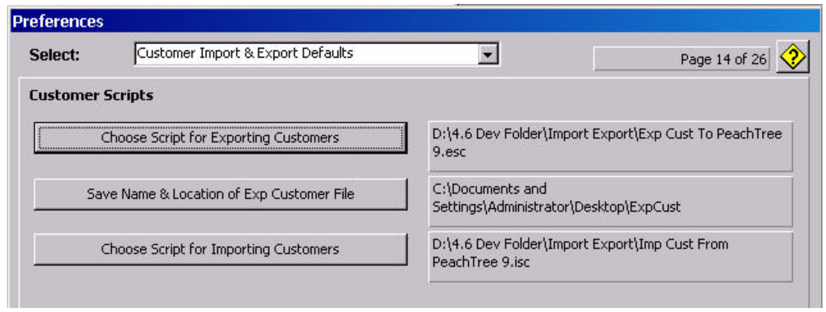
PrintPoint will display an Open File dialog:



31 Select the Import Customers from Peachtree script for your territory and version.

32 Click Open.

Your PrintPoint Customer Import & Export Defaults Preference screen should look similar to this:



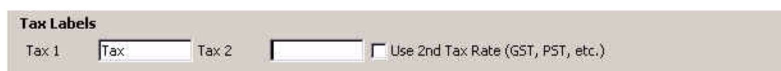
Setting Tax Labels on Invoices

PrintPoint allows you to define your own labels for up to 2 taxes that will appear on invoices.

The label is the name that will appear on the customer records and invoices describing the tax percentage that will actually be applied to invoice items. The word “Tax” would be sufficient in many cases, where the words “GST” and “PST” in Canada would be more appropriate.

33 Select Invoices from the Select drop-down at the top of the Preferences screen.

34 Enter labels for Tax 1.



35 If a 2nd level tax is to be used, enter the label for Tax 2 and select the checkbox titled Use 2nd Tax Rate.

Saving Preferences

Once you have completed the steps above you need to save preferences.

36 Click the OK button at the bottom of the Preferences screen.

Sales Tax Settings

Before you can proceed to the next steps, you must setup your Sales Taxes inside of PrintPoint to match what you have already created in Peachtree in the previous steps in this chapter.

Refer to the chapter - Peachtree: Sales Tax Settings for detailed instruction on setting up your Sales Taxes in PrintPoint.

Updating Existing PrintPoint Customers

If you have been using PrintPoint and a now beginning to use Peachtree, you can batch update your existing customers with the defaults setup in the previous sections.

CAUTION

You must have setup your Sales Tax Settings in the previous section before continuing.

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

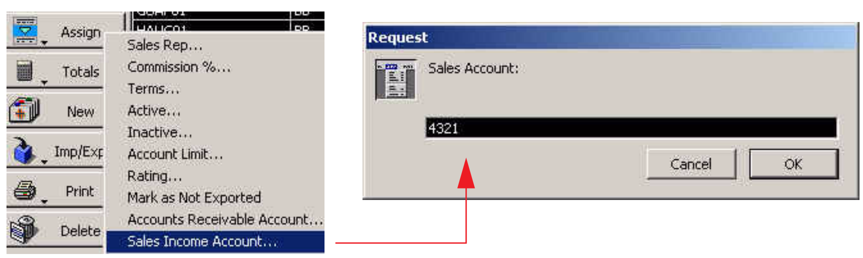
2 To confirm the steps below, it is recommended that you create a custom list view to show the columns for the fields being assigned.

See the chapter - List View Editor for detailed instructions.

3 Select the customers for which you want to assign the General Ledger Account Names.

4 Click the Assign button.

5 Select Sales Income Account... from the drop-down menu.



The default Sales Income Account name will be displayed. You can override this if necessary.

6 Click OK.

7 Repeat Steps 3 - 6 for Tax Code, Terms, etc.

Chapter 67

Peachtree: Importing Customers from Peachtree

OVERVIEW

PrintPoint has an excellent tool to assist you in importing customers created in Peachtree into PrintPoint.This chapter will teach you how to:

- Export your customers out of Peachtree
- Import those customers into PrintPoint.
- Post-process Customers After Importing.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the Peachtree Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customers out of Peachtree.
- Importing Customers into PrintPoint.
- Post-process Customers After Importing.

Exporting Customers out of Peachtree

1. Select File Menu > Select Import/Export.

   PeachTree displays the Select Import/Export Dialog.
2. Click on Accounts Receivable item from the list on the left side of the dialog.
3. Select the "Customer List To PrintPoint" script previously created in the PeachTree Integration chapter.

   For more information on creating the Customer List To PrintPoint script see the chapter "Peachtree Integration".
4. Click Export.
5. Click OK to export your customers.

Importing Customers Into PrintPoint

CAUTION

Make a backup of your PrintPoint data.

1. Select Navigator > Customers.

   PrintPoint displays the Customer Review List.
2. Click the Imp/Exp button.
3. Select Import from Peachtree Complete for Windows from the drop-down menu.
4. At the Confirm dialog select Continue if you have a backup or Abort to stop the import so you can create a backup.

   A dialog is displayed asking you to select your customer file to import in the next dialog.

5. Click OK.

   PrintPoint displays a file browser dialog.
6. Select the Customers_To_PrintPoint.csv file created in the export steps above.
7. Click OK to import the records.

Post-processing customers after importing

Adjusting the Customer Ratings

All customers, when imported into PrintPoint, are given a BB rating. If you would like to change the ratings for any of your imported customers, see the chapter on Customers for instructions on batch assigning the customer rating to groups of customers.

Setting Preferences for New Customers

If you intend to use PrintPoint's invoice module and then export those invoices to PeachTree, see Preferences > Accounting Links: Default G/L Account Names/Numbers for new Customers.

Sales Tax Settings

If you intend to use PrintPoint's invoice module and then export those invoices to PeachTree, see the following two chapters: “PeachTree: Sales Tax Settings” and “Customers”.

Chapter 68

Peachtree: Exporting Customers to Peachtree

OVERVIEW

This chapter will help you export your customers from PrintPoint and then import those customers into Peachtree 2002 (v9) or higher.

We recommend the entry of new customers first in PrintPoint and then, prior to exporting invoices, export the customer records to Peachtree.

PrintPoint has excellent exporting tools to help you in this two-step process. You will first need to prepare and export the data from PrintPoint. Once that step is completed, you will import the data into Peachtree.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the Peachtree Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customers from PrintPoint.
- Importing Customers into Peachtree

Exporting Customers From PrintPoint

1. Select Navigator > Customers.

   PrintPoint displays the Customer Review List.
2. From the Customer Review List, select the customers you want to export to Peachtree.
3. Click the Imp/Exp button.
4. Select Export to Peachtree Complete for Windows from the drop-down menu.

   PrintPoint displays a dialog box which shows the invoices to be exported.
5. Click Export to export the records.

Importing Customers Into Peachtree

1. Select File Menu > Select Import/Export.
2. In the Select Import/Export dialog select Customer List from the Accounts Receivable column.
3. Click the Import button.
4. Click the Field tab.
5. Click the Show None button.
6. Place a check mark in the Show Column for the following fields:

Field Number	Customer ID
1	Customer ID
2	Customer Name
3	Contact
4	Bill to Address-Line One
5	Bill to Address-Line Two
6	Bill to City
7	Bill to State
8	Bill to Zip

Field Number	Customer ID
9	Bill to Country
10	Bill to Sales Tax Code
11	Ship to Name 1
12	Ship to Address 1-Line One
13	Ship to Address 1-Line Two
14	Ship to City 1
15	Ship to State 1
16	Ship to Zip code 1
17	Ship to Country 1
18	Ship to Sales Tax Code 1
19	Telephone 1
20	Fax Number
21	Customer E-mail
22	Sales Representative ID
23	G/L Sales Account
24	Resale Number
25	Credit Limit
26	Custom Field 1 (your name may vary)
27	Custom Field 2 (your name may vary)
28	Custom Field 3 (your name may vary)
29	Custom Field 4 (your name may vary)
30	Custom Field 5 (your name may vary)
31	Customer Web Site

7. Select the Options Tab
8. In the Import/Export File: area click on the button to select the import file you created in the Import Customers from PrintPoint section.

NOTE

Do not check the Include Headings option.

9. Click Save.
10. In the Save As dialog save the script you just created as “Import Customers from PrintPoint”, enter a Description such as “This script imports the fields and filename for customers from PrintPoint.”.

11 Click Save.

12 Click OK to import your customers.

NOTE

The next time you import invoices, you will not have to setup the field and filenames, you will simply select the "Import Customers from PrintPoint" script, click the Export button...and click OK.

Chapter 69
Peachtree: Sales Tax Settings

OVERVIEW

If you have set up PrintPoint to link to Peachtree for Windows in preferences, the Sales Tax Settings Dialog is used to create codes for sales tax, tax items, tax authorities, etc., to parallel the tax settings in Peachtree for Windows.

These codes are by PrintPoint's customers, during invoice transactions and subsequent exporting of invoices to the accounting package you have selected.

TIP

If you do not intend to link to any accounting programs, you do not need to use this area of PrintPoint. You will be able to enter sales tax codes. rates, etc., directly into customers and invoices.

Sales Tax Definitions

Each of the three accounting packages uses different terms to refer to similar sales tax concepts. The table below presents the definition in the left hand column and the term used by each of the packages in the appropriate column to the right.

Definition	Peachtree	
A sales tax	Tax Authority	Maintain Menu > Sales Taxes > Sales Tax Authorities...
A number of sales taxes which are applicable to a transaction and which are combined together as a single rate	Tax Code	Maintain Menu > Sales Taxes > Sales Tax Codes...
Flag indicating whether tax is payable on a line item on an invoice	Item Tax Type	Maintain Menu > Default Information > Inventory Items > Taxes/Shipping Tab

BEFORE YOU BEGIN

You should...	Where this information is found...
Collect your accounting information regarding sales tax codes, rates, authorities, vendors, etc.	In Peachtree: Maintain Menu > Sales Taxes > Sales Tax Authorities... Maintain Menu > Sales Taxes > Sales Tax Codes... Maintain Menu > Default Information > Inventory Items > Taxes/Shipping Tab
Read the Peachtree Integration chapter.	In this manual.

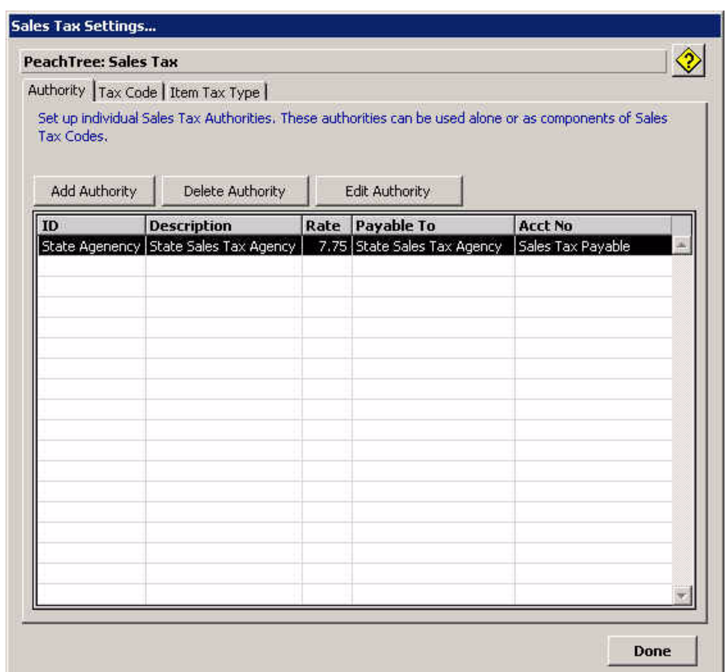
STEP-BY-STEP

This section includes the following topics:

- Accessing the Sales Tax Settings Dialog
- Setting Up Sales Tax
  - Adding a Sales Tax Authority
  - Editing a Sales Tax Authority
  - Deleting a Sales Tax Authority
  - Adding a Tax Code
  - Editing a Tax Code
  - Adding a Tax Authority to a Tax Code
  - Deleting an Individual Sales Tax Authority from a Tax Code
  - Deleting a Tax Group
  - Specifying the Taxable Status of Invoice Line Items

Accessing the Sales Tax Settings Dialog

1 Select Accounting Menu > Sales Tax Settings.
PrintPoint displays the Sales Tax Settings Dialog.

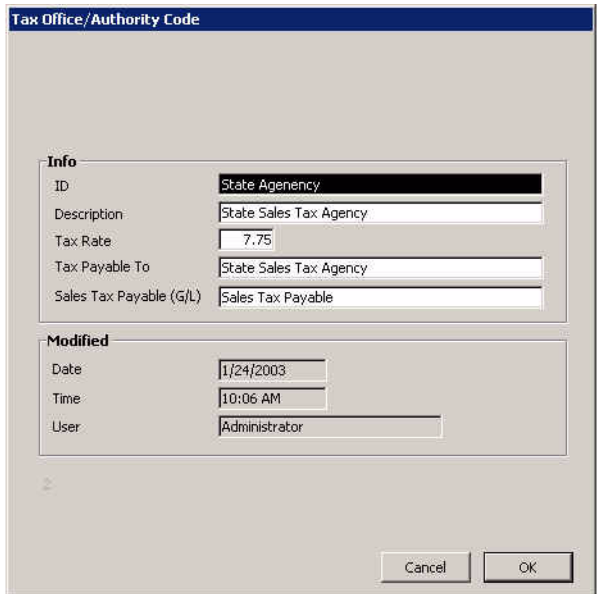


Setting Up Sales Tax

Adding a Sales Tax Authority

1. From the Sales Tax Settings Dialog, select the Authority tab.
2. Click the Add Authority button.

   PrintPoint displays the Tax Authority Dialog.



TIP

You enter data tax code information in the Info section of the Tax Code dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3. Complete the fields in the Tax Authority Dialog as follows:
   a. In the ID field, type the ID for the sales tax, e.g., Gwinnett.
   b. In the Description field, type a brief description for the sales tax, e.g., Sales tax for Gwinnett County.
   c. In the Tax Rate field, type applicable rate for the sales tax, e.g., 5 or 3.5.
   d. In the Tax Payable To field, type the name of the tax agency collecting the sales tax, e.g., Georgia Revenue Office.
   e. In the Sales Tax Payable (GL) field, type the General Ledger account number for the sales tax item, e.g., Sales Tax Receivable.
4. Click the OK button.
5. Complete steps 2 and 4 for each sales tax authority you want to add to the database.
6. Click the Done button to close the Sales Tax Settings Dialog.

Editing a Sales Tax Authority

1 From the Sales Tax Settings Dialog, select the Authority tab.
2 Select the sales tax authority you want to edit.
3 Click the Edit Authority button.
PrintPoint displays the Tax Authority Dialog.
4 In the Info section, overtype the current data as relevant and click the OK button.
5 Click the Done button to close the Sales Tax Settings Dialog.

NOTE

If the edited authority is part of a tax code group, PrintPoint automatically updates the tax code group record.

Deleting a Sales Tax Authority

1 From the Sales Tax Settings Dialog, select the Authority tab.
2 Select the sales tax authority record you want to delete.
3 Click the Delete Authority button.

NOTE

If the tax authority is used in a tax code, PrintPoint displays an Alert message. You will need to delete the tax authority from the tax code (see below) before you can complete this procedure.

4 Click the Delete button.
5 Complete steps 2 to 4 for each sales tax authority you want to delete.
6 Click the Done button to close the Sales Tax Settings Dialog.

Adding a Tax Code

If certain taxes are always levied in a jurisdiction, use this procedure to combine the taxes into a uniquely identified tax code group.

This is a three-stage process.

- You first create the individual tax authorities as described in Adding a Sales Tax Item above
- You set up a unique ID for the tax code group. See below
- Finally, you add the individual sales tax authorities to the tax code group. See Adding a Tax Authority to a Tax Code below.

1 From the Sales Tax Settings Dialog, select the Tax Code tab.
2 Click the Add Code button.
PrintPoint displays the Tax Code Dialog.

TIP

You enter data tax code information in the Info section of the Tax Code dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3 Complete the fields in the Tax Code Dialog as follows.
   a. In the Code field, type the alphanumeric code for the tax code group, e.g., GAGWINN
   b. In the Description field, type a brief description for the tax group, e.g., Gwinnett County, Georgia
   c. If freight is subject to tax, click the Freight Taxable checkbox to tick it.

4 Add the individual sales tax codes as described in Adding a Tax Authority to a Tax Code below.

Editing a Tax Code

Use this procedure to change the ID or description of the tax code without affecting the status of the individual sales tax authorities in the tax code group.

NOTE

You cannot edit the individual sales tax authorities from the Tax Code tab. To do that, see Editing a Sales Tax Authority above. PrintPoint will then update the tax code record.

1 From the Sales Tax Settings Dialog, select the Tax Code tab.

2 Select the record for the tax code you want to edit.

3 Click the Edit Code button.

   PrintPoint displays the Tax Code Dialog.

4 Overtype the existing information as appropriate and click the OK button.

5 Click the Done button to close the Sales Tax Settings Dialog

Adding a Tax Authority to a Tax Code

1 From the Sales Tax Settings Dialog, select the Tax Code tab.

2 Select the tax code to which you want to add individual sales tax authorities.

3 Click the Add Authority button in the bottom half of the dialog.

   PrintPoint displays the Choose a Tax Item Choice List, showing the individual sale tax authorities available for selection.

4 Select a tax authority and click the OK button.

5 Repeat steps 2 to 4 for each sales tax authority you want to add to the tax group.

NOTE

The Total at the bottom of the dialog shows the consolidated tax rate for the tax code.

6 Click the Done button to close the Sales Tax Settings Dialog.

Deleting an Individual Sales Tax Authority from a Tax Code

1. From the Sales Tax Settings Dialog, select the Tax Code tab.
2. Select the record for the tax code from which you want to delete an individual tax authority.
3. Select the individual sales tax authority and click the Delete Authority button.
4. Click the Delete button.
5. Repeat steps 2 to 5 for each sales tax code you want to delete from the consolidated group.
6. Click the Done button to close the Sales Tax Settings Dialog.

Deleting a Tax Group

1. From the Sales Tax Settings Dialog, select the Tax Code tab.
2. Select the record you want to delete.
3. Click the Delete Code button.
4. Click the Delete button.

NOTE

The individual sales tax authorities associated with the tax code are not deleted from the database. To delete them, see Deleting a Sales Tax above.

5. Click the Done button to close the Sales Tax Settings Dialog.

Specifying the Taxable Status of Invoice Line Items

Use this procedure to create up to 25 categories for invoice line items that are taxable or non-taxable.

1. From the Sales Tax Settings Dialog, select the Item Tax Type tab.
2. Double-click a row.

   The Field field displays the sequence numbers for the 25 categories available.
3. To specify an invoice line item as taxable or non-taxable:
   a. In the Description field, type a brief description of the invoice line item.
   b. If the invoice line item is taxable, click the Tax checkbox to tick it.
   c. Click the OK button.
4. Click the Done button to close the Sales Tax Settings Dialog.

TIP

To edit a taxable status, follow the general procedure described above and overtype the current data.

TIP

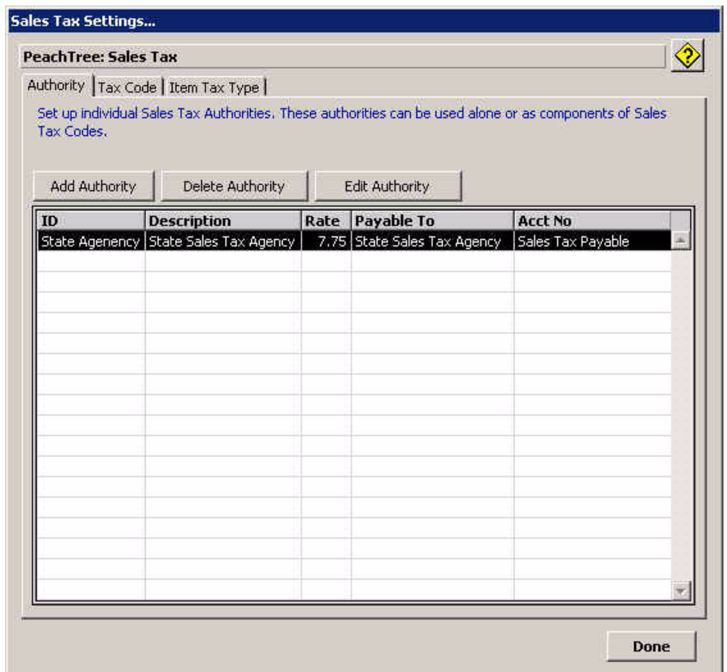
To delete a tax item type, follow the general procedure described above, but place a hyphen in the ID and Description fields and uncheck the Tax checkbox if ticked.

About the Screens

Sales Tax Settings Dialog

Authority Tab

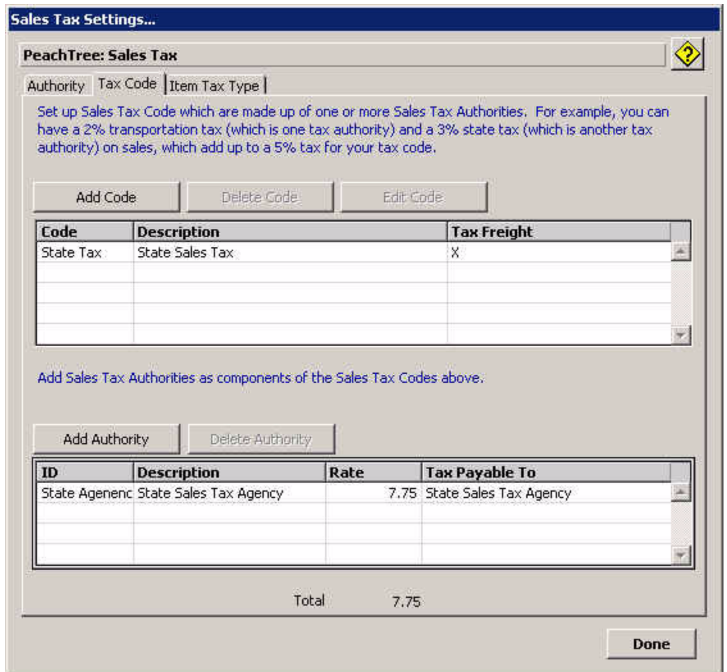
This screen displays details of the sales taxes currently recorded on the PrintPoint database.



Column Title	Description
ID	ID of the sales tax
Description	Brief description of the sales tax
Rate	Rate of sales tax levied
Payable To	Name of the agency levying the tax
Acct No	General Ledger account number

Tax Code Tab

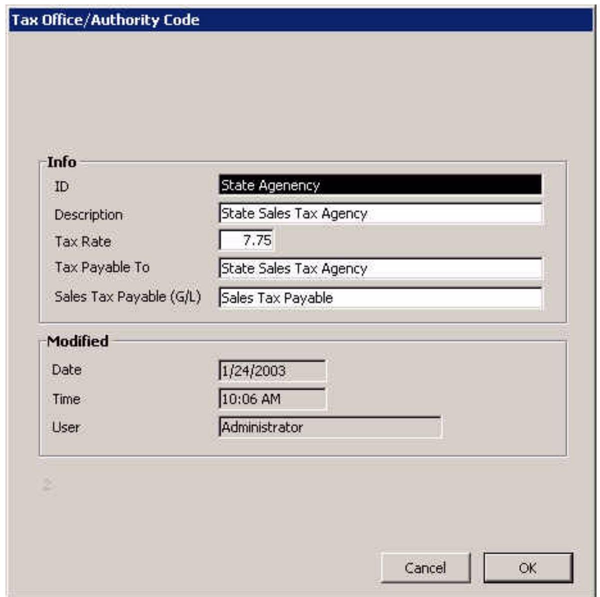
This screen displays details of the combinations of sales taxes relating to different jurisdictions currently recorded on the PrintPoint database.



Column Title	Description
Tax Code section	
Code	ID for a group of tax authorities that are levied together
Description	Brief and meaning description of the tax code
Tax Freight	Flag indicating whether tax is payable on the freight
Tax Authority section	
ID	ID of the sales tax
Description	Brief description of the sales tax
Rate	Rate of sales tax levied
Payable To	Name of the agency levying the tax
Total	The sum of the individual tax rates

Tax Authority Add/ Edit Dialogs

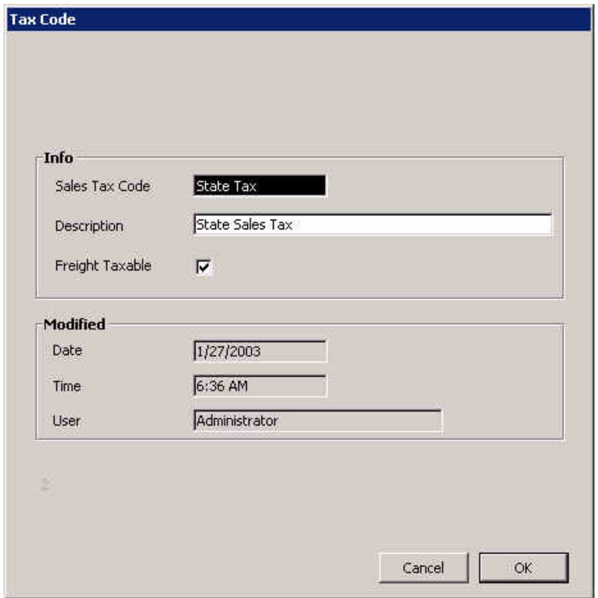
The screens on which you add or edit sales tax data have the same fields.



Field	Description
Info section	
ID	ID of the sales tax
Description	Brief description of the sales tax
Tax Rate	Rate of sales tax levied
Tax Payable To	Name of the agency levying the tax
Sales Tax Payable (GL)	General Ledger account number
Modified section	
Date	PrintPoint date on which the data was saved to the database
Time	PrintPoint time at which the data was saved to the database
User	The name/ID of the person who entered the data

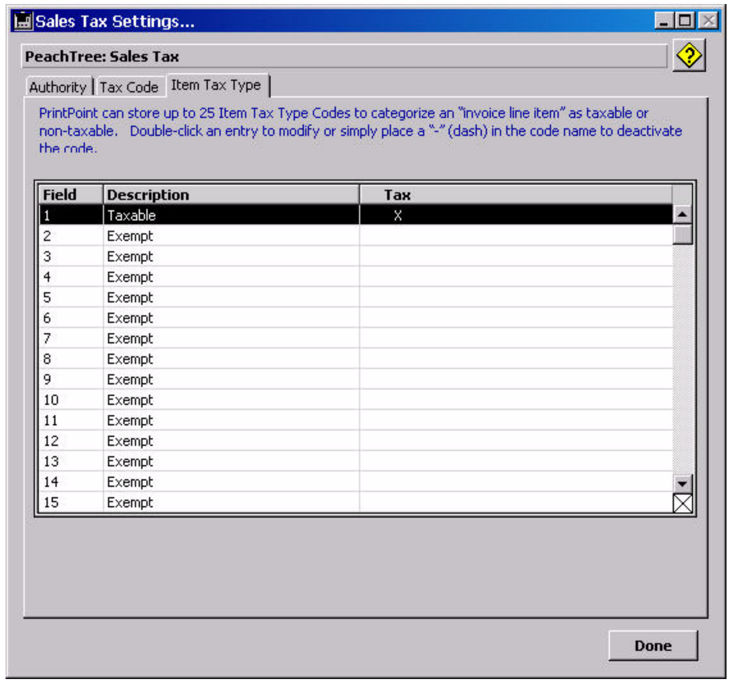
Tax Code Add/Edit Dialogs

The screens on which you add or edit data relating to sales tax groups have the same fields.



Field	Description
Info section	
GST Code	ID for a group of tax authorities that are levied together
Description	
Freight Taxable	
Modified section	See Tax Authority Add/Edit Dialogs above

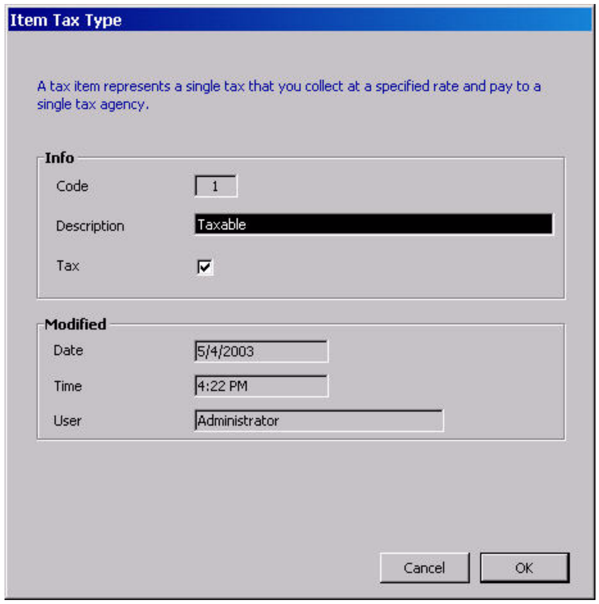
Item Tax Type Tab



Column Title	Description
Field	System-defined ID for taxable category of a line items on an invoice
Description	Brief description of the taxable status of a line items on an invoice
Tax	Flag indicating whether tax is payable on a line item on an invoice

Item Tax Type Dialog

Use this screen to create up to 25 categories for taxable and non-taxable invoice line items.



Column Title	Description
ID	System-defined ID of the invoice category
Description	Brief description of the invoice category
Tax	Flag indicating whether the line item is taxable

Chapter 70

Peachtree: Exporting Invoices To Peachtree

OVERVIEW

PrintPoint will allow you to export invoices created in PrintPoint to Peachtree Complete Accounting for Windows. In order to complete the export process you will have to make sure that the information in PrintPoint and Peachtree are well synchronized.

This chapter addresses the settings required in each program to help you successfully integrate your shop management with your accounting as well as the steps to export your invoices.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the Peachtree Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Invoices out of PrintPoint.
- Importing Invoices into Peachtree

Exporting Invoices From PrintPoint

1. Select Navigator > Invoices.

   PrintPoint displays the Invoice Review List.
2. From the Invoice Review List, select the invoices you want to export to Peachtree.
3. Click the Imp/Exp button.
4. Select Export to Peachtree Complete for Windows from the drop-down menu.

   PrintPoint displays a dialog box which shows the invoices to be exported.
5. Click OK to export the records.

Importing Invoices Into Peachtree

1. Select File Menu > Select Import/Export in Peachtree Accounting for Windows

   PrintPoint displays the Select Import/Export Dialog.
2. Click on Accounts Receivable list on the left side of the screen.
3. Select Import Invoices From PrintPoint from the list on the right side of the screen.
4. Click the Import button.

   The Import Invoices From PrintPoint dialog is displayed.
5. Click OK.

CAUTION

After you have successfully imported your invoices it is essential to delete the “.csv” file before exporting from PrintPoint again.

Best Practice: if you have created duplicate invoice entries and received the warning in Peachtree on attempting to import.

A: Trash you ".csv" file before exporting from PrintPoint.
B: Delete the Invoices in Peachtree.
C: Mark as “not exported” in PrintPoint.
D: Re-export the invoices out of PrintPoint.

NOTE

An invoice exported from Peachtree to PrintPoint uses the Due date from PrintPoint to generate your Aging Reports for Peachtree.

Chapter 71
QuickBooks: Integration

OVERVIEW

PrintPoint provides tools to export invoices created in PrintPoint to QuickBooks for Windows as well as importing and exporting customers back and forth between the two programs.

This chapter addresses the settings required in each program to help you successfully integrate your PrintPoint management system with QuickBooks.

If you have already been working with QuickBooks and are a new PrintPoint customer you can export your customers from QuickBooks to PrintPoint. See the chapter - QuickBooks: Importing Customers From QuickBooks.

Conversely, if you are an existing PrintPoint user and new to QuickBooks, you can setup your QuickBooks customers by exporting from PrintPoint to QuickBooks. See the chapter - QuickBooks: Exporting Customers To QuickBooks.

CAUTION

If you have been using both programs independently, contact PrintPoint Tech Support for help integrating existing data.

Once you have setup the initial "link" between the two programs, you should add new customers and invoices in PrintPoint. During the exporting of invoices from PrintPoint to QuickBooks, your new customers will automatically be moved into QuickBooks.

QuickBook's Fields vs. PrintPoint's Fields

Every database program has it's own unique way of keeping information stored in the program. The exact way that QuickBooks stores information about invoices and customers is somewhat different than PrintPoint's method. However, we have created special files and fields inside of PrintPoint to make sure that the two programs can "talk" to each other.

We have created fields inside each PrintPoint customer and invoices that correspond to fields inside of QuickBooks.

Each time you export invoices to QuickBooks, PrintPoint performs an operation that moves information for PrintPoint's customer files and invoice files into a temporary file used solely for the purpose of exporting to QuickBooks. Once the export is completed, this file can be deleted.

If this file is not deleted after the import into QuickBooks, it will be appended to provided you have not changed the name of the file. With this in mind, you could export several times from PrintPoint and end up with one file to import into QuickBooks.

CAUTION

You should be careful not to export the same invoices twice.

Additional Reference

After you have finished the procedures in this chapter, please review the following chapters for a complete picture of your integration with QuickBooks:

- QuickBooks: Importing Customers from QuickBooks
- QuickBooks: Exporting Customers to QuickBooks
- QuickBooks: Sales Tax Settings
- QuickBooks: Exporting Invoices To QuickBooks

BEFORE YOU BEGIN

You should...	Where this information is found...
Make sure you are using QuickBooks 2002 or higher for Windows (Regular or Pro version).	Open your Quickbooks software and choose Help Menu > About...

STEP-BY-STEP

This section includes the following topics:

- What to do in QuickBooks
  - Setting up the QuickBooks Customer List
  - Setting up Required Accounts on the QuickBooks Chart of Accounts
  - Setting up the QuickBooks Tax Item
  - Setting up QuickBooks Customers with a Tax Item
  - Setting up QuickBooks Sales Tax Code List
  - Setting up the QuickBooks Vendor List
- What to do in PrintPoint
  - Setting PrintPoint Preferences
    a. Set the PrintPoint Accounting Package Linking
    b. Set the Default G/L Account Names/Numbers for New Customers
    c. Set Other Defaults for New Customers
    d. Set the Customer Import & Export Defaults
    e. Setting Tax Labels on Invoices
    f. Saving Preferences
  - Sales Tax Settings
  - Updating existing PrintPoint Customers

What to do in QuickBooks

Setting Up the QuickBooks Customer List

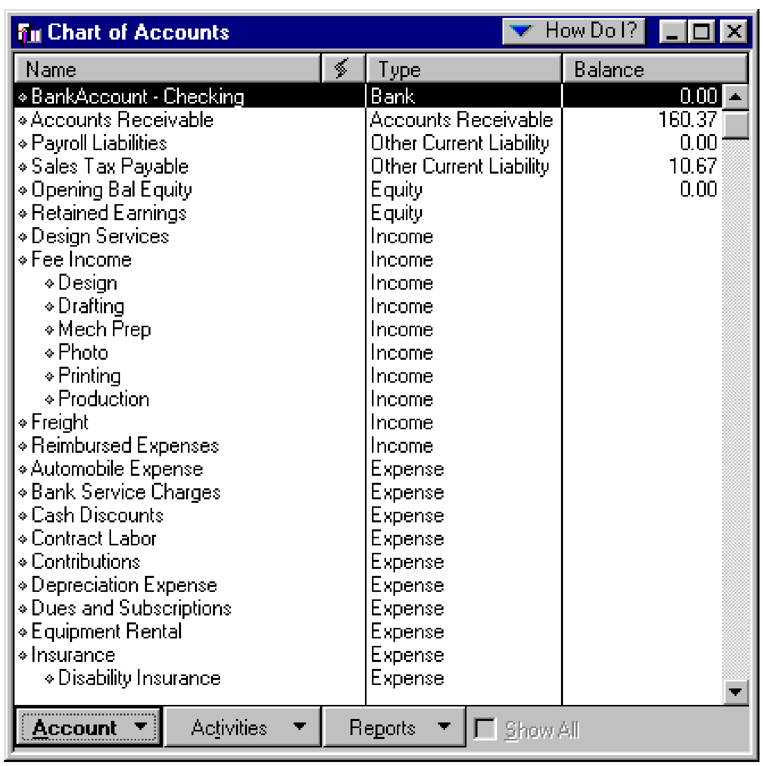
It is not necessary to "pre-setup" your QuickBooks Customer List. Once you have set your PrintPoint Accounting Preferences to contain the appropriate Default General Ledger Account Names, the Tax Item, and the Tax Agency to synchronize with QuickBooks (see details below), PrintPoint will "send" QuickBooks all the information that is required to setup new customers in QuickBooks whenever invoices are exported.

Setting Up Required Accounts on the QuickBooks Chart of Accounts

The following must be setup in QuickBooks to be able to import invoice information from PrintPoint:

- 4 default account names must be setup in the Chart of Accounts.
  - Accounts Receivable Account
  - Sales Income Account
  - Freight Account
  - Sales Tax Payable Account

1 QuickBooks > List Menu > Chart of Accounts

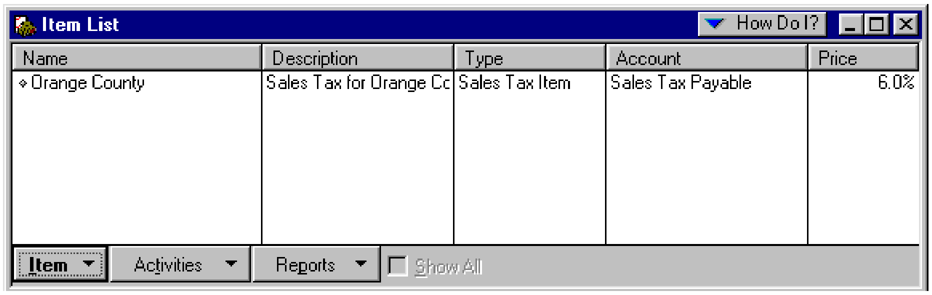


Setting Up the QuickBooks Tax Item

Tax Item (s) identify the "jurisdiction (s)" for which sales tax is calculated. At least one Tax Item must be setup in the Item List in QuickBooks (if only one Tax item is setup, it becomes the default tax item).

Example — The sample Item List Screen below displays the item "Orange County" which is the name for the tax that will be charged as Sales Tax for Orange County, and also displays the tax rate.

1 QuickBooks > List Menu > Item List

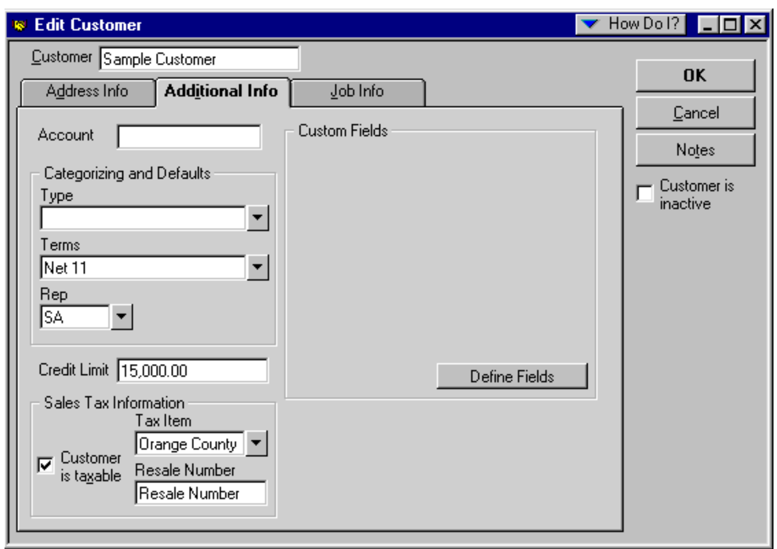


Setting Up QuickBooks Customers with a Tax Item

Each customer in QuickBooks needs to be setup with the appropriate Tax Item.

Example — The sample QuickBooks Customer Card below displays a customer that has been setup with "Orange County" as the Tax Item. Sales Tax charged on invoices for this customer will be allocated to Orange County.

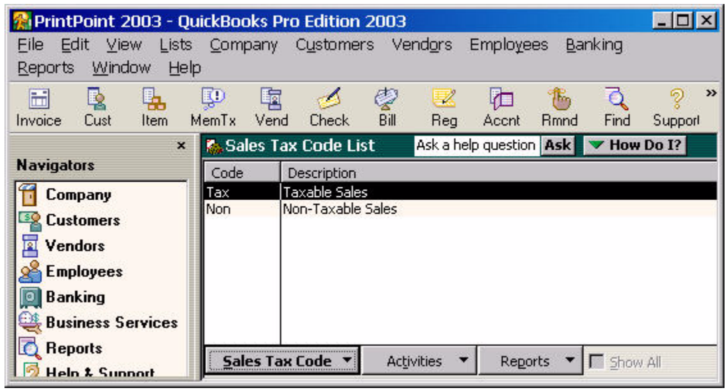
1 QuickBooks > List Menu > Customer List > Double-click customer



Setting up QuickBooks Sales Tax Code List

QuickBooks has a Sales Tax code List with "Tax" and "Non" as the defaults. If you need to create other Tax Codes for use with PrintPoint, do so now.

1 QuickBooks > List Menu > Sales Tax Code List

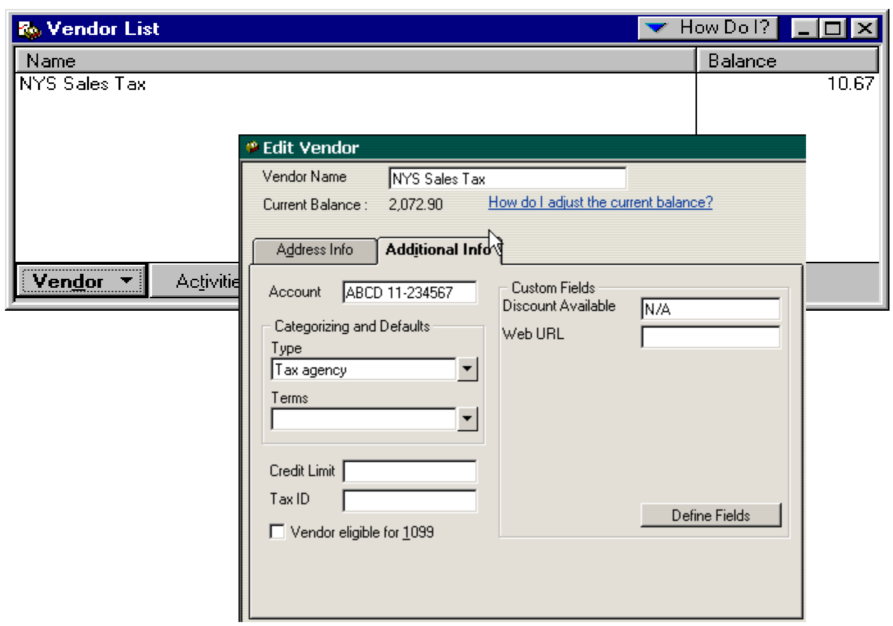


Setting Up the QuickBooks Vendor List for Sales Tax Agency

You must setup a vendor(s) on the QuickBooks Vendor List for every Tax Item for which tax will be calculated.

1 QuickBooks > List Menu > Vendor List

Example The sample Vendor List below shows that payments for sales tax for the "Orange County" Tax Item from the previous example will be "paid" to the Vendor defined as NYS Sales Tax. Notice that the Vendor is "Categorized" as a "Tax Agency".



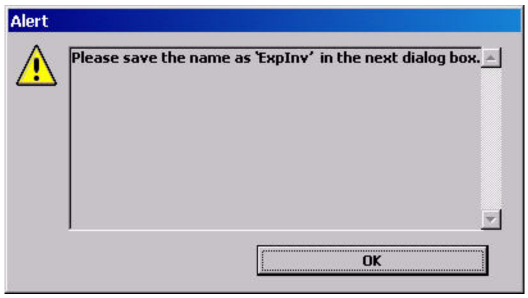
What to do in PrintPoint

Setting PrintPoint Preferences

Set the PrintPoint Accounting Package Linking Preferences

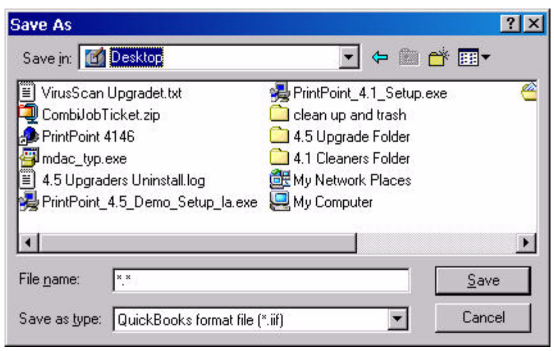
1. Select File Menu > Preferences > Accounting Links from the Select drop down menu.
2. Choose QuickBooks for Windows from the Link Accounting To drop-down menu.
3. Click on the Save Name & Location of Exported Invoice File button.

   PrintPoint will display the following Alert dialog:



4. Click OK.

   PrintPoint will display a Save As dialog:



5. Type “ExpInv” into the File name field.
6. Click the Save button.

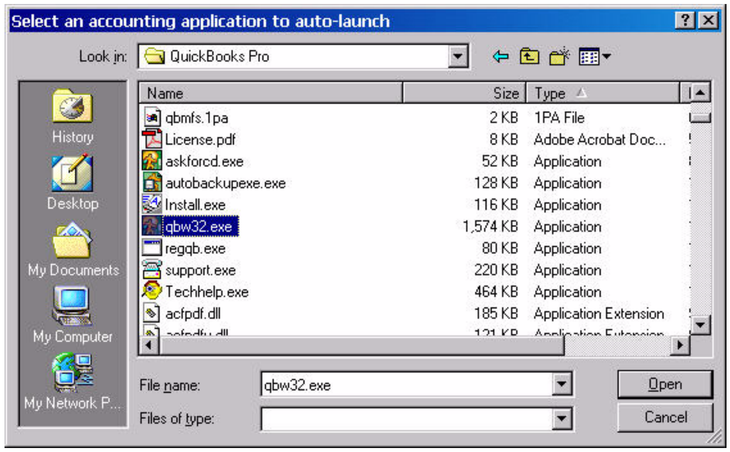
OPTIONS

If you would like PrintPoint to automatically launch QuickBooks after you have exported your invoices from PrintPoint, follow the steps 7 - 11.

Otherwise, skip to step 12.

7 Click the Launch Path to Accounting Program button.

PrintPoint will display the Select Accounting Application dialog:



8 Locate your version of QuickBooks (most likely in the following location: “C:\Program Files\Intuit\QuickBooks Pro\qbw32.exe”.

9 Select qb32.exe.

CAUTION

Auto Launch option must have the “.exe” attached to the QuickBooks file. You cannot select your datafile for QuickBooks. You must select the application itself.

10 Click the Open button.

11 Place a check in the Autolaunch accounting program on export checkbox.

TIP

You can always disable the autolaunch be unchecking this option.

Set the Default G/L Account Names/Numbers for New Customers

When you create new customers in PrintPoint, the entries you create here in PrintPoint preferences will be used as defaults for each new customer. You can override these defaults on a customer by customer basis. The first group is the Chart of Accounts (General Ledger) defaults.

12 Locate the Default G/L Account Names...section at the bottom of the screen and enter the following names from your QuickBooks Chart of Accounts:

- Accounts Receivable
- Sales Income

- Freight
- Sales Tax Payable

NOTE

These names must exactly match the names that appear in the QuickBooks Chart of Accounts.

Set Other Defaults for New Customers

In addition to the Chart of Account (General Ledger) defaults there are several other defaults you will need to enter. The entries must exactly match the names that appear in the QuickBooks

13 Enter the default **Tax Item** from your QuickBooks Item List.

14 Enter the default matching **Tax Rate** for the Tax Item above.

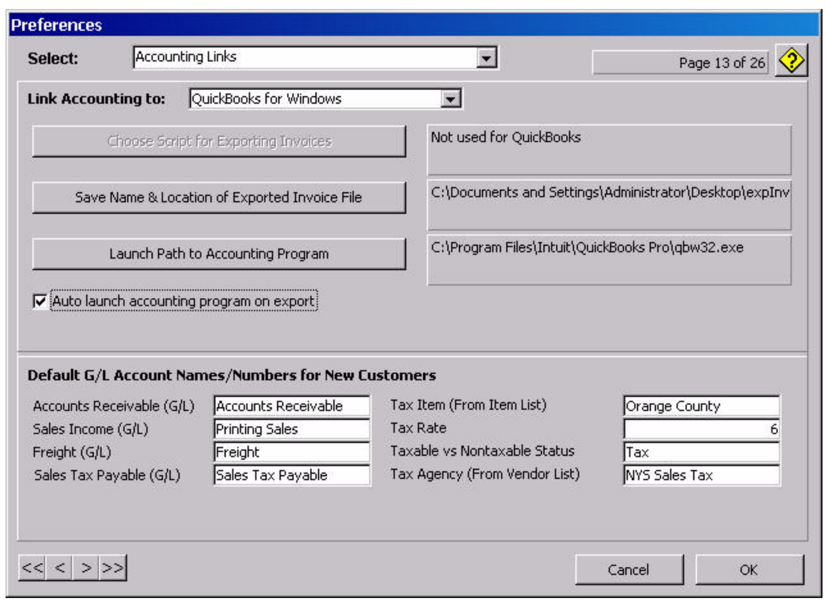
15 Enter the default **Taxable vs Non-taxable Status** for invoice line items to match the Tax Item you selected above.

NOTE

PrintPoint helps you automate this step (normally a manual step in QuickBooks) by defaulting the Taxable or Non-taxable status of the invoice items. Your entry will most likely "**Tax**" or "**Non**".

16 Enter the default **Tax Agency** from your QuickBooks Vendor List.

Your PrintPoint Accounting Links Preferences screen should look similar to this:



Set the Customer Import & Export Defaults

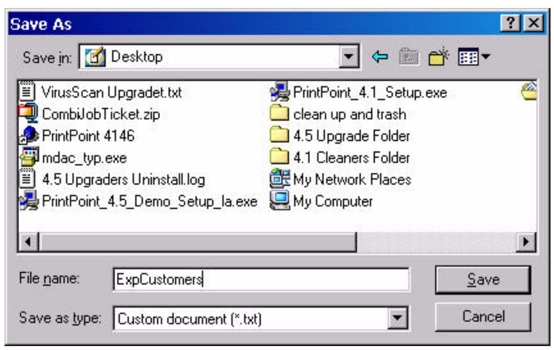
17 Select Customer Import & Export Defaults from the Select drop-down at the top of the Preferences screen.

18 Click on the Save Name & Location of Exp Customer File button.

PrintPoint will display the following Alert dialog:

19 Click OK.

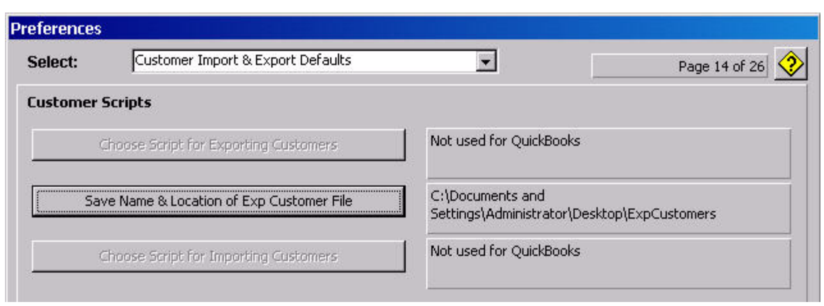
PrintPoint will display a Save As dialog:



20 Type “ExpCustomer” into the File name field.

21 Click the Save button.

Your PrintPoint Customer Import & Export Defaults Preference screen should look similar to this:



Setting Tax Labels on Invoices

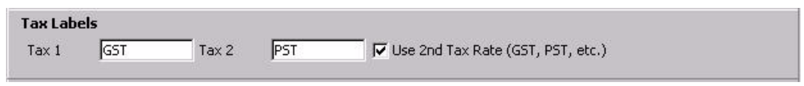
PrintPoint allows you to define your own labels for up to 2 taxes that will appear on invoices.

The label is the name that will appear on the customer records and invoices describing the tax percentage that will actually be applied to invoice items. The word “Tax” would be sufficient in many cases, where the words “GST” and “PST” in Canada would be more appropriate.

22 Select Invoices from the Select drop-down at the top of the Preferences screen.

23 Enter labels for Tax 1.

24 If a 2nd level tax is to be used, enter the label for Tax 2 and select the checkbox titled Use 2nd Tax Rate.



Saving Preferences

Once you have completed the steps above you need to save preferences.

25 Click the OK button at the bottom of the Preferences screen.

Sales Tax Settings

Before you can proceed to the next steps, you must setup your Sales Taxes inside of PrintPoint to match what you have already created in QuickBooks in the previous steps in this chapter.

Refer to the chapter - QuickBooks: Sales Tax Settings for detailed instruction on setting up your Sales Taxes in PrintPoint.

Updating Existing PrintPoint Customers

If you have been using PrintPoint and a now beginning to use QuickBooks, you can batch update your existing customers with the defaults setup in the previous sections.

CAUTION

You must have setup your Sales Tax Settings in the previous section before continuing.

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

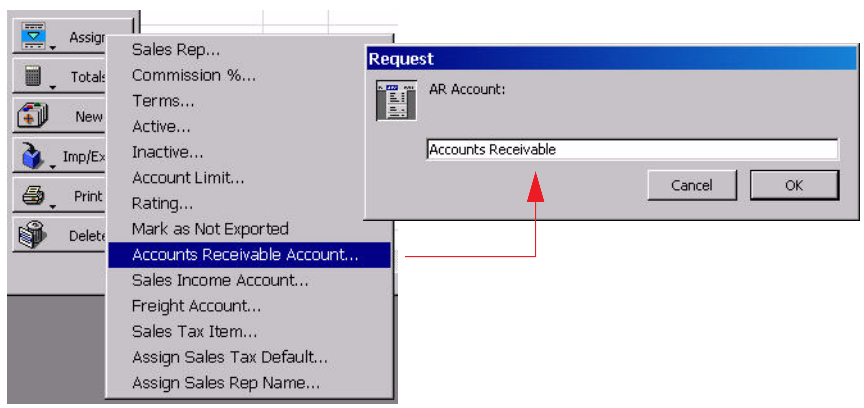
2 To confirm the steps below, it is recommended that you create a custom list view to show the columns for the fields being assigned.

See the chapter - List View Editor for detailed instructions.

3 Select the customers for which you want to assign the General Ledger Account Names.

4 Click the Assign button.

5 Select Accounts Receivable Account from the drop-down menu.



The default Accounts Receivable name will be displayed. You can override this if necessary.

6 Click OK.

7 Repeat Steps 3 - 6 for Sales Income Account, Freight Account, Sales Tax Payable Account, Sales Tax Item, Terms, etc.

Chapter 72

QuickBooks: Importing Customers from QuickBooks

OVERVIEW

PrintPoint has excellent tools to assist you in importing customers created in QuickBooks for Windows into PrintPoint.This chapter will teach you how to:

- Export your customers from QuickBooks.
- Import those customers into PrintPoint.
- Make any specific changes to those customers once they have been successfully imported into PrintPoint.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the QuickBooks Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customer List From QuickBooks
- Importing Customer List into PrintPoint
  - Importing
  - Saving a Preview
- Post-processing customers after importing
  - Adjusting the Customer Ratings
  - Setting Preferences for New Customers
  - Sales Tax Settings

Exporting Customers from QuickBooks

From within QuickBooks for Windows:

1. File menu > Utilities > Export
2. From the Export dialog check Customer List then click OK.
3. At the export dialog box select your Desktop in the Save in Location and name the file "`Customer_List_To_PrintPoint.iif`".
4. Click Save.
5. Click OK when the confirmation dialog "Your Data Has Been Exported" is displayed.

Importing Customer List into PrintPoint

CAUTION

Make a backup of your PrintPoint data before you begin the import process

Importing

From within PrintPoint:

1. Navigator > Customers button
2. Select Imp/Exp button > Import from QuickBooks for Windows from Customer List window.
3. At the Confirm dialog click Continue if you have a backup or Abort to stop the import so you can create a backup.

4 Click OK.

PrintPoint displays a file browser dialog.

5 Select the "Customer_List_To_PrintPoint.iif" file created in the export steps above.

NOTE

PrintPoint displays the Customer Import Preview dialog. The Customer Import Preview dialog allows you to manipulate the data, much like an Excel spreadsheet, before that data is imported into PrintPoint.

6 Review your imported customer data and make any changes by entering a "cell" in the spreadsheet and changing the data.

NOTE

If you need more than one session to review all the customer information before importing, see the section below: Saving a Preview and skip the following steps.

7 Click the Import button, if you are happy with the data and are ready to import. PrintPoint will import your customer list.

CAUTION

If there are any "duplicate" Customer Codes found during the import process, PrintPoint will display a dialog requesting that you temporarily assign the customer a "unique" code. Keep track of these entries, and manually assign these customers unique Customer Codes later.

Be sure to review your customer list in QuickBooks to make sure that these customers are not duplicated there.

8 Click the Select > Show All Records from the customer to show all the records you just imported.

Saving a Preview

If you need more than one session to review all the customer information before importing PrintPoint allows you to save a "copy/preview" of the condition of the file after the modifications you have made. This will give you the opportunity to return to the file with all the changes you have made up to this point and continue the import process.

1 Click the Save Preview button if you are not able to complete the process in a one session.

NOTE

Once you click Save Preview an Alert dialog opens which says, "Your QuickBooks Customer Import Preview has been saved".

2 To re-access this list you select Imp/Exp button > Import from QuickBooks for Windows as described above.
3 Click OK when PrintPoint will display the backup confirmation window again.
4 Click Resume to access the “preview” you were previously working on.
5 Finish editing your customer list.
6 Click the Import button, if you are happy with the data and are ready to import. PrintPoint will import your customer list.

CAUTION

If there are any “duplicate” Customer Codes found during the import process, PrintPoint will display a dialog requesting that you temporarily assign the customer a “unique” code. Keep track of these entries, and manually assign these customers unique Customer Codes later.

Be sure to review your customer list in QuickBooks to make sure that these customers are not duplicated there.

7 Click the Select > Show All Records from the customer to show all the records you just imported

Post-processing customers after importing

Adjusting the Customer Ratings

All customers, when imported into PrintPoint, are given a BB rating. If you would like to change the ratings for any of your imported customers, see the chapter on Customers for instructions on batch assigning the customer rating to groups of customers.

Setting Preferences for New Customers

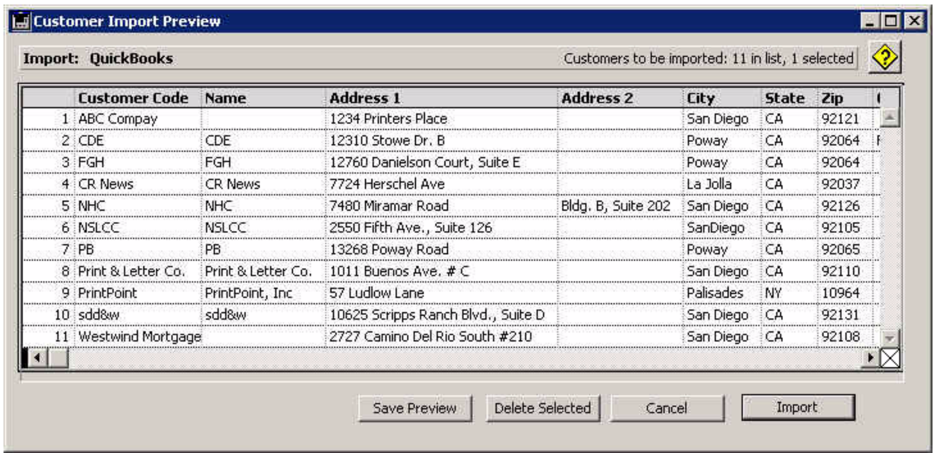
If you intend to use PrintPoint’s invoice module and then export those invoices to QuickBooks, see Preferences > Accounting Links: Default G/L Account Names/Numbers for new Customers.

Sales Tax Settings

If you intend to use PrintPoint’s invoice module and then export those invoices to QuickBooks, see the following two chapters: “QuickBooks: Sales Tax Settings” and “Customers”.

About The Screens

Customer Import Preview Dialog



Info/Buttons	Contents/Usage
Save Preview (button)	Click to save the preview so you can finish the import at a later time.
Delete Selected (button)	Click to delete the selected customer from the import list.
Cancel (button)	Click to cancel the import.
Import (button)	Click to complete the import.

Chapter 73

QuickBooks: Exporting Customers to QuickBooks

OVERVIEW

PrintPoint provides tools to export customers created in PrintPoint to QuickBooks for Windows.

This chapter addresses the settings required in each program to help you successfully integrate your PrintPoint management system with your accounting system, as well as the steps required to export your invoices.

TIP

At the same time PrintPoint exports invoice information, it will also export information on new customers to QuickBooks. If you enter all the customer information into PrintPoint first, you will not have to re-key it into QuickBooks. Once a customer has been exported. It will not be exported again. Any changes made to the customer in PrintPoint after the customer has been exported must be manually updated in QuickBooks.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the QuickBooks Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Customers from PrintPoint
- Importing Customers into QuickBooks.

Exporting Customers From PrintPoint

1. Select Navigator > Customers.

   PrintPoint displays the Customer Review List.
2. From the Customer Review list, highlight the customers you want to export to QuickBooks.
3. Click the Imp/Exp button.
4. Select Export to QuickBooks for Windows from the pull-down menu.

   PrintPoint displays a dialog box which shows the number of customers to be exported.
5. Click Export to export the records.

NOTE

You must have the file save location setup in preferences. File Menu > Preferences > Customer Import & Export Defaults.

Importing Customers Into QuickBooks

1. Open QuickBooks
2. Select File Menu > Utilities > Import...

   The QuickBooks Import File Dialog will be displayed
3. Locate and select the recently exported customer file you just created during the PrintPoint export process.
4. Click the Open button. QuickBooks will import your invoices.

Chapter 74
QuickBooks: Sales Tax Settings

OVERVIEW

If you have set up PrintPoint to link to QuickBooks for Windows in preferences, the Sales Tax Settings Dialog is used to create codes for sales tax, tax items, tax authorities, etc., to parallel the tax settings in QuickBooks for Windows.

These codes are by PrintPoint's customers, during invoice transactions and subsequent exporting of invoices to the accounting package you have selected.

TIP

If you do not intend to link to any accounting programs, you do not need to use this area of PrintPoint. You will be able to enter sales tax codes. rates, etc., directly into customers and invoices.

Sales Tax Definitions

Each of the three accounting packages uses different terms to refer to similar sales tax concepts. The table below presents the definition in the left hand column and the term used by each of the packages in the appropriate column to the right.

Definition	QuickBooks	Where This Information is Found in QuickBooks...
A sales tax	Sales Tax Item	Lists Menu > Item List > > Item Type Column
A number of sales taxes which are applicable to a transaction and which are combined together as a single rate	Sales Tax Group	List Menu > Item List > Item Type Column
Flag indicating whether tax is payable on a line item on an invoice	Tax Code	List Menu > Sales Tax Code Lists

BEFORE YOU BEGIN

You should...	Where this information is found...
Collect your accounting information regarding sales tax codes, rates, authorities, vendors, etc.	In QuickBooks: Lists Menu > Item List > Item Type Column List Menu > Sales Tax Code Lists Vendors Menu > Vendor List
Read the QuickBooks Integration chapter.	In this manual.

STEP-BY-STEP

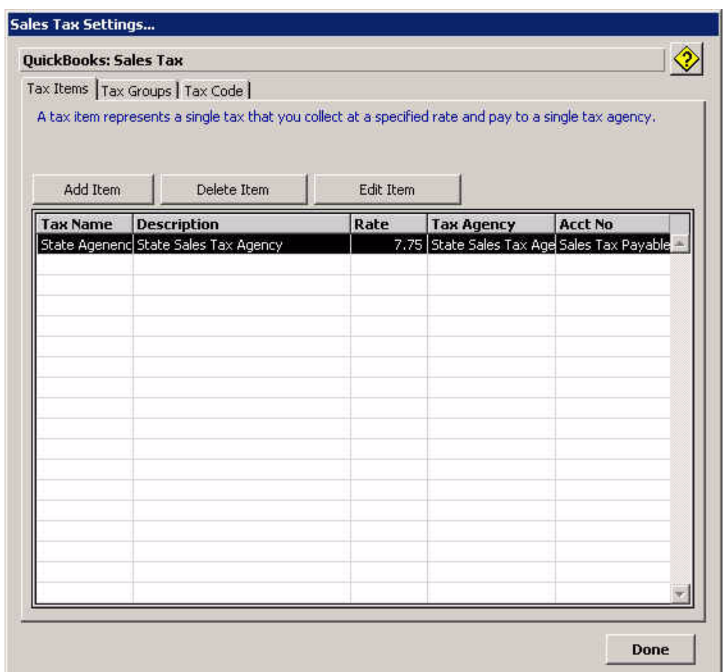
This section includes the following topics:

- Accessing the Sales Tax Settings Dialog
- Setting Up Sales Taxes
  - Adding a Sales Tax Item
  - Editing a Sales Tax Item
  - Deleting a Sales Tax Item
  - Adding a Tax Group
  - Editing a Tax Group
  - Adding a Tax Item to a Tax Group
  - Deleting an Individual Sales Tax Item from a Tax Group
  - Deleting a Tax Group

Accessing the Sales Tax Settings Dialog

1 Accounting Menu > Sales Tax Settings.

PrintPoint displays the Sales Tax Settings Dialog.

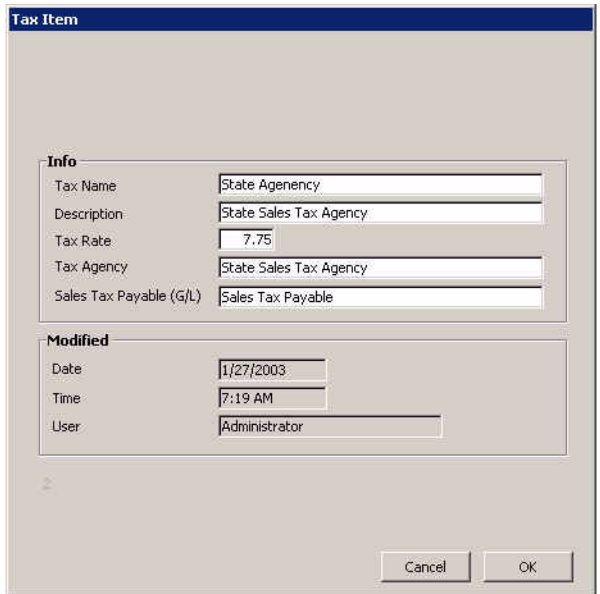


Setting Up Sales Taxes

Adding a Sales Tax Item

1. From the Sales Tax Settings Dialog, select the Tax Items tab.
2. Click the Add Item button.

   PrintPoint displays the Tax Item dialog.



TIP

You enter data tax code information in the Info section of the Tax Code dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3. Complete the fields in the Tax Item dialog as follows.
   a. In the Tax Name field, type the name for the sales tax, e.g., Gwinnett
   b. In the Description field, type a brief description for the sales tax, e.g., Sales tax for Gwinnett County.
   c. In the Tax Rate field, type applicable rate for the sales tax, e.g., 5 or 3.5.
   d. d In the Tax Agency field, type the name of the agency levying the sales tax, e.g., Georgia Revenue Office.
   e. e In the Sales Tax Payable (GL) field, type the General Ledger Account Number for the sales tax item, e.g., 11300.
4. Click the OK button.
5. Repeat steps 2 and 4 for each sales tax item you want to add to the database.
6. Click the Done button to close the Sales Tax Settings Dialog.

Editing a Sales Tax Item

1. 1 From the Sales Tax Settings Dialog, select the Tax Items tab.
2. Select the sales tax record you want to edit.
3. Click the Edit Item button.
4. In the Info fields, overtype the current data as relevant and click the OK button.
5. 5 Click the Done button to close the Sales Tax Settings Dialog.

NOTE

If the edited item is part of a tax group, PrintPoint automatically updates the tax group record.

Deleting a Sales Tax Item

1. From the Sales Tax Settings Dialog, select the Tax Items tab.
2. Select the sales tax record you want to delete.
3. Click the Delete Code button.

NOTE

If the tax code is used in a tax group, PrintPoint displays an Alert message. You will need to delete the tax item from the tax group (see below) before you can complete this procedure.

4. Click the Delete button in the Confirm dialog.
5. Click the Done button to close the Sales Tax Settings Dialog.

Adding a Tax Group

If certain taxes are always levied in a jurisdiction, use this procedure to combine the relevant taxes into a uniquely identified tax group.

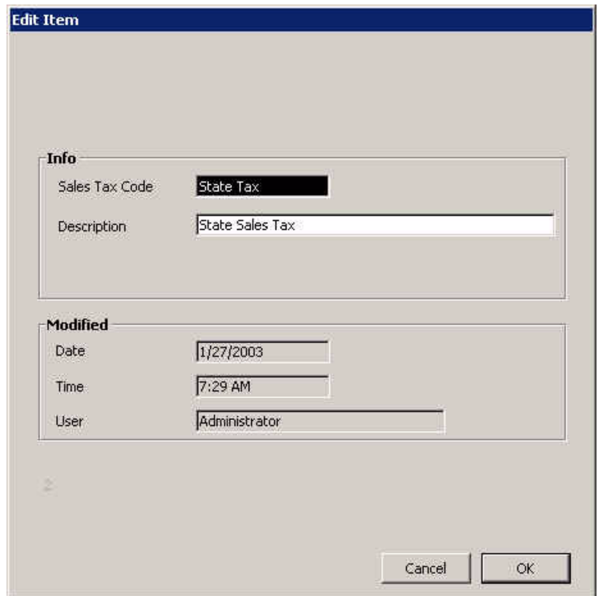
This is a three-stage process.

- You first create the individual tax items as described in Adding a Sales Tax Item above
- You then set up a unique Code for the tax group. See below
- Finally, you add the individual sales tax codes to the tax group. See Adding a Tax Item to a Tax Group below.

1 From the Sales Tax Settings Dialog, select the Tax Groups tab.

2 Click the Add Group button.

PrintPoint displays the Add Group Dialog.



TIP

You enter data tax code information in the Info section of the Tax Group dialog. PrintPoint completes the Modified section of the dialog after you have saved the record to the database (in step 4 below). It is displayed the next time you open this record.

3 Complete the fields in the Tax Group dialog as follows.

a. In the Code field, type the alphanumeric code for the tax group, e.g., State Tax.

b. In the Description field, type a brief description for the tax group, e.g., State Sales Tax.

4 Add the individual sales tax codes as described in Adding a Tax Item to a Tax Group below.

Editing a Tax Group

Use this procedure to change the ID or description of the tax group without affecting the status of the individual sales tax codes in the group.

NOTE

You cannot edit the individual sales tax items from the Tax Group tab. To do that, see Editing a Sales Tax Item above. PrintPoint will then update the group record.

1. From the Sales Tax Settings Dialog, select the Tax Groups tab.
2. Select the tax group record you want to edit.

   In the bottom half of the dialog PrintPoint displays the individual sales tax items associated with the tax group.
3. Click the Edit Group button.
4. Overtype the Tax Code and/or Description fields as appropriate and click the OK button.
5. Click the Done button to close the Sales Tax Settings Dialog.

Adding a Tax Item to a Tax Group

1. From the Sales Tax Settings Dialog, select the Tax Groups tab.
2. Select the tax group to which you want to add individual sales tax items.
3. Click the Add Item button in the bottom half of the dialog.
4. Select an item and click the OK button.
5. Repeat steps 1 to 4 for each individual sales tax item you want to add to the tax group.

   NOTE

   The Total at the bottom of the dialog shows the consolidated tax rate.
6. Click the Done button to close the Sales Tax Settings Dialog.

Deleting an Individual Sales Tax Item from a Tax Group

1. From the Sales Tax Settings Dialog, select the Tax Groups tab.
2. Select the record for the tax group from which you want to delete an individual tax item.

   In the bottom half of the dialog, PrintPoint displays the individual sales tax items associated with the tax group.
3. Select the individual sales tax item and click the Delete Code button.
4. Click Delete Item button.
5. Click the Delete button in the Confirm dialog.
6. Click the Done button to close the Sales Tax Settings Dialog.

Deleting a Tax Group

1. From the Sales Tax Settings Dialog, select the Tax Groups tab.
2. Select the Tax Group you want to delete.
3. 3 Click the Delete Group button.

4 4 Click the Delete button in the Confirm dialog.

NOTE

The individual sales tax items associated with the tax group are not deleted from the database. To delete them, see Deleting a Sales Tax Item above.

5 5 Click the Done button to close the Sales Tax Settings Dialog.

Specifying the Taxable Status of Invoice Line Items

Use this procedure to create up to 25 categories for invoice line items that are taxable or non-taxable.

1 From the Sales Tax Settings Dialog, select the Tax Code tab.

2 Double-click a row.

PrintPoint displays the Item Tax Type dialog.

3 To specify an invoice line item as taxable or non-taxable:

a. In the Tax Code field, type a unique code for the invoice line item.
a. In the Description field, type a brief description of the invoice line item.
a. If the invoice line item is taxable, click the Taxable checkbox to tick it.
b. Click the OK button.

4 Click the Done button to close the Sales Tax Settings Dialog.

TIP

To edit a taxable status, follow the general procedure described above and overtype the current data.

TIP

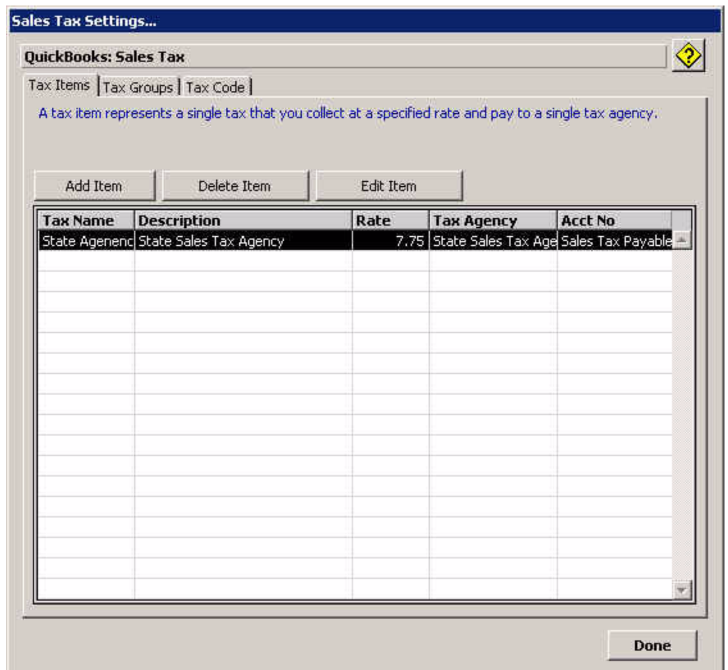
To delete a tax item type, follow the general procedure described above, but place a hyphen in the Code and Description fields and uncheck the Taxable checkbox if ticked.

About The Screens

Sales Tax Settings Dialog

Tax Items Tab

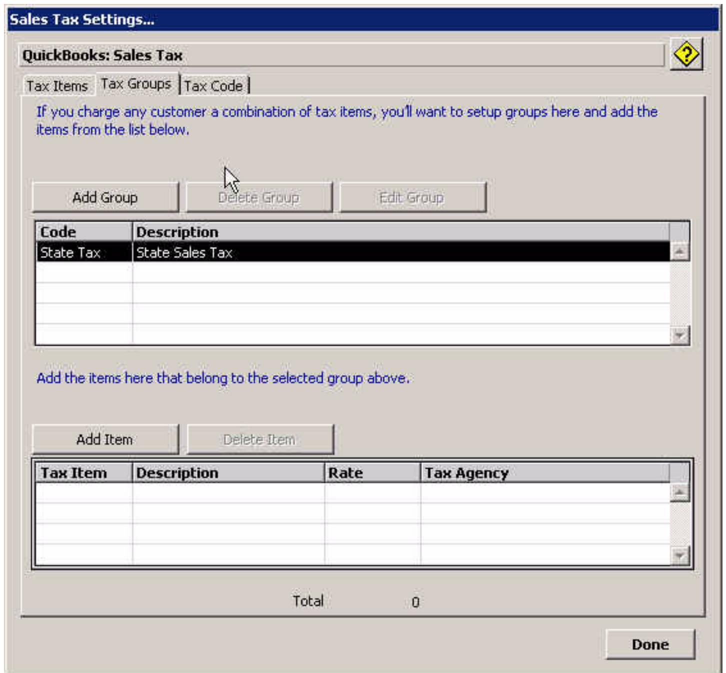
This screen displays details of the tax items currently recorded on the PrintPoint database.



Column Title	Description
Tax Name	ID of the sales tax
Description	Brief description of the sales tax
Rate	Rate of sales tax levied
Tax Agency	Name of the agency levying the tax
Acct No	General Ledger account number

Tax Groups Tab

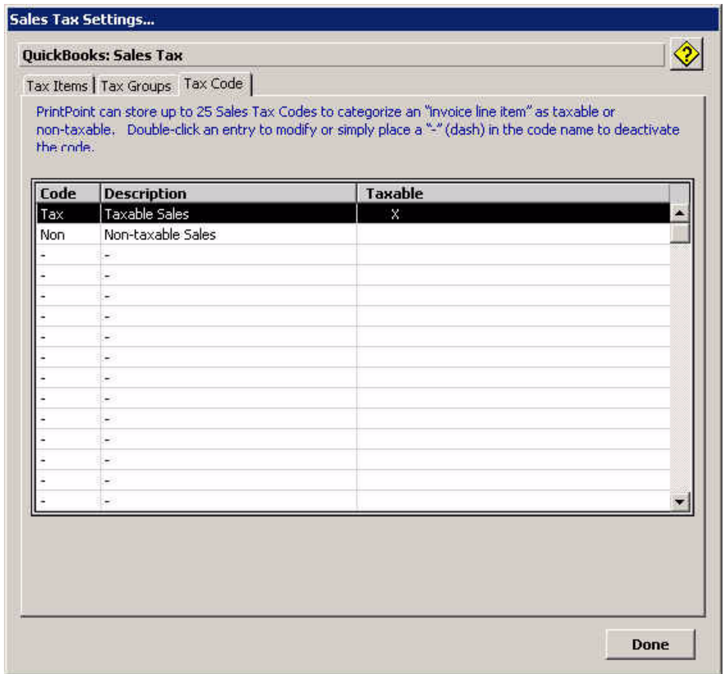
This screen displays details of the combinations of sales taxes relating to different jurisdictions currently recorded on the PrintPoint database.



Column Title	Description
Tax Group Subsection (in the top half of the dialog)	
Code	Unique ID for a tax group made up of a one or a number of tax items
Description	Brief description of a tax group
Tax Item Subsection (in the bottom half of the dialog)	
Tax Item	ID of the sales tax
Description	Brief description of the sales tax
Rate	Rate of sales tax levied
Tax Agency	Name of the agency levying the tax
Total	The sum of the individual tax rates in the tax group

Tax Code Tab

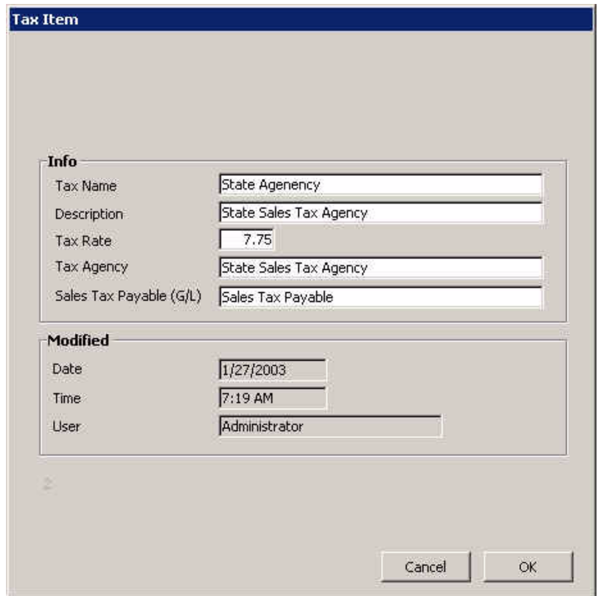
This screen displays the details of which line items on invoices are taxable or non-taxable.



Column Title	Description
Code	Unique ID for taxable status of a line items on an invoice
Description	Brief description of the taxable status of a line items on an invoice
Taxable	Flag indicating whether tax is payable on a line item on an invoice

Tax Item Add/Edit Dialogs

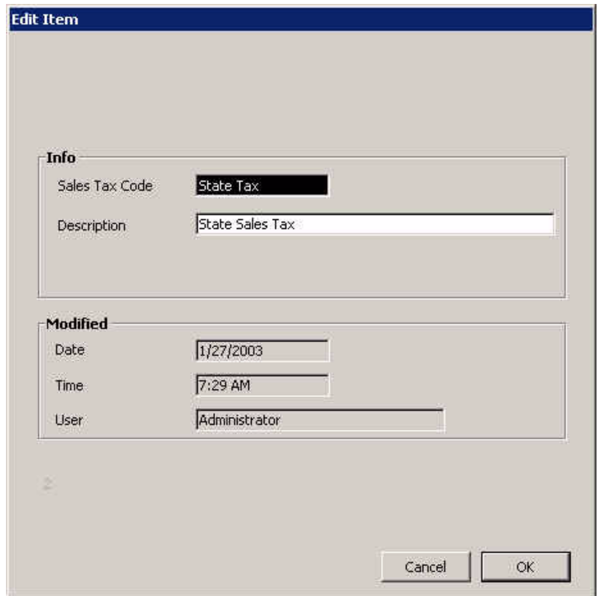
The screens on which you add or edit tax item data have the same fields.



Fields	Description
Info section	
Tax Name	ID of the sales tax
Description	Brief description of the sales tax
Tax Rate	Rate of sales tax levied
Tax Agency	Name of the agency levying the tax
Sales Tax Payable (GL)	General Ledger account number
Modified section	
Date	PrintPoint date on which the data was saved to the database
Time	PrintPoint time at which the data was saved to the database
User	The name/ID of the person who entered the data

Group Tax Entry/ Edit Dialogs

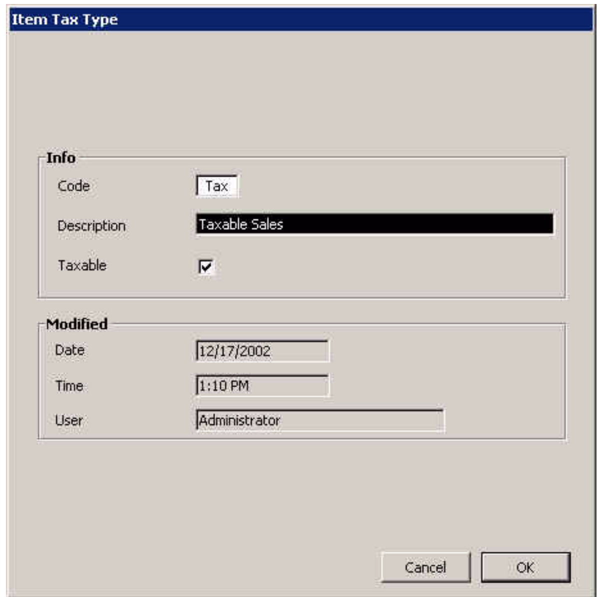
The screens on which you add or edit group tax data have the same fields.



Fields	Description
Info section	
Sales Tax Gruop Code	Unique ID of a group of tax items (tax group)
Description	Brief description of the group of tax items (tax group)
Modified section	See Tax Item Add/Edit Dialog above

Item Tax Type Dialog

Use this screen to create up to 25 categories for taxable and non-taxable invoice line items.



Column Title	Description
Tax Code	ID of the invoice category
Description	Brief description of the invoice category
Taxable	Flag indicating whether the line item is taxable
Modified section	See Tax Item Add/Edit Dialog above

Chapter 75

QuickBooks: Exporting Invoices To QuickBooks

OVERVIEW

PrintPoint provides tools to export invoices created in PrintPoint to QuickBooks for Windows. In order to complete the export process, you have to make sure that the information in PrintPoint and QuickBooks is properly synchronized.

This chapter addresses the settings required in each program to help you successfully integrate your PrintPoint management system with your accounting system, as well as the steps required to export your invoices.

TIP

At the same time that PrintPoint exports invoice information, it will also export information on new customers to QuickBooks. If you enter all the customer information into PrintPoint first, you will not have to re-key it into QuickBooks. Once a customer has been exported. It will not be exported again. Any changes made to the customer in PrintPoint after the customer has been exported must be manually updated in QuickBooks.

This chapter will teach you how to:

- Export your Invoices out of PrintPoint
- Import those Invoices into QuickBooks.

BEFORE YOU BEGIN

You should...	Where this information is found...
Read the QuickBooks Integration chapter.	In this manual.

STEP-BY-STEP

This section includes the following topics:

- Exporting Invoices from PrintPoint
- Importing Invoices in QuickBooks.

Exporting Invoices From PrintPoint

1. Select Navigator > Invoices.

   PrintPoint displays the Invoice Review List.
2. From the Invoice Review List, select the invoices you want to export to QuickBooks.
3. Click the Imp/Exp button.
4. Select Export to QuickBooks for Windows from the drop-down menu.

   PrintPoint displays a dialog box which shows the invoices to be exported.
5. Click OK to export the records.

PrintPoint will now create one file, including both your exported customers (if required) and your exported invoices.

Importing Invoices Into QuickBooks

1. Select File Menu > Utilities > Import...

   The QuickBooks "Import" open file dialog will be displayed
2. Locate and select the recently "exported invoices.iif" file you just created during the PrintPoint export process. It will have "today's" date as part of the file name.
3. Click the Open button.

NOTE

If this file is not deleted after the import into QuickBooks, it will be appended to provided you have not changed the name of the file. With this in mind, you could export several times from PrintPoint and end up with one file to import into QuickBooks. In some cases, this may be the preferred technique.

CAUTION

If you have "re-exported" an invoice it will appear twice in the file, creating a problem on the QuickBooks import. You will receive a warning that you have two invoices with the same number. If there is a possibility that this may occur, you should open the ".iff" file (using Excel or another easy to edit word processor) prior to importing to clean up the duplicate information.

NOTE

Best Practice: if you have created duplicate invoice entries and received the warning in QuickBooks on attempting to import.

A: Trash your “.iff” file before exporting from PrintPoint.

B: Delete the Invoices in QuickBooks.

C: Mark as the invoices “not exported” in PrintPoint.

D: Re-export the invoices from PrintPoint.

Data Collection & Job Costing

Chapter 76

Data Collection & Job Costing Introduction

OVERVIEW

PrintPoint's Data Collection and Job Costing Module has these main purposes:

- It allows you to enter information about what is to be charged to a job as operations occur on the shop floor, pre-press department or purchases are made on the outside. Data is collected either directly from PC's or Mac's or from "timesheets" that were filled-in manually and then later entered into the computer.
- It provides both information on what a job has actually cost, based on the input collected vs. estimated costs.
- It provides real-time job status and tracking information.

The module allows data to be input from either a keyboard, a barcode scanner or wand, or a combination of keyboard and barcode reader.

These are the main components of most jobs:

- Time (labor) expended
- Paper used
- Materials used
- Outside Services that are purchased and must be allocated to the job.

PrintPoint's Philosophy of Job Costing/Data Collection

The unique structure of PrintPoint's Job Costing and Data Collection System allows users the option to exert an extraordinary level of control over the completeness of the transactions that are entered.

When an employee receives the job ticket and is ready to log in an operation, they enter their employee number, job number, and one operation code. Optionally, via the Watchdog options selected during the Job Costing Express Setup, that operation code can "require" that other pieces of information are collected at the same time. This will speed up the input of the information and enforce certain collections, since the operator will be unable to complete the transaction without providing all the information you have specified.

For example, you can ensure that an operator enters the amount of paper used while simultaneously recording the press time, or an operator who is making plates enters the number of plates used while simultaneously recording the time it takes to strip, burn and process the plates.

Entries that "should have been made" but were not (because the operator chose to ignore the warning message) are reported on Job Cost List View as "skipped operations. The administrator can then fill in the correct data when it is known.

The individual records are displayed in the Job Costing Reports area, and are used for the built-in End-of-Shift Report and Job Cost Reports, as well as for user-defined QuickReports and SuperReports. They include all the job/employee/operation information, as well as the specifics about each different component that was collected.

Each is coded with the appropriate code for time, material, paper, outside service or pause. You can search and sort by every detail, including Job Number, Employee, Dates, Times, Operation Codes and Names, Material Codes and Names, Paper Codes and Names, Outside Service Names, Department Codes and Names, Cost Center Codes and Names, or virtually any combinations of identifiers you choose.

Data Collection Chapters

This section includes the overview of the Job Cost/Data Collection Chapters including the steps you will take to setup for data collection, do the actual collection, and then print reports for review.

- Express Setup Chapter
  - Departments
  - Cost Centers
  - Update Budgeted Hourly Rates
  - Operation Codes
  - Controls on what information must be entered
  - Start & Stop Stations
  - Internet Station
  - Printing the Express Setup
- Materials Chapter
  - Adding materials
  - Reviewing materials
  - Deleting materials
- Employees Chapter
  - Adding employees
  - Auto-Start Time
  - Reviewing employees
  - Deleting employees
  - Printing the End of Shift Report for Individual Employees
- Data Collection Chapter
  - Starting an Operation
  - Collecting Time

- Ending an Operation
- Collecting Materials
- Collecting Paper
- Collecting Outside Services

■ Job Costing & Reporting Chapter

- Reporting Job Costing Information
  a. Viewing Active Records
  b. Editing Active Records
  c. Searching for “Skipped” Records
  d. Job Cost Report
  e. Skipped Items Report

- End-of-Shift Reports
  a. End-of-Shift Report Contents
  b. Printing the End-of-Shift Report

- Viewing and Updating Real Time Job Costing Information from the Electronic Job Ticket
  a. Job Cost Tab
  b. Accessing Job Cost Information
  c. Updating Job Cost Totals

Chapter 77
Data Collection: Express Setup

OVERVIEW

PrintPoint's Express Setup is used to setup and maintain Operation Codes, which are user-defined 3-tier codes, comprised of Department, Cost Centers, and Operation Codes.

TIP

See the Table below for a graphical representation of the following examples

- Departments is the top level of the 3-tier system in your shop. They are usually stored as 2-digit codes such as 10, 20, 30, etc.

  Example Design, Pre-Press, Press, Post-Press, Outside Service all all common examples of departments.

- Cost Centers are under the umbrella of departments and are at the middle level of the 3-tier system. Each Department can be composed of one or more Cost Centers. They are usually stored as 3-digit codes such as 010, 020, 030, etc.

  Example The Design Department may have Creative Services as a Cost Center, while the Pre-Press Department may have Camera & Stripping and Proofs & Plates as Cost Centers. Similarly, the Press Department may be setup with the Hamada and Ryobi presses as Cost Centers.

- Operation Codes fall within the scope of Cost Centers and are the activities which are actually performed in and entered by employees. They are usually stored as 3-digit codes such as 010, 020, 030, etc.

  The net result of the combined Department Code/Cost Center Code/ Operations code will take the format XX-XXX-XXX (10-010-020)

  Example The Creative Services Cost Center, which is part of the Design Department, could be setup with Operation Codes for Design, Photo Retouching, File Search, and Page Layout.

  The Camera & Stripping Cost Center, which is part of the Pre-Press Department, could have Operations Codes for Line Shots, Halftones, and Stripping.

  The Proofs and Plates Cost Center, which is also part of the Pre-Press Department, could have Operation Codes for Dylux Proof and Platemaking - exposures.

  The Hamada Cost Center, part of the Press Department, could be setup with Operation Codes for Make Ready, Running, and Wash Up.

The Ryobi Cost Center, which is also part of the Press Department, could be also be setup with the very same Operation Codes for Make Ready, Running, and Wash Up.

TIP

In this last case the MakeReady Operation Code for the Ryobi Cost Center can be accounted for separately from the MakeReady Operation Code for the Hamada Cost Center.

The following table further illustrates the relationships between Departments, Cost Centers and Operation Codes.

Department	Cost Center	Operation Code
Design	Creative Services	Design Photo Retouching File Search Page Layout
Pre-Press	Camera & Stripping	Line Shots Halftones Stripping
	Proofs & Plates	Dylux Proof Platemaking - exposures
Press	Hamada	Make Ready Running Wash Up
	Ryobi	Make Ready Running Wash Up

BEFORE YOU BEGIN

You should...	Where this information is found...
Set the PrintPoint Data Collection Preferences	File Menu > Preferences > Data Collection (Described in Preferences chapter)
Establish the Job Stations and Internet stations.	On-The-Fly during the Express Setup or File Menu > List Editor > Job Station/ Job Station - Internet
Decide the Departments, Cost centers and the Operations for each cost center.	Using the examples provided in the PrintPoint sample datafile, revise your selection first on paper and then here in the Express Setup.

STEP-BY-STEP

This section discusses the use of the Express Setup Dialog to setup the data collection/job costing process for the following areas:

- Departments
- Cost Centers
- Operation Codes
- Watchdog Controls for Operation Codes
  - Chargeable Operation
  - Collect Material
  - Collect Time
  - Collect Paper
  - Pause Actions
  - Collect Outside Services
  - Start & Stop Stations
  - Internet Station
- Printing the Express Setup

Departments

Adding a Department

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section, and the buttons are titled New Department and Delete Department.

2 Select the New Department button.

PrintPoint displays the recommended next Department Code.

TIP

Leave room (for example, 10 numbers) between your Department Codes so that you can easily insert additional Department Codes later.

NOTE

You can assign your own Code by over-writing the recommended Code.

3 Enter the Department Name.

Deleting a Department

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section and the buttons are titled New Department and Delete Department.

2 Select the Department you want to delete from the Department list.

3 Click the Delete button.

4 Click Yes to the dialog box.

NOTE

Deleting a Department also deletes all associated Cost Centers and Operations.

Cost Centers

Adding a Cost Center

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section, and the buttons are titled New Department and Delete Department.

2 Select the Department for which you wish to add a Cost Center.

PrintPoint highlights the selected Department.

3 Click on the Cost Center section.

NOTE

The purple checkmark moves to the Cost Center Section, and the button is now titled New Cost Center.

4 Select the New Cost Center button.

5 PrintPoint displays the recommended next Cost Center Code.

TIP

Leave room (for example, 10 numbers) between your Cost Center Codes so that you can easily insert additional Cost Center Codes later.

NOTE

You can assign your own Code by over-writing the recommended Code.

6 Enter the Cost Center Name.

7 Enter the BHR (Budgeted Hourly Rate) for that Cost Center.

NOTE

The BHR entered becomes the default hourly rate for all Operations in that Cost Center.

TIP

You can override BHR's for specific Operations.

Update Budgeted Hourly Rates

There may be times when it is convenient to change the Budgeted Hourly Rates for many Operations to the same value, at the same time.

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section.

2 Select the Department for which you wish to change the BHR's for all Operations for a specific Cost Center.

PrintPoint highlights the selected Department.

3 Click on the Cost Center section.

NOTE

The purple checkmark moves to the Cost Center Section.

4 Select the Cost Center for which you wish to change the BHR's for all Operations.

PrintPoint displays the selected Cost Center.

5 Enter the BHR you wish to assign to all Operations for the selected Cost Center.

6 Click the Update Op(eration) BHRs button to assign the Cost Center's default BHR for all Operation Codes.

NOTE

You can override BHR's for specific Operations.

Deleting a Cost Center

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section.

2 Select the Department from which you wish to delete a Cost Center.

PrintPoint highlights the selected Department.

3 Select the Cost Center you want to delete from the Cost Center list.

NOTE

The purple checkmark moves to the Cost Center Section.

4 Click the Delete button.

5 Click Yes to the dialog box.

NOTE

Deleting a Cost Center also deletes all associated Operations.

Operation Codes

Adding an Operation Code

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section.

2 Select the Department and Cost Center for which you wish to add an Operation.

NOTE

The purple checkmark is in the Cost Center Section.

PrintPoint highlights the selected Department and Cost Center.

TIP

Check to make sure you have selected the correct Department and Cost Center.

3 Click on the Operation Code section.

NOTE

The purple checkmark moves to the Operation Code Section, and the button is now titled New Operation.

4 Select the New Operation button.

5 PrintPoint displays the recommended next Operation Code.

TIP

Leave room (for example, 10 numbers) between your Operation Codes so that you can easily insert additional Operation Codes later.

NOTE

You can assign your own Code by over-writing the recommended Code.

6 Enter the Operation Name.

PrintPoint displays the default BHR (Budgeted Hourly Rate) for that Operation.

7 Enter the BHR if you want to override the default BHR for that Operation.

Deleting an Operation Code

1 Job Costing Menu > Express Setup.

PrintPoint displays the Job Costing Express Setup screen.

NOTE

The purple checkmark is in the Department Section, and the buttons are titled New Department and Delete Department.

2 Select the Department and Cost Center from which you wish to delete an Operation.

PrintPoint highlights the selected Department and Cost Center.

TIP

Check to make sure you have selected the correct Department and Cost Center.

3 Select the Operation Code you want to delete from the Operation Code list.

4 Click the Delete button.

5 Click Yes to the dialog box.

Watchdog Controls For Operation Codes

PrintPoint allows you to enforce some very specific controls on what information must be entered by an employee.

For example, you can:

- Ensure that a specific operation is Chargeable, even if the rest of the job is non-chargeable.
- Ensure that an operator enters the amount of paper used when he/she is simultaneously recording the time while running the press.
- Ensure that an operator who is making plates enters the number of plates used when he/she is simultaneously recording the time it takes to strip, burn and process the plates.

The operator will be unable to complete the transaction without receiving a warning that he/she has not provided all the information you have specified.; if he/she chooses to ignore the alert, an entry will be printed on the Outstanding Data Collection Items Report.The following checkboxes allow you to pre-define the entries that operators will need to enter into the system.

They can be combined in a variety of ways to help you enforce that all data is collected by employees when and where you expect it to be.

Chargeable Operation

1 Place a mark in the Chargeable checkbox if the operation is normally chargeable.

TIP

When using data collection, the operator can overwrite any operation and flag it as non-chargeable.

Collect Material

1 Place a mark in the Collect Material checkbox if the operator needs to enter materials before accepting the record. The action of recording material can be “associated” with a time recording activity or can be set up as a separate activity.

Example If the employee is collecting time on the platemaking process and you want to ensure that he/she will record the chemicals, number of plates and number of flats, etc., place a mark in both the the Collect Material checkbox and the Time checkbox. When the employee tries to accept the Time portion of the job, he/she will be prompted to add at least one material if none have already been collected during this session.

Collect Time

1 Place a mark in the Collect Time checkbox if time is to be collected.

Collect Paper

1 Place a mark in the Collect Paper checkbox if the user needs to enter Paper before accepting the record.

Is A Pause Action

During the process of data collection, there are many times when a time-based activity will need to be paused.

Rather than forcing the employees to create additional records just for the pause, PrintPoint has added a Pause button on the data collection activity entry screen.

When a user clicks this button, he/she will be presented with a list of Pause Operations directly associated with the department and cost center of the original time record. When he/she selects one of these options, a new data collection activity record will be created in the background for them, filling in all the information without their intervention.

Example

1 Create an operation called “Waiting for Instructions”.

NOTE

It can be a part of any department and cost center. In many cases, the same explanation for pausing will appear in many departments and cost centers. There are certainly many times in all departments when your employees are “Waiting for Instructions” or “Waiting for Customer Approval” right in the middle of doing their work.

2 Decide if the pause is chargeable or not and place a mark in the Chargeable checkbox if applicable.

3 Place a mark in the Is a Pause Action checkbox.

Is An Outside Services

Outside Services are recorded in a similar way to any other cost. For the most part, these costs are independent of time, materials, etc., and are therefore setup only as Outside Service operations.

If you setup the operation as described next, then an employee who records outside services into the system will only be required to fill in the information on the Outside Services tab of the Data Collection record.

1. Create an operation called “Outside Services”.

   NOTE

   It can be a part of any department and cost center or you can create a special department called “Outside Services” with a special Cost Center also called “Outside Services”. Or, you can be more specific and sub-categorize the Cost Centers to track the categories of Outside Services you purchase.

2. Decide if the Outside Service is chargeable or not and place a mark in the Chargeable checkbox if applicable.
3. Place a mark in the Is an Outside Service checkbox.

Start & Stop Stations

The Data Collection and Job Costing module is fully integrated within PrintPoint. You can associate every Operation Code with the Job Tracking System so that when an operator enters an Operation Code, anyone on the network can instantaneously know the applicable Job Tracking Station.

Example Conference in the Creative Services Cost Center:

Data Collection Button	Job Tracking Station
Start	CreativeSvcs/Conf - IN
Stop	CreativeSvcs/Conf - COMPLETE

1. Select the Start Station from the pop-up list.

   PrintPoint displays the Start Station on all Job Tracking screens.
2. Select the Stop Station from the pop-up list.

   PrintPoint displays the Stop Station on all Job Tracking screens.

Internet Station

NOTE

Some PrintPoint customers allow their own clients to use either the Internet or an intranet to view the status of their own jobs. PrintPoint allows you to “filter” the status.

Example The Komori press is currently being MadeReady on a specific job. When the user looks up the status via the Internet or intranet, we want to display that the job is underway, and not that it just started.

Data Collection Dept./Cost Center/ Operation Code	Internet Station
Press/Komori/MakeReady	On Press

Printing the Express Setup

While you are creating your Department/Cost Center/Operation code structure, you may want to print it to review your organization.

The print button has six options:

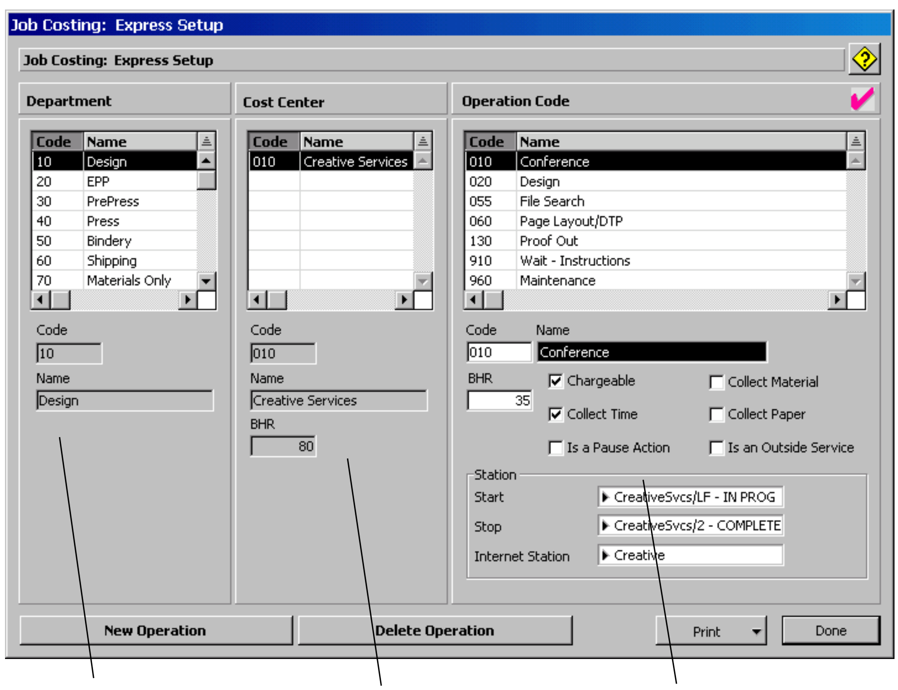
Selection	Result
Print	Prints the operation code list
Print Preview	Previews the operation code list
Sort & Print	Displays a sort editor and then prints the operation code list
Sort & Print Preview	Displays a sort editor and then previews the operation code list
Search & Sort & Print	Displays a sort editor, then a query editor and then prints the operation code list
Search & Sort & Print Preview	Displays a sort editor, then a query editor and then previews the operation code list

About the Screens

The following screens are used for Data Collection/Job Costing:

- Express Setup
  - Department Subsection
  - Cost Center Subsection
  - Operation Code Subsection
- Express Setup Print Menu

Express Setup

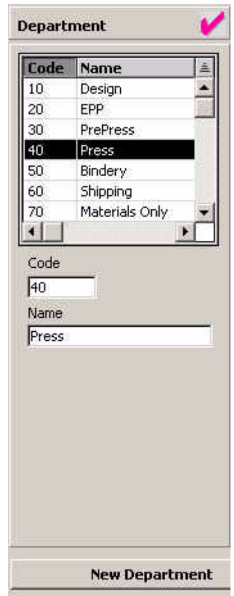


Department SubSection
See Details on following pages

Cost Center SubSection
See Details on following pages

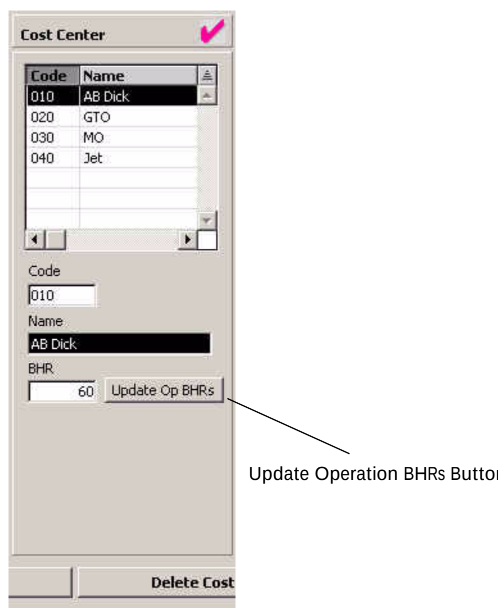
Operation Code SubSection
See Details on following pages

Department Subsection



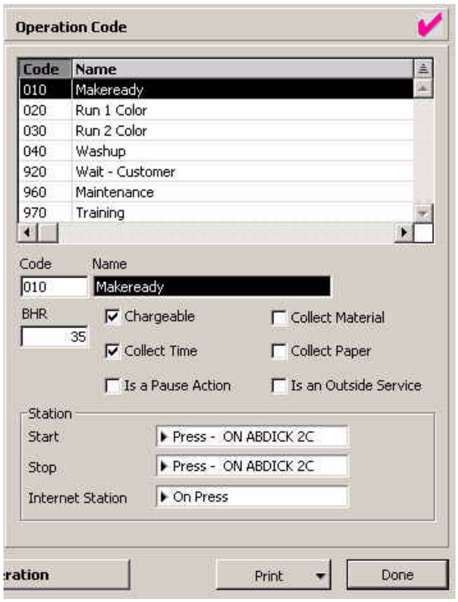
Field/Button Name	Contents/Usage
Department Section	Displays Department Code and Name
Code	Department Code
Name	Department Name

Cost Center Subsection



Field/Button Name	Contents/Usage
Cost Center Section	Displays Cost Center Code and Name
Code	Department Code
Name	Department Name
BHR	Billable Hourly Rate
Update Op BHRs (button)	Used to update/change the BHR

Operation Code Subsection

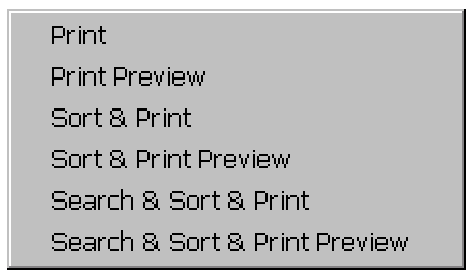


Field/Button Name	Contents/Usage
Cost Center Section	Displays Cost Center Code and Name
Code	Department Code
Name	Department Name
BHR	Billable Hourly Rate
Chargeable (checkbox)	Denotes if a chargeable operation (true/false)
Collect Time (checkbox)	Makes operation a mandatory time collection (true/false)
Is a Pause Action (Checkbox)	Denotes if operation can be paused (true/false)
Collect Material (checkbox)	Makes operation a mandatory material collection (true/false)

Field/Button Name	Contents/Usage
Collect Paper (checkbox)	Makes operation a mandatory paper collection (true/false)
Is an Outside Service (checkbox)	Makes operation an outside service collection (true/false)
Start	Denotes what station to show job in tracking list when operation is started
Stop	Denotes what station to show job in tracking list when operation is stopped
Internet Station	Denotes what station to show job in internet tracking list

Express Setup Print Menu

The Express Setup Print button/menu has six options



Menu Item	What Gets Printed
Print	Prints the operation code list
Print Preview	Previews the operation code list
Sort & Print	Displays a sort editor and then prints the operation code list
Sort & Print Preview	Displays a sort editor and then previews the operation code list
Search & Sort & Print	Displays a sort editor, then a query editor and then prints the operation code list
Search & Sort & Print Preview	Displays a sort editor, then a query editor and then previews the operation code list

Chapter 78
Data Collection: Materials

OVERVIEW

Materials are a key component of the data collection/job costing process. Before you begin collecting any data, you will need to setup materials.

TIP

The only material that is not part of this chapter is paper. That information described with the paper database under the following section:

Paper Chapter: Job Cost Tab

BEFORE YOU BEGIN

You should...	Where this information is found...
Identify the basic materials used in your processes, excluding paper.	In your accounting package or inventory information.
Set your Material Auto-Tab Filter preferences for the length of Material Codes if you do not intend to use bar code scanners. TIP If you are using barcode scanners, you should NOT enter anything in this preference field.	File Menu > Preferences > Data Collection > Employee Auto-Tab Filter

STEP-BY-STEP

This section includes the following topics:

- Adding materials
- Reviewing materials
- Deleting materials

Adding a Material

1 Select Job Costing Menu > New Material.

PrintPoint displays the Material Definition Input Screen.

2 Enter the Material Code for the material you want to add.

NOTE

The Material Code should be the length that was defined for the Material Auto-Tab Filter in Preferences and can be alphanumeric (a mixture of letters and numbers.

TIP

Click the Sort button to see the Material Code and Name for all materials in the database.

3 Enter the Material Name.

4 Select the Unit Name from the Units Choice List.

NOTE

The Unit Name is used to describe the material.

Example plates, skids

5 Enter the Unit Cost for the material.

6 Select the Unit of Measure from the Unit of Measure Choice List.

7 Click the Chargeable checkbox if the material is normally chargeable.

TIP

When using data collection, the operator can flag any material as non-chargeable.

8 Clock OK to accept the new material.

Reviewing Materials

1 Select Job Costing Menu > Review Material.

PrintPoint displays the Material List.

NOTE

Find any specific materials in the database by clicking on the Search button to access the Search Editor or by clicking on the Sort button to access the Sort Editor.

Deleting Materials

1 Select Job Costing Menu > Review Material.

PrintPoint displays the Material List.

NOTE

Find any specific materials in the database by clicking on the Search button to access the Search Editor or by clicking on the Sort button to access the Sort Editor.

2 Select and highlight the material(s) you want to delete.

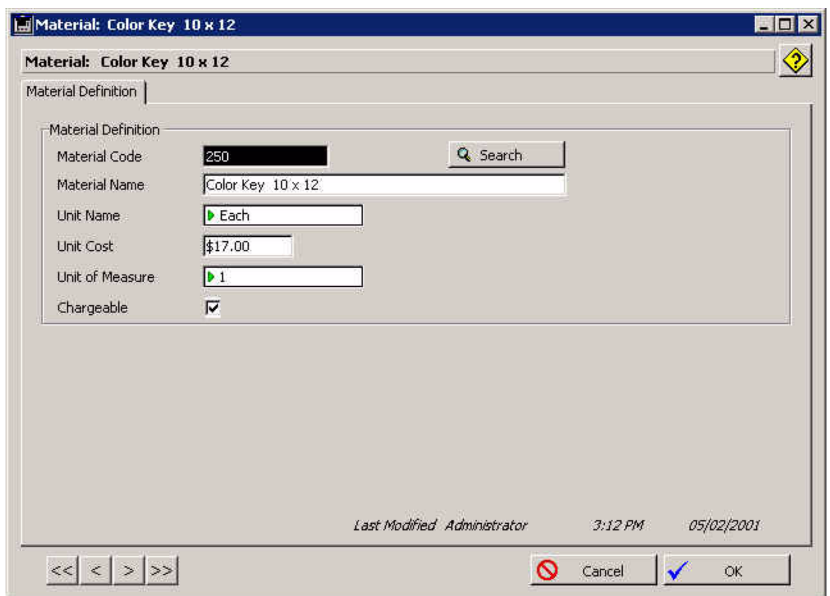
3 Click the Delete key.

About the Screens

The following screens are used for Data Collection/Job Costing:

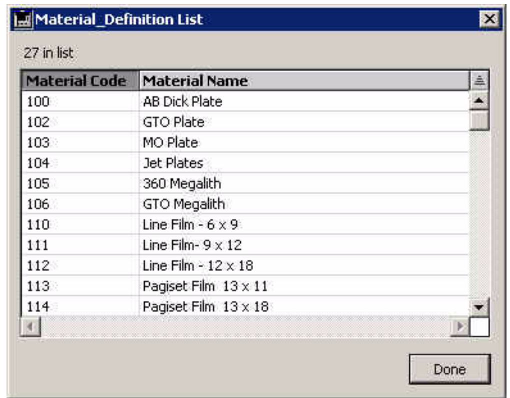
- Material Entry Tab
- Material Definition Search For Existing Codes Dialog

Material Entry Tab



Field/Button Name	Contents/Usage
Material Code	Code number associated with material
Material Name	Name of material
Unit Name	Units material is sold
Unit Cost	Cost per Unit
Unit of Measure	How many pieces per unit
Chargeable	Denotes if material is chargeable (true/false)

Material Definition Search For Existing Codes Dialog



Field/Button Name	Contents/Usage
Material Code	Code number associated with material
Material Name	Name of material

Chapter 79
Data Collection: Employees

OVERVIEW

Employees are the key players in the data collection/job costing process. As a job moves through the shop, employees use either bar code scanners or mice and keyboards to log in and collect the time and materials used for work performed on their part of the job.

Depending on the privileges granted, employees can make decisions about the data entered, including chargeablity, notes and comments. Additionally, you control (using the Watchdog options defined in the Express Setup dialog) the data they must capture.

BEFORE YOU BEGIN

You should...	Where this information is found...
Gather the names and key information of the employees who will be collecting data	In your accounting packages or payroll information.
Set your Employee Auto-Tab Filter preferences for the length of Employee Codes if you do not intend to use bar code scanners. TIP If you are using barcode scanners, you should NOT enter anything in this preference field.	File Menu > Preferences > Data Collection > Employee Auto-Tab Filter

STEP-BY-STEP

This section includes the following topics:

- Adding employees
- Auto-Start Time
- AutoStart Timers
- Reviewing employees
- Deleting employees
- Printing the End of Shift Report for Individual Employees

Adding an Employee

1. Select Job Costing Menu > New Employee.

   PrintPoint displays the General Tab of the Employee Input Screen.
2. Enter the Employee Number for the employee you want to add.

   NOTE

   If you are not using barcode scanners, the Employee Number should be the length that was defined for the Employee Auto-Tab Filter in Preferences.
3. Enter the employee’s First Name.
4. Enter the employee’s Last Name.
5. Enter the employee’s Address - 1.
6. Enter the employee’s Address - 2.
7. Enter the employee’s City.
8. Enter the employee’s State.
9. Enter the employee’s Zip.
10. Enter the employee’s Country.
11. Enter the employee’s Telephone Number.
12. Enter the employee’s Fax Number.
13. Enter the employee’s Beeper.
14. Enter the employee’s E-Mail-1.
15. Enter the employee’s E-Mail-2.
16. Enter the employee’s SSN (Social Security Number).
17. Enter the employee’s Supervisor.
18. Enter the employee’s Job Title.

19 Enter the employee's Password.

NOTE

This password is required for the Individual Employee End of Shift (EOS) report.

20 Enter the employee's Password Confirmation.

21 Indicate if the employee is active or inactive.

Auto-Start Time

1. Click on the Job Cost tab.
2. Put a mark in the Auto-Start time when selecting operation code checkbox if you want PrintPoint to automatically start recording time when this employee enters an Operation Code, so that the employee does not need to also click the Start button.
3. Click OK to accept the new employee.

Employee Rates

The employee rates information can be used in the calculation of costs where machine hourly costs are set independent of labor. This may be the case where an employee divides their time between several machines.

1. Click on the Job Cost tab
2. In the field Billable rate enter the Hourly rate to be used for billing the Employees time
3. In the field Hourly cost enter the hourly rate you pay the employee. This should be the pay rate plus oncosts. This is the figure that would be used in Job Costing.

Reviewing Employees

1. Select Job Costing Menu > Review Employees.

   PrintPoint displays the Employee List.

   NOTE

   Find any specific materials in the database by clicking on the Search button to access the Search Editor or by clicking on the Sort button to access the Sort Editor.

Deleting Employees

1. Select Job Costing Menu > Review Employees.

   PrintPoint displays the Employee List.

   NOTE

   Find any specific employee in the database by clicking on the Search button to access the Search Editor or by clicking on the Sort button to access the Sort Editor.

2. Select and highlight the employee(s) you want to delete.
3. Click the Delete key.

Printing the End of Shift Report for Individual Employees

At the end of each employee's shift, often shops will want to have the employee print our his/her End of Shift Report to validate the data collected for accuracy before it is accepted into the entire system.

Although End of Shift reporting is available at the "Admin" level for those users with access to the Reports section of the Job Costing/Data Collection module...this access to printing the Individual EOS report is restricted by employee password.

1. Select Job Costing Menu > Employee EOS Report.
2. Enter the employee's ID number.
3. Enter the employee's Password.
4. Select the Shift.
5. Select the Date of the shift for the report
6. Click OK.

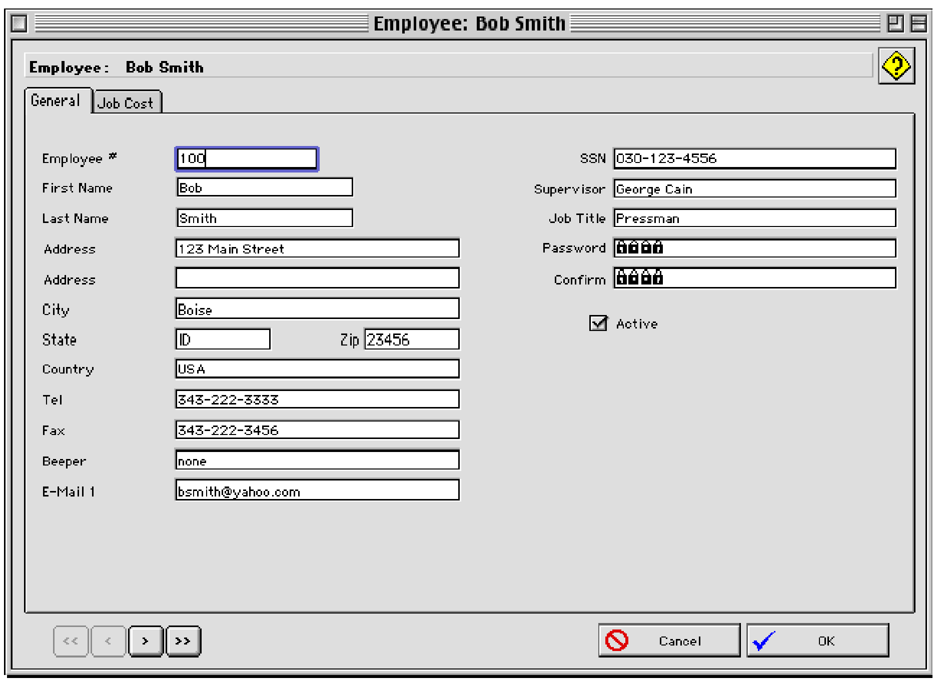
ABOUT THE SCREENS

The following screens are used for Data Collection/Job Costing:

- Employee Detail Screen
  - General Tab
  - Job Cost Tab
- Employee End of Shift Report Dialog

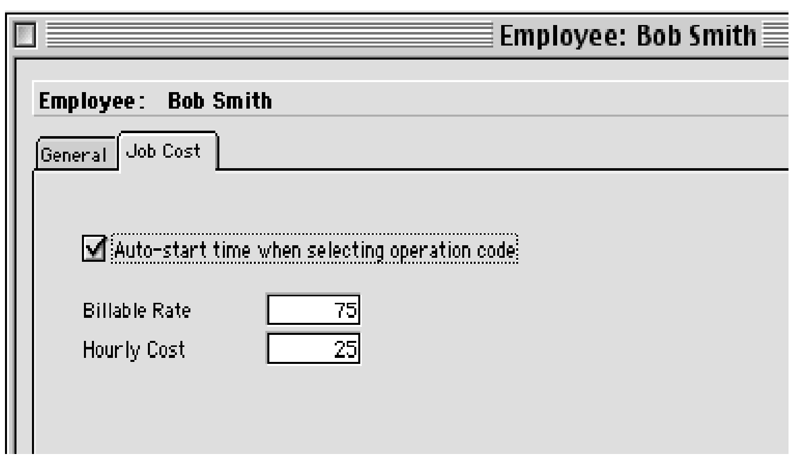
Employee Detail Screen

General Tab



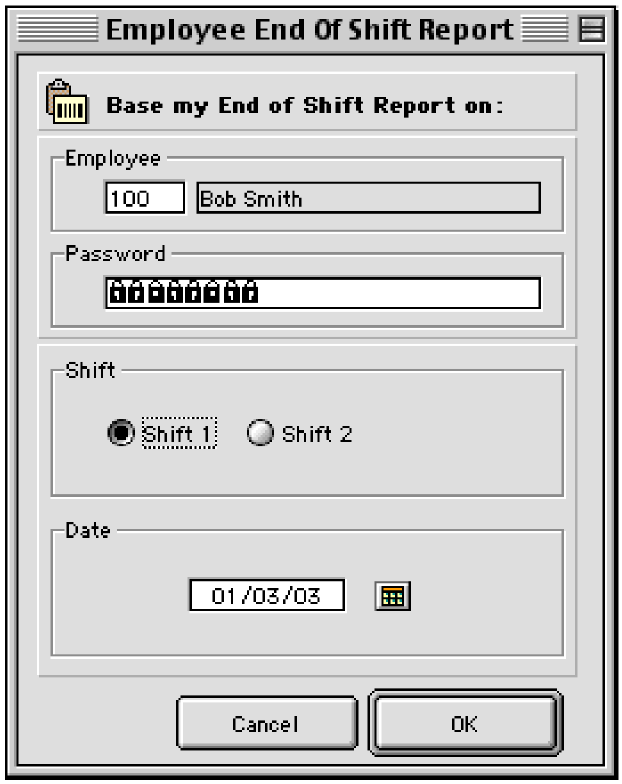
Button / Field	Definition
Employee Number	Employee Number (used for scanner entry or keyboard entry). If you are not using a scanner, make sure that your Employee Number matches the Auto-Tab Filter in Preferences.
First Name	40 character field for employee first name
Last Name	40 character field for employee last name
Address_1	Address 1 (80 character maximum)
Address_2	Address 2 (80 character maximum)
City	City (80 character maximum)
State	State (3 character maximum)
Zip	Zip (3 character maximum)
Country	Country (80 character maximum)
E-mail Address	E-mail Address (20 character maximum)
Telephone	Telephone (30 character maximum)
Fax	Fax (30 character maximum)
Beeper	Beeper [30 character maximum)
Active (Checkbox)	Checkbox field - true/false
E-Mail	E-Mail (20 character maximum)
SSN	Social Security Number [20 character maximum]
Supervisor	Supervisor [80 character maximum]
Job Title	Job Title [40 character maximum]
Password	Password [20 character maximum]
Confirm	Password [20 character maximum]

Job Cost Tab



Button / Field	Definition
Auto-start time when selecting operation code (Checkbox)	Checkbox field - true/false
Billable Rate	Cost to customer
Hourly Cost	Cost of employee

Employee End of Shift Report Dialog



Button / Field	Definition
Employee Number	Employee’s assigned number
Password	Enter Password
Shift	Select shift
Date	Select date

Chapter 80

Data Collection: Collecting Data

OVERVIEW

This chapter reviews the actual process of shop floor data collection. It covers material for both the administrators and the employees.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup Express Setup, Employees, Materials, Paper Job Cost	Previous chapters re Data Collection.
Set your User Settings for the button options for the Navigator Palette	File Menu > User Settings > Startup Tab > Open Navigation Palette... (See the User Setting chapter: Startup Tab)
Set your User Setting to Open New Data Collection Record On Startup	File Menu > User Settings > Data Collection Tab

TIP

This is an optional setting.

STEP-BY-STEP

This section includes the following topics:

- Opening a Data Collection Terminal Window
- Collecting Time
- Ending an Operation
- Collecting Materials
- Collecting Paper
- Collecting Outside Services
- Viewing Active Records

Open a Data Collection Terminal Window

1 Select Navigator > Data Collection

TIP

You can also display a new Data Collection input screen by holding down Cmd+D on Macintosh or the Ctrl+D on Windows.

PrintPoint displays the Data Collection Entry screen, with 4 possible tabs and 3 common buttons to all the tabbed screens:

- The Activity Tab is used to identify the employee and the Job, and collect information on Time.
- The Materials Tab is where information on Materials Used is entered
- The Paper Tab is where information on Paper Used is entered
- The Outside Service Tab is where data on Outside Services which are to be charged to the job is entered.
- Next Operation (Button) is used to begin collecting data on the same job when all required data has been collected for a particular operation.
- Next Job (Button) is used to begin collecting data on the next job when all required data has been collected for a all operations on the previous job.
- Close Window (Button) allow you to leave the Data Collection Detail Screen. If you have not finished collecting all data, you will receive an alert reminding you to complete your data collection. If you choose

the option “I’ll Finish Later”...it is important that you do, since no record of the data is stored at this point.

NOTE

This is different from choosing the Skip button on some of the other tabs. In that case a “shell data collection record” is created that the administrator/supervisor can return to later and fill in the correct information. Details of this technique are described in the Job Costing & Reporting Chapter under the heading “Filling In Skipped Data”

a. Enter the Employee Number by: selecting from the Employee Name Choice List, scanning the employee’s badge number or direct keyboard entry.

   PrintPoint displays the Employee’s Name.

2 Key or scan in the Job Number.

PrintPoint displays the Customer Code and Job Name for verification and information.

Collecting Time

Starting an Operation

If you are using a barcode reader for entry:

- Scan in the Operation Code
- PrintPoint displays the Department, Cost Center, and Operation Codes which have been selected.
- Skip to Collecting Time below.

If you are not using a barcode reader for data collection:

PrintPoint displays the Operation Dialog.

1 Select the Department in which the work is being done.

PrintPoint displays the Cost Centers which have been setup for that department.

2 Select the Cost Center in which the work is being done.

PrintPoint displays the Operation Codes which have been setup for that department.

3 Select the Operation Code which describes the work that is being done.

PrintPoint displays the Department, Cost Center, and Operation Codes which have been selected.

TIP

Notify a Supervisor if any of the required codes (Department, Cost Center, and/or Operation Code) do not appear.

Collecting Time

Under the words "Required Data" near the bottom of the screen, PrintPoint displays the words Time, Materials, and/or Paper in Red, based on what was defined in Express Setup.

4 Click the Start Button if the employee's Auto-Start Time checkbox has not been marked. (If it has, you can skip this step.)

PrintPoint displays the Green Status indicator and the Elapsed Time counter displays time being spent on that operation.

5 Enter any Notes that are important for the entry.

6 Select the Rework radio button to indicate the time is to be charged to rework

or

select the AAs (Author's Alterations) radio button to indicate the time is to be charged to AAs.

NOTE

PrintPoint deselects the Normal radio button.

NOTE

The Chargeable checkbox displays a check if the operation code was set to normally chargeable in Express Setup.

7 Remove the check from the Chargeable checkbox to make the material noncharged...or place a check to make it chargeable.

TIP

You can initiate any number of data collection records for the same employee, or other employees, at any time.

Ending an Operation

1 Click the Stop Button.

2 Select Stop to stop the timer.

PrintPoint displays the Elapsed Time spent on the operation.

3 Enter the Production Count.

Example Number of pieces folded.

4 Enter the Production Waste.

Example Number of pieces wasted during folding.

5 Click Close Window to accept the record.

Pausing an Operation

1 Click the Pause Button.

TIP

PrintPoint displays the Pause Operation Dialog.

You must have associated a Pause Operation with the Cost Center in the Express Setup to have a pause operation available.

2 Select the Code for the Pause from the list and click the Pause button.

PrintPoint displays the Orange Status indicator, stops the Elapsed Time counter, and the Paused Time counter displays time being spent during the pause.

Resuming after a Pause

1 Click the Resume Button.

2 PrintPoint displays the Green Status indicator, stops the Paused Time counter, and the Elapsed Time counter resumes counting time being spent on that operation.

Collecting Materials

Entering Materials

1 Click on the Materials tab.

2 Scan in or select the Material Code from the Material Name Choice List.

PrintPoint displays the Material Name.

3 Enter the Quantity Used.

4 Select the Rework radio button if the material is to be assigned to Rework

or

select the AAs (Author’s Alterations) radio button if the material is to be assigned to AAs.

NOTE

PrintPoint deselects the Normal radio button.

NOTE

The Chargeable checkbox displays a check if the Material was set to normally chargeable.

5 Remove the check from the Chargeable checkbox to make the material noncharged...or place a check to make it chargeable.

6 Enter any Notes that are important for the entry.

7 Click Save Material to accept the Materials entry.

8 Go back to Step 2 to add more materials.

Collecting Paper

Entering Paper

1 Click on the Paper tab.

The paper Part Number and Paper Name is automatically displayed based on the paper required for the job.

NOTE

PrintPoint assigns a unique Paper Part Number as a permanent identifier to each paper. This is not the same as the paper stock number.

2 Enter the Number of Sheets Used for:

a. Make Ready
b. Running
c. Overs
d. Waste

PrintPoint calculates and displays the Total Sheets used.

3 Select the Rework radio button if the paper is to be handled as Rework

OR

select the AAs (Author's Alterations) radio button if the paper is to be handled as AAs.

NOTE

PrintPoint deselects the Normal radio button.

NOTE

The Chargeable checkbox displays a check if the paper was setup as normally chargeable.

4 Remove the check from the Chargeable checkbox to make the material noncharged...or place a check to make it chargeable.

5 Enter any Notes that are important for the entry.

6 Click Save Paper to accept the Paper entry.

NOTE

If the suggested is paper is not available or you need to add an additional paper, you can select the Paper Code from the Select Paper Choice List. Be sure to enter a note about why you had to select a different paper or additional papers.

Collecting Outside Services

Entering an Outside Service

1 Click on the Outside Service tab.

PrintPoint displays the Current Date (will be used to generate a Purchase order for the Outside Service in a future version of PrintPoint).

TIP

Click on the Calendar Icon to select another date.

2 Select the Service Name from the Outside Service Choice List.

3 Select the Supplier from the Supplier Choice List.

4 Enter the Description of the Outside Service.

5 Enter the information which is used to calculate the Cost of the Outside Service:

a. Qty (the Quantity of Outside Services you will buy)

b. Unit Cost (how much you will be charged, for each Rate Basis)

c. Rate Basis (the basis on which the charge is based)

Example If the Ouside Service you are buying is Folding, enter 1 if the charge is for each fold, enter 100 if the charge is for every one hundred folds.

PrintPoint calculates and displays the Total Cost.

6 Enter any Notes that are important for the entry.

7 Select the Rework radio button to indicate the Outside Service is to be charged to Rework

OR

select the AAs (Author's Alterations) radio button to indicate the outside service is to be charged to AAs.

NOTE

PrintPoint deselects the Normal radio button.

NOTE

The Chargeable checkbox displays a check if the Outside Service was setup as normally chargeable.

8 Put a mark in the Chargeable checkbox to indicate the Outside Service is non-chargeable.

9 Click the Add Button to record the Outside Service.

PrintPoint displays the Date, Service Name, Supplier, and other information for the Outside Service that was entered.

10 Go back to Step 2 to add another Outside Service.

11 Click Close Window to accept the Outside Service entry.

About the Screens

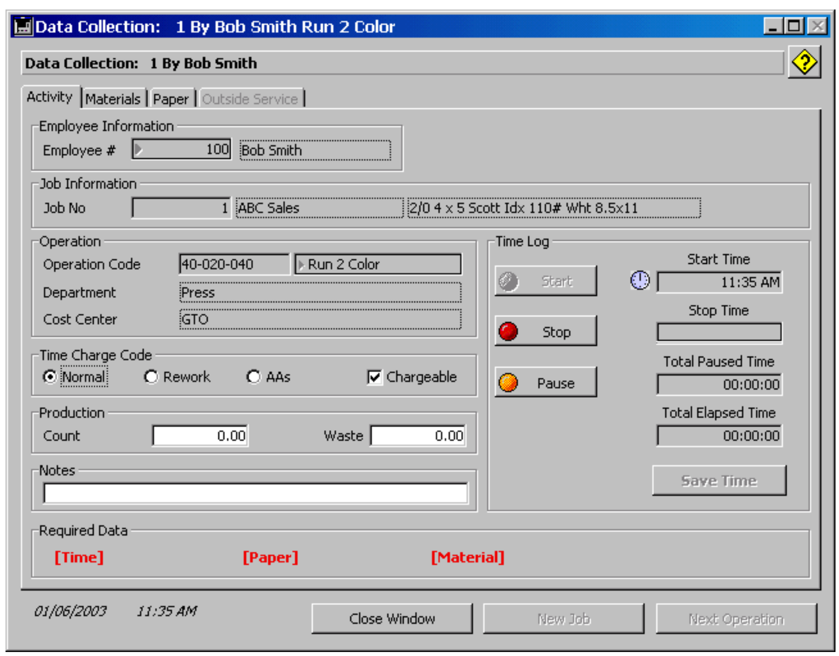
The following screens are used for Data Collection/Job Costing:

- Data Collection Terminal - Activity Tab
- Express Setup
- Job Cost Review
- Materials
- Employees
- Employee End of Shift Report Dialog

Data Collection Terminal

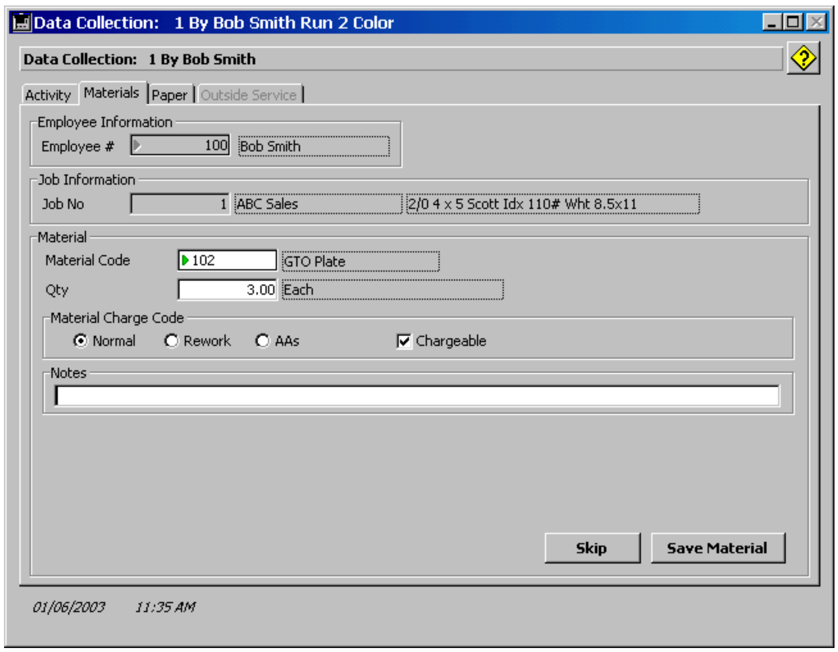
The Data Collection Terminal Window is divided into 4 tabbed subsections: Activity, Materials, Paper and Outside Services.

Activity Tab



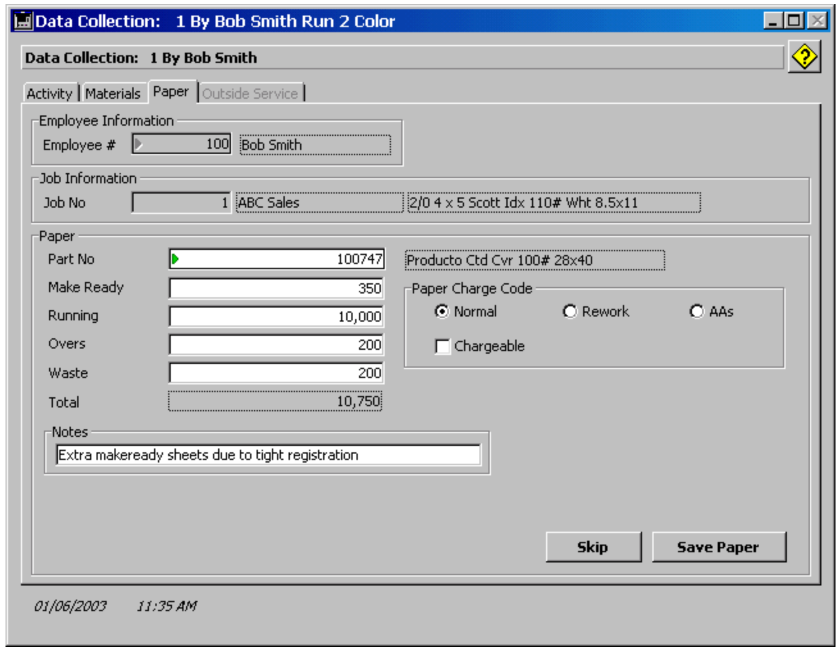
Column / Button / Option	Definition
Employee Information	Denotes which employee collected the data
Job Information	Denotes which job number, customer and job description
Operation Information	Denotes what operation data is being collected
Time Charge Code	You can selected what type of cost are involved and if it's chargeable
Production Information	Denotes job and waste count
Time Log	Denotes when an operation was started, stopped and if it was paused.

Material Tab



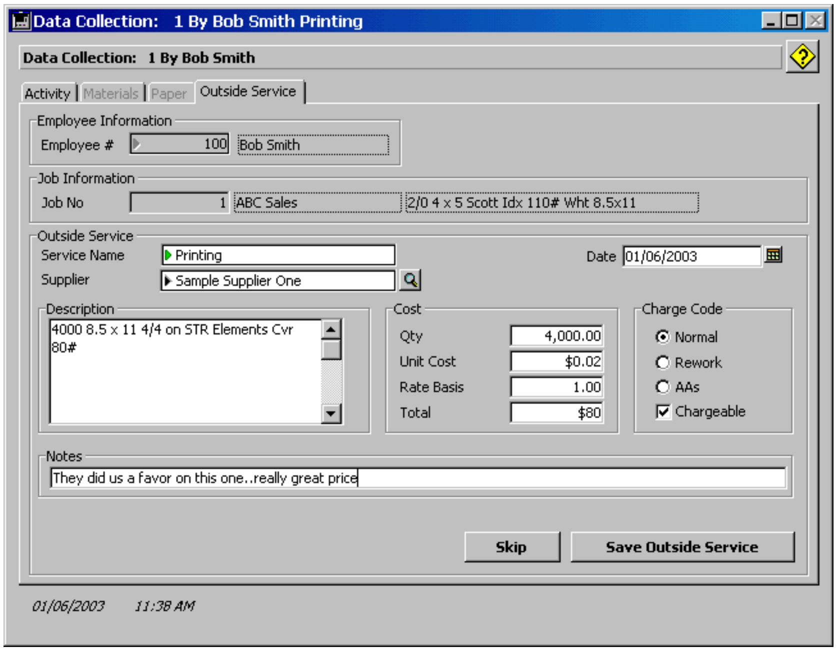
Column / Button / Option	Definition
Employee Information	Denotes which employee collected the data
Job Information	Denotes which job number, customer and job description
Material Information	Denotes material code, description, quantity and units
Material Charge Code	You can selected what type of cost are involved and if it's chargeable

Paper Tab



Column / Button / Option	Definition
Employee Information	Denotes which employee collected the data
Job Information	Denotes which job number, customer and job description
Paper Information	Denotes part number, description and how many sheets were used for make ready, running, overs and waste
Paper Charge Code	You can selected what type of cost are involved and if it’s chargeable

Outside Services Tab



Column / Button / Option	Definition
Employee Information	Denotes which employee collected the data
Job Information	Denotes which job number, customer and job description
Outside Service Information	Denotes service name, the supplier, the date received from the supplier and an area to write a description
Cost Information	Denotes quantity received, unit cost, rate basis (how many per unit) and the total
Charge Code	You can selected what type of cost are involved and if it’s chargeable

Chapter 81
Data Collection: Barcodes

OVERVIEW

NOTE

If you intend to collect data with barcode scanners you will need to read this chapter. If you are using “point and click” with a mouse, you do not need to read this chapter.

This chapter describes how to:

- Install barcode fonts.
- Create the barcodes and “human readable” information on job tickets, employee badges or placards and bar code operation sheets.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your User Setting to Use Barcode Scanner	File Menu > User Settings > Data Collection Tab
Purchase a pre-programmed barcode scanner from PrintPoint	Call PrintPoint Sales
Purchase a barcode font	Later on in this chapter

STEP-BY-STEP

This section includes the following topics:

- Install barcode fonts.
- Create the barcodes and "human readable" information on job tickets, employee badges or placards and bar code operation scan sheets.

Install barcode fonts

Barcode fonts must be purchased for use with the PrintPoint Data Collection system. You will be printing barcodes on the Job Ticket, Employee badges or placards and operation placards.

PrintPoint recommends the use of Code39 Barcode fonts available from many vendors. Check the internet for your sources. These fonts are often available in either Postscript or TrueType fonts and are also available for both Macintosh and Windows platforms.

1. Purchase a barcode font.
2. Follow the font vendors installation instructions.

Create the barcodes for Job Tickets, Employees and Operations

Job Ticket

You must use a SuperReport Job Ticket to add a scannable Job Ticket Number to a Job Ticket.

1. Create or modify an existing Job Ticket using the SuperReport Module.

   NOTE

   PrintPoint has sample SuperReport Job Tickets available on the web site in PrintPoint Central.

2. Duplicate the Job Number Str field.
3. Select the barcode font you have purchased from the Font menu and assign it to the Job Number Str field you just created.
4. Adjust the size of the font if required.
5. Click Save & Close button to save the Job Ticket.

Employee Badge

Most users will place the employee login barcode directly on the Operation Scan sheets used by that employee. However, if can create a badge that the employee can wear and therefore log-in from any station without having a prior setup.

Using any drawing program (Illustrator, Quark, Photoshop) or word processor (Microsoft Word, Appleworks):

1. Create a barcode with the employee's number using the barcode font.
2. Create a standard font for their name in "human readable" font such as Times, Helvetica, Arial, etc.

Example See the sample in About the Screens on the next page.

Operation Scan Sheet

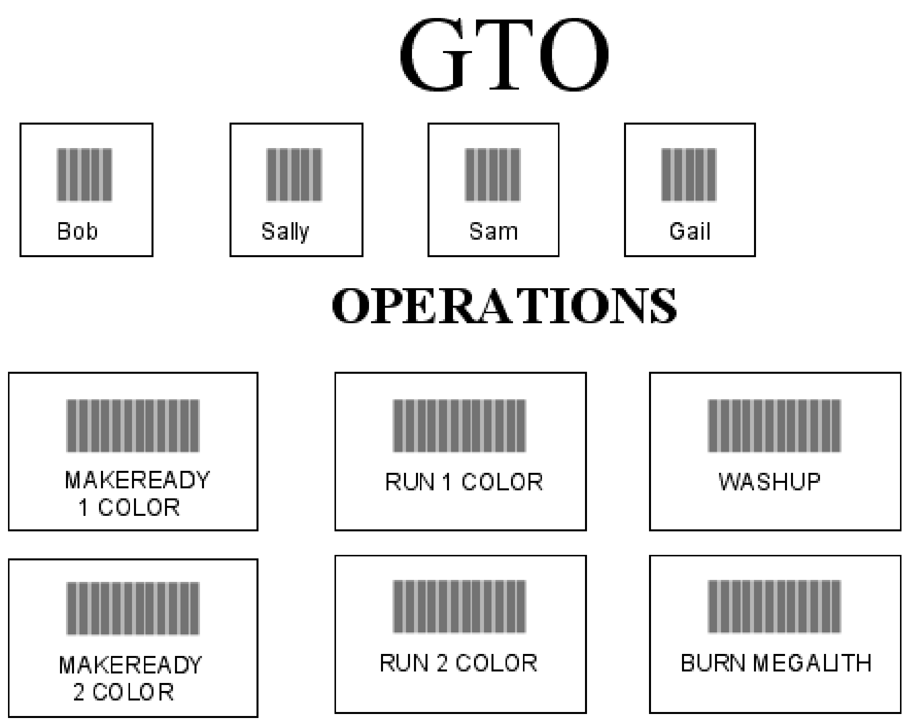
Using any drawing program (Illustrator, Quark, Photoshop) or word processor (Microsoft Word, Appleworks):

1. Create a barcode with the Operation Code (Number) using the barcode font.
2. Create a the name of the operation below the barcode in a "human readable" font such as Times, Helvetica, Arial, etc.

Example See the sample in About the Screens on the next page.

About The Screens

The following is a sample barcode placard used at a shop floor collection station:



Chapter 82

Data Collection: Job Costing & Reporting

OVERVIEW

Installing data collection devices on the shop floor is the first step in the Job Costing process, but not the last. You need to do more than collect data, you need to review the data, adjust the data and then print reports to help analyze and compare actual costs versus estimated costs.

With PrintPoint's real-time data access, managers are able to make well-informed decisions on the fly, such as re prioritizing a job or reallocating staffing. Additionally, with real-time data access, faster response to customer inquiries and requests requires an up-to-the-minute view of WIP (work-in-process) to determine exactly where a job is and when it will be completed.

By compiling accurate data on labor hours and activities productivity analysis allows users to measure performance and analyze labor costs by employee, operation, job, department, or cost center. Based on this data, managers are able to pro-actively make decisions to improve plant operations. By knowing accurate labor costs, manufacturers are also better able to make informed pricing decisions

**Some concepts and verbiage used in this overview are paraphrased from an article written by Stacy Malesiewski (StacyM@corrypub.com) for Integrated Solutions.*

BEFORE YOU BEGIN

You should...	Where this information is found...
Collect shop floor data	See all the preceding chapters on data collection.

STEP-BY-STEP

This section includes the following topics:

- Reviewing & Editing Collected Data
  - Editing Collected Data
  - Filling in “Skipped Data”
- Reporting Job Costing Information
  - Job Cost Report
- End-of-Shift Reports
  - End-of-Shift Report Contents
  - Printing the End-of-Shift Report
- Viewing and Updating Real Time Job Costing Information from the Electronic Job Ticket
  - Job Cost Tab
  - Accessing Job Cost Information
  - Updating Job Cost Totals

Reviewing & Editing Collected Data

Editing Collected Data

After all transactions are entered for the shift or day, supervisors and employees review the transactions that have been collected for accuracy and completeness, and modify any transactions that need to be changed before they print the End-of-Shift Report and Job Cost Report.

1 Select Job Costing Menu > Reports.

PrintPoint displays the Reports: Data Collection List.

2 Select the records you would like to edit using standard List View techniques of column header sorting or scrolling

or

use the Search and/or Sort buttons to find the records which you want to review and then highlight them.

NOTE

The Search and Sort buttons allow you to search and/or sort by:

- Job Number
- Operation
- Employee

- Category Code
- Customer
- Skipped (find all the records where the user clicked the Skip button.
- Date or Date Range
- Search or Sort Editor

3 Select and double-click the record that you want to change.

PrintPoint displays the selected record.

4 Click the Adjust button.

PrintPoint makes all fields on the record changeable.

5 Change all necessary information.

6 Click OK to save the record.

Filling in Skipped Data

An important adjunct to editing the collected data described above is searching for and updating "Skipped" data collection records. There are times when an employee will be unable to complete a data collection process and will use the Skip button associated with Materials, Paper or Outside Services in order to create a "shell" record that you can later complete.

Example — The operator has not entered the amount of paper used when recording the time while running the press, even though it was specified in Express Setup.

1 Select Job Costing Menu > Reports.

PrintPoint displays the Reports: Data Collection List.

2 Select Search Skipped from the Search drop-down button.

All the records that are marked as "Skipped" will be displayed.

3 Select and double-click the record that you want to update.

4 Click the Adjust button.

PrintPoint makes all fields on the record changeable.

5 Change all necessary information.

6 Click OK to save the record.

Adding Uncollected Data

There will be times when the operator has completely forgotten to collect some data. The administrator will then need to add a "shell" record as if collecting real time data, and then immediately editing that data following the steps outlined in either the Editing Collected Data or Filling in Skipped Data sections above.

Reporting Job Costing Information

Job Cost Report

The Job Cost Report displays the following information for any selected job(s):

- Time charged to the job, by Operation Code sequence, with Subtotals by Department and Total Time
- Paused (time) charged to the job, by Operation Code within Department sequence
- Material charged to the job, in detail, in Material Code sequence, with a sub-total for Material
- Paper used on the job, in detail, in Paper Part Number sequence, with a sub-total for Paper
- Outside Services charged to the job, with a sub-total for Outside Services.

NOTE

Field Titles and Contents/Usage of each field are described in the Job Cost Report Contents table below.

For each job, the report also provides:

- (Total) Actual Costs
- (Total) Estimated Cost
- Variance Percent
- Variance Amount

Accessing the Job Cost Report

1. Select Job Costing Menu > Reports.

   PrintPoint displays the Data Collection List View.
2. Use the Select and/or Search and/or Sort buttons to find the job(s) for the report.
3. Highlight the records for the job(s) for the report.
4. Click the Print button and select Job Cost from the pull-down list.
5. Follow the dialogs to Print Preview and/or Print the report.

Job Cost Report Contents

The Job Cost Report provides the following information for each job:

Field Title	Contents/Usage
Job #	self-explanatory
Job Name	self-explanatory
Customer	self-explanatory
Sales Rep	self-explanatory

Field Title	Contents/Usage
CSR	Customer Service Representative
Due Date	self-explanatory
Time	Due Time

- Time:

Field Title	Contents/Usage
Operation	Department/Cost Center/Operation Code
Operation	Operation Name
Employee	self-explanatory
Start Date	self-explanatory
Start Time	self-explanatory
Finish Date	self-explanatory
Finish Time	self-explanatory
Elapsed Time	Time spent on the operation
Paused	Paused time spent on the operation
BHR	Budgeted Hourly Rate assigned to the operation
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

- Paused (Time):

Field Title	Contents/Usage
Operation	Department/Cost Center/Operation Code
Operation	Operation Name
Employee	self-explanatory
Start Date	self-explanatory
Start Time	self-explanatory
Finish Date	self-explanatory
Finish Time	self-explanatory
Paused	Paused time spent on the operation
BHR	always blank for Pause records
Type	Normal or Rework or AA
Charge	Pause records are always non-chargeable
Total	always 0 for Pause records

■ Material:

Field Title	Contents/Usage
Material Code	self-explanatory
Material Name	self-explanatory
Employee	self-explanatory
Date	self-explanatory
Unit Name	self-explanatory
Unit of Measure	self-explanatory
Count	self-explanatory
Unit Cost	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

■ Paper:

Field Title	Contents/Usage
Part No.	Paper Part Number
Paper	Paper Name
Employee	self-explanatory
Date	self-explanatory
Make Ready	MakeReady Sheets
Running	Running Sheets
Waste	Waste Sheets
Overs	Overs Sheets
Total Paper	Total Sheets
Cost/M	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

■ Outside Services:

Field Title	Contents/Usage
Service Name	self-explanatory
Supplier	self-explanatory
Employee	self-explanatory
Date	self-explanatory
Qty	Quantity
Unit Cost	self-explanatory

Field Title	Contents/Usage
Rate Basis	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

Skipped Items

When you print your Job Cost Report or End of Shift Report, you can view the Skipped Items.

Skipped items appear in the report when operators have chosen not to enter transactions that the user has predefined as necessary (in Express Setup).

Example Even though it was specified in Express Setup, the operator has not entered the amount of paper used when while she was recording the time running the press.

Example The operator who was making plates did not enter the number of plates used when he recorded the time to strip, burn and process the plates.

End-of-Shift Report

The End-of-Shift Report displays the following information, in employee number sequence, for each employee who collected data during the selected shift:

- Time, with sub-totals for each Department and a Total Time
- Paused (Time)
- Material, with a sub-total for Material
- Paper, with a sub-total for Paper
- Outside Services, with a sub-total for Outside Services

NOTE

If you want to allow each employee to print his/her own EOS report and the end of the shift, see the section under Employees: Printing the End of Shift Report for Individual Employees.

For each employee, the report also provides:

- Total Time (hours)
- Percent Chargeable Time
- Percent Non-chargeable Time

The End-of-Shift Report Contents

- Time:

Field Title	Contents/Usage
ID	Sequence number assigned by PrintPoint and used for editing
Operation	Department/Cost Center/Operation Code
Name	Operation Name
(no title)	Job Number
Start Date	self-explanatory
Start Time	self-explanatory
Finish Date	self-explanatory
Finish Time	self-explanatory
Elapsed Time	Time spent on the operation
Paused	Paused time spent on the operation
BHR	Budgeted Hourly Rate assigned to the operation
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

■ Paused (Time):

Field Title	Contents/Usage
ID	Sequence number assigned by PrintPoint and used for editing
Operation	Department/Cost Center/Operation Code
Name	Operation Name
(no title)	Job Number
Start Date	self-explanatory
Start Time	self-explanatory
Finish Date	self-explanatory
Finish Time	self-explanatory
Paused	Paused time spent on the operation
BHR	always blank for Pause records
Type	Normal or Rework or AA
Charge	Pause records are always non-chargeable
Total	always 0 for Pause records

■ Material:

Field Title	Contents/Usage
ID	Sequence number assigned by PrintPoint and used for editing
Code	Material Code
Material Name	self-explanatory
(no title)	Job Number
Date	self-explanatory
Unit Name	self-explanatory
Unit of Measure	self-explanatory
Count	self-explanatory
Unit Cost	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

■ Paper:

Field Title	Contents/Usage
ID	Sequence number assigned by PrintPoint and used for editing
Part No.	Paper Part Number
Paper	Paper Name

Field Title	Contents/Usage
(no title)	Job Number
Date	self-explanatory
(no title)	MakeReady Sheets
(no title)	Running Sheets
Waste	Waste Sheets
Overs	Overs Sheets
Total Paper	Total Sheets
Cost/M	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

- Outside Services:

Field Title	Contents/Usage
ID	Sequence number assigned by PrintPoint and used for editing
Service Name	self-explanatory
Supplier	self-explanatory
(no title)	Job Number
Date	self-explanatory
Qty	Quantity
Unit Cost	self-explanatory
Rate Basis	self-explanatory
Type	Normal or Rework or AA
Charge	x indicates Chargeable
Total	Amount Charged
(no title)	Notes

Printing the End-of-Shift Report

1. Click the Print button and select End of Shift from the pull-down list.

   PrintPoint displays the End of Shift Filter which allows you to select the Shift and Date for which you wish to print the report.

2. Select the radio button for the shift on which you wish to report.
3. Select the date on which you would like to base the report.

   TIP

   Click the Calendar icon to switch dates.

4. Click OK to accept the filter.

5 Follow the dialogs to Print Preview and/or Print the report.

6 Review the report and highlight any record (s) that you want to change.

NOTE

The ID (unique sequence number assigned by PrintPoint) can be easily used as a link to find any records in the database.

Viewing and Updating Real Time Job Costing Information from the Electronic Job Ticket

Job Cost Tab

The Job Cost Tab on the Electronci Job Ticket displays detailed information on each of the following, on individual tabs:

- Time
- Material
- Paper
- Outside Service.

NOTE

See Job Cost Tabs below for the contents of the individual tabs

The Job Cost Tab also displays:

- amount for Time
- amount for Material
- amount for Paper
- amount for Outside Service
- Total Amount
- Last Updated Date

Accessing Job Cost Information

1 Select Navigator > Jobs.

PrintPoint displays the Jobs List.

2 Select and double-click the job you would like to view.

PrintPoint displays the Job Info tab of the selected job.

3 Select the Job Cost Tab.

Updating Job Cost Totals

1 Click the Update Totals button to update:

- Time amount
- Material amount
- Paper amount
- Outside Service amount

- Total amount
- Last Updated Date.

Job Cost Tabs

Time Tab:

- This tab shows details of each collected Time entry
  - Start Date and Time
  - Finish Date and Time
  - Elapsed Time (calculated)
  - Paused Time
  - Total Time Cost (Dollar Amount)
  - Operation (Name)
  - Production Count
  - Employee
  - Charge Code (Normal/Rework/AA)
  - Chargeable/Non-Chargeable
  - Notes

Material Tab:

- This tab shows details of each collected Material entry
  - Material Code
  - Material Name
  - Count (number used)
  - Total (Dollar Amount)
  - Charge Code (Normal/Rework/AA)
  - Chargeable/Non-Chargeable
  - Notes

Paper Tab:

- This tab shows details of each collected Paper entry
  - (Paper) Code Name
  - Finished Sheets
  - Make Ready Sheets
  - Waste Sheets
  - Total Sheets
  - Over Sheets
  - Cost per M

- Total (Dollar Amount)
- Charge Code (Normal/Rework/AA)
- Charge
- Notes

Outside Service Tab:

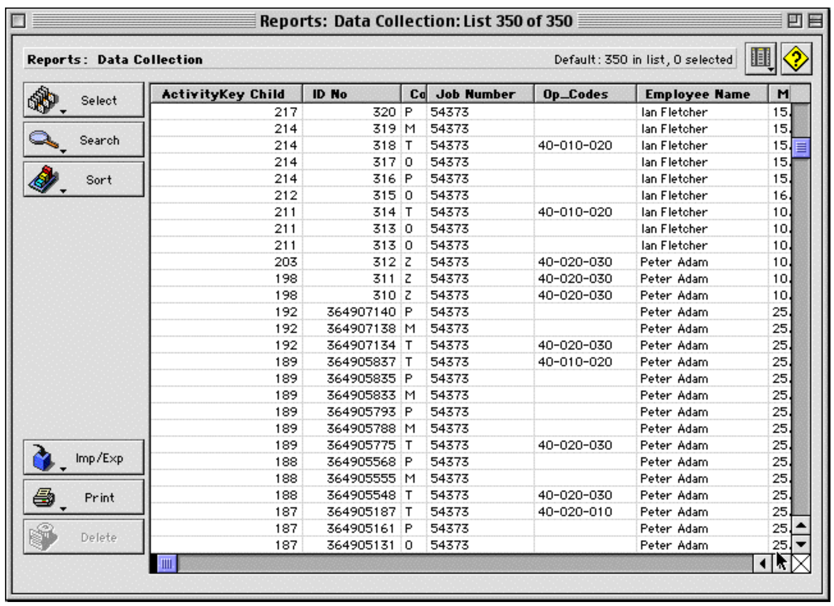
- This tab shows details of each collected Outside Service entry
  - Service Name
  - Supplier
  - Employee Number
  - Quantity
  - Unit Cost
  - Per (Unit of Measure)
  - Total
  - Service Date
  - Charge Code (Normal/Rework/AA)
  - Charge
  - Notes

ABOUT THE SCREENS

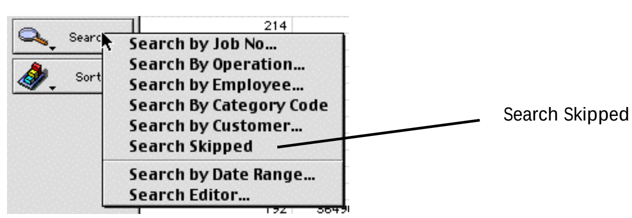
The following screens are used for Data Collection/Job Costing:

- Job Cost Report List View
  - Search Button
  - Print Button
- End of Shift Report Filter
- Electronic Job Ticket - Job Cost Tab

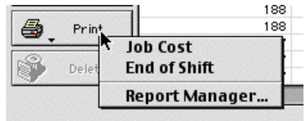
Job Cost Report List View



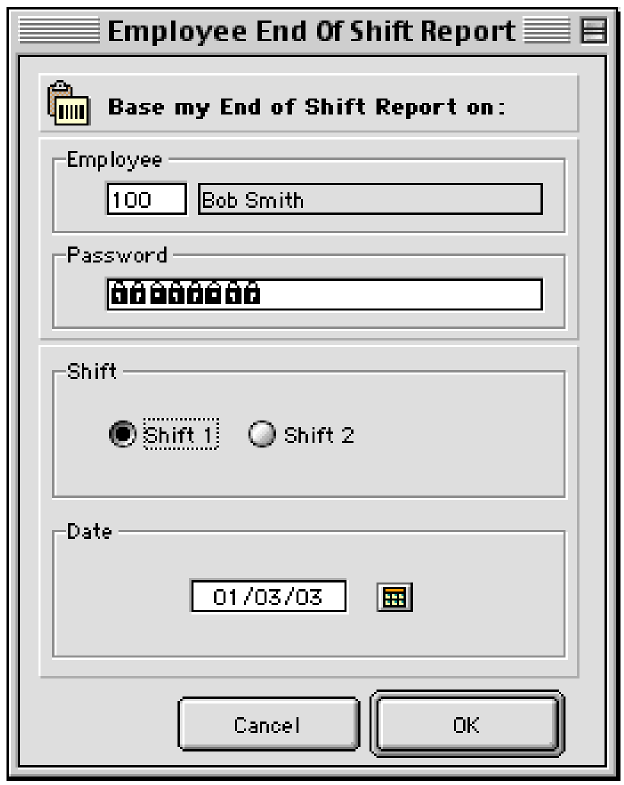
Search Button



Print Button



End of Shift Report Filter



Button / Field	Definition
Employee Number	Employee's assigned number
Password	Enter Password
Shift (radio buttons)	Radio buttons to select shift for EOS Report
Date	Select date
Cancel (button)	Cancel the EOS Report
OK (button)	Print the EOS Report

Electronic Job Ticket - Job Cost Tab

See the Jobs - Electronic Ticket: Job Cost Tab chapter for the screen snapshot and details.

Telecommunications

Chapter 83
Emailing from PrintPoint

OVERVIEW

Emailing out of PrintPoint has become easy. You now have the option of sendig the email in letter format or as an attachment. This is a seamless intigration for the Macintosh users and requires a very simple third party program for the PC users.

BEFORE YOU BEGIN

You should...	Where this information is found...
Verify the Telecommunication are setup correctly	File > Preferences > Telecommunications
PC users - install PDF995	included on your PrintPoint CD
PC users - make sure you have QuickTime 4 or later installed on your computer.	www.apple.com/quicktime/download/.

STEP-BY-STEP

This section includes the following topics:

- Sending an email from a Macintosh Computer (MAC)
- Sending an email from an IBM Compatable Computer (PC)
- More About PDF995

NOTE

To send emails as attachments, make sure to go to File > Preferences > Telecommunications to setup the Prefix for PDF attachments.

Sending an Email from a Macintosh Computer (MAC)

1. From any screen in PrintPoint that has an Email button, click on the button.

   The Email Dialog is displayed
2. If sending as an attachment, check the Send As Attachment checkbox.
3. Verify the information and click the Send button.
4. Click OK.

Sending a Fax from an IBM Compatable Computer (PC)

1. Install PDF995995 (included on the PrintPoint install CD).
2. Verify you have QuickTime 4 or later installed on your computer.

   If you need QuickTime go to www.apple.com/quicktime/download/. You only need the free player not the full version of the software.
3. From any screen in PrintPoint that has an Email button, click on the button.

   The Email Dialog is displayed
4. If sending as an attachment, check the Send As Attachment checkbox.
5. Verify the information and click the Send button.
6. Click OK.

More about PDF995

PDF995 is included on the PrintPoint insallation CD. The free versions display a sponsor page in your web browser each time you run the software. If you would prefer not to see sponsor pages, you may upgrade by obtaining individual keys for the product at any time for $9.95. Purchasing also entitles you to email support by software engineers (12-hour response time).

About The Screens

Field Name	Contents/Use
From	Who the email is from. This is automatically entered but can be manually changed.
To	Who the email is to. Automatically get the information from the Contact record or you can manually type.
CC	If you want to send a Carbon Copy of the email to another person, enter their email address in this box
Bcc	If you want to send a Blind Carbon Copy of the email to another person, enter their email address in this box
Subject	The subject of the email
Message	Use this box to add a message.

Chapter 84
Faxing from PrintPoint

OVERVIEW

Faxing out of PrintPoint has become easy with the advent of virtual fax devises in both Window and Macintosh operating system. It's as simple as choosing the installed Fax from the print window during printing.

BEFORE YOU BEGIN

You should...	Where this information is found...
Verify the Virtual Fax is installed	Windows: Start > Pinters and Faxes Macintosh: Preferences > Printer and Faxes
Be connected to a fax-modem	Use a fax-modem and dial up telephone line, or connect to a fax-server through your network.

STEP-BY-STEP

This section includes the following topics:

- Sending a Fax from a Macintosh Computer (MAC)
- Sending a Fax from an IBM Compatable Computer (PC)

Sending a Fax from a Macintosh Computer (MAC)

1. From any screen in PrintPoint that has a Print button, click on the button.
   The Page Setup window is displayed
2. Verify the information and click the OK button.
   The Print window is displayed
3. Click the Fax button.
   The Print window is displayed
4. Select a customer from the Address Book or enter a Fax number.
5. Click OK.

Sending a Fax from an IBM Compatable Computer (PC)

1. From any screen in PrintPoint that has a Print button, click on the button.
   The Print window is displayed
2. Select the virtual Fax from the list.
3. Click the Print button.
4. The Windows Send Fax Wizard is displayed.
5. Complete the steps of the wizard to send the fax.

Chapter 85
Phonebook

OVERVIEW

PrintPoint's Phonebook provides a searching feature to quickly locate a customer, a supplier, or a contact and then allows easy access to the stored information for that customer, supplier, or contact.

BEFORE YOU BEGIN

You should:	Where to find it:
Setup your Suppliers	See the chapter on Suppliers
Setup your Customers	See the chapter on Customers
Setup you Contacts	See the chapter on Customers

STEP-BY-STEP

This section includes the following topics:

- Finding the contact information for a Customer, Supplier or Contact.
- Searching for the contact information for Multiple Customers or Suppliers.

Finding the Contact Info for a Customer, Supplier or Contact

1. Select Extras > Phonebook.

   PrintPoint displays the Phonebook screen.
2. Type a the full or part of the customer, supplier, or contact name in the Search entry field and press the Search button.

   PrintPoint displays a list of customers, suppliers, or contacts that match the search criteria.

NOTE

When you search using the Search button, PrintPoint displays contact info for Customers, Suppliers...whose names begin with what was typed in the Search Entry Field.

3. Scroll through the list to find the contact you want.

   The Company Info is displayed for the selected contact.
4. Click the Contact Info tab to display the contact information.

Searching for the Contact Info for Multiple Customers or Suppliers

1. Click the **Contains** button.

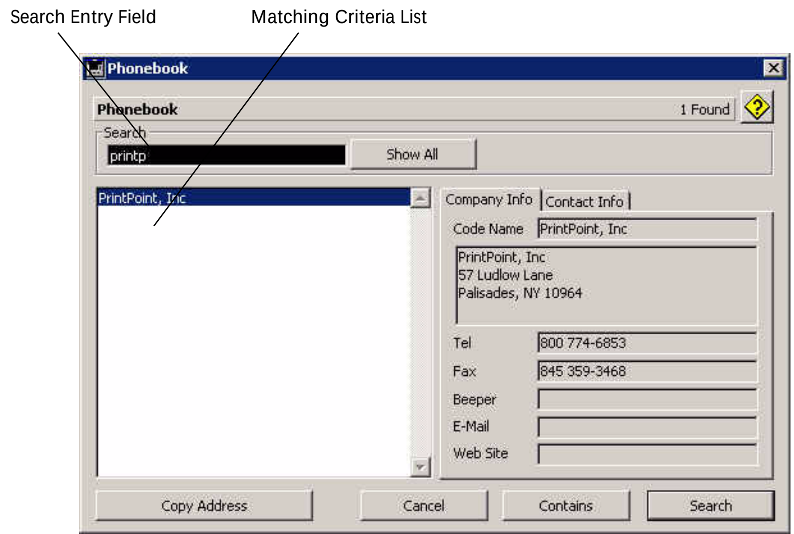
   PrintPoint displays a Request dialog.
2. Type a couple of characters in the Search phone book containing: dialog box.
3. Click OK to start the search for all customers whose Company or Supplier Name contains the characters you specified.

   The search result displays in the list window.

NOTE

You can also enter the name of a customer, supplier, or contact followed by the “@” (wildcard) symbol to search for a partial name. For example: type “Bob S@” to find Bob Smith, Bob Stevens or Bob Spelling.

ABOUT THE SCREENS



Field Name	Contents/Use
Search Entry Field	Used to enter search info.
Matching Criteria List	List the company name for matched criteria.
Copy Address (button)	Used to copy the company address info to be pasted into another area.
Cancel (button)	Used to exit the Phonebook.
Contains (button)	Used to search for all companies who’s names contain the criteria.
Search (button)	Used to search for all companies who’s names begin with the criteria.
Company Info tab	List the company info for the company highlighted in the Matching Criteria List.
Contact Info tab	List the mail contact info for the company highlighted in the Matching Criteria List.

The Databases

Chapter 86
Calendar Preferences

OVERVIEW

PrintPoint's new Calendar Module incorporates features that give you the opportunity to view your activities in multiple ways

- Create Categories better organize your calendar
- Sets are a convenient way to filter your view of events
- Set priorities to view your activities according to importance
- Create different Actions to show what needs to be done to an event
- You can also assign the type of event and show the status of that event
- Set defaults for different event types
- Change the Font, Color and Style to make it even easier to quickly find events.

BEFORE YOU BEGIN

You should:	Where to find it:
Confirm that the correct users have access to the calendar	File > Users and Passwords
Ensure the Job Due is active	File > Preferences > Show Job Due in To Do List checkbox

STEP-BY-STEP

This section includes the following topics:

- Entering Calender Preferences
- Category
  - Entering a New Category
  - Deleting a Category
  - Editing an existing Category
- Sets
  - Entering a New Set
  - Deleting a Set
  - Editing an existing Set
- Priority
  - Entering a New Priority
  - Deleting a Priority
  - Editing an existing Priority
  - Sorting Priorities
- Actions
  - Entering a New Actions
  - Deleting a Actions
  - Editing an existing Actions
  - Sorting Actions
- Type
  - Entering a New Type
  - Deleting a Type
  - Editing an existing Type
  - Setting Defaults
  - Sorting Types
- Status
  - Entering a New Status
  - Deleting a Status
  - Editing an existing Status
  - Sorting Status
- Event Defaults
  - Quote Generated Follow-up Event Entries

- Job Generated Follow-up Event Entries
- Job Generated Check-up Event Entries

- Look
- Date and Time
- Colors
- Options

Entering Calender Preferences

1. From the Navigator click on the To Do button.
   The Show Calendar Activities dialog is displayed.
2. Click on either the No, Just Mine button or the All button to enter into the calendar.
3. From the Calendar, click on the Preferences button.
   The Contact Manager Preference window is displayed.

Category

Entering a New Category

1. From the Category tab, click on the New button.
   The Enter Category Name dialog is displayed.
2. Enter a Category Name.
3. Enter a Category Purpose.
4. Click on the Category icon and choose the color.
5. Select the Public radio button to make the category available to all users
   OR
6. Select the Private radio button to make the category private.
7. Click OK

Deleting a Category

1. From the Category tab click on the category you want to delete so it's highlighted.
2. Click the Delete button.
   The Confirm Delete dialog is displayed
3. Click OK.

Editing an existing Category

1. From the Category tab click on the category you want to delete so it's highlighted.
2. Click the Edit button.
   The Edit Category dialog is displayed.

3 Make the necessary changes to the category
4 Click OK.

Sets

Entering a New Set

1 From the Sets tab, click on the New button.
The Enter Name dialog is displayed.
2 Enter a Sets Name.
3 Select the Category to add it to the set.
A check mark will be displayed next to the category.

Deleting a Set

1 Choose the set you wish to delete from the drop down menu.
2 Click the Delete button.
The Confirm Delete dialog is displayed
3 Click OK.

Editing an existing Set

1 Choose the set you wish to rename from the drop down menu.
2 Click the Rename button.
The Enter Name dialog is displayed.
3 Enter a new name for the Set.
4 Click OK.

Priority

Entering a New Priority

1 From the Priority tab, click on the New button.
The Enter Name dialog is displayed.
2 Enter a Priority name.
3 Click OK.

Deleting a Priority

1 Choose the Priority you wish to delete from the list.
2 Click the Delete button.
The Confirm Delete dialog is displayed
3 Click OK.

Editing an existing Priority

1 Choose the Priority you wish to rename from the drop down menu.
2 Click the Edit button.
The Enter Name dialog is displayed.

3 Enter a new name for the Priority.
4 Click OK

Sorting Priorities

1 Highlight the Priority you want to sort from the list.
2 Use the Up and/or Down buttons to reorder the list.

Actions

Entering a New Actions

1 From the Action tab, click on the New button.
The Enter Name dialog is displayed.
2 Enter a Action name.
3 Click OK.

Deleting a Actions

1 Choose the Action you wish to delete from the list.
2 Click the Delete button.
The Confirm Delete dialog is displayed
3 Click OK

Editing an existing Actions

1 Choose the Action you wish to rename from the drop down menu.
2 Click the Edit button.
The Enter Name dialog is displayed.
3 Enter a new name for the Action.
4 Click OK

Sorting Actions

1 Highlight the Priority you want to sort from the list.
2 Use the Up and/or Down buttons to reorder the list

Type

Entering a New Type

1 From the Type tab, click on the New button.
The Enter Name dialog is displayed.
2 Enter a Type name.
3 Click OK

Deleting a Type

1. Choose the Type you wish to delete from the list.
2. Click the Delete button.

   The Confirm Delete dialog is displayed
3. Click OK.

Editing an existing Type

1. Choose the Type you wish to rename from the list.
2. Click the Edit button.

   The Enter Name dialog is displayed.
3. Enter a new name for the Type.
4. Click OK.

Setting Defaults

1. Choose the Type you wish assign defaults.
2. Choose a default Category, Priority, Action and Set for the Type.
3. If you want the Type to Roll Forward Till Done, put a check in the check box.

Sorting Types

1. Highlight the Type you want to sort from the list.
2. Use the Up and/or Down buttons to reorder the list.

Status

Entering a New Status

1. From the Status tab, click on the New button.

   The Enter Name dialog is displayed.
2. Enter a Status name.
3. Click OK.

Deleting a Status

1. Choose the Status you wish to delete from the list.
2. Click the Delete button.

   The Confirm Delete dialog is displayed
3. Click OK.

Editing an existing Status

1. Choose the Status you wish to rename from the list.
2. Click the Edit button.

   The Enter Name dialog is displayed.
3. Enter a new name for the Status.
4. Click OK.

Sorting Status

1. Highlight the Status you want to sort from the list.
2. Use the Up and/or Down buttons to reorder the list.

Event Defaults

Quote Generated Follow-up Event Entries

1 From the Event Default tab select Quote Generated Follow-up Event Type, Action, Priority, Category and Status from the drop-down menus.

2 To have the event Roll Forward until marked done, check the Roll forward Until Done check box.

Job Generated Follow-up Event Entries

1 From the Event Default tab select Job Generated Follow-up Event Type, Action, Priority, Category and Status from the drop-down menus.

2 To have the event Roll Forward until marked done, check the Roll forward Until Done check box.

Job Generated Check-up Event Entries

1 From the Event Default tab select Job Generated Check-up Event Type, Action, Priority, Category and Status from the drop-down menus.

2 To have the event Roll Forward until marked done, check the Roll forward Until Done check box.

Look

1 From the Look tab select the font you wish to use for the calendar.

2 Select the size of the font.

3 Select the format for printing the calendar.

4 Select the scale.

5 Check the Print in color checkbox if want the calendar to print in color and you have a printer that will accommodate printing in color.

Date and Time

1 From the Date and Time tab set the date format.

2 Set the time format.

3 Check the check box if you want to hide the time while viewing in the month view.

4 Set the calendar from hours.

5 Set the calendar to hours.

6 Set the working from hours.

7 Set the working to hours.

Color

1 From the Colors tab select a color for each of the items.

NOTE

When you click on the box to change the color the color pallet will be displayed. To get more info on the color pallet, see the “About The Screens” section of chapter.

Options

1 From the Option tab enter the amount of corner rounding you want for the event.

This will round the corner of the event in the calender. If you want the event to have square corners, enter a zero “0”.

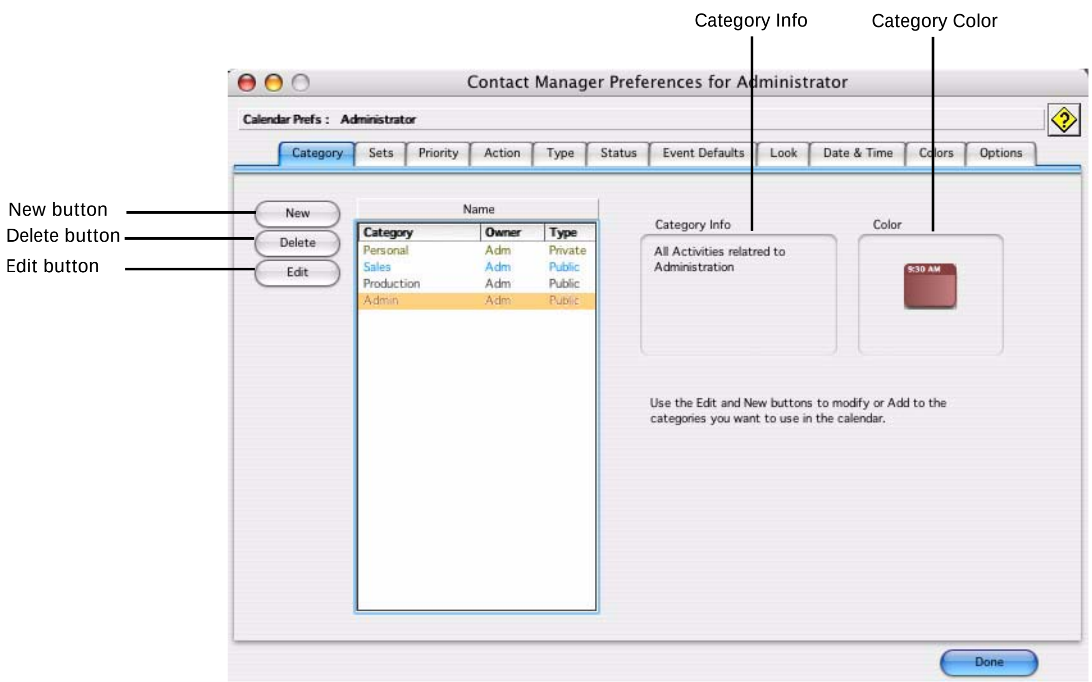
2 Enter the time rounding interval for the events.

3 Enter the overlap settings for events.

4 Enter the Startup Options.

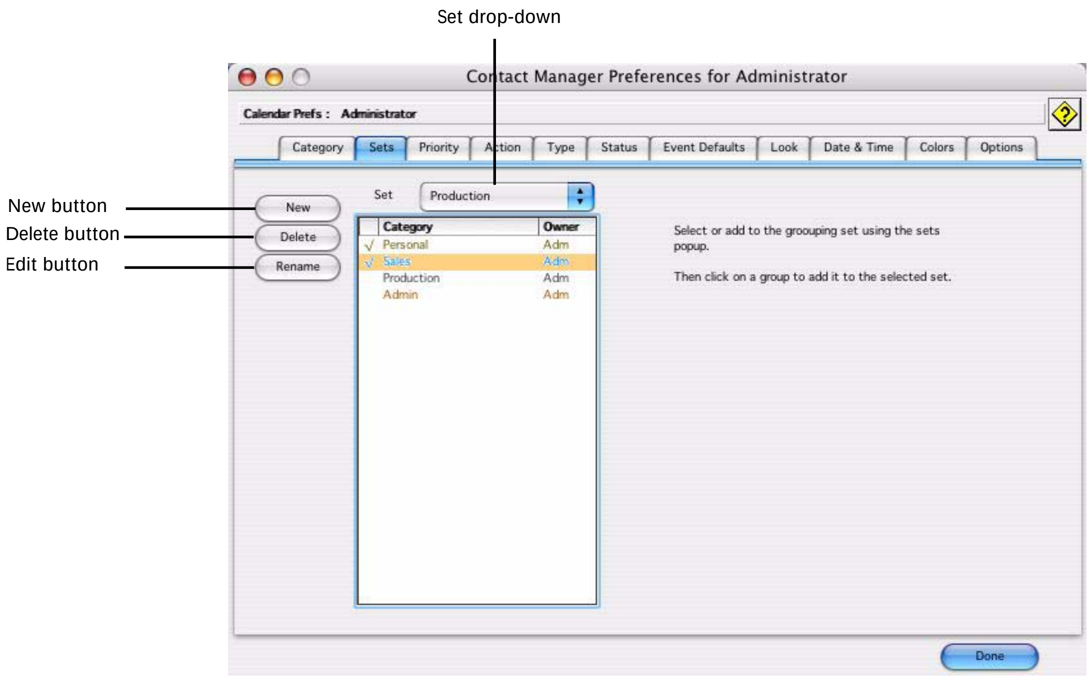
ABOUT THE SCREENS

Category Tab



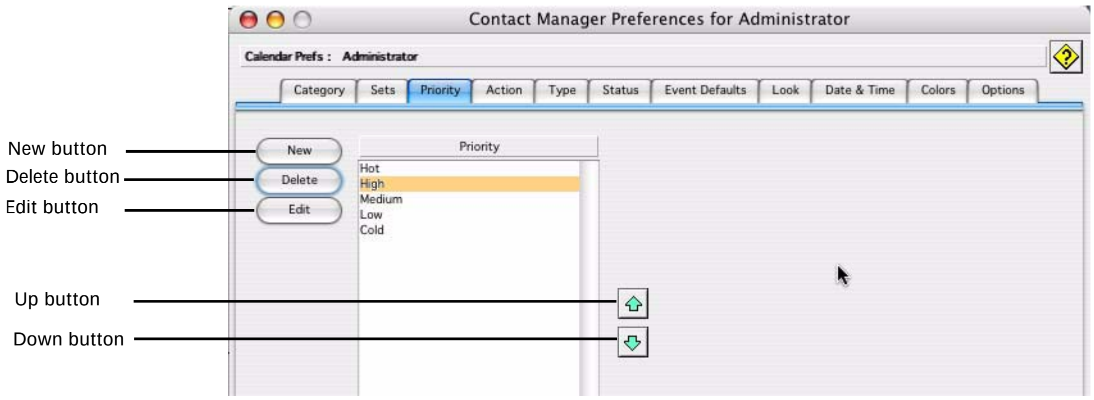
Info/Buttons	Contents/Usage
New button	Click to create a new category
Delete button	Click to delete a category
Edit button	click to edit a category
Category Info	Information about the selected category
Category Color	display of the color assigned to the category

Sets Tab



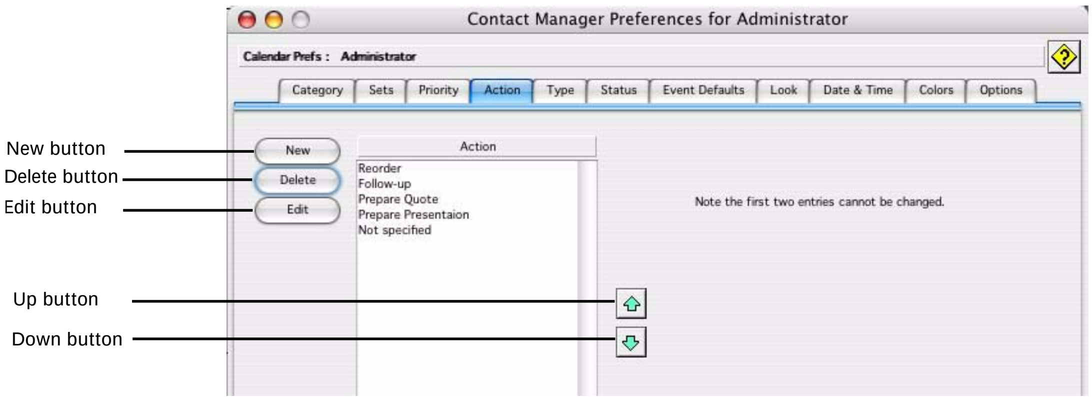
Info/Buttons	Contents/Usage
New button	Click to create a new set
Delete button	Click to delete a set
Edit button	click to edit a set
Set drop-down	Click to select the set you want to edit

Priority Tab



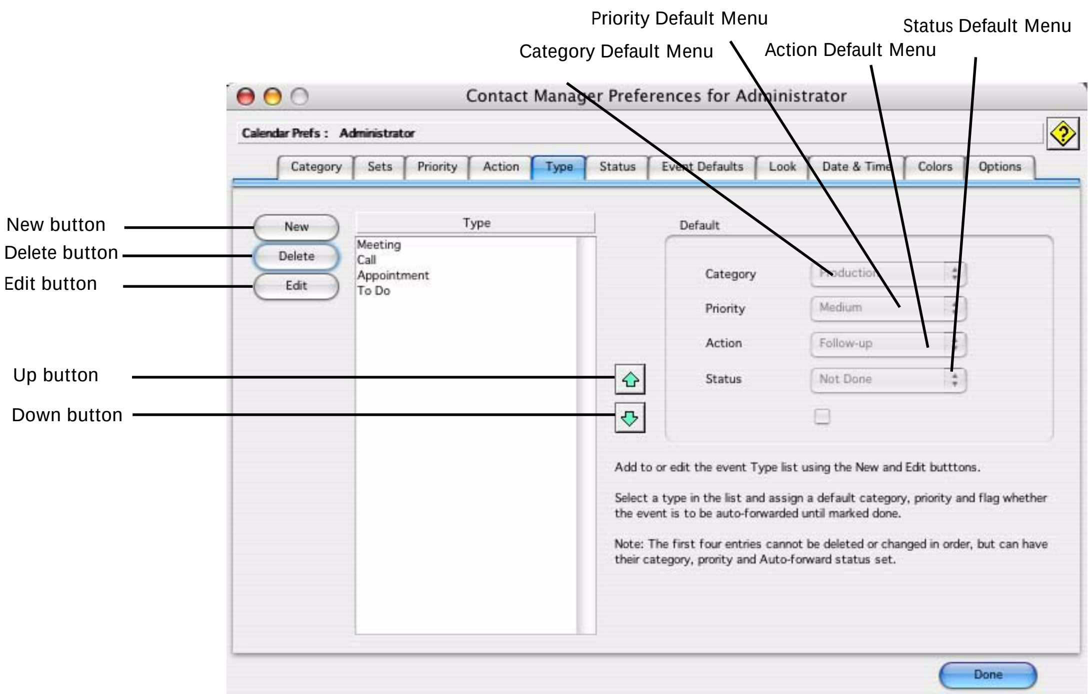
Info/Buttons	Contents/Usage
New button	Click to create a new priority
Delete button	Click to delete a priority
Edit button	click to edit a priority
Up button	Click to move a priority up
Down button	Click to move a priority down

Action Tab



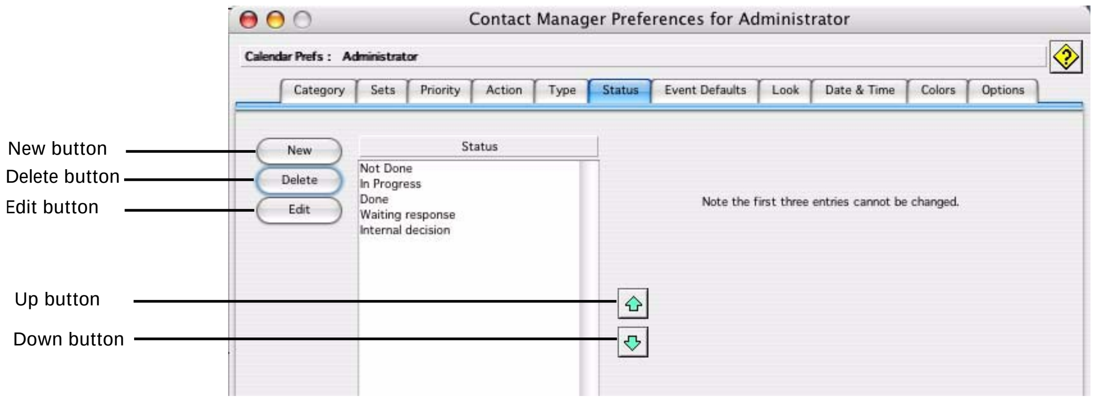
Info/Buttons	Contents/Usage
New button	Click to create an new action
Delete button	Click to delete an action
Edit button	click to edit an action
Up button	Click to move an action up
Down button	Click to move an action down

Type Tab



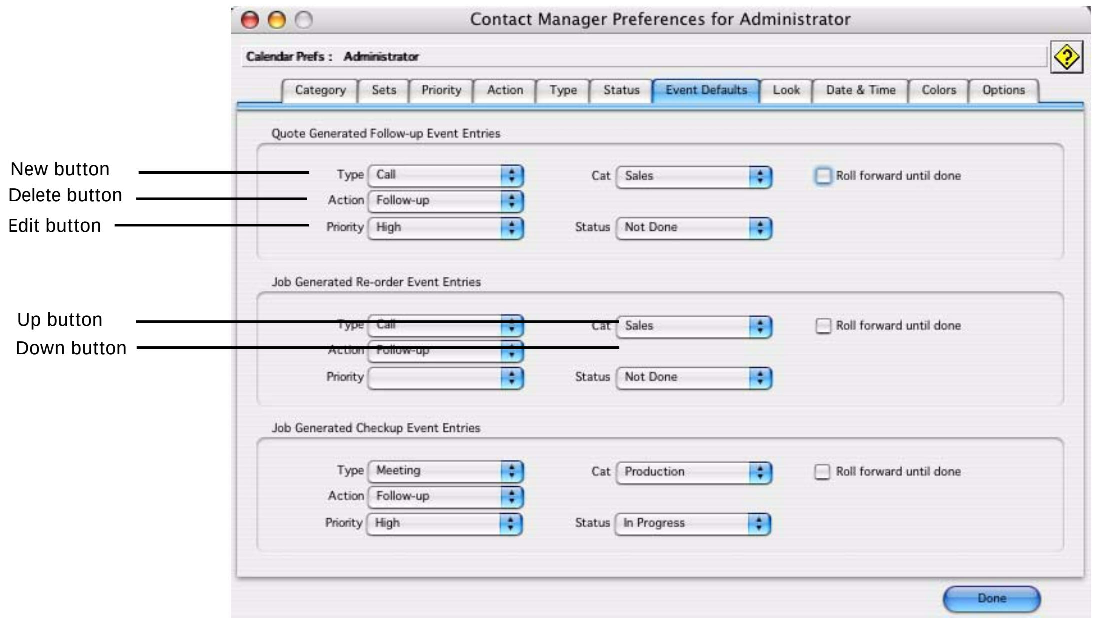
Info/Buttons	Contents/Usage
New button	Click to create a new type
Delete button	Click to delete a type
Edit button	click to edit a type
Up button	Click to move a type up
Down button	Click to move a type down
Category Default Menu	Click to set the default category
Priority Default Menu	Click to set the default priority
Action Default Menu	Click to set the default action
Status Default Menu	Click to set the default status

Status Tab



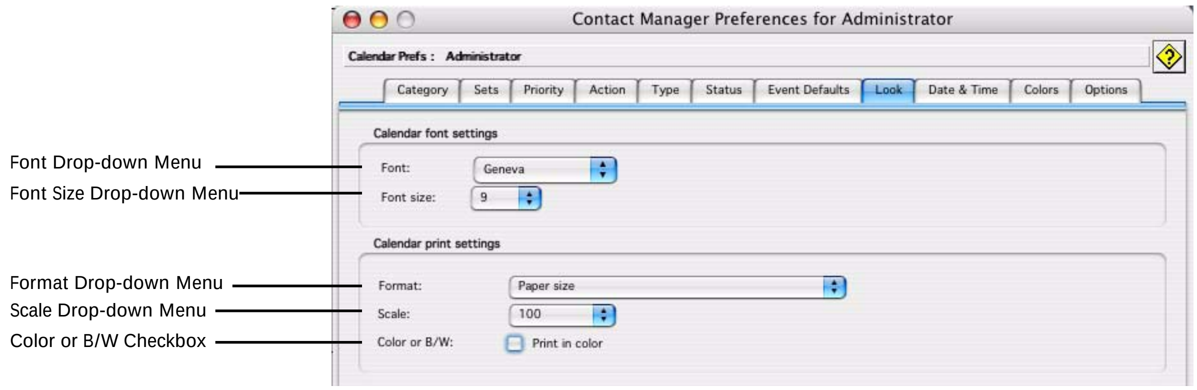
Info/Buttons	Contents/Usage
New button	Click to create a new Status
Delete button	Click to delete a Status
Edit button	click to edit a Status
Up button	Click to move a Status up
Down button	Click to move a Status down

Event Defaults Tab



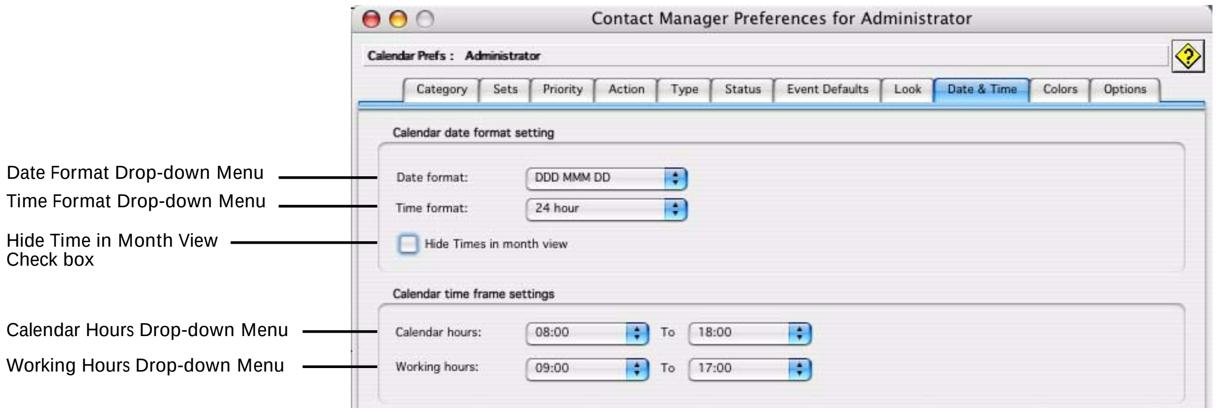
Info/Buttons	Contents/Usage
New button	Click to create a new priority
Delete button	Click to delete a priority
Edit button	click to edit a priority
Up button	Click to move a priority up
Down button	Click to move a priority down

Look Tab



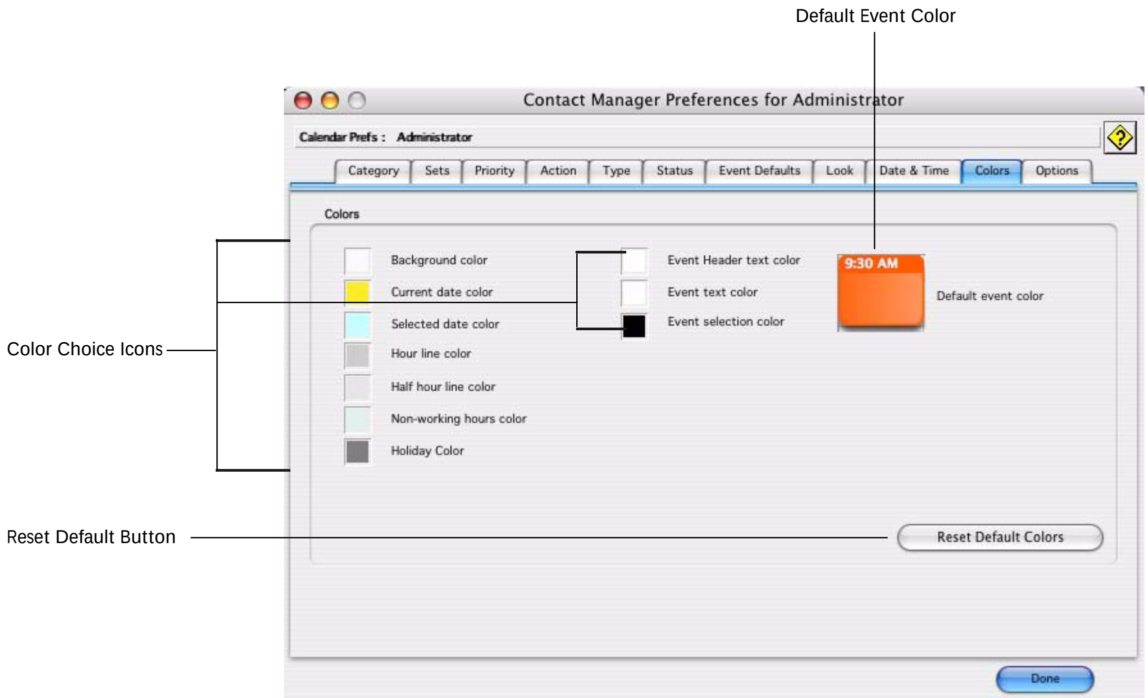
Info/Buttons	Contents/Usage
Font Drop-down Menu	Click to choose font
Font Size Drop-down Menu	Click to choose font size
Format Drop-down Menu	click to choose the format print settings
Scale Drop-down Menu	Click to choose the scale percentage
Color or B?W Checkbox	Click to print calendar in color

Priority Tab



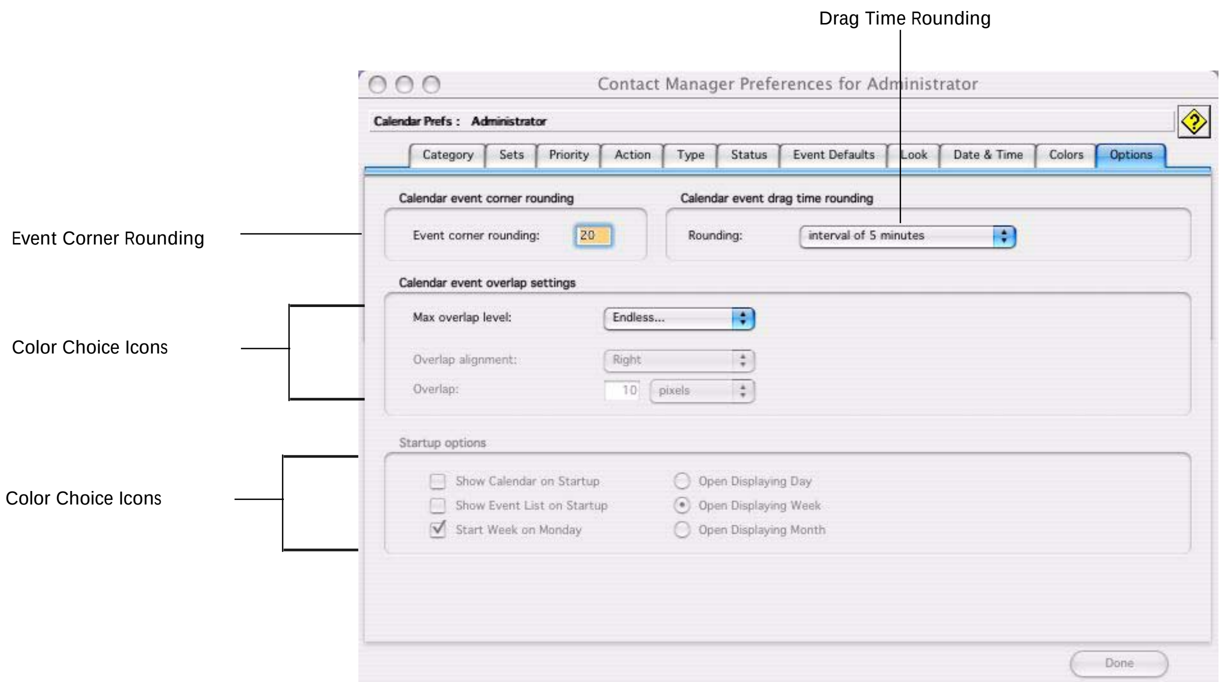
Info/Buttons	Contents/Usage
Date Format Drop-down Menu	Click to choose the date format
Time Format Drop-down Menu	Click to choose the time format
Hide Time in Month View Check box	Click to hide the time in the month view
Calendar Hours Drop-down Menu	Click to choose the from and to hours that you want to show in the calendar
Working Hours Drop-down Menu	Click to choose the from and to work hours

Colors Tab



Info/Buttons	Contents/Usage
Color Choice Icons	Click to display the Colors Pallet and choose the color
Reset Defaultbutton	Click to reset the calendar back to the default colors
Default Event Color	Click to choose a default event color

Options Tab



Info/Buttons	Contents/Usage
Color Choice Icons	Click to display the Colors Pallet and choose the color
Reset Defaultbutton	Click to reset the calendar back to the default colors
Default Event Color	Click to choose a default event color

Chapter 45
Purchase Orders

OVERVIEW

The Purcase Oder database will help to keep track of Po's that are associated with jobs and General PO"s.

Before You Begin

You should...	Where this information is found...
Set your preferences for Sequence Numbering	File Menu > Preferences > Seqence Numbering NOTE If you check the box to havePO numbers to have the same number as the Job, only the PO's created that are associated to a the job will have the same number as the job. PO's created from the Purchase Order List View will have the next number in the sequence as per the Preference > Sequence Number.

STEP-BY-STEP

This section describes the information and functions available when viewing the Outside Services Tab:

- Accessing Purcase Order List View
- Creating a New Purchase Order
  - From the Purchase Order List View
  - From the Electronic Job Ticket Outside Service Tab
- Voiding a Purchase Order
- Setting Up Purchase Order Preferences
- Exporting Purchase Orders

Accessing Purcase Order List View

1 Click on the Navigator > Daily Tab> Purchase Orders

The Purchase Order List View is displayed

Creating a New Purchase Order

From the Purchase Order List View

1 Access the Purchase Order List View.

NOTE

Purchase Orders Created here will not be associated with a job. To create a purchase order that is associated with a job, see the “Job: Electronic Ticket-Outside Service Tab” chapter.

2 Click on the New button.

The Purchase Order Entry Screen is Displayed

3 Select a Vendor from the choice list

4 Enter a Quantity for the item you are ordering

5 Press your Tab key to move through the remaining fields entering the criteria for the purchase as you move along.

6 Click the Print button to print the Purchase Order or you can email the PO by clicking the Email button

7 Click OK

From the Electronic Job Ticket Outside Service Tab

1. Access the Electronic Job Ticket Outside Service Tab

> **NOTE**
>
> Purchase Orders Created here will be associated with the job. To create a purchase order that is not associated with the job, see the “Job: Electronic Ticket-Outside Service Tab” chapter.

2. Click on the New button.

   The Purchase Order Entry Screen is Displayed
3. Select a Vendor from the choice list
4. Enter a Quantity for the item you are ordering
5. Press your Tab key to move through the remaining fields entering the criteria for the purchase as you move along.
6. Click the Print button to print the Purchase Order or you can email the PO by clicking the Email button
7. Click OK

Voiding a Purchase Order

1. Access the Job > Outside Service tab
2. Highlight the PO want to Void.
3. Click the Void button.

Setting Up Purchase Order Preferences

Exporting Purchase Orders

About The Screens

TIP

See the chapter “Custom Fields Editor” for information on changing the labels for each tab and the names.

Outside Service Tab

Field Name	Contents
Buyout Title	Displays the default label set in the Custom Fields Editor.Can be customized for each job directly on the screen.
Buyout Due Date Title	Displays the default label set in the Custom Fields Editor. Can be customized for each job directly on the screen.

Field Name	Contents
Buyout Due Date	Click on the Calendar icon to select a date
Notes	Enter notes regarding details of the buyout/outside service from the vendor.
PO From Estimate	Purchase orders generated form the PostPress/ Ouside Service area of the Estimate
PO From Est. Detail	A quick detail view of the PO generated from the estimate
Additional PO’s	Purchase orders created from the Outside Service Tab

Chapter 86
Customers

OVERVIEW

PrintPoint's Customer database provides a way to store information about your customers and contacts including:

- Multiple contacts
- Tel, Fax, Email, Pager number, etc.
- Mailing address
- Billing Address
- Shipping Address
- Alternate Shipping Addresses
- Accounting Information and Links to QuickBooks for Windows, Peachtree for Windows and AccountEdge (MYOB) for both Macintosh and Windows.
- Various Additional Customizable Information
- Customer History

NOTE

Key Concept: Customer Ratings

Three ratings are available when you set up a new customer; AA, BB, and CC. Generally, the AA rating is used for your most demanding customers. These are customers who submit complicated electronic files, require quick turnaround on difficult jobs, are on site for press checks, or require other special handling. The BB rating is for customers with less demanding jobs, while CC is for customers to whom you want to give the lowest prices.

There is a direct relationship between the customer rating and the Preferences > Global Markup or Discount screen. The associated Global Markup or Discount percentage is used to markup the estimate unless you have selected the checkbox, Use individual customer markups instead of global, on the same Preferences screen. This option allows you to enter a unique markup for each customer.

You may also re-assign a rating, other than the default, on an estimate by estimate basis. For example, you may want to give an AA customer a CC rating for a one-color, envelope job when they normally do 4 color work.

BEFORE YOU BEGIN

You should:	Where to find it:
Set the Preferences Global Markup or Discount screen to set your rating percentages prior to entering new customers.	1 Select File menu > Preferences. 2 Click the drop-down list in the Preferences window and select Global Markup or Discount. 3 Enter a markup percentage in each of the three rating entry fields. The number you enter is the percentage of markup or discount that will be applied to the grand total on a job. 4 Click OK to save your changes.
Setup Customer Custom Fields	File Menu > Custom Fields Editor TIP See Custom Fields Editor chapter of this Manual

STEP-BY-STEP

This section includes the following topics:

- Activating the Customer Wizard
- Adding a New Customer
  - From the Customer List View
  - From the Estimate
- Cloning a Customer
- Modifying a Customer
  - From the Customer List View
  - From the Estimate
- Deleting a Customer
- Finding Information for Deleted Customers
- Activating and Inactivating a Customer
  - Marking a Customer Inactive
  - Marking a Customer Active
- Adding a Contact
  - From a Customer Record
  - On-The-Fly
- Deleting a Contact
- Maintaining Customer Accounting Information
- Review the Customer History
  - Reviewing the Estimate History
  - Reviewing the Quote History
  - Reviewing the Job History
  - Reviewing the Invoice History
  - Reviewing the Letter History
  - Reviewing the Sales Analysis

Activating the Customer Wizard

PrintPoint has developed an On-Screen Wizard for setting up a new Customer.

Follow the steps below to activate the Wizard.

1. File Menu > Preferences.
2. Select Wizards from the Select drop-down list.

3 Place a mark in the checkbox for the Use Customer Wizard.

4 Click OK to save your Preferences.

NOTE

It is recommended that you use the Customer Wizard to setup a new customer until you become familiar enough with the program to use the standard Customer Detail Screen.

Adding a New Customer

From the Customer List View

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

2 Click the New button.

PrintPoint displays Customer Wizard Confirm dialog.

3 Click the Wizard button.

4 PrintPoint displays the Customer Wizard.

5 Follow the on-screen instructions to setup the customer.

NOTE

It is recommended that you use the Customer Wizard to setup a new customer until you become familiar enough with the program to use the standard Customer Detail Screen.

From the Estimate

1 Open an existing or create a new Estimate.

2 In the Customer Setup subsection, click on the Black Triangle in the Code Name selection box.

PrintPoint displays the Customer Choice List.

3 Click the New button.

PrintPoint displays Customer Wizard Confirm dialog.

4 Click the Wizard button.

5 PrintPoint displays the Customer Wizard.

6 Follow the on-screen instructions to setup the customer.

NOTE

It is recommended that you use the Customer Wizard to setup a new customer until you become familiar enough with the program to use the standard Customer Detail Screen.

Cloning a Customer

1 Select Navigator > Customers.
  PrintPoint displays the Customer List View.
2 Click the Clone button.
  PrintPoint displays the New Customer Code Request dialog.
3 Enter a new customer code.
4 Click OK.
  PrintPoint adds the new customer to the Customer List View.
5 Select the new customer for the list.
6 Make changes as necessary and click OK.

Modifying a Customer

From the Customer List View

1 Select Navigator > Customers.
  PrintPoint displays the Customer List View.
2 Double-click a customer in the List View to display the customer record.
3 Modify the customer data after selecting the appropriate tabs.
4 Click OK to save your changes.

NOTE

Once you have modified a customer from the database, it's code name will no longer appear in your Customer Choice List. This can make searching for any historical information difficult. See the section "Finding Information for Deleted Customers" below.

Deleting A Customer

PrintPoint allows you to delete customers from the database.

NOTE

This procedure does not delete the estimates, jobs, quotes, and invoices for deleted customers - they are retained in the PrintPoint database.

1 Select Navigator > Customers.
  The Customer List View is displayed.
2 Highlight the customer or customers you want to delete.

3 Click the Delete button.
4 Click the Delete button in the confirmation box.
The customer record is removed from the PrintPoint database.

Finding Information for Deleted Customers

NOTE

Once you have deleted a customer from the database, it's code name will no longer appear in your Customer Choice List. This can make searching for any historical information difficult. If you should need to search for a record in the Estimate, Quote, Job or Invoice files, try using the sample method below.

1 Select Navigator > Estimates.
PrintPoint displays the Estimate List View.
2 Click the Search button and select Search by Search Editor**.**
3 In the Estimate Search Editor window, click on Customer_Code, followed by your qualifier (e.g., begins with) and type your search criteria.
4 Click OK and the search for the estimates that begin with the Customer Code you provided will begin.

Activating and Inactivating a Customer

Customers can be marked as inactive, but their customer record remains in the PrintPoint database. Inactive customers can be returned to active status.

Marking a Customer Inactive

1 Select Navigator > Customers.
The Customer List View is displayed.
2 Double-click the customer you want to mark as inactive.
The Customer Entry screen is displayed.
3 On the Customer tab, click the Active checkbox.

The checkbox is cleared, marking this customer as inactive.

Marking a Customer Active

1 Select Navigator > Customer.
The Customer List View is displayed.
2 Double-click the customer you want to mark as active.

3. The Customer Entry screen is displayed.
4. On the **Customer** tab, click the **Active** checkbox.

   The checkbox is selected, marking this customer as active.

Adding A Contact

From the Customer

Contacts are added to a customer's record using the Contact tab on the Customer Entry screen. You can use the Contact tab to add or delete a customer contact and select one contact as the Primary Contact.

1. Display the Customer Detail Screen.
2. Click the Contact tab.
3. Click the Add button.
4. The cursor is placed in the Salut entry field.
5. Complete the contact information.
6. Place a mark in the Primary Contact checkbox if this person is the primary contact.

   NOTE

   Each customer can have multiple contacts, but only one can be the primary contact.

7. Click OK to save the contact information.

On-The-Fly

Contact can also be added On-The-Fly from the following locations:

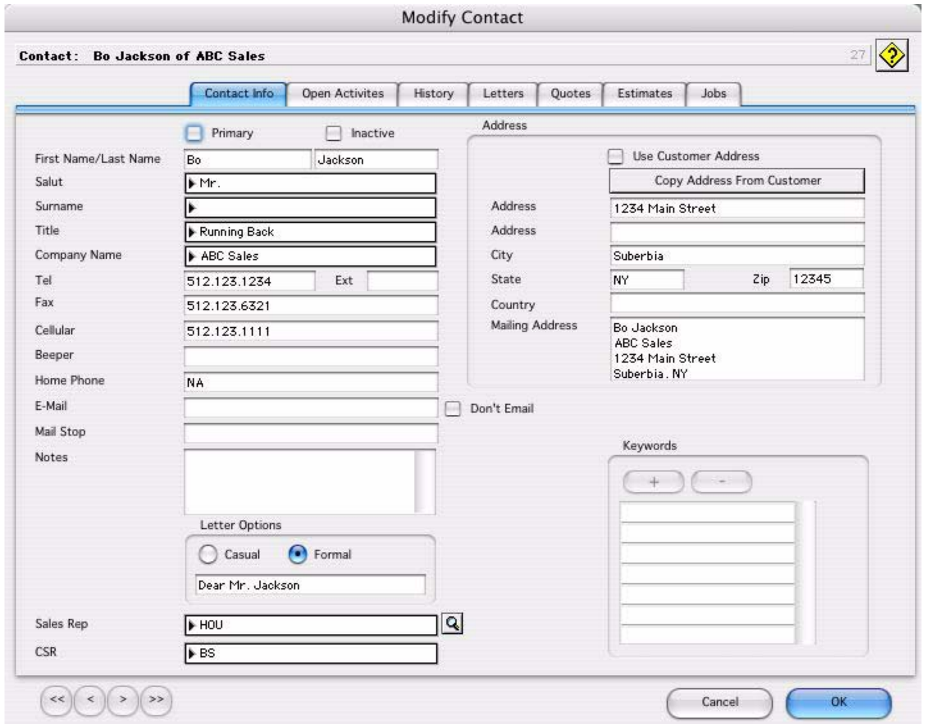
- Estimates
- Quotes
- Jobs

1. Open an existing or create a new Estimate, Quote or Job.
2. lick on the Black Triangle in the Contact selection box.

   PrintPoint displays the Contact Choice List.
3. Click the New button.

   PrintPoint displays the New Contact dialog.

4 Complete the contact information.



NOTE

For more information on the contact entry screen, see the “Contact” chapter.

5 Place a mark in the Primary Contact checkbox if this person is the primary contact.

NOTE

Each customer can have multiple contacts, but only one can be the primary contact.

6 Click OK to save the contact information.

CAUTION

If you are adding the contact On-The-Fly from a Quote Detail Screen, you must save the quote for the Contact to be saved.

Deleting a Contact

1. Display the Customer entry form.
2. Click the Contact tab.
3. Click the Delete button.
4. Click OK to delete the contact.

Maintaining Customer Accounting Information

PrintPoint uses Accounting information which is stored in the Customer database for everything from checking credit limits to calculating sales commissions to linking to external Accounting Systems.

1. Select Navigator > Customers.

   PrintPoint displays the Customer Review List.
2. Double-click the entry you want to modify.

   PrintPoint displays the Customer entry screen.
3. Click the Accounting tab.
4. Complete the information as required.
5. Click the Additional Accounting tab.

   NOTE

   The Additional Accounting Tab could be labeled differently depending on if you've setup accounting links in preferences.
6. Complete the information as required.
7. Click OK.

Review the Customer History

PrintPoint maintains a detailed history of the contact made for each customer. You can view the customers history for Estimates, Quotes, Jobs, Invoices, Letters and Sales Analysis.

Reviewing the Estimate History

1. From the Customer Record click on the History tab.

   PrintPoint displays the history 2nd Level Tabs.

2 Click on the Estimate tab.

PrintPoint displays the Estimate History List View.

NOTE

From the Contact dropdown menu choose All to view all the estimates for the customer or you can select only the estimates for a specific contact. See the “About the Screens” section of this chapter.

NOTE

The default view will show all the estimate history for the selected contact. You can choose to narrow your view by selecting a date range using the calendar. See the “About the Screens” section of this chapter.

3 Double click on the estimate you want to review.

PrintPoint displays the Estimate Screen.

Reviewing the Quote History

1 From the Customer Record click on the History tab.

PrintPoint displays the history 2nd Level Tabs.

2 Click on the Quote tab.

PrintPoint displays the Quote History List View.

NOTE

From the Contact dropdown menu choose All to view all the quotes for the customer or you can select only the quotes for a specific contact. See the “About the Screens” section of this chapter.

NOTE

The default view will show all the quote history for the selected contact. You can choose to narrow your view by selecting a date range using the calendar. See the “About the Screens” section of this chapter.

NOTE

If you click the Expand All button you can see each line item of a Quote. See the “About the Screens” section of this chapter.

3 Double click on the quote you want to review.

PrintPoint displays the Quote Screen.

Reviewing the Job History

1 From the Customer Record click on the History tab.

PrintPoint displays the history 2nd Level Tabs.

2 Click on the Jobs tab.

PrintPoint displays the Jobs History List View.

NOTE

From the Contact dropdown menu choose All to view all the jobs for the customer or you can select only the jobs for a specific contact. See the “About the Screens” section of this chapter.

NOTE

The default view will show all the jobs history for the selected contact. You can choose to narrow your view by selecting a date range using the calendar. See the “About the Screens” section of this chapter.

3 Double click on the estimate you want to review.

PrintPoint displays the Electronic Job Ticket.

Reviewing the Invoice History

1 From the Customer Record click on the History tab.

PrintPoint displays the history 2nd Level Tabs.

2 Click on the Invoices tab.

PrintPoint displays the Invoice History List View.

NOTE

The default view will show all the invoice history for the customer. You can choose to narrow your view by selecting a date range using the calendar. See the “About the Screens” section of this chapter.

3 Double click on the invoice you want to review.

PrintPoint displays the Invoice Screen

Reviewing the Letter History

1 From the Customer Record click on the History tab.

PrintPoint displays the history 2nd Level Tabs.

2 Click on the Letters tab.

PrintPoint displays the Letters History List View.

NOTE

From the Contact dropdown menu choose All to view all the letters for the customer or you can select only the letters for a specific contact. See the “About the Screens” section of this chapter.

NOTE

The default view will show all the estimate history for the selected contact. You can choose to narrow your view by selecting a date range using the calendar. See the “About the Screens” section of this chapter.

3 Double click on the letter you want to review.

PrintPoint displays the Letter

Reviewing the Sales Analysis

1 From the Customer Record click on the History tab.

PrintPoint displays the history 2nd Level Tabs.

2 Click on the Sales Analysis tab.

PrintPoint displays the (Morrie I'm not sure what to call this view) Customer Sales Analysis View.

3 Choose the Date Range for the sales you want to analyze.

4 Choose the type of report you want by selecting either the All Jobs, Completed Jobs or the Invoiced Jobs radio button.

5 Click Calculate to view a sales analysis report based on sales categories.

NOTE

You must have previously setup your sales categories. See the chapter "About the Screens" section of this chapter.

NOTE

The default view will show all the estimate history for the selected contact. You can choose to narrow your view by selecting a date range using the calendar. See the "About the Screens" section of this chapter.

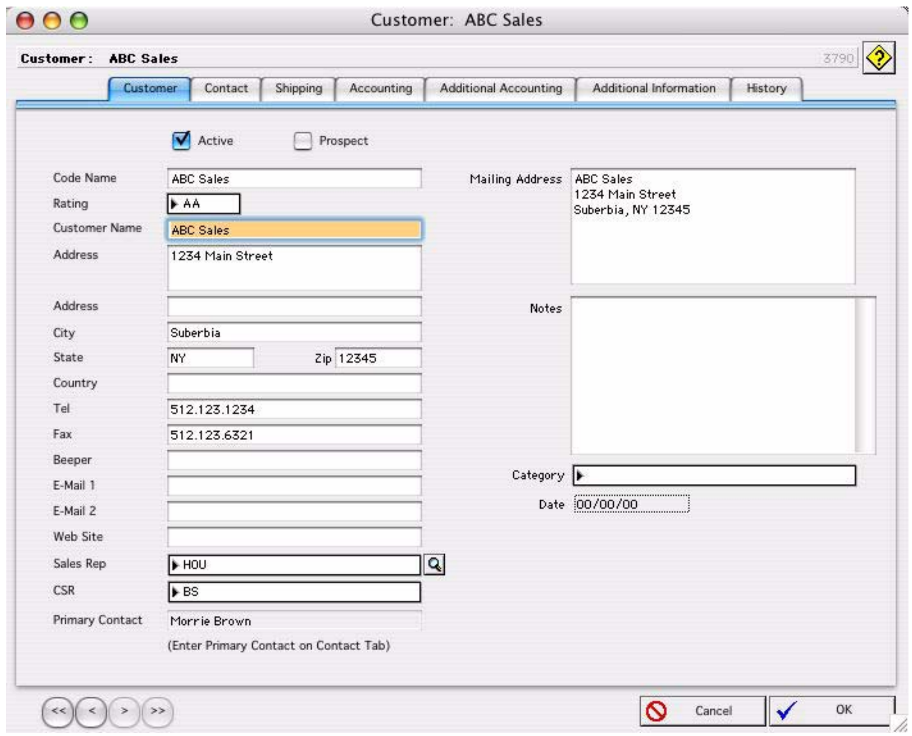
6 Double click on the estimate you want to review.

PrintPoint displays the Estimate Screen

About the Screens

The Customer Detail Screen

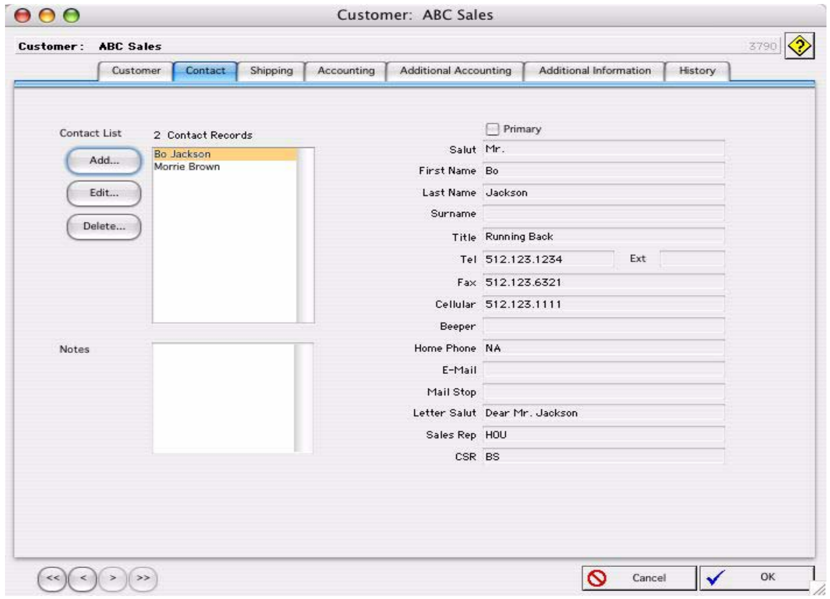
Customer Tab



Info/Buttons	Contents/Usage
Active checkbox	Check to have the customer show in the numerous customer list. If not checked, the customer will not be available to be selected from any list
Prospect checkbox	Check this box to mark the customer as a prospect. You can then add this field to the Customer List View (See the chapter Getting Started > List Views) and sort by prospect to list your prospects
Code Name	The Code Name is an abbreviated customer name used on the Customer List Views and the Customer Choice Lists.
Customer Name	Enter the customer name.
Address	Enter the customers street address.
Address	Enter additional customer street address info.

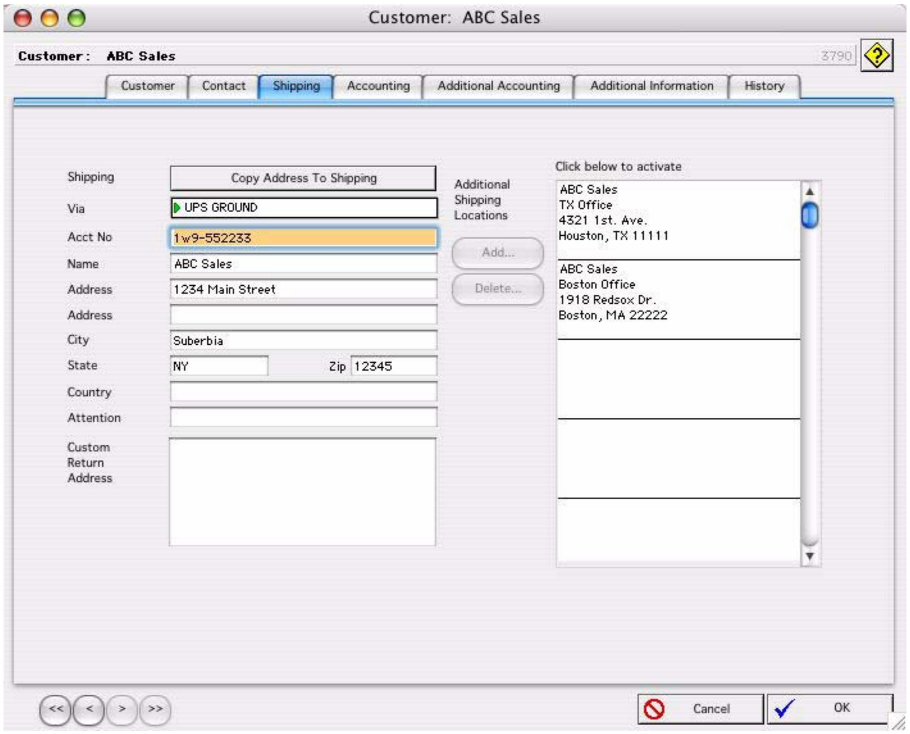
Info/Buttons	Contents/Usage
City	Enter the customers city.
City	Enter the customers city.
State	Enter the customers state.
Zip	Enter the customers zip code.
Country	Enter the customers country.
Tel	Enter the customers telephone number.
Fax	Enter the customers fax number.
Beeper	Enter the customers pager number.
E-mail 1	Enter the customers primary e-mail address.
E-Mail 2	Enter the customers secondary e-mail address.
Web Site	Enter the customers web address.
SR	Select the Sales Rep from the drop-down menu.
CSR	Select the Customer Service Rep from the drop-down menu.
Primary Contact	The customers primary contact. This box is automatically filled in by PrintPoint based on the Primary Contact information on the Contact Tab.
Mailing Address	The customers mailing address. This box is automatically filled in by PrintPoint based on the Address, City, State and Zip entries or you can manually type the info.
Notes	Enter notes about the customer.
Active (check box)	Check to make customer active.

Contact Tab and Contact Entry/ Modify Dialog



Info/Buttons	Contents/Usage
Add (button)	Click to add a contact.
Edit (button)	Click to edit selected contact.
Delete (button)	Click to delete selected contact.
Primary (check box)	Check to make the selected contact the primary contact.
Contact Entry/Modify dialog	For detailed information on contact entry, see the Contact chapter in this manual.

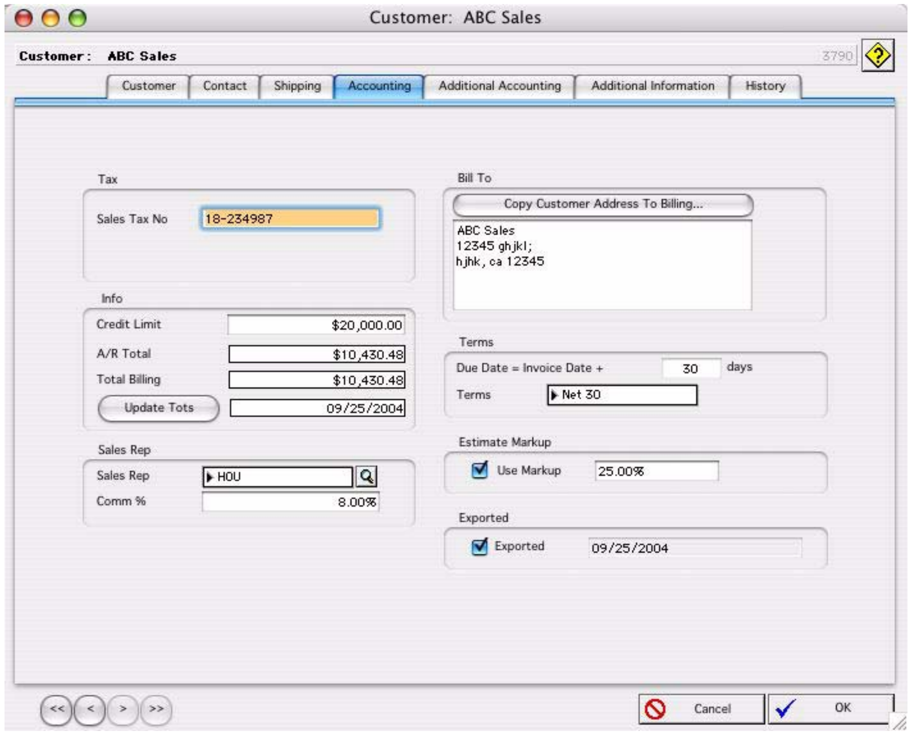
Shipping Tab



Info/Buttons	Contents/Usage
Copy Address to Shipping (button)	Click to copy the customers address that was entered on the customer tab to the shipping information below.
Via	Choose from list or enter manually the default way jobs should be shipped to the customer.
Acct No	Enter the customers shipper account number.
Name	Enter the customer name.
Address	Enter the customers street address.
Address	Enter additional customer street address info.
City	Enter the customers city.
State	Enter the customers state.
Zip	Enter the customers zip code.
Country	Enter the customers country.
Attention	Enter the name of the person the shipping is to the attention to.
Custom Return Address	If the customer has a custom shipping address enter it here.
Additional Shipping Locations	Enter any additional shipping address.

Info/Buttons	Contents/Usage
Add (button)	Click to add an additional shipping address.
Delete (button)	Click to delete and additional shipping address.

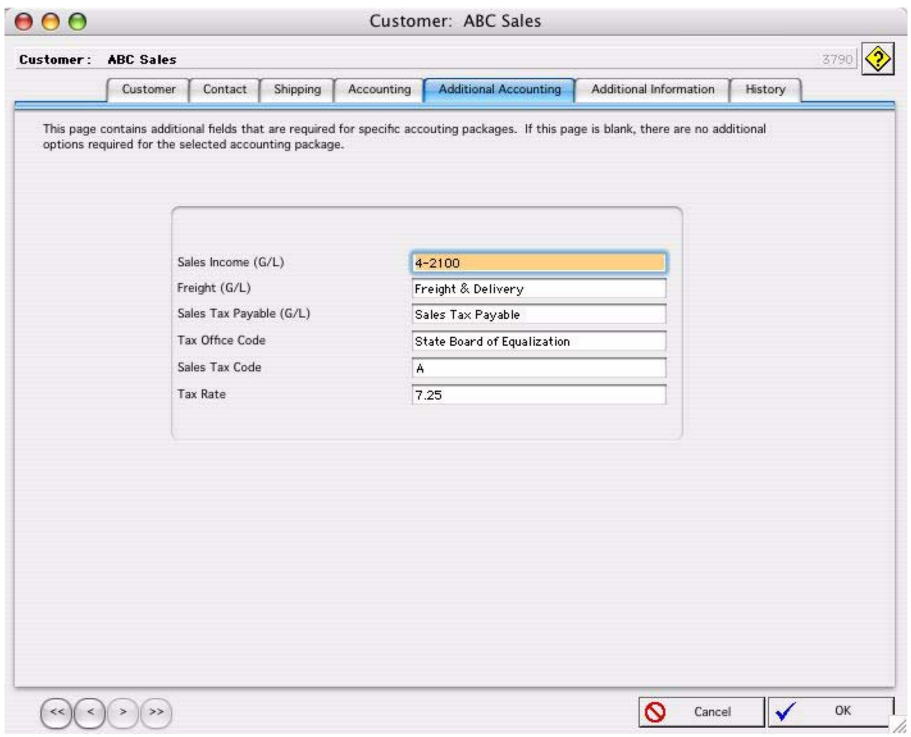
Accounting Tab



Info/Buttons	Contents/Usage
Sales Tax No	Enter the customers sales tax number.
Credit Limit	Enter a credit limit for the customer.
Update Tots (button)	Click to update the A/R Total and Total Billing boxes. The date box displays the date the totals were last updated.
SR	Click the Black Triangle to select the Sales Rep from a drop-down list.
QuickLink to Sales Rep Record (button)	Click to access the sales rep information.
Copy Customer Address to Billing (button)	Click to copy the customers address that was entered on the customer tab to the billing address information below.
Terms	Click the Black Triangle to select the terms from a drop-down list.

Info/Buttons	Contents/Usage
Estimate Markup	Enter a markup percentage for this customers estimates. Click the check box to use this markup instead of the default markups setup in preferences.
Exported	Click to mark this customer as already exported to your accounting package. The date box displays the date the customer info was exported.

Additional Accounting Tab

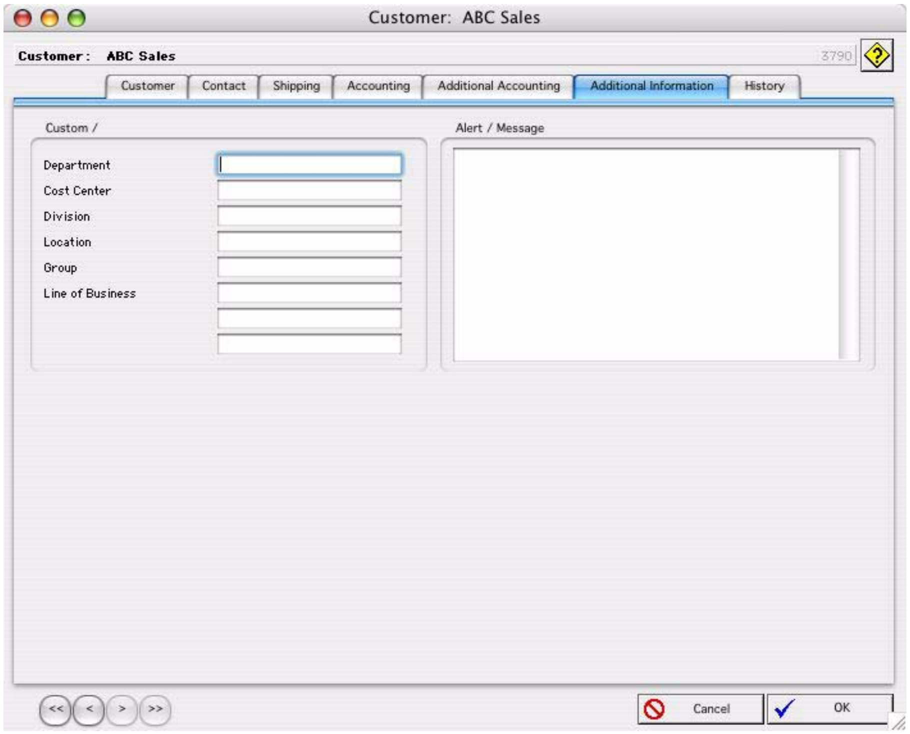


This tab contains additional fields that are required for specific accounting packages. If this tab is blank, no additional options are required.

NOTE

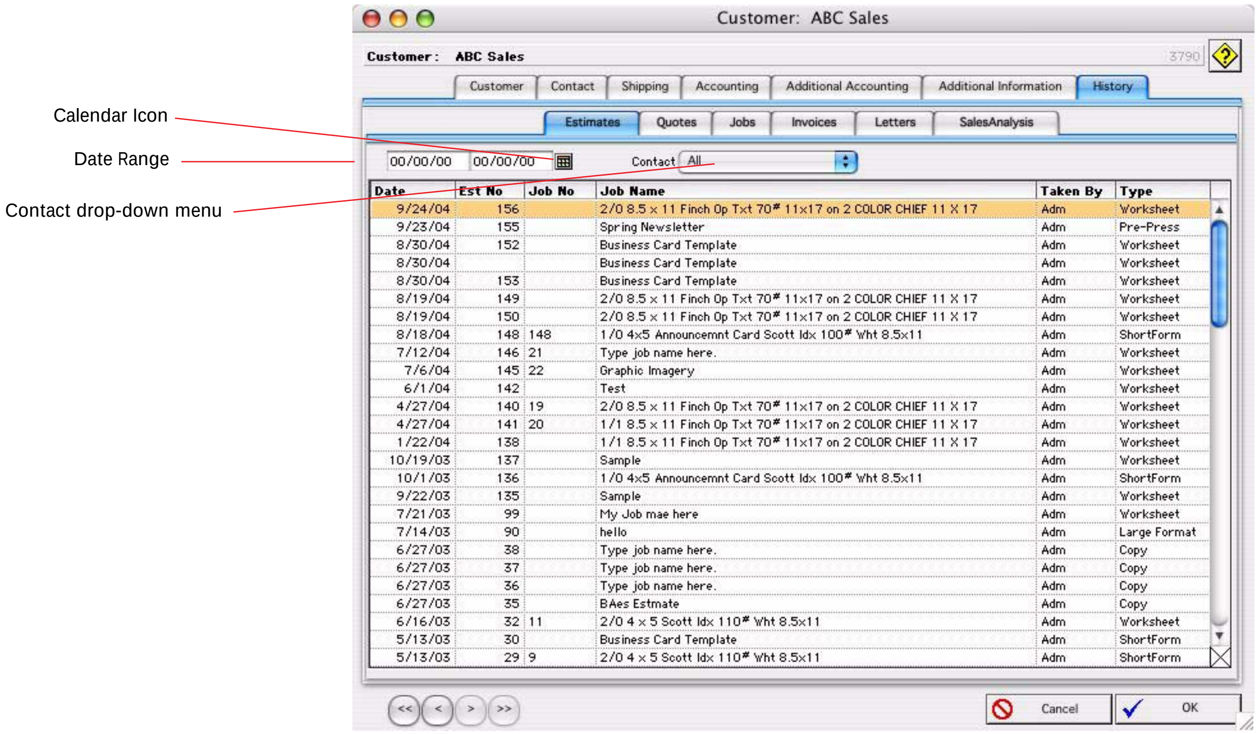
If you have setup accounting links in the File Menu > Preferences > Accounting Links the tab heading for this tab will change from Additional Accounting to the name of your accounting package.

Additional Information Tab



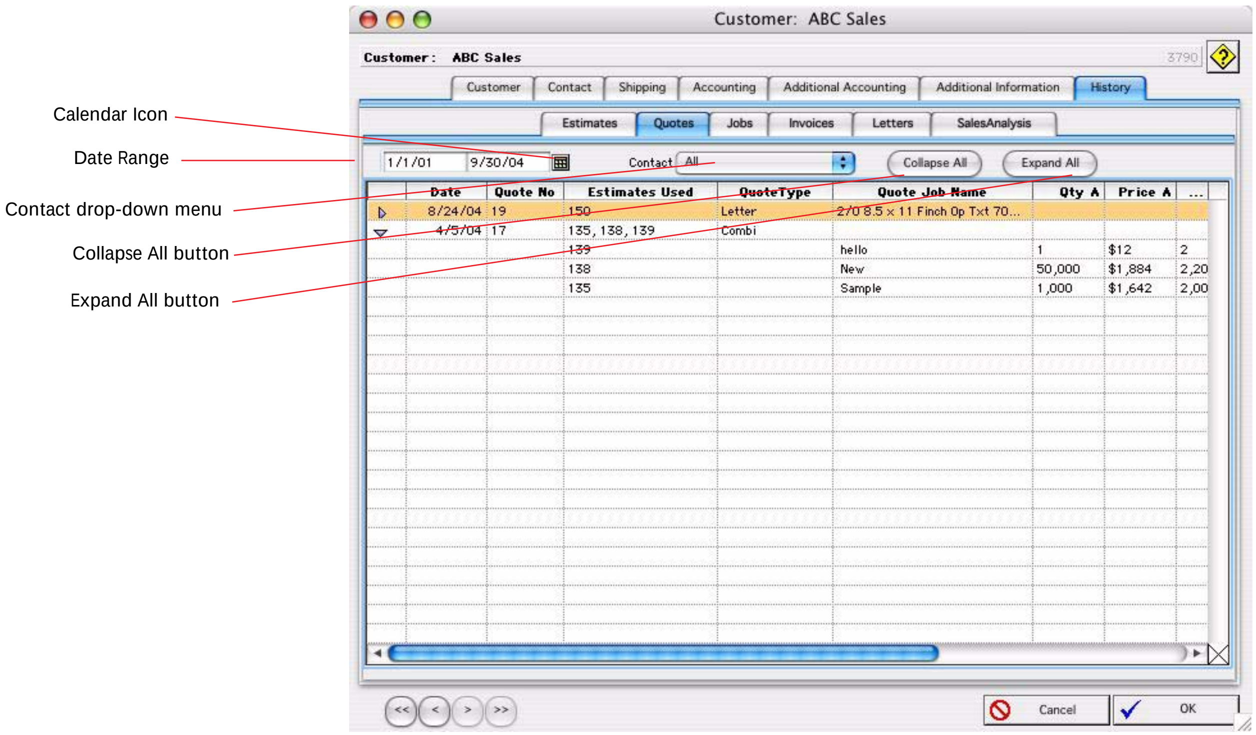
This tab contains custom information specific to your business. For more info see the chapter on “Custom Fields Editor”.

History Estimates Tab



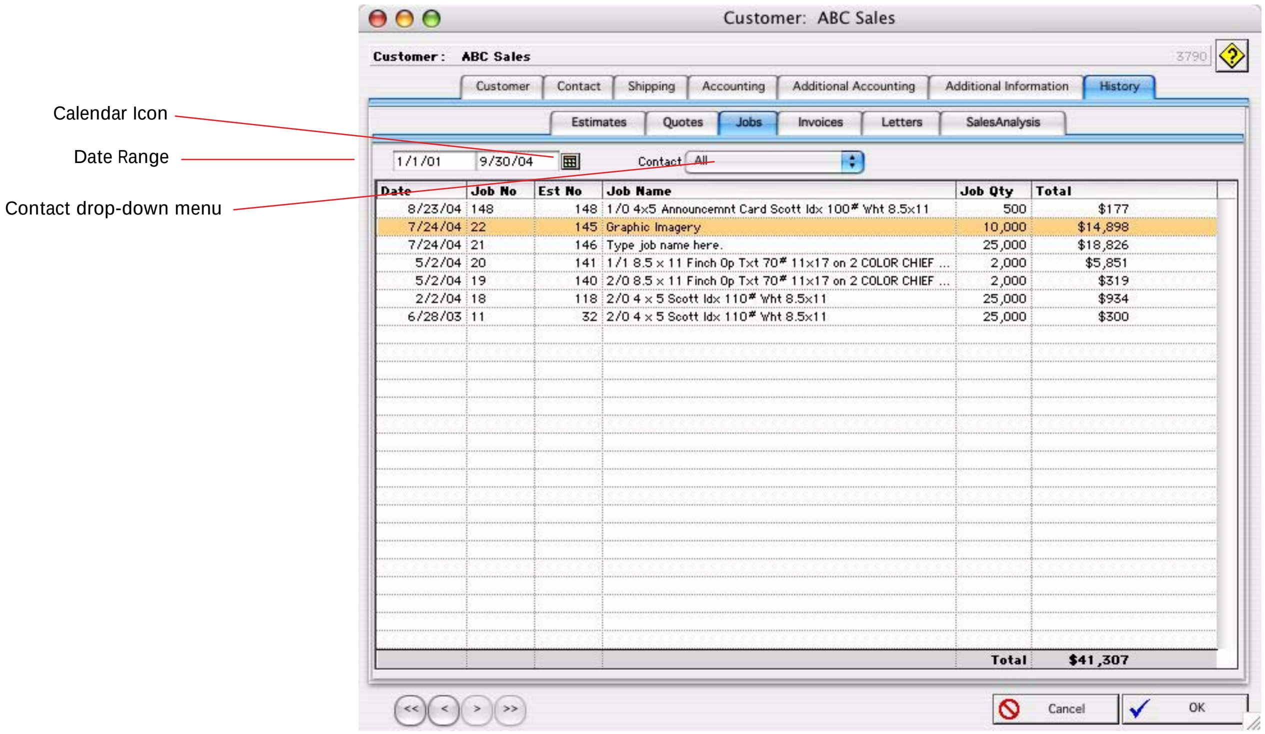
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Contact drop-down menu	Click to select the contact who's history you wish to display. NOTE Double click on any item to open.

History Quotes Tab



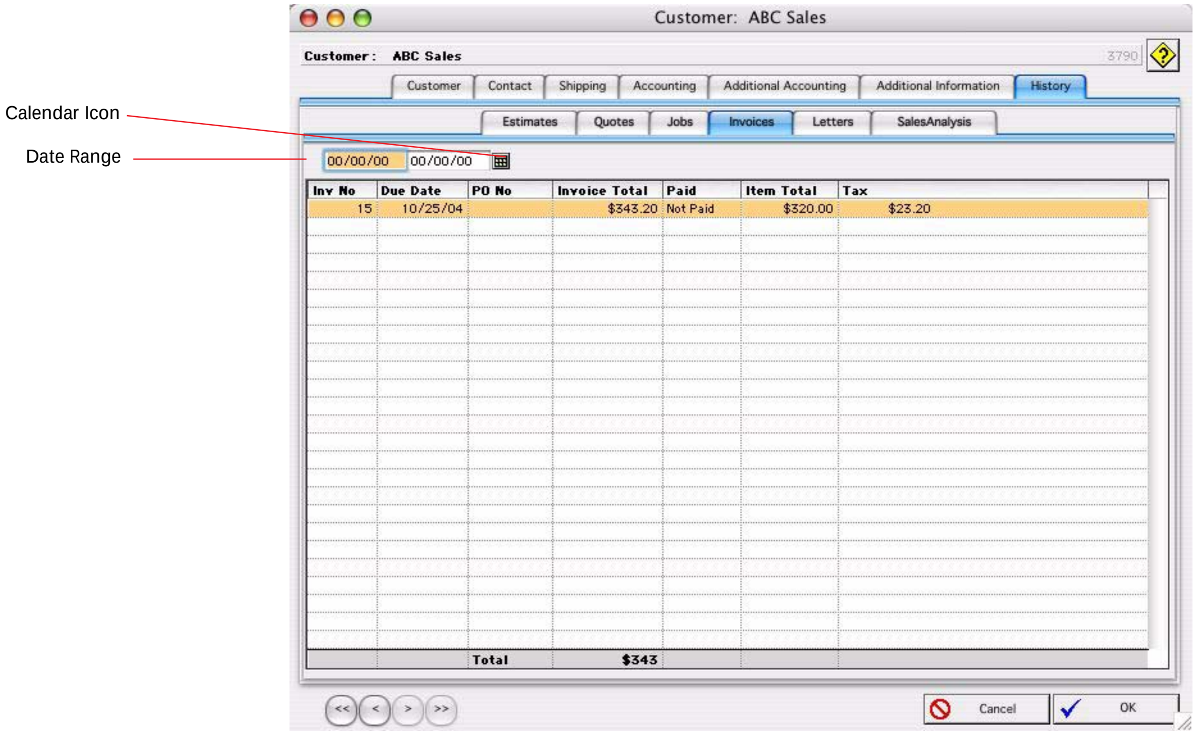
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Contact drop-down menu	Click to select the contact who's history you wish to display.
Collapse All button	Click to collapse the to a detail view of the quote
Expand All button	Click to expand the detail view of all quotes NOTE Double click on any item to open.

History Jobs Tab



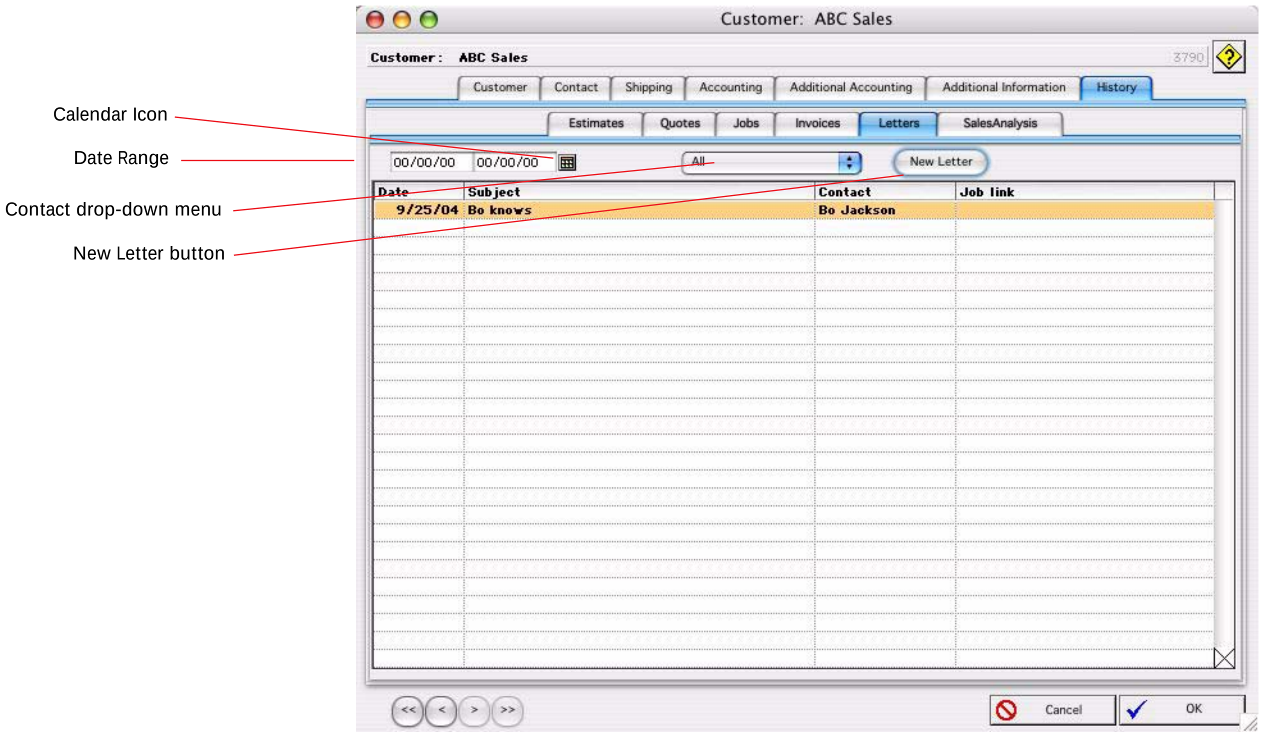
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Contact drop-down menu	Click to select the contact who's history you wish to display. NOTE Double click on any item to open.

History Invoice Tab



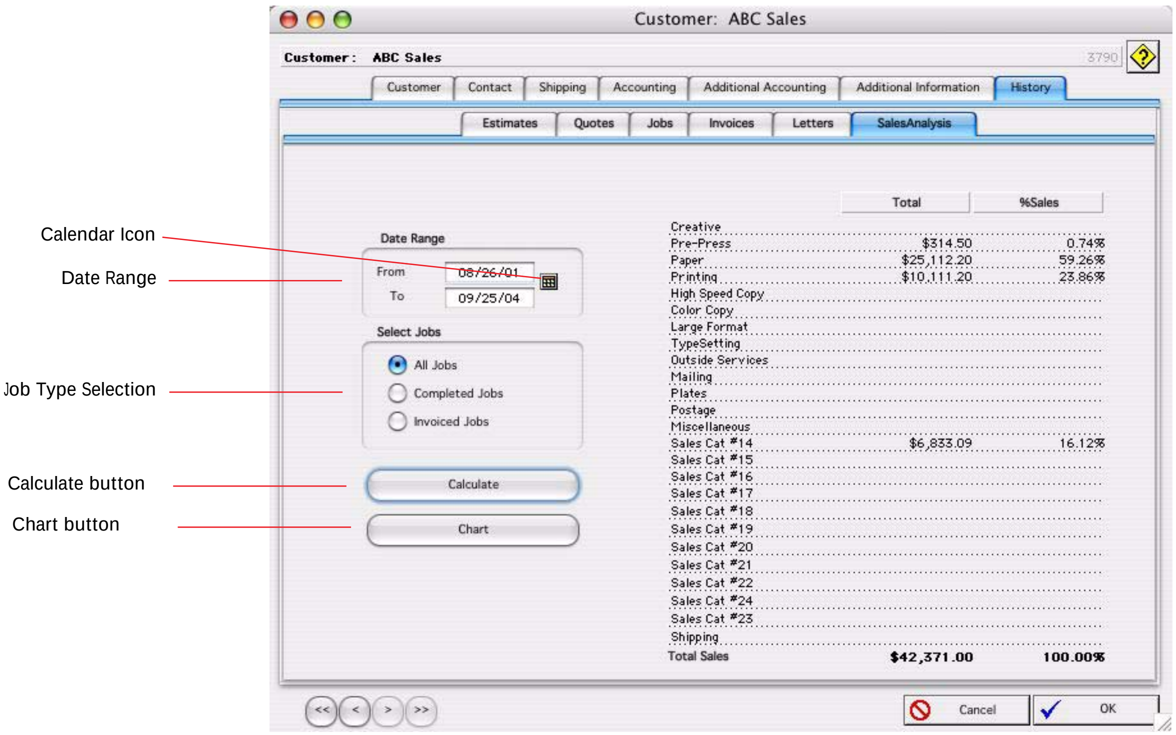
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select. NOTE Double click on any item to open

History Letter Tab



Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Contact drop-down menu	Click to select the contact who's history you wish to display.
New Letter button	Click to create a new letter. NOTE Double click on any item to open.

Sales Analysis Tab



Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Job Type Selection	Click on the radio button to select which jobs you want displayed
Calculate button	Click to calculate.
Chart button	Click to create a chart of the data.

Chapter 87
Contacts

OVERVIEW

PrintPoint's Contact database provides a way to store information specific to the contacts for your customers and to view/extract that information. The Contacts database works hand in hand with the Customers database.

BEFORE YOU BEGIN

You should:	Where to find it:
Set the Preferences Global Markup or Discount screen to set your rating percentages prior to entering new customers.	1 Select File menu > Preferences. 2 Click the drop-down list in the Preferences window and select Global Markup or Discount. 3 Enter a markup percentage in each of the three rating entry fields. The number you enter is the percentage of markup or discount that will be applied to the grand total on a job. 4 Click OK to save your changes.
Setup Customer Custom Fields	File Menu > Custom Fields Editor TIP See Custom Fields Editor chapter of this Manual

STEP-BY-STEP

This section includes the following topics:

- Adding a New Contact
  - From the Customer Detail Screen Contact Tab
  - From the Estimate
- Accessing Contact List View
- Deleting a Contact
  - From the Contact List View
  - From the Customer Detail Screen Contact Tab
- Modifying a Contact
  - From the Contact List View
  - From the Customer Detail Screen Contact Tab
- Contact Info Tab
- Activity Tab
- History Tab
- Letters Tab
- Quotes Tab
- Estimate Tab
- Jobs Tab

Adding a New Contact

From the Customer Detail Screen Contact Tab

1. Select Navigator > Customers.

   PrintPoint displays the Customer List View.
2. Double click on a customer to open the customer detail screen.
3. Click the Contact tab.
4. Click on the New button.

   The Contact Detail Screen is displayed.
5. Complete the information on the Contact Info Tab.

From the Estimate

1. Open an existing or create a new Estimate.
2. If creating a new estimate, choose the customer from the choice list.

   PrintPoint then displays the Contact Choice List.

3 Click the New button.

PrintPoint displays Customer Detail Screen screen.

OR

4 If using an existing estimate, In the Customer Setup subsection, click on the Black Triangle in the Contact Name selection box.

PrintPoint then displays the Contact Choice List.

5 Click the New button.

PrintPoint displays Customer Detail Screen screen

6 Click the Contact tab.

7 Click on the New button.

The Contact Detail Screen is displayed.

8 Complete the information on the Contact Info Tab.

Accessing Contact List View

1 From the Navigator click on the Contact button.

The Contact List View is displayed.

Deleting a Contact

From the Contact List View

1 From the Navigator click on the Contact button.

The Contact List View is displayed.

2 Highlight the contact you wish to delete.

3 Click on the Delete button.

From the Customer Detail Screen Contact Tab

1 Display the Customer Detail Screen.

2 Click the Contact tab.

3 Highlight the contact you wish to delete.

4 Click the Delete button.

5 Click OK to delete the contact.

Modifying a Contact

From the Contact List View

1 From the Navigator click on the Contact button.

The Contact List View is displayed.

2 Double click on the contact you wish to modify.

3 Make the necessary changes to the contact.

From the Customer Detail Screen Contact Tab

1 Display the Customer Detail Screen.
2 Click the Contact tab.
3 Highlight the contact you wish to modify.
4 Click on the Edit button.
5 Make the necessary changes to the contact.

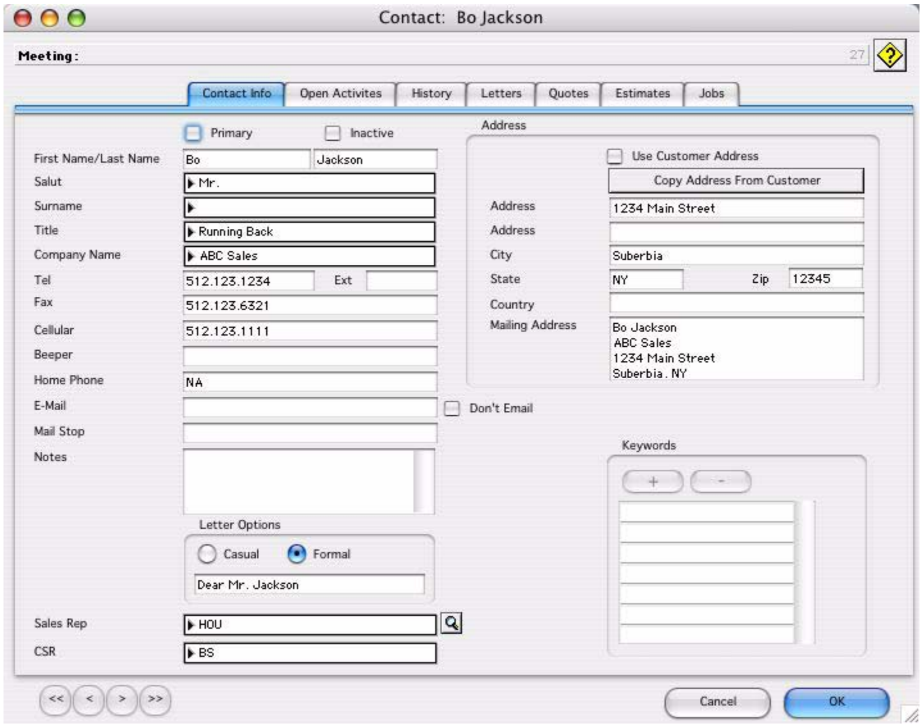
NOTE

Within the new contact detail screen you can view information specific to the contact. This info is covered in the About the Screens section of this chapter.

About the Screens

The Contact Detail Screen

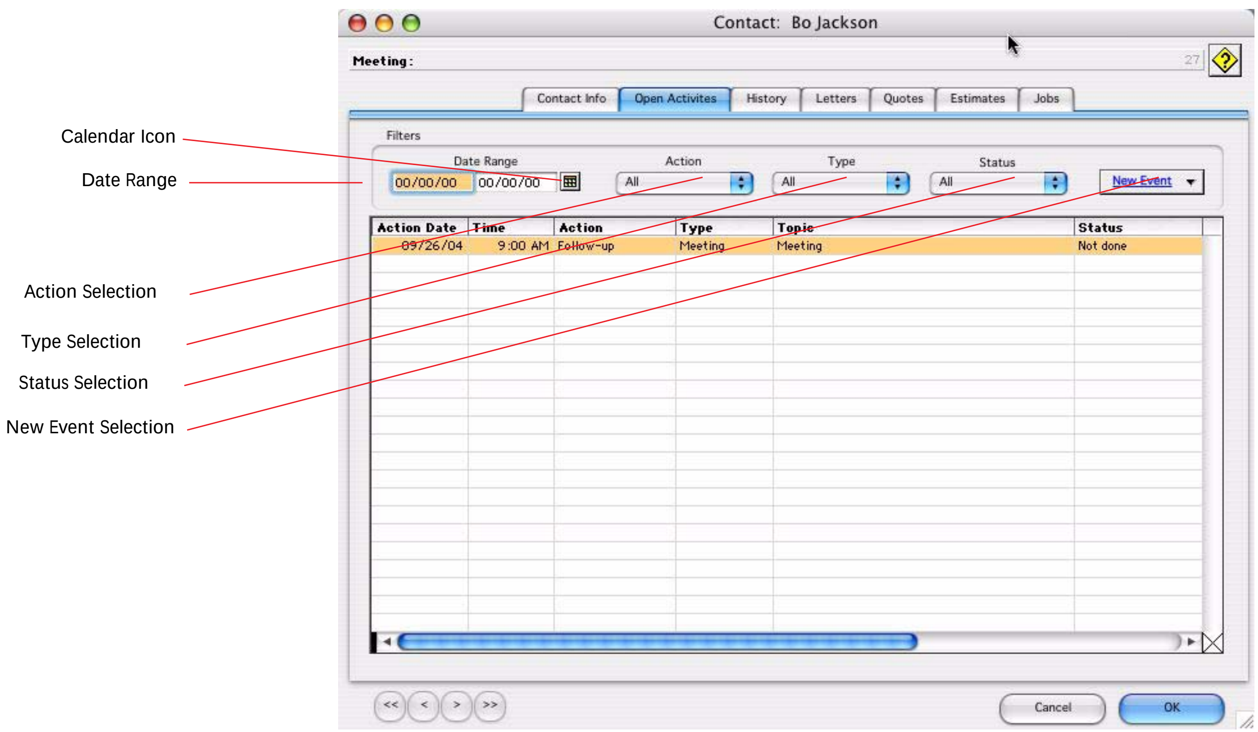
Contact Info Tab



Info/Buttons	Contents/Usage
Primary (check box)	Check to make the selected contact the primary contact.
Inactive (check box)	Click to make this contact inactive
Salutation	Choose the way in which you want the greeting of written communication to be displayed for the contact
Surname	Click to choose a surname form the list
Title	Click to choose a title from the list
Company Name	Click to choose the company this contact is associated with
Tel	Enter the direct phone number of the contact
Ext	Enter the phone extension for the contacts
Fax	Enter the direct fax number for the contact

Info/Buttons	Contents/Usage
Cellular	Enter the contacts cellular phone number
Beeper	Enter the contacts beeper number
Home Phone	Enter the contacts home phone number
E-Mail	Enter the contact e-mail address
Mail Stop	Enter the contacts internal mail stop information
Notes	Enter any notes for the contact
Letters Option	Click the appropriate radio button for written communication for the contact.
Sales Rep	Click to choose a Sales Rep from the list
CSR	Click to choose a Customer Service Rep from the list
Address Information	Enter the address info for this contact or choose the check box to use the same info as the customer
Keywords	morrie

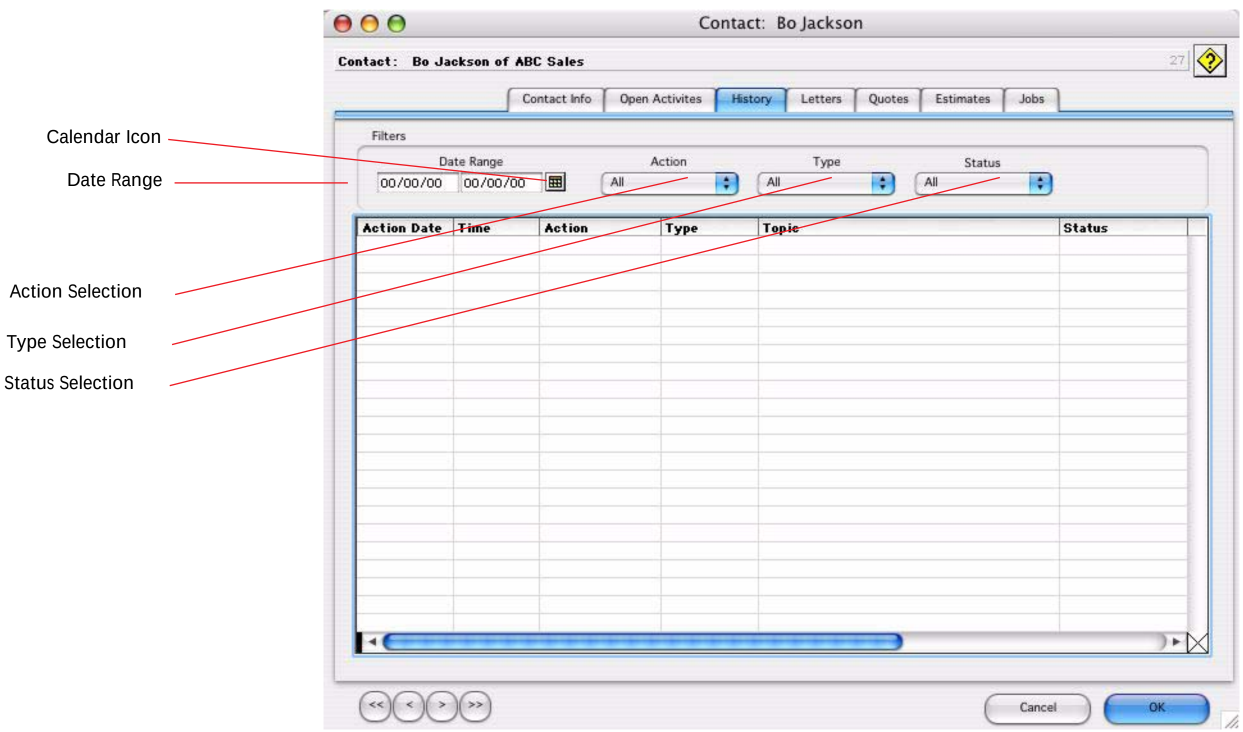
Open Activities Tab



Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.

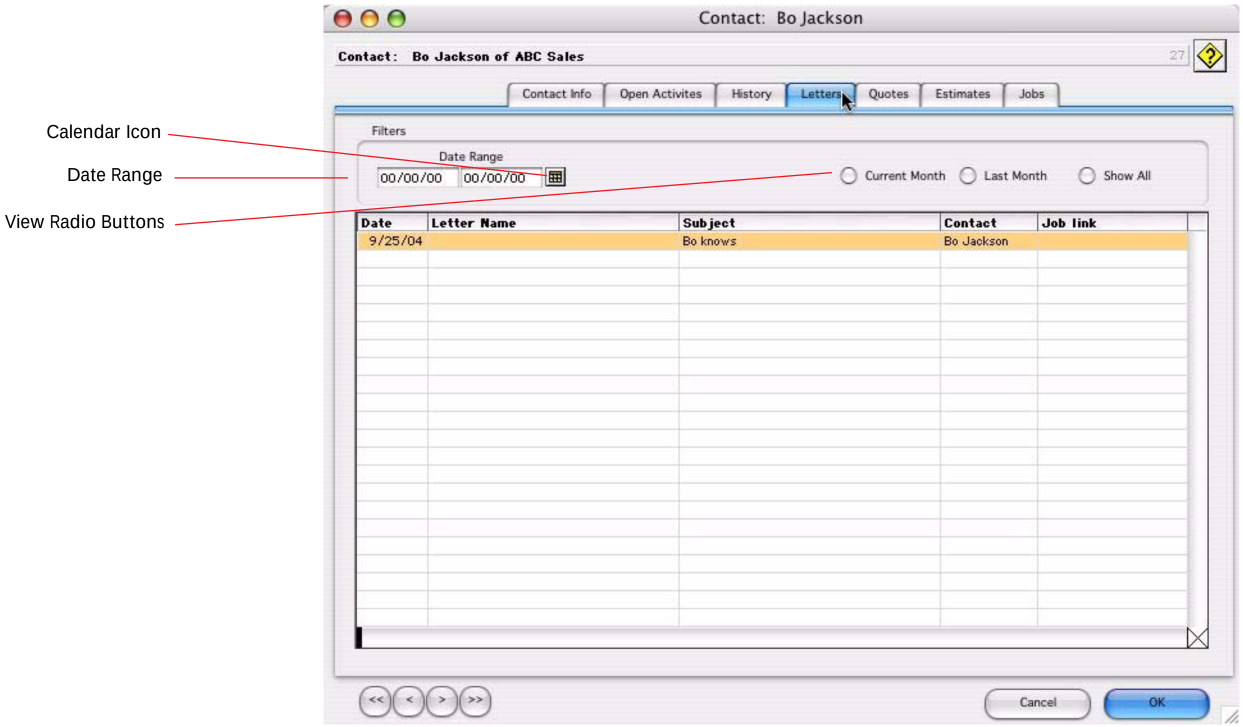
Info/Buttons	Contents/Usage
Action Selection	Click to choose the activity action you want displayed
Type Selection	Click to choose the activity type you want displayed
Status Selection	Click to choose the activity status you want displayed
New Event Selection	Click to choose a new event from the drop-down menu

History Tab



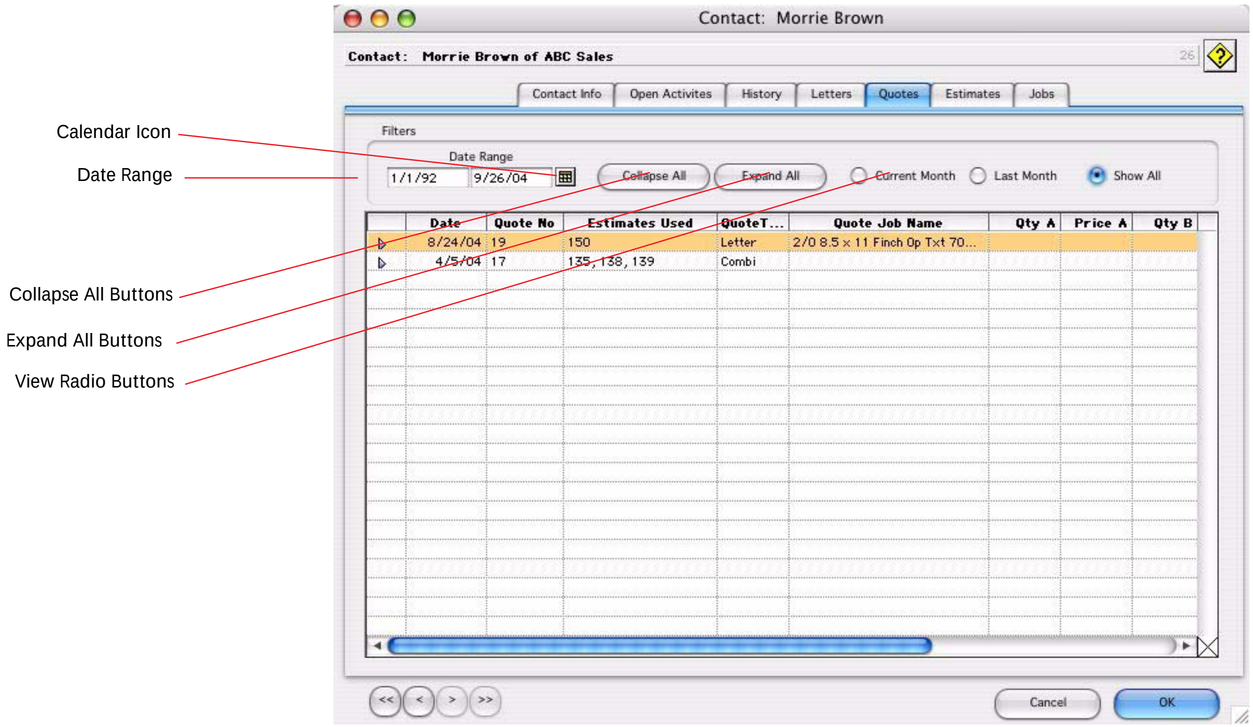
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Action Selection	Click to choose the history action you want displayed
Type Selection	Click to choose the history type you want displayed
Status Selection	Click to choose the history status you want displayed

Letters Tab



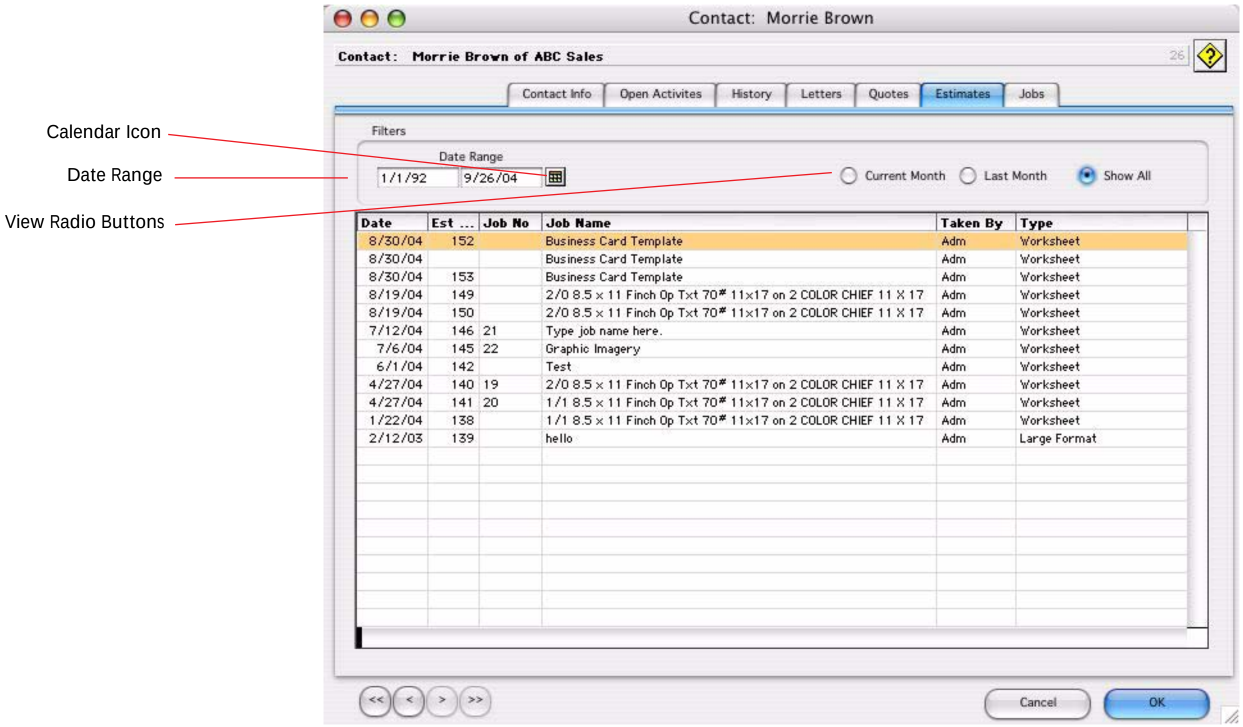
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
View radio buttons	Click the appropriate radio button for the display desired

Quotes Tab



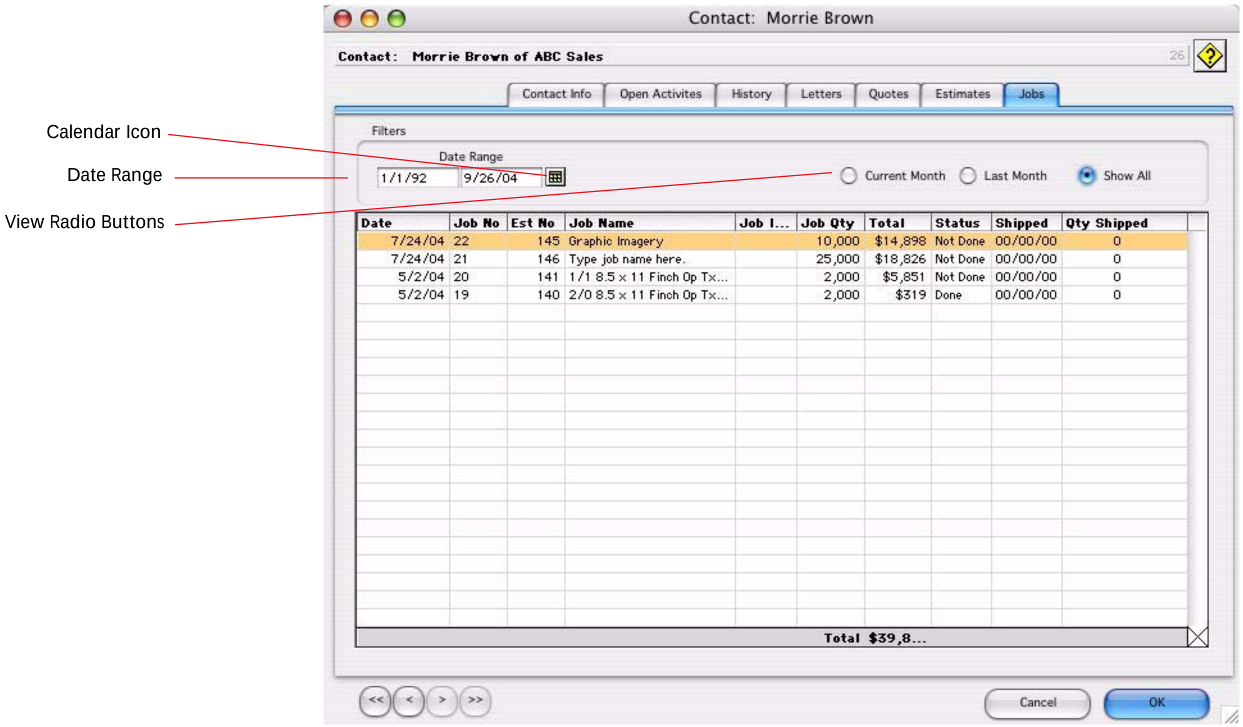
Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Collapse All button	Click to collapse the view
Expand All button	Click to expand the view
View radio buttons	Click the appropriate radio button for the display desired

Estimates Tab



Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
View radio buttons	Click the appropriate radio button for the display desired

Jobs Tab



Info/Buttons	Contents/Usage
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
View radio buttons	Click the appropriate radio button for the display desired

Chapter 88
Suppliers

OVERVIEW

PrintPoint allows you to maintain information on your Suppliers (for instance: Name, Address, Internet information, information on your contacts at the supplier, and an additional address that is used for shipping to the supplier).

PrintPoint uses the stored supplier information when you send purchase orders for paper. The information is also used when you setup a post-press activity as an outside service - you can setup default suppliers for specific services.

BEFORE YOU BEGIN

You should...	Where this information is found...
Review your supplier (vendor) list from your accounting package or contact database	Various accounting packages, address books and contact managers.

STEP-BY-STEP

This section describes the following:

- Accessing the Supplier List View
- Adding a new Supplier
- Changing Supplier Information
- P.O. Report (Reserved for Future Use)
- Supplier Categories

Accessing the Supplier List View

1. Click Navigator > Suppliers.
   PrintPoint displays the Supplier List View.

Adding a New Supplier

1. From the Supplier List View, click on the New button.
   PrintPoint displays the Supplier tab.
2. Fill in the information for each of the fields.
3. Click the Contact tab.
4. Fill in the contact information for up to two different supplier representatives.
5. Click the Shipping tab.
6. Fill in the shipping information for this supplier.
7. Click OK to accept or Cancel to exit the window without saving.

Changing Supplier Information

1. Select the supplier whose information you want to change from the Supplier List View.
2. Edit the information.
3. Click OK to accept or Cancel to exit the window without saving.

Supplier Categories

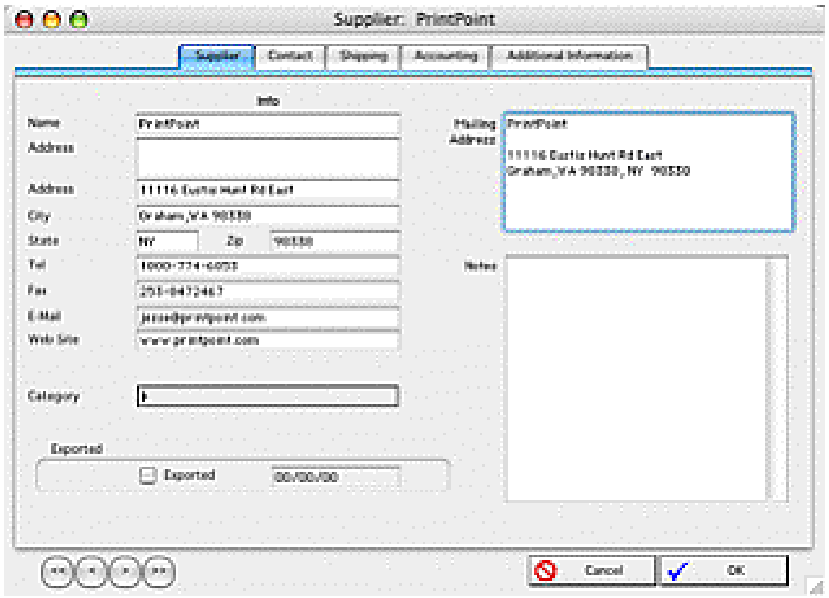
PrintPoint allows you to maintain a list of Supplier Categories. This can be used to ease sorting and review of your suppliers. For instance, you can use PrintPoint to sort and list all of your paper suppliers for a regular review.

1. From the Supplier window > Supplier Contact tab click on the Category button to view categories dialog.
2. Click on the New button to add a new category or select a category from the list.

About the Screens

The Supplier Detail Screen

Supplier Tab



Option	Description
Name	30 Alphanumeric Characters
Address	80 Alphanumeric Characters
Address-2	30 Alphanumeric Characters
City	30 Alphanumeric Characters
State	7 Alphanumeric Characters
Zip	10 Alphanumeric Characters
Telephone	30 Alphanumeric Characters
Fax	30 Alphanumeric Characters
E-Mail	80 Alphanumeric Characters
Web Site	30 Alphanumeric Characters
Category	Click on the arrow to select a Category for the Supplier.

Option	Description
Mailing Address	216 Alphanumeric Characters
Notes	Virtually unlimited number of Alphanumeric characters, You can use this area to enter information that is non-specific or that helps you remember information about this supplier.

Contact Tab

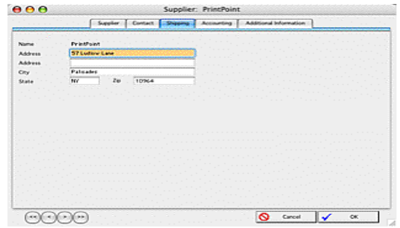
PrintPoint allows you to keep contact information for 2 representatives.

.

Option	Description
Name	30 Alphanumeric Characters
Telephone	30 Alphanumeric Characters
Cellular	30 Alphanumeric Characters
Beeper	30 Alphanumeric Characters
E-Mail	30 Alphanumeric Characters
Fax	30 Alphanumeric Characters

Shipping Tab

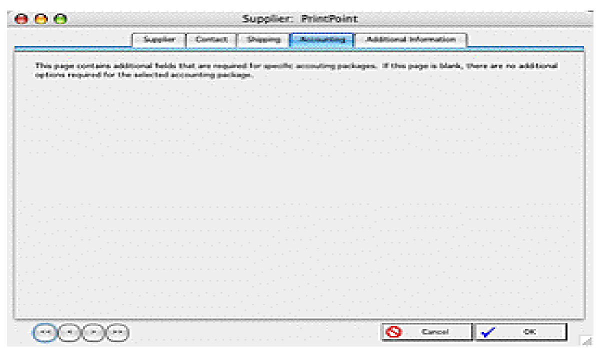
PrintPoint allows you to keep Shipping address information for each supplier.



Option	Description
Name	PrintPoint displays the Supplier Name
Address	30 Alphanumeric Characters
Address - 2	30 Alphanumeric Characters
City	30 Alphanumeric Characters
State	9 Alphanumeric Characters
Zip	10 Alphanumeric Characters

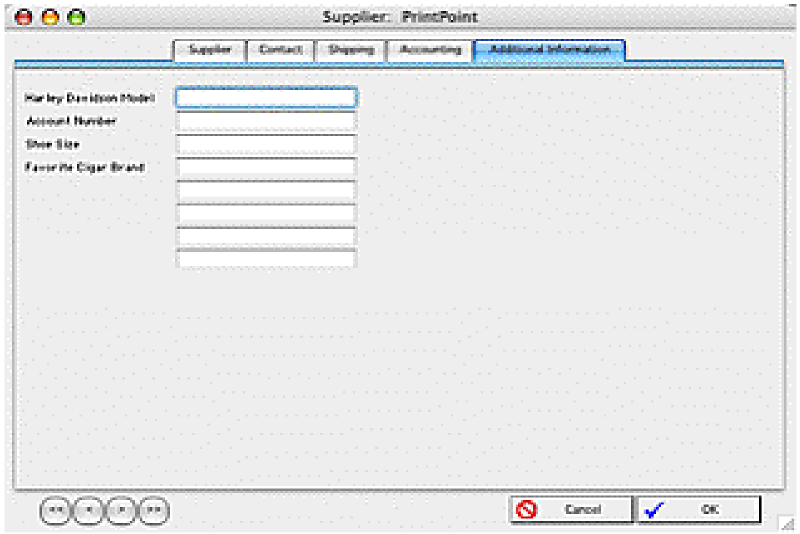
Shipping Tab

PrintPoint allows you to keep various accounting information for each supplier based on your accounting package.



Shipping Tab

PrintPoint provides you with an area to keep specialized information for your vendors. For more info see the chapter Custom Fields Editor.



Chapter 89
Pre-Press Items

OVERVIEW

PrintPoint allows you to maintain an unlimited listing of Pre-Press Items (e.g., bluelines, halftones, negs, photography) with pricing and Sales Category information that you can access during the estimating stages.

NOTE

This list of Pre-press items is independent of the Pre-Press Table covered in the chapter: "Pre-Press Table"

Before You Begin

You should...	Where this information is found...
Know how to create an estimate.	Estimating Tools: ShortForm, Estimating Tools: WorkSheet Estimating Tools: Copy-Digital Estimating Tools: Large Format

STEP-BY-STEP

This section includes the following topics:

- Accessing Pre-Press
- Adding a New Pre-Press Item
  - From the Pre-Press List View
  - From an Estimate
- Modifying a Pre-Press Item
  - From the Pre-Press List View
  - From an Estimate
- Cloning a Pre-Press Item
- Deleting a Pre-Press Item

Accessing Pre-Press

1 Click Navigator > Pre-Press.

PrintPoint displays the Pre-Press List View.

Adding a New Pre-Press Item

From the Pre-Press List View

1 Click the New button.

PrintPoint displays the Pre-Press Detail Screen.

2 Enter a Name for the new Pre-Press Item.

3 Enter a Charge for each of the AA, BB and CC fields.

4 Enter a Markup percentage for each of the AA, BB and CC fields.

NOTE

This markup is in addition to/or instead of the global markup used in the estimate.

The Total is automatically calculated.

5 Enter any Comments about the item.

6 Enter a Job Description.

This description is used for pre-press description portion of the estimate description.

7 Click on the Black Triangle in the Sales Category field.

8 Select a Sales Category from the drop-down menu.
9 Click OK.

From an Estimate

1. Open an existing or create a new Estimate.
2. In the Pre-Press section, click on the Black Triangle in the one of the Pre-Press selection boxes.
3. PrintPoint displays the Pre-Press Choice List.
4. Click the New button.

   PrintPoint displays the Pre-Press Detail Screen.
5. Enter a Name for the new Pre-Press Item.
6. Enter a Charge for each of the AA, BB and CC fields.
7. Enter a Markup percentage for each of the AA, BB and CC fields.

   NOTE

   This markup is in addition to/or instead of the global markup used in the estimate.

   The Total is automatically calculated.
8. Enter any Comments about the item.
9. Enter a Job Description.

   This description is used for pre-press description portion of the estimate description.
10. Click on the Black Triangle in the Sales Category field.
11. Select a Sales Category from the drop-down menu.
12. Click OK.

Modifying a Pre-Press Item

From the Pre-Press List View

1. Click Navigator > Pre-Press.

   PrintPoint displays the Pre-Press List View
2. Select the item you wish to modify.

   PrintPoint displays the Pre-Press Detail Screen for the selected item.
3. Change the information you wish to modify.
4. Click the OK button.

From an Estimate

1. Open an existing or create a new Estimate.

   Using the WorkSheet Estimate:

   In the Pre-Press section, click on the White Triangle next to the Pre-Press item you want to modify.

Using the ShortForm, Large Format or Copier Estimate

In the Pre-Press section, click on the Magnifying Glass Icon next to the Pre-Press item you want to modify. 

PrintPoint displays the Pre-Press Detail Screen for the selected item.

2 Change the information you wish to modify.

3 Click the OK button.

Cloning a Pre-Press Item

1 Click Navigator > Pre-Press.

PrintPoint displays the Pre-Press List View

2 Highlight the item you wish to clone.

3 Click the Clone button.

The cloned Pre-Press Device Detail Screen is displayed with an "*" after the Pre-Press Name.

4 Change the information you wish to modify.

5 Click the OK button.

Deleting a Pre-Press Item

1 Click Navigator > Pre-Press.

PrintPoint displays the Pre-Press List View

2 Highlight the item you wish to delete.

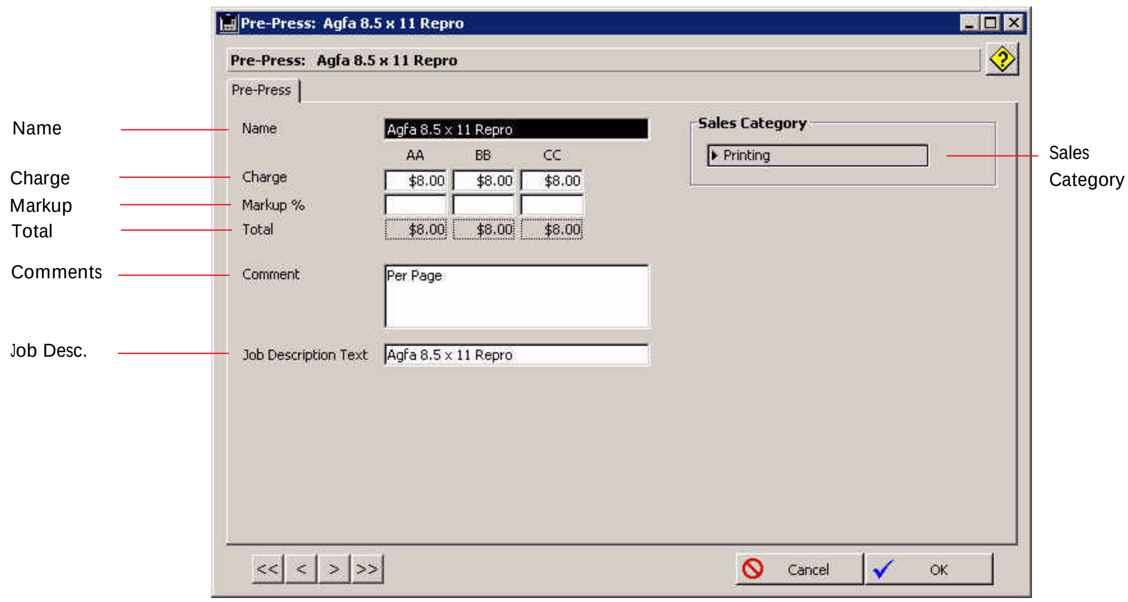
3 Click the Delete button.

PrintPoint displays the Delete Confirm dialog.

4 Click Delete.

ABOUT THE SCREENS

Pre-Press Detail Screen



Button / Field	Definition
Name Section	The general specifications of the device.
Charge	The amount to be charged for this pre-press item.
Markup	The percentage of markup for this pre-press item.
Total	The total of the charge plus markup. This field is automatically calculated.
Job Description	The description of this pre-press item as it will show in the estimate description.
Sales Category	The sales category assigned to this pre-press item.

Chapter 90
Pre-Press Table

OVERVIEW

PrintPoint allows you to maintain a database of Pre-press items in a table format consisting of 40 Pre-Press items, materials, and/or operations (e.g., Digital Film, Digital Sep's, Creative Services) divided into 4 categories with 10 items each.

The intent of storing and choosing Pre-press items in a "grid" like view is to isolate your most commonly used items in easy to select groupings.

Additionally, each item can be assigned to a Sales Category.

NOTE

This table of Pre-press items is independent of the normal "listing" of pre-press items covered in the chapter: "Pre-Press Items"

STEP-BY-STEP

This section describes the following:

- Building the Pre-Press Table
- Modifying the Pre-Press Table
- Printing the Pre-Press Table.

Building the Pre-Press Table

1. Select **Navigator > Pre-Press Table.**

   PrintPoint displays the PrePress tab of the Pre-Press Table.
2. Click the Custom Labels button.

   PrintPoint unlocks the Label fields for the four label headings and the 10 items per heading. These are the first of the four Pre-Press Table items.
3. Enter the Name of the Pre-Press Table item.
4. Press the Tab button.

   PrintPoint highlights one of the ten Categories for the selected Pre-Press Table items.
5. Enter the Name of the Category for the selected Pre-Press Table item.
6. Repeat steps 4 and 5 for up to 10 Categories.
7. Press the Tab button.
8. Enter the Rate for the selected Category.
9. Repeat steps 7 and 8 for each of the Categories.
10. Repeat steps 3 through 9 for each of the Pre-Press Table items.
11. Click on the Sales Category tab.

    PrintPoint displays the Sales Category tab of the Pre-Press Table.
12. Select a Sales Category from the Sales Category Choice List for each item.
13. Click the OK button to Accept or click the Cancel button.

Modifying the Pre-Press Table

1. Select **Navigator > Pre-Press Table.**

   PrintPoint displays the PrePress tab of the Pre-Press Table.
2. Click the Custom Labels button

   PrintPoint unlocks the Label fields for the Pre-Press Table items

3 Change the Name of the field you wish to modify.

NOTE

This is the method used to change the Heading Labels, the Category Labels, the Rate and the Sales Category.

4 Click the OK button to Accept or click the Cancel button.

Printing the Pre-Press Table

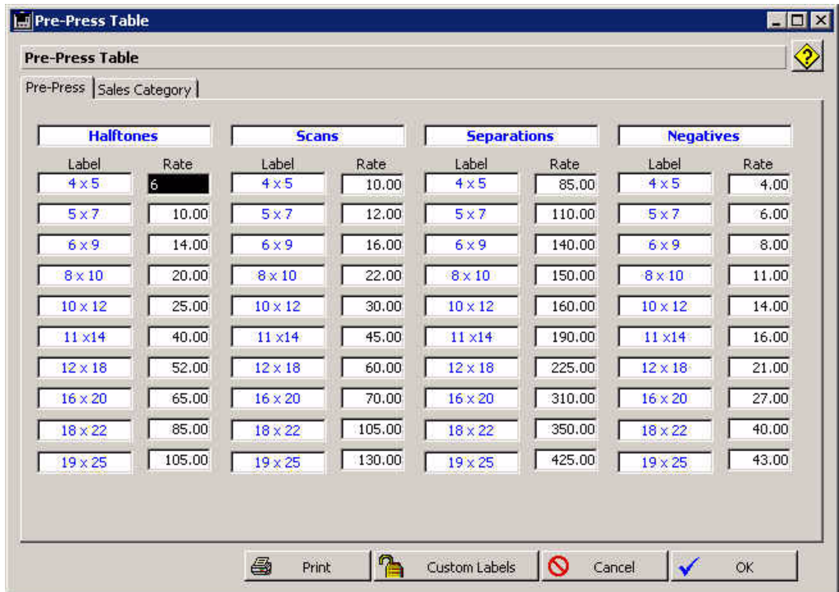
1 Select **Navigator > Pre-Press Table.**

PrintPoint displays the PrePress tab of the Pre-Press Table.

2 Click the Print button to print the Pre-Press Table.

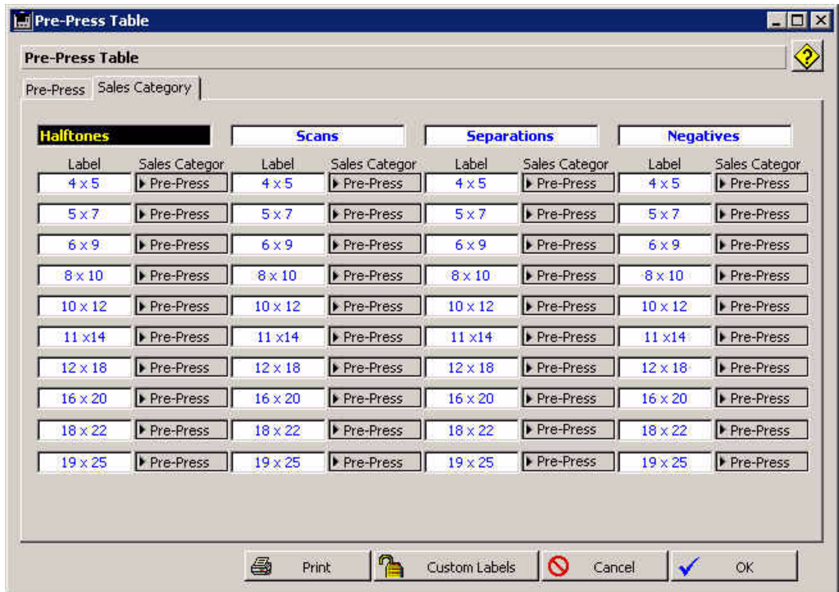
About the Screens

Pre-Press Tab



Field Name	Contents	Properties
Label (for each of 4 Pre-Press Table items)	Label of the Pre-Press Table item	17 Characters
Category Label (for each of 10 Categories)	Label of the Category for the Pre-Press Table item	10 Characters
Rate (for each of 10 Categories)	Charge for this category for the Pre-Press Table item	Dollars and cents

Sales Category Tab



Field Name	Contents	Properties
Sales Category (for each entry)	Sales Category for this entry	Choice list

Chapter 91
Paper

OVERVIEW

PrintPoint's database includes more than 1000 papers, envelopes, and NCR forms. You can add or remove papers or update the list of existing papers.

You can use PrintPoint to track your paper inventory and order paper from your supplier. Optionally, customers can supply the paper for their own print jobs.

Before You Begin

Option...	Where You'll Find this...
Set your paper preferences	File Menu > Preferences > Paper
Understand paper terminology	Later in this chapter

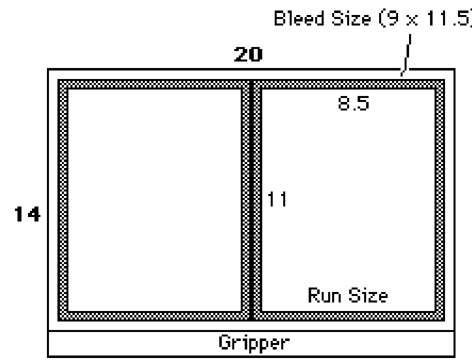
STEP-BY-STEP

This section includes the following topics:

- Understanding Paper terminology
- Displaying a List of Existing Papers
- Activating the Customer Wizard
- Adding a New Paper
  - From the Paper List View
  - From an Estimate
- Paper Details
  - Specifications
  - Pricing
  - Supplier/Inventory
  - Press Speed Link
  - Job Cost
- Cloning Paper
  - From the Paper List View
  - From an Estimate: On-The-Fly
- Modifying Paper Information
- Batch Assigning Information For Multiple Papers
- Deleting Paper
- Deleting Items from Paper Classification Lists
- Ordering Paper
  - Printing a Single Paper PO with the Job Ticket
  - Batch Paper Purchase Orders
- Keeping Track of Inventory
  - Turning on the Inventory Tracking Option
  - Checking Paper Inventory

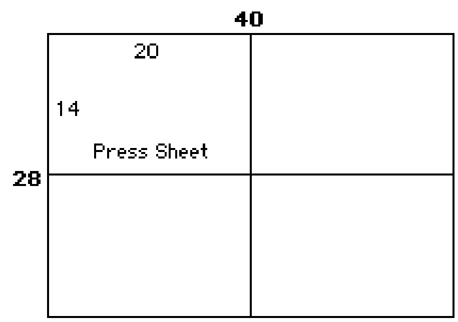
Understanding Paper Terminology

PrintPoint uses standard terminology for paper terms, including:



Press Sheet Size

- Finished Size—The final dimension of the printed piece delivered to the customer. This includes all post-press activities, including folding, etc.
- Run Size—The flat, *trimmed* dimension of the printed piece run on the Press Sheet. If you run two 8.5 x 11 pieces on a 14 x 20 sheet, the 8.5 x 11 is the run size, while 14 x 20 is the press sheet size.
- Bleed Size—The flat, *untrimmed* dimension of the printed piece run on the Press Sheet. This allows for bleed on all four sides of the individual piece, backtrimming, etc., before the sheet is trimmed to its final dimensions. In the figure above, the Bleed size is 9 x 11.5.



Parent Sheet Size (28 x 40)

- Press Sheet Size—The actual dimension of the sheet that is put on the press. In the figure above, the Press Sheet size is 14 x 20.

  NOTE

  In Australia, New Zealand, and the United Kingdom, the term “Press Sheet” is replaced with “Print Sheet”.

- Parent Sheet Size—The size of the paper, as packed in cartons, reams, skids, etc., delivered by your supplier. In the figure above, the Parent Sheet size is 28 x 40.

  NOTE

  In Australia, New Zealand, and the United Kingdom, the term “Parent Sheet” is replaced with “Original Sheet”.

Displaying a List of Existing Papers

Display the Paper List View to search for a specific paper; sort your papers a specific way; add a new paper; order more paper; change information for an existing paper; adjust markup percentages; and delete papers that you no longer need.

1. Select Navigator > Paper.

   PrintPoint displays the Paper List View.

Adding a New Paper

From the Paper List View

1. Select Navigator > Paper.

   PrintPoint displays the Paper List View.
2. Click the New button.

   PrintPoint displays Paper Wizard Confirm dialog.
3. Click the Wizard button.
4. PrintPoint displays the Paper Wizard.
5. Follow the on-screen instructions to setup the press.

NOTE

It is recommended that you use the Paper Wizard to setup a new paper until you become familiar enough with the program to use the standard Paper Detail Screen.

From an Estimate

1. Open an existing or create a new Paper.
2. In the Paper Setup subsection, click on the Black Triangle in the Paper Name selection box.

   PrintPoint displays the Paper Choice List.
3. Click the New button.

   PrintPoint displays Paper Wizard Confirm dialog.
4. Click the Wizard button.
5. PrintPoint displays the Paper Wizard.
6. Follow the on-screen instructions to setup the paper.

NOTE

It is recommended that you use the Paper Wizard to setup a new paper until you become familiar enough with the program to use the standard Paper Detail Screen.

Paper Details

1 Select Navigator > Paper.

PrintPoint displays the Paper List View.

2 Double-click the paper you want to work with.

The Paper Detail Screen displays

PrintPoint uses five tabbed subsections to store different kinds of information about your paper:

- Specifications— detailed information about the paper, including its name, size, weight, and type.
- Pricing— how the paper is packaged, the price break information, the actual cost of the paper at each price break, and your markup percentage.
- Supplier/Inventory— information about your current inventory and the supplier that you normally purchase this paper from.
- Press Speed Link— information about the standard press speed used for this paper.
- Job Cost - information about this paper that is used for job costing.

Creating a New Paper

1 Select Navigator > Paper.

PrintPoint displays the Paper List View.

2 Click the New button.

NOTE

If you selected Use Paper Wizard in your Preferences, PrintPoint asks whether you want to use a Wizard or the Standard Paper Detail Screen. Select Detail Screen.

The Specifications tab of the Paper Detail Screen displays.

Specifications Tab

1 In the Paper Code text box, type an *abbreviated paper name*, then press the Tab key.

NOTE

This abbreviation is only used for internal documentation: it is not printed on any of the documents that go out to your customer.

2 In the Name for Reports text box, type the *full name of the paper as you want it to appear on customer documentation*, then press the Tab key.

3 Fill in the remaining information on this tab.

Pricing Tab

1 Click the Pricing tab.

2 Choose one of the following pricing options:

- Click the CWT button if the price is based on Per Hundred Weight (CWT)

  OR

- Click the Per/M button if the price is based Per Thousand sheets.

3 Choose one of the following packaging options:

- Click the Carton button if this paper is packaged in cartons
- Click the Ream button if this paper is packaged in individual reams
- Click the Other button if you want to enter a different description in the price break table.

4 Fill in the pricing table.

NOTE

If the paper is supplied by the customer, you do not have to fill in this information. Just click in the Customer Supplied checkbox.

NOTE

Any change to prices will automatically update the Price Mod field. The Last Modified By field will be automatically filled in with the currently logged on user's 3 character code. You may also directly enter the date of price modifications in the Price Mod text box.

5 In the Markup text box, enter the *percentage you markup the supplier's price.*

Supplier/Inventory Tab

1 Click the Supplier/Inventory tab.

TIP

PrintPoint can track your inventory of this paper and let you know when you are running low. Fill in the Inventory area if you want PrintPoint to let you know when you need to order more paper.

2 Enter the Date the inventory was taken. The Last Modified By field will be automatically filled in with the currently logged on user's 3 character code.

3 Enter the Number of Cartons in inventory.

4 Enter the Number of Sheets in inventory.

5 Enter the inventory Location.

6 Enter the Reorder Level.

NOTE

This field will NOT automatically trigger a re-order, but can be displayed in a list view or used in a report.

7 Select the Supplier of this paper from the Choice list.

PrintPoint displays the Supplier's 2 Sales Reps, Telephone, Fax, and Pager numbers.

8 Enter the Supplier's Part Number.

Press Speed Link Tab

1 Click the Press Speed Link tab.

2 Select the Press Speed normally associated with this paper.

Job Cost Tab

1 Click the Job Cost tab.

2 Enter the Cost/M to be used in Job Costing.

The Cost/M is an "average" cost of the paper. If you choose to allocate a specific paper cost to a specific job, you must use the "Adjustment" features in Job Cost Reporting.

3 Enter the Paper Part Number to be used in Job Costing.

4 Select the checkbox if this paper is normally Chargeable in Job Costing.

5 Click the OK button.

Cloning Paper

From the Paper List View

1 Select Navigator > Paper.

PrintPoint displays the Paper List View.

2 Select the paper that you want to clone.

TIP

Use the Search option to quickly find a specific paper to clone.

3 Click the Clone button.

PrintPoint displays the Detail Screen for the paper you selected.

4 In the Paper Code field, the Paper Code will have an "*" appended. Overtype an *new paper name*, then press the Tab key.

CAUTION

You cannot have two papers with the same name so make sure you use a unique code name for the new paper.

5 In the Name for Reports text box, type the *full name of the paper as you want it to appear on customer documentation*, then press the Tab key.

6 Make changes to any information that is different from the paper you copied.

7 Click the OK button.

From a the Paper Choice List or Selector

1 From any estimate, select paper using any of the standard paper selection techniques.

2 Click the Clone button.

PrintPoint displays the Detail Screen for the paper you selected.

3 In the Paper Code field, the Paper Code will have an "*" appended. Overtype an *new paper name*, then press the Tab key.

CAUTION

You cannot have two papers with the same name so make sure you use a unique code name for the new paper.

4 In the Name for Reports text box, type the *full name of the paper as you want it to appear on customer documentation*, then press the Tab key.

5 Make changes to any information that is different from the paper you copied.

6 Click the OK button.

Modifying Paper Information

From the Paper List View

1 Select Navigator > Paper.

PrintPoint displays the Paper List View.

2 Double-click the paper you want to change.

TIP

Use the Search option to quickly find the specific paper you want to change.

The Paper Detail Screen is displayed.

3 Make any changes needed.

4 Click the OK button.

From an Estimate On-The-Fly

1 Open or create an estimate.

2 Select a paper.

3 Click on the QuickLink to the Paper (QuickLink button on ShortForm or QuickLink Cursor Magnifying Glass on the WorkSheet)

The Paper Detail Screen is displayed.

4 Make any changes needed.
5 Click the OK button.

NOTE

If you had previously made any changes to the pricing of the paper on the estimate, the Comp Vs. Custom Dialog will be displayed to alert you that you have made changes to the current paper for estimating and to be aware of how those changes may affect your estimate.

Batch Assigning Information For Multiple Papers

PrintPoint allows you assign specifications or make adjustments to multiple papers at one time.

Example If you wanted to assign a new supplier to all your Hammermill stock, you could select all that stock and then choose the Assign > Supplier.

You can batch assign:

- Paper Grade
- Supplier
- Sheets in Stock
- Additional Sheets in Stock
- Sheets per Lift
- Press Speed Factor
- Coated 1 or 2 Sides
- Color
- Mill
- Chargeable (for Job Costing purposes)
- Ink Absorbency Factor
- Category

You can batch adjust:

- Adjust Markup Percentage
- Adjust Prices by Percent
- Set Prices

1 Select Navigator > Paper.
PrintPoint displays the Paper List View.

2 Create a subset of the papers you want to change.

TIP

Use the Search and Select options to quickly find the specific papers you want to modify or simply select the group of papers using your mouse.

3 Click the Assign button

OR

Click the Adjust button.

4 Select one of the options displayed.

PrintPoint displays either a choice list or a text box, depending on which option you select.

5 Fill in the information requested.

6 Click the OK button.

Deleting Paper

CAUTION

Once you delete a paper, you cannot get it back unless you have a backup copy of your data file.

1 Select Navigator > Paper.

PrintPoint displays the Paper List View.

2 Highlight the paper(s) you want to delete

OR

Create a subgroup of the papers you want to delete.

TIP

Use the Search and Select options to quickly find the specific paper or to create a subgroup of papers that you want to delete. PrintPoint displays the Paper List View for the selected papers.

3 Click the Delete button.

4 At the prompt, click the Delete button again.

Deleting Items from Paper Classification Lists

There are times when you will want to "clean up" items in your paper choice lists for Color, Mill, Paper Grade, etc.

We have an excellent tech note in PrintPoint Central on how to do just this.

Go to www.printpoint.com > PrintPoint Central > Tutorials > Removing a Color from the Paper Color Choice List.

Ordering Paper

Printing a Single Paper PO with Job Ticket

If you have set your Paper Preferences as follows:

- Activate all automatic paper inventory features
- Print Paper PO with Job Ticket

PrintPoint will print a standard Paper Purchase Order whenever you print a Job Ticket and the quantity of paper in stock cannot fulfill the job.

Batch Paper Purchase Order

You can print a batch Paper Order grouped by supplier by collecting your previously printed paper purchase orders (printed with your job tickets)

NOTE

You must load and configure your SuperReport Purchase Order before you can print an order.

File Menu > Preferences > SuperReports > Paper PO

1. Select Navigator > Paper.

   PrintPoint displays the Paper List View.

2. Highlight the paper(s) you want to order

   OR

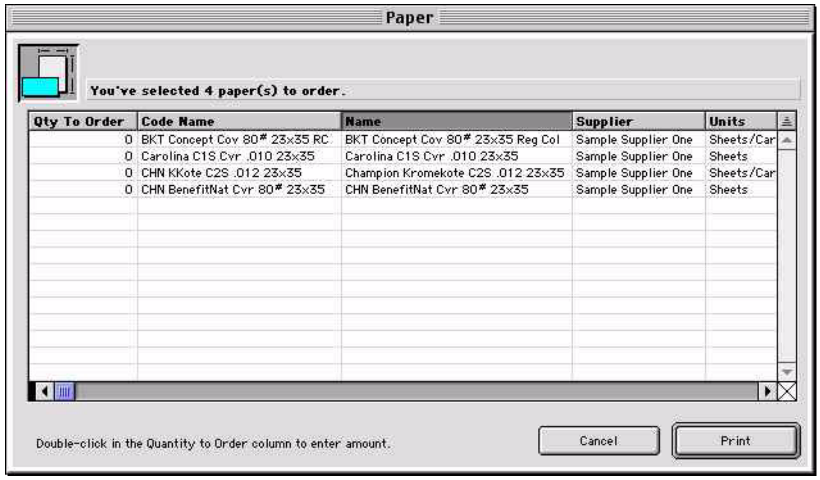
   Create a subset of the papers you want to order.

TIP

Use the Search and Select options to quickly find a specific paper or to create a subgroup of papers that you want to order.

3 Click the Order button.

PrintPoint displays the Paper Order List for the selected papers.



4 Double-click the Qty To Order column for the first paper you are ordering, then type the *order amount*.

5 If you need to order additional papers, press the Tab key and type the *order amounts*.

6 When you have typed the order amount for all the papers, click the Print button.

If you ordered multiple papers from the same supplier, PrintPoint will combine the orders and sort and print them by supplier.

Keeping Track of Inventory

TIP

Once you turn on the inventory tracking features, PrintPoint subtracts the amount of paper you are using for the current job from the amount you have in inventory. If you do not have enough paper for the current job, PrintPoint prints out a Paper Purchase Order along with the Job Ticket.

Turning on the Inventory Tracking Option

1 Select File Menu > Preferences > Paper.

2 Turn on the Activate all automatic paper inventory features checkbox.

Checking Paper Inventory

Use the Paper Inventory Report to see your paper inventory.

1 From the Navigator, select Paper.

The Paper List View displays.

2 Highlight the paper of which you want to see the inventory

OR

Create a subgroup of the papers of which you want to see the inventory.

TIP

Use the Search and Select options to quickly find a specific paper or to create a subgroup of papers of which you want to see the inventory.

3 Click the Print button.

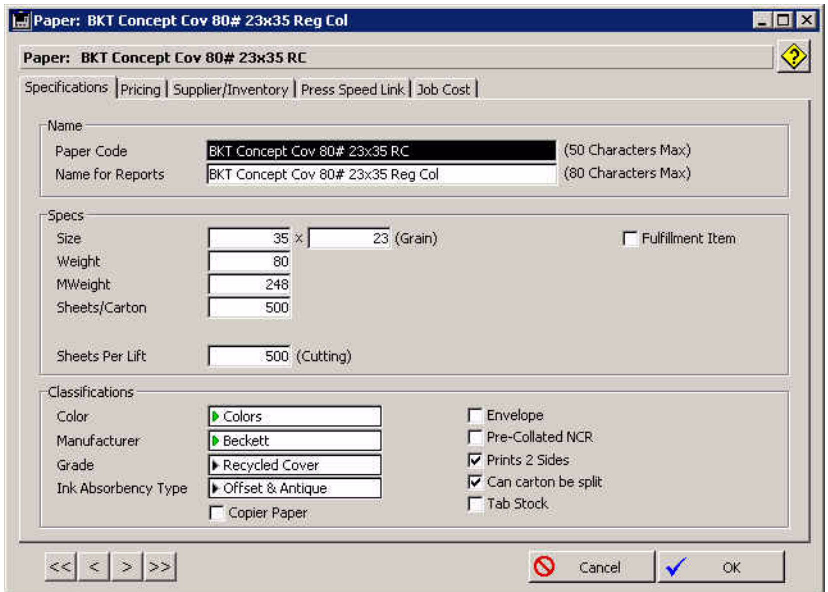
4 Select Inventory List from the pop-up window.

The standard Print screen displays.

5 Print or view the Inventory List.

About the Screens

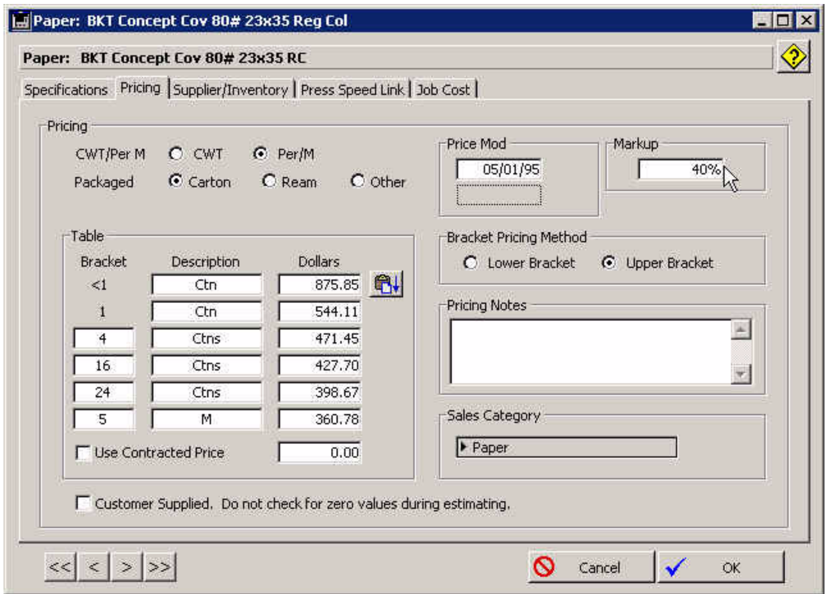
Specifications Tab



Info/Buttons	Contents/Usage
Paper Code	The Paper Name is an abbreviated paper name used on the Paper List Views and the Paper Choice Lists.
Name for Report	The paper name as you want it to appear on reports.

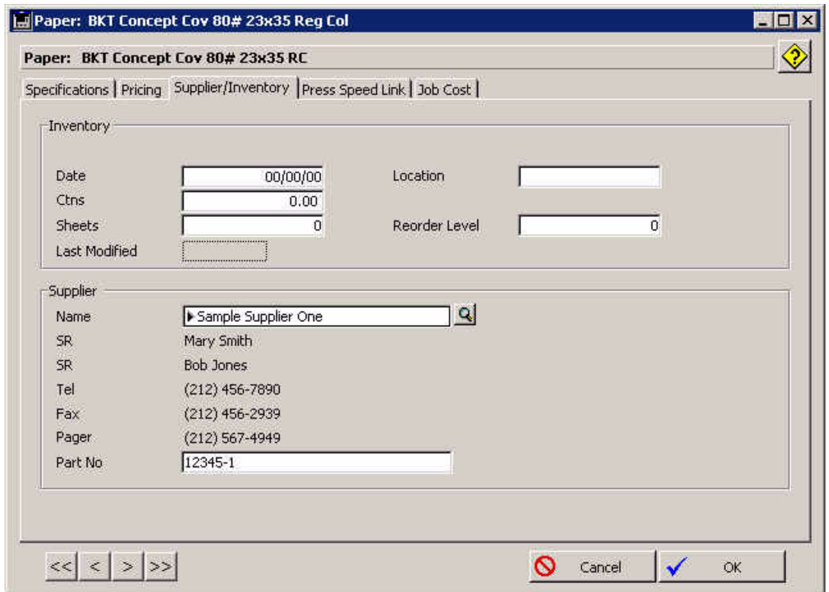
Info/Buttons	Contents/Usage
Specifications Section	Enter the specification of the paper in the appropriate boxes. a. Size (Length x Width) b. Weight c. MWeight d. Sheets per Carton NOTE If the Pre-Collated NCR check box is check, this will change to Sets per Carton. e. Sheets per Lift (how many sheets will fit into your cutter per lift) f. Fulfillment Item (check this box to mark this paper as a fulfillment. i.e. customer business card masters)
Classifications Section	Enter the Color, Manufacturer... in the appropriate boxes. Use the check boxes to specify the particulars about the paper. a. Color (choose from list) b. Manufacturer (choose from list) c. Grade (choose from list) d. Ink Absorbency (choose from list) e. Envelope (check if paper is an envelope) f. Pre-Collated NCR (check if paper is carbonless then enter how many sheets per set) g. Prints 2 Sided 9check if paper can be printed on both sides) h. Can carton be split (check if you can purchase this paper one sheet at a time) i. Tab Stock (check if the paper is a tabbed stock then enter how many banks per set)

Pricing Tab



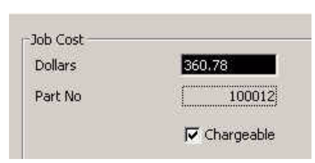
Info/Buttons	Contents/Usage
CWT/Per M (radio buttons)	Select if pricing is Per M or Carton Weight.
Packaged (radio buttons)	Select type of packaging for the paper.
Table Section	Enter pricing from the column of the vendors paper book or enter a special contracted price.
Customer Supplied (check box)	Use to denote if paper is supplied from a customer. Checking this box will turn off the alert message that no paper cost is entered for the estimate.
Sales Category	Used to assign the sales category for this paper.
Pricing Notes	Use to enter any notes for this paper.
Bracket Pricing Method Section	Select the Lower Bracket radio button if you want the stock pricing to be rounded down to the lower price bracket. Select the Upper Bracket to have the stock pricing rounded up to the higher bracket.
Price Mod Section	Displays date paper was last modified and user who did the modification.
Markup Section	Displays the amount of markup for this paper, date modified and by whom.

Supplier/Inventory Tab



Info/Buttons	Contents/Usage
Inventory Section	Displays inventory information for the paper. The date the inventory was last modified, how many sheets/cartons are in stock, where it's located and when to reorder.
Supplier Section	Displays the supplier information for the paper. Select the vendor from the list and enter the part number. The other info is filled in automatically.

Press Speed Link & Job Cost Tabs



Info/Buttons	Contents/Usage
Press Speed Link Tab	Use the radio buttons to select the default speed at which the paper will run.
Job Cost Tab	Use to enter the actual cost of the paper and to denote if it’s a chargeable item. NOTE This entry is required for the cost collection module

Chapter 92
Press

OVERVIEW

PrintPoint allows you to maintain a file with all of your Presses, with detailed specifications for each press. These press specs are used to calculate costs during estimating. The Impressions Rate Calculator can be used to generate a rate per thousand impressions as a starting point for the Impressions Grid.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your Press Preferences	File Menu > Preferences > Press & Large Format Defaults
Set your Sales Categories	Accounting Menu > Sales Categories > Edit Sales categories

STEP-BY-STEP

This section includes the following topics:

- Activating the Press Wizard
- Adding a New Press
  - From the Press List View
  - From the Estimate
- Cloning a Press
- Modifying a Press
  - From the Press List View
  - From the Estimate
- Deleting a Press

Activating the Press Wizard

PrintPoint has developed an On-Screen Wizard for setting up a new Press.

Follow the steps below to activate the Wizard.

1. File Menu > Preferences.
2. Select Wizards from the Select drop-down list.
3. Place a mark in the checkbox for the Use Press Wizard.
4. Click OK to save your Preferences.

NOTE

It is recommended that you use the Press Wizard to setup new press until you become familiar enough with the program to use the standard Press Detail Screen.

Adding a New Press

From the Press List View

1. Select Navigator > Press.

   PrintPoint displays the Press List View.
2. Click the New button.

   PrintPoint displays Press Wizard Confirm dialog.
3. Click the Wizard button.

4 PrintPoint displays the Press Wizard.

5 Follow the on-screen instructions to setup the press.

NOTE

It is recommended that you use the Press Wizard to setup new press until you become familiar enough with the program to use the standard Press Detail Screen.

From the Estimate

1 Open an existing or create a new Estimate.

2 In the Press Setup subsection, click on the Black Triangle in the press selection box.

PrintPoint displays the Press Choice List.

3 Click the New button.

PrintPoint displays Press Wizard Confirm dialog.

4 Click the Wizard button.

5 PrintPoint displays the Press Wizard.

6 Follow the on-screen instructions to setup the press.

NOTE

It is recommended that you use the Press Wizard to setup new press until you become familiar enough with the program to use the standard Press Detail Screen.

Cloning a Press

1 Select Navigator > Press.

PrintPoint displays the Press List View.

2 Click the Clone button.

The cloned Press Screen is displayed with an “*” after the press name.

3 Make changes as necessary and click OK.

Modifying a Press

From the Press List View

1 Select Navigator > Press

PrintPoint displays the Press List View.

2 Double-click the Press you wish to modify.

3 Change the information you wish to modify.

4 Click OK to save your changes.

From the Estimate

1. Open an existing or create a new Estimate.
2. Click on the QuickLink to the Press record.
   PrintPoint displays the Press Detail Screen.
3. Change the information you wish to modify.
4. Click OK to save your changes.

Deleting a Press

1. Select Navigator > Press
   PrintPoint displays the Press List View.
2. Select the Press you wish to delete.
3. Click the Delete button and confirm.

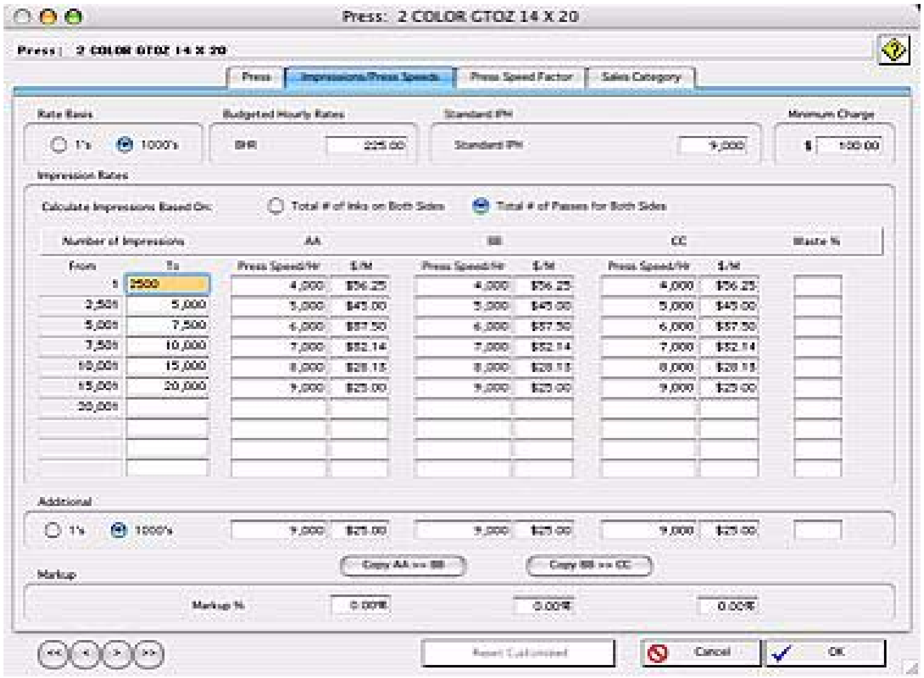
ABOUT THE SCREENS

Press Tab

Info/Buttons	Contents/Usage
Press Name	Displays the name of the press.
Specs Section	Use to enter the default specifications of the press. a. Printing Units (number of) b. Max Press Sheet (length x width) c. Max Image (the maximum image that can be printed on this press) d. Default Press/Parent Sheet (The most common paper for this press) e. Gripper Information (use to set the default gripper of the press. Check the Use Default Gripper box if you want the press to add the gripper by default) NOTE The button are used to choose which direction you will grip the job from and if you want to use the gripper or have it not calculated as part of the image.

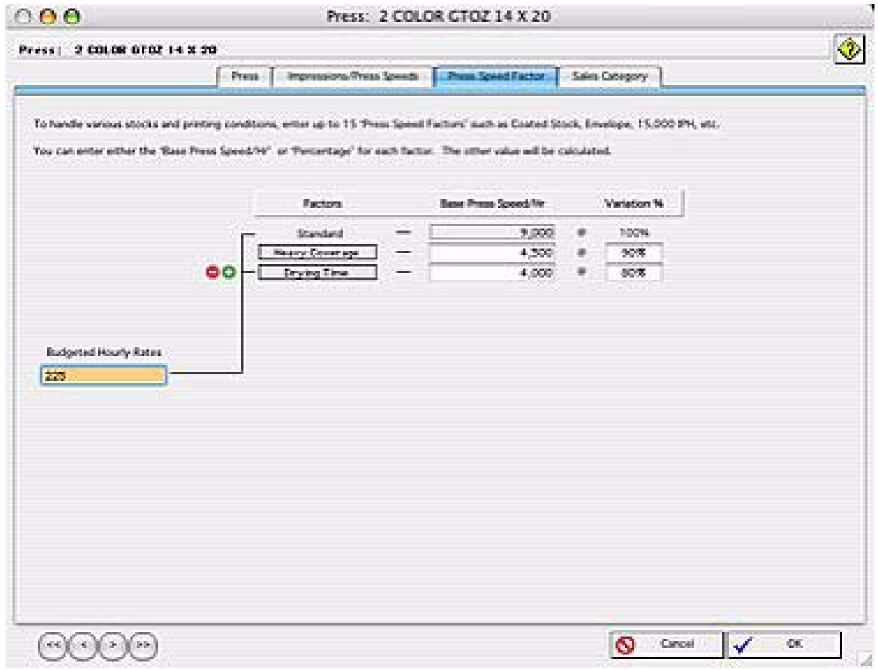
Info/Buttons	Contents/Usage
Info Section	Use to denote if press is a perfector and if you want to charge for black ink and washup.
Waste Section	Use to enter default waste amount for the press.
Fixed Section	Use to enter the fixed cost for Plates, Make Ready, Washup, Inks, PMS Charge and Stripping. You can choose to enter either the dollor cost or the time required to complete the operation.
Plate Changes	Use to setup a charge for an additional plate if a plate change is required after a determined number of impressions.
Custom Labels (button)	Unlocks the fields/labels that can be customized. The Custom Labels for this screen are: ■ Plates ■ Pms Charge ■ Strip (Hr)

sImpressions/Press Speed Tab



Info/Buttons	Contents/Usage
Budgeted Hourly Rates	The hourly dollar amount (before markup) you charge for the press.
Standard IPH	Enter the standard number of impressions per hour
Minimum Charge	Enter the minimum charge for the press
Calculate Impression based on radio buttons	Choose whether you want the price based on total number of inks per side or total number of passes per side.
Number of Impressions	Use to set price breaks based on job quantity
Press Speed/Hr (AA, BB, CC)	Enter either the press speed or the cost based on the price break
Additionals	Enter an additional cost to charge if the job goes over the impressions price break
Copy AA >> BB, Copy BB >> CC buttons	Click to copy the AA column pricing to the BB column ect...
Markup %	Enter an additional markup for the press cost if desired. This would be a markup that would be in addition to the global markup

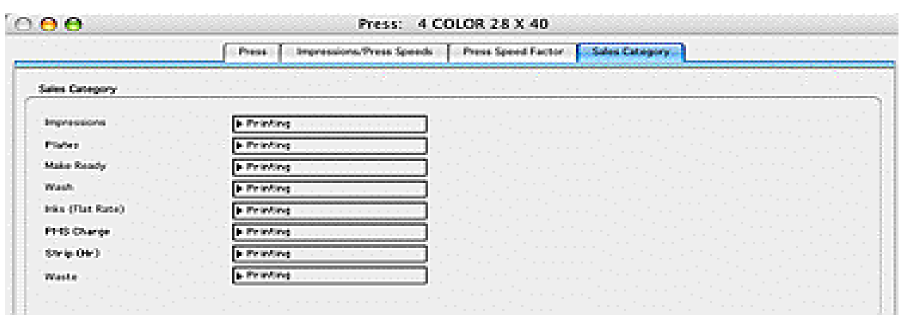
Impressions Tab



Info/Buttons	Contents/Usage
Budgeted Hourly Rate	Enter the BHR of the press
Factor Column	Starting with the standard factor enter up to 15 different press speeds
Base Press Speed/hr	Starting with standard press speed enter up to 15 differnt press speeds. These speeds should corispond with the items in the Base Press Speed Column
Variation%	PrintPoint automatically calculated the % of standard based on the entered information.

Sales Category Tab

Use this tab to assign Sales Categories for the press.



Chapter 93
Copy-Digital

OVERVIEW

PrintPoint's Copy/Digital Module is specifically designed for high speed duplicators and color copiers. The software can estimate 3 quantities on up to 6 trays and combined products from offset and other copy/digital estimates into one estimate. Specially designed Job Tickets and SuperReport Job Tickets are available for Copy/Digital Jobs.

Each piece of equipment can be setup for pricing in one of three methods:

- Flat rate per click charge
- Matrix of total number of clicks
- Matrix of total number of originals and number of copies.

If you need assistance in determining your Cost Per Click, PrintPoint's Cost Per Click Calculator can be used to generate a rate per click based on various factors such as maintenance fees, hourly rates, general overhead, etc.

Before You Begin

You should...	Where this information is found...
Set your Copy/Digital Equipment Preferences	File Menu > Preferences > Post-Press Defaults > Copy
Set your Sales Categories	Accounting Menu > Sales Categories > Edit Sales categories

STEP-BY-STEP

This section includes the following topics:

- Adding a new Copy/Digital Device
  - From the Copier List View
  - From the Estimate
- Setting up a Copier/Digital Device
  - The Specifications Tab
  - The Cost Basis Tab
  - The Pricing Tab - Square Area Method
  - The Pricing Tab - Matrix Method
- Working With the Matrix Pricing Method
  - Setting Up a New Matrix
  - Setting a Matrix as the Default Matrix
  - Cloning a Matrix for a Customer
  - Modifying a Matrix
  - Deleting a Matrix
  - Matrix of Total Area
  - Matrix of Area and Originals
- Modifying a Copy/Digital Device
  - From the Copier List View
  - From the Estimate
- Cloning a Copy/Digital Device
- Deleting a Copy/Digital Device.

Adding a New Copier/Digital Device

From the Copier List View

1. Select Navigator > Copier.

   PrintPoint displays the Copier List View.
2. Click the New button.

   PrintPoint displays the New Copier Detail screen.
3. Enter information into all fields.

   See the section Setting up a Copier/Digital Device later in this chapter.
4. Click OK.

From the Estimate

1. Open an existing or create a new Copier - Digital Estimate.
2. In the Copier section, click on the Black Triangle in the copier selection box.

   PrintPoint displays the Choice List.
3. Click the New button.

   PrintPoint displays the New Copier Detail screen.
4. Enter information into all fields.

   See the section Setting up a Copier/Digital Device later in this chapter.
5. Click OK.

Setting up a Copier/Digital Device

This section covers setting up a copier/digital device using the three tabbed subsections of the Copier/Digital Detail Screen.

The Specifications Tab

1. Open the Copier/Digital Device Detail Screen.
2. Enter a Name for the device.
3. Enter a Description for the device.
4. Click the radio button to specify if the device is Color or B&W.
5. Enter the Copies per Minute.
6. Select the Number of Trays the device uses from the drop-down menu.

   NOTE

   You will see a tab for each tray, in the Tray Setup section, based on the number of trays selected from the drop-down menu.

7. Enter a cost for Setup in each of the fields.
8. Enter the Number of Setups.

NOTE

The number of setups and the cost per setup section can be left blank. This information can be added during the estimating process.

9. Click on one of the Tray Tabs.
10. Enter the Max Press Sheet size.
11. Click on the Black Triangle in the Paper field.

    PrintPoint displays the Paper Choice List.

NOTE

It is not a requirement to enter a default paper.

12. Select a default paper from the Paper Choice List.The Parent Sht field will be automatically entered based on the paper selected in the paper field.
13. Enter a Run Size for the tab.
14. Select a Sales Category from the drop-down list.

The Cost Basis Tab

1. Click on the Cost Basis tab.

NOTE

This page is optional. You can click on the pricing Tab and enter a cost directly.

2 Enter the information in the Machine Cost section. This will give you a Machine Cost Per Copy.

3 Enter the information in the Labor Cost section. This will give you a Labor per Copy cost.

4 Enter the information in the General Overhead section. This will give you a Per Copy cost of the general overhead.

5 Enter the Copies per Minute for the device.

6 Enter the information in the Toner Costs section. This will give you the Toner per Copy cost.

7 Enter the information in the Developer Costs section. This will give you the Developer per Copy cost.

8 By completing steps 2 thru 7 you will get a Total Cost per Copy.

The Pricing Tab Per Click Method

1 Click on the Pricing Tab.

2 Click the Paper Cost In Rate checkbox if you want the cost of the default paper added to the per click cost.

3 Enter a Default Cost per M.

4 Click the Use Paper Markup radio button if you want to use the markup set in the paper setup.

5 Click the Use Copier Paper Markup is you want to use the markup setup in the from this section.

6 Enter a Markup in the AA, BB, and CC fields. This is the Copier Paper Markup.

7 Click on the Per Click radio button.

8 Enter a Minimum Price for 1 Copy in the field.

If this field is left blank PrintPoint will use the Cost Per Click.

9 Enter a Markup in each field.

NOTE

This markup is in addition to/or instead of the global markup used in the estimate.

10 Click on the Update Cost per Click button. This will enter the Markup, Cost per Click from the Cost Basis Tab and, if you have the Paper Cost in Rate box checked, the Paper Cost.

The Rate/Square Foot is automatically calculated or you can manually edit the field.

11 Click on the Black Triangle in the Second Side Pricing section to select how to price the second side of the job.

The Pricing Tab - Matrix Method

Matrix pricing allows you to price Copy/Digital jobs using one of several types of pricing grids (matricies). For the sake of clarity, we have created a separate section below: Working with Matrix Pricing

See the section below: Working with Matrix Pricing

Working with the Matrix Pricing Method

Setting Up a New Matrix

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Click the Select/New button.

PrintPoint displays the Matrix Choice List dialog.

4 Click the New button.

NOTE

If you have already setup a matrix, that matrix will show in the Matrix Choice List and can be selected instead of clicking the New button.

PrintPoint displays the New Large Format Matrix Screen.

5 Go to the “Matrix of Total Area” or “Matrix or Area and Original” section below.

Setting a Matrix as the Default Matrix

Setting a matrix as the default means that the matrix will be used for the default pricing for all customers who do not have a customer specific matrix.

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Highlight the matrix you want to set as default.

4 Click the Set Default Matrix button.

5 The name of the matrix will now appear in the Default Matrix field.

Cloning a Matrix for a Customer

When you want customer specific pricing, you must create a matrix for that customer. Whenever you create a new estimate for that customer, this matrix will be used in place of the default matrix.

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Highlight the matrix you want to clone.

4 Click the Clone Matrix for Customer button.

PrintPoint displays the Customer Choice List.

5. Select the customer to associate with the matrix.
   The matrix is displayed in the matrix list with an "*" after the name.
6. Double click on the new matrix to access and modify.

Modifying a Matrix

1. Click on the Pricing Tab.
2. Click on the Matrix radio button.
3. Double click on the matrix, from the matrix list, you want to modify.

NOTE

You can also highlight the matrix and click the Edit button.

4. Modify the matrix as needed.

Deleting a Matrix

1. Click on the Pricing Tab.
2. Click on the Matrix radio button.
3. Highlight the matrix, from the matrix list, that you want to delete.
4. Click the Remove button.

Matrix of Total Area

NOTE

Follow these instructions if you have selected the Matrix of Total Area in the "Setting Up a New Matrix" section above.

1. Enter a Name for the matrix.
2. Enter a Description for the matrix.
3. If this will be a customer specific matrix, click on the Black Triangle in the Customer Code field to select the customer from the Customer Choice List. If this is not a customer specific matrix you can leave the Customer Code field blank.
4. Select the Matrix of Total Area from the Type drop-down menu.
5. In the Area Column enter the price breaks based on total area.
6. In the Price Column enter the total price for the area.

Matrix of Area and Originals

NOTE

Follow these instructions if you have selected the Matrix of Area and Originals in the "Setting Up a New Matrix" section above.

1. Enter a Name for the matrix.
2. Enter a Description for the matrix.

3 If this will be a customer specific matrix, click on the Black Triangle in the Customer Code field to select the customer from the Customer Choice List. If this is not a customer specific matrix you can leave the Customer Code field blank.

4 Select the Matrix of Area and Originals from the Type drop-down menu.

5 In the Area Column enter the price breaks based on total area.

6 In the Number Of Originals section enter the number of original you want to apply to the price break.

7 Enter the pricing into the corresponding field based on total area and number of originals.

Modifying a Copier/Digital Device

From the Press List View

1 Select Navigator > **Copier.**

PrintPoint displays the Copier List View.

2 Double-click the piece of equipment you wish to modify.

3 Change the information you wish to modify.

4 Click the OK button.

From the Estimate

1 Open an existing or create a new Copier - Digital Estimate**.**

2 In the Copier section, click on the Quicklink to Copier button.

PrintPoint displays the Review Copier dialog.

3 Change the information you wish to modify.

4 Click the OK button.

Cloning a Copier/Digital Device

1 Select Navigator > **Copier**.

PrintPoint displays the Copier List View.

2 Select the Copier you want to clone.

3 Click the Clone button.

The cloned Copier Detail Screen is displayed with an “*” after the Copier Name.

4 Make changes as necessary and click OK.

Deleting a Copier/Digital Device

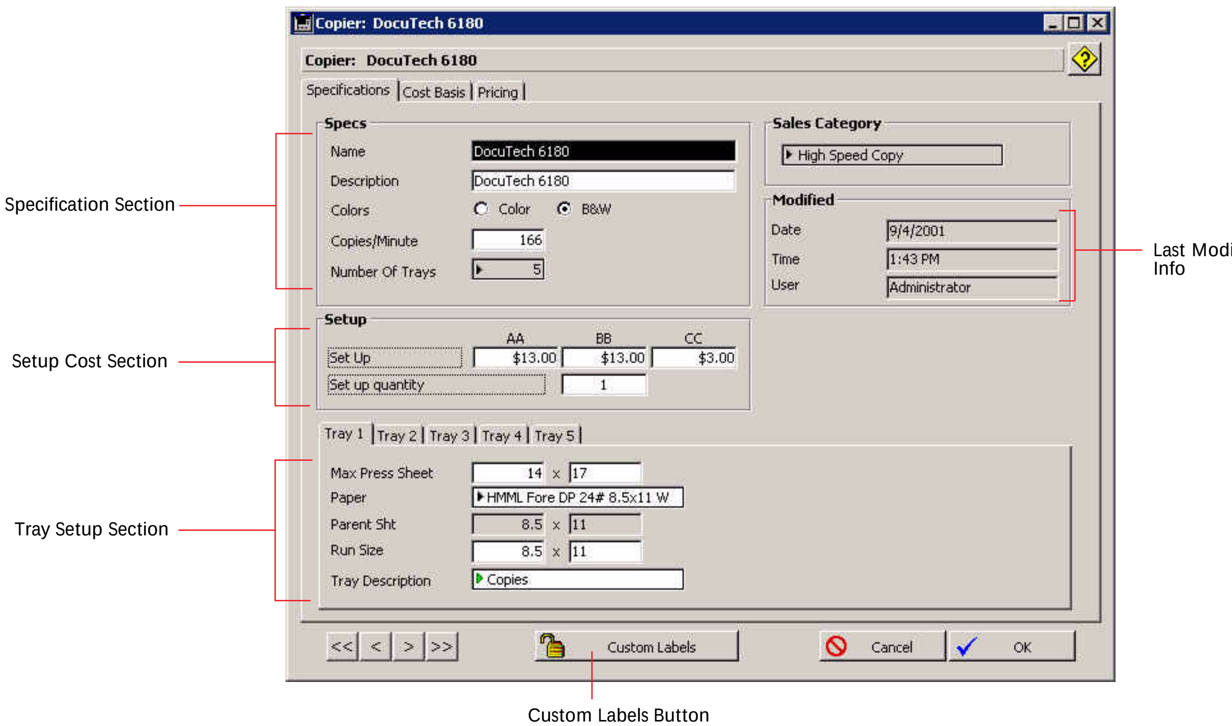
1. Select Navigator > **Copier.**

   PrintPoint displays the Copier List View.

2. Select the piece of equipment you wish to delete.
3. Click the Delete button and confirm.

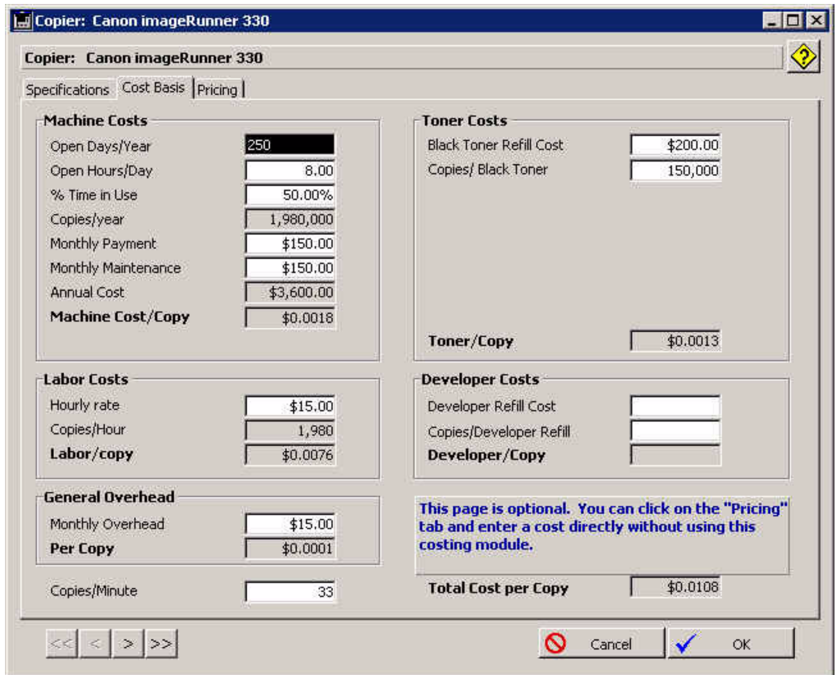
About The Screens

Specifications Tab



Button / Field	Definition
Specification Section	The general specifications of the device.
Setup Cost Section	The default setup cost and default number of setups required for the device.
Tray Setup Section	The default information for each tray of the device. NOTE The number of tray tabs will equal the number of trays selected in the Specification Section.
Custom Labels (button)	Unlocks the custom label fields for editing.
Last Modified Info	Displays the Date and Time of the last modification of the device and the user who did the modifications.

Cost Basis Tab

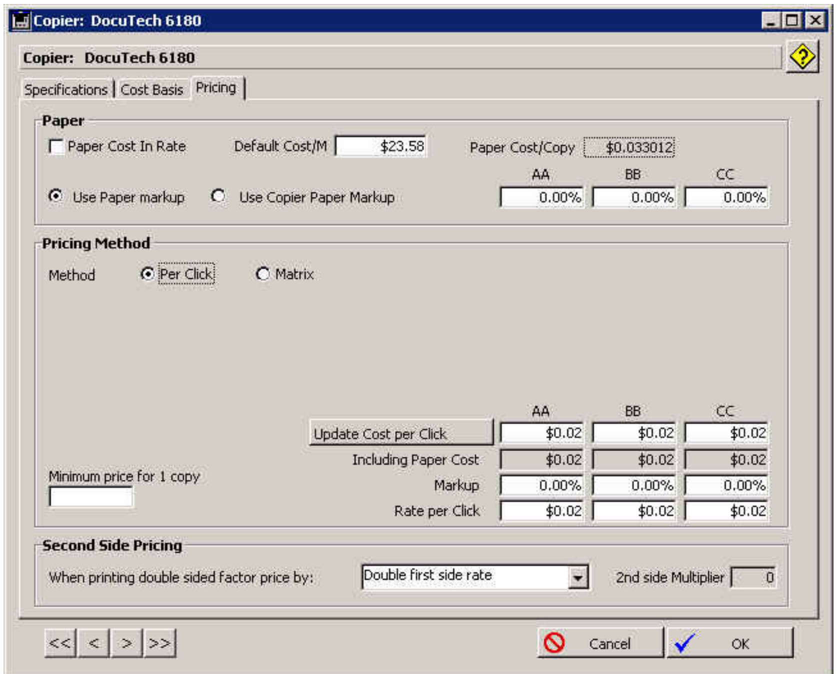


NOTE

This page is optional. You can click on the pricing Tab and enter a cost directly.

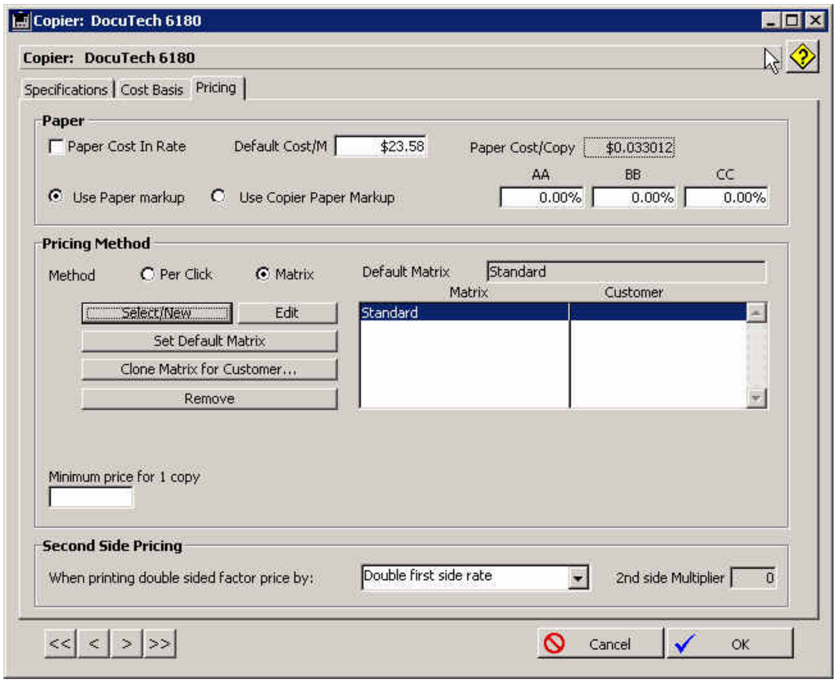
Button / Field	Definition
Machine Cost Section	Used to determine the cost of the device on a per copy basis.
Labor Cost Section	used to determine the cost of labor on a per copy basis.
General Overhead Section	Used to determine the cost of general overhead on a per copy basis,
Toner Cost Section	Used to determine the cost of toner on a per copy basis.
Developer Cost Section	Used to determine the cost of developer on a per copy basis.
Total Cost per Copy	Displays a per copy cost based on the information of each of the above section.

Pricing Tab
Per Click



Button / Field	Definition
Paper Cost in Rate (check box)	Check to add the cost of the selected stock to the per click cost.
Use Paper markup & Use Copier Paper Markup (radio buttons)	Select if you want to use the paper markup or the copier paper markup.
Pricing Method Per Click / Matrix (radio buttons)	Above view is Per Click pricing. See below for Matrix detail.
Second Side Pricing	Use this section to calculate how to charge for two-sided copies.

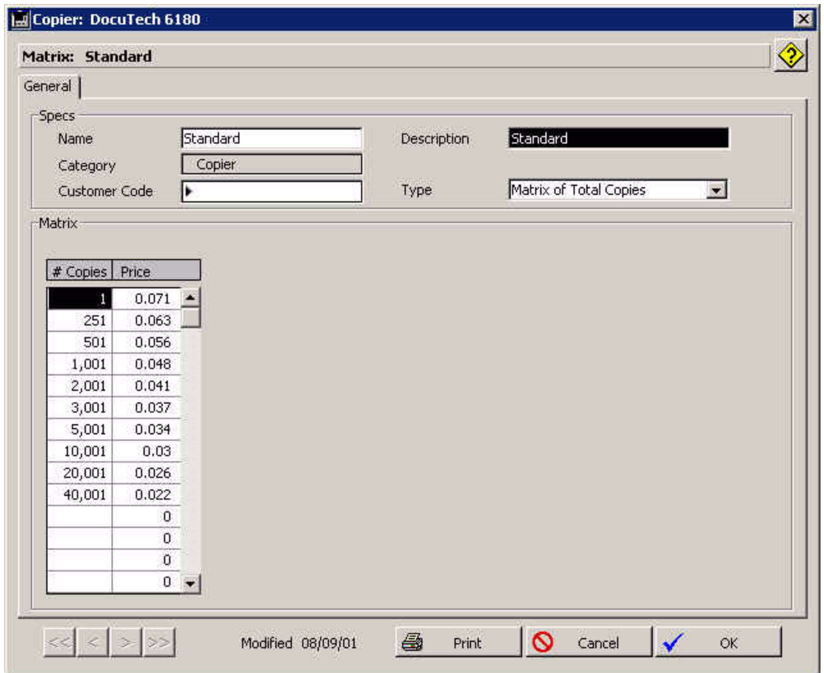
Pricing Tab Matrix



If you choose the **Matrix** the pricing tabs changes to look like the above view. A sample view of a pricing matrix follows.

Button / Field	Definition
Select/New (button)	Use to select an existing or create a new matrix.
Edit (button)	Use to access the matrix and edit as needed.
Set Default Matrix (button)	Use to set the highlighted matrix as the default.
Clone Matrix for Customer... (button)	Use to clone the highlighted matrix and select that matrix for a specific customer.
Remove (button)	Use to delete a matrix.

Matrix Detail Screen
Total Copies

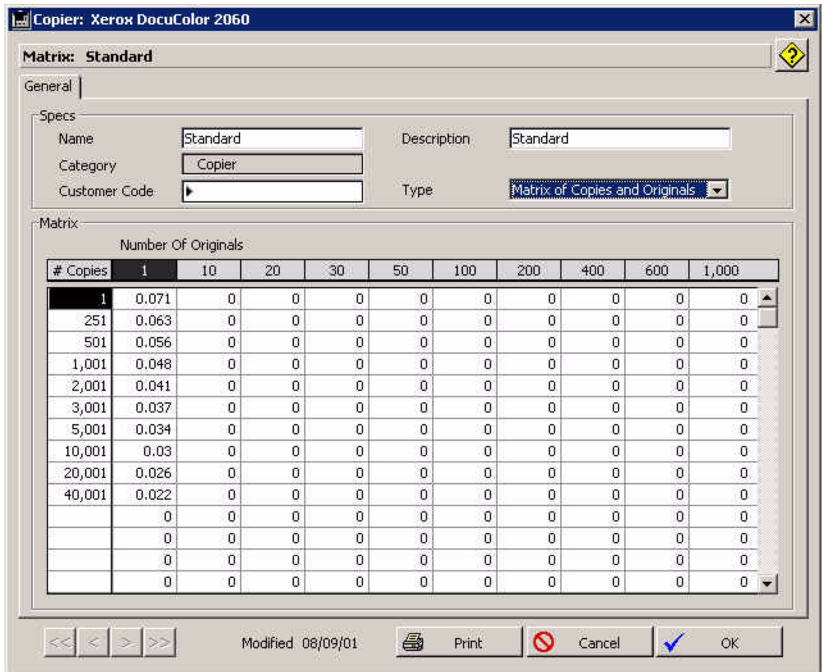


NOTE

A matrix can be setup as for a specific customer or a general pricing grid.

Button / Field	Definition
Specs Section	Use to enter the general information for the matrix.
Customer Code	Use this if you want this matrix to be customer specific.
Type	You can select a Total Copies matrix or a Copies and Originals matrix.

Matrix Detail Screen
Copies and Originals



NOTE

The Matrix of Copies and Originals is a matrix based on number of originals and number of copies per each original.

Button / Field	Definition
Specs Section	Use to enter the general information for the matrix.
Customer Code	Use this if you want this matrix to be customer specific.
Type	You can select a Total Copies matrix or a Copies and Originals matrix.

Chapter 94
Large Format Media

OVERVIEW

PrintPoint allows you to maintain a database of Media for your large format devices, with specifications, pricing, sales category, and supplier information.

STEP-BY-STEP

This section includes the following topics:

- Adding Large Format Media to your Database
  - From the Media List View
  - From the Estimate
  - From the Large Format Device Pricing Tab
- Setting Up Large Format Media
- Modifying Media Information
  - From the Media List View
  - From the Estimate
- Cloning Media
- Deleting Large Format Media

Adding Large Format Media to your Database

From the Media List View

1. List View Menu > Large Format Media.

   The Large Format Media List View displays.
2. Click the New button.

   PrintPoint displays the Media Detail Screen.
3. Enter the information about the new media.
4. Click OK.

From a Large Format Estimate

1. Open an existing or create a new Large Format Estimate.
2. In the Media section, click on the Black Triangle in the Media selection box.
3. PrintPoint displays the Media Choice List.
4. Click the New button.

   PrintPoint displays the Media Detail Screen.
5. Enter the information about the new media.
6. Click OK.

From the Large Format Device Pricing Tab

You can also add a new media from the Large Format Device Pricing Tab.

For more information see the chapter “Large Format Devices”.

Setting Up Large Format Media

1. Open the Media Detail Screen.
2. Enter a Name for the media.
3. Enter a Job Description that will describe the type of media.
4. Select if media is Roll or Sheet.
5. Enter the Size of the media.
6. Enter the Thickness of the media.
7. Enter the Price of the media.

   NOTE

   The Price is per sheet or per roll depending on which you selected in step 4.

8. Select a Supplier from the drop-down list.
9. Enter the Part No for the media.
10. Select a Sales Category from the drop-down list.
11. Click on the Markup tab.
12. Enter the Markup for the media.

   NOTE

   This markup is an additional markup that will be applied above the overall markup of the estimate.

Modifying Large Format Media Information

From the Media List View

1. List View Menu > Large Format Media.

   The Large Format Media List View displays.
2. Double-click the media you want to change.

   TIP

   Use the Search option to quickly find the specific media you want to change.

   PrintPoint displays the Media Detail Screen.
3. Make any changes needed.
4. Click the OK button.

From the Estimate

1. Open an existing or create a new Estimate.
2. In the Media section, click the QuickLink to Media button.

   PrintPoint displays the Media Detail Screen.
3. Make any changes needed.
4. Click the OK button.

Cloning Media

1. List View Menu > Large Format Media.

   PrintPoint displays the Large Format Media List View.
2. Select the Media you want to clone. (Only one media at a time.)
3. Click the Clone button.

   The cloned Media Detail Screen is displayed with an “*” after the Media Name.
4. Make any changes necessary and click OK.

Deleting Large Format Media

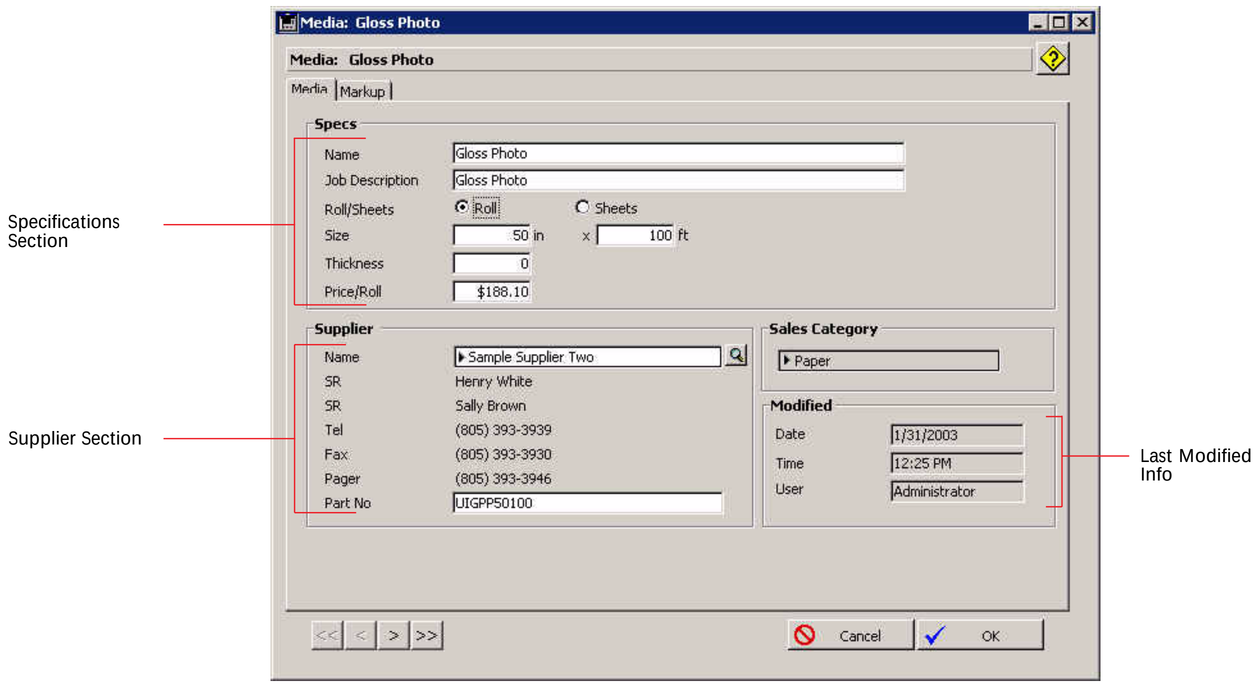
You can delete one media at a time or you can create a group of media and delete the entire group.

1. List View Menu > Large Format Media.

   PrintPoint displays the Large Format Media List View.
2. Select the media(s) you want to delete.
3. Click the Delete button.
4. At the prompt, click the Delete button again.

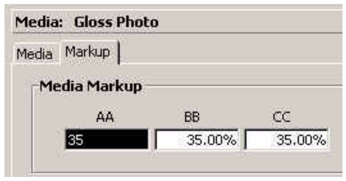
About The Screens

Media Tab



Button / Field	Definition
Specifications Section	The general specifications of the media. for more detail see the section “Setting Up Large Format Media” in this chapter.
Supplier Section	Information about the supplier for this media.
Last Modified Info	Displays the Date and Time of the last modification of the device and the user who did the modifications.
Sales Category Sections	Used to assign the sales category for the device.

Markup Tab



Use this tab to set the specific markup for this media.

Chapter 95
Large Format Devices

OVERVIEW

PrintPoint allows you to maintain a file with all of your Large Format equipment, with detailed specifications for each device. These specs are used to calculate costs during estimating.

Before You Begin

You should...	Where this information is found...
Set your Large Format Preferences	File Menu > Preferences > Post-Press Defaults > Large Format
Set your Sales Categories	Accounting Menu > Sales Categories > Edit Sales categories

STEP-BY-STEP

This section includes the following topics:

- Adding a New Large Format Device
  - From the List View
  - From an Estimate
- Setting up Large Format Device.
  - The Specifications Tab
  - The Pricing Tab - Square Area Method
  - The Pricing Tab - Matrix Method
  - The Printing Speed & Variation Tab
- Working With the Matrix Pricing Method
  - Setting Up a New Matrix
  - Setting a Matrix as the Default Matrix
  - Cloning a Matrix for a Customer
  - Modifying a Matrix
  - Deleting a Matrix
  - Matrix of Total Area
  - Matrix of Area and Originals
- Modifying a Large Format Device
  - From the List View
  - From an Estimate
- Cloning a Large Format Device
- Batch Assigning Sales Categories
- Deleting a Large Format Device

Adding a New Large Format Device

From the List View

1. Select Navigator > Large Format.

   PrintPoint displays the Large Format List View.
2. Click the New button.

   PrintPoint displays the New Large Format Detail Screen.
3. Enter information into all fields.
4. Click the OK button.

From the Estimate

1. Open an existing or create a new Estimate.
2. In the device section, click on the black triangle in the media selection box.

   PrintPoint displays the media choice list.
3. Click the New button.

   PrintPoint displays the New Large Format Detail Screen.
4. Enter information into all fields.
5. Click the OK button.

Setting up Large Format Device

The Specifications Tab

1. Access the Large Format Detail Screen.
2. Enter a Name for the device.
3. Enter a Description for the device.
4. Enter the Roll or Cut Sheet dimensions.
5. Enter the percentage of Ink Coverage.

   NOTE

   The 3 labels in the ink coverage section, Light, Normal and Heavy Coverage, are customizable using the Custom Labels button. For more information on the Customized Labels, see the “About the Screens” section of this chapter.
6. Select a Sales Category from the drop-down list.
7. Enter a Leading, Trailing and Left or Right Margin and check the Use Default Margins if you want these settings to be the default.

NOTE

Margins can be added on a job specific basis as they apply during the estimating process. For more information see the chapter “Estimating Tools: Large Format.

The Pricing Tab Square Area Method

1. Click on the Pricing Tab.
2. Click on the Square Area radio button.
3. Enter a Cost per Square Ft. in each of the fields.

4 Enter a Markup in each of the fields.

NOTE

This markup is in addition to/or instead of the global markup used in the estimate.

The Rate/Square Foot is automatically calculated or you can manually edit the field.

5 Enter a Minimum Charge for 1 Output.

If this field is left blank PrintPoint will use the Rate/Square Foot.

6 Click on the Black Triangle in the default field to choose a media from Media Choice List.

You can also create a new media from Choice List by clicking the New button. For more information see the chapter “Large Format Media”.

7 Select either Use Media Markup or Use Device Markup.

8 Enter the Device Markup into each of the fields.

The Pricing Tab - Matrix Method

Matrix pricing allows you price Large Format jobs using one of several types of pricing grids (matrices). For the sake of clarity, we have created a separate section below: Working with Matrix Pricing

See the section below: Working with Matrix Pricing

The Printing seed & Variation Tab

1 Click on the Printing Speed and Variation tab.

2 Enter a Square Ft. per Hr rate in each of the boxes.

NOTE

High Speed, Normal and High Quality are customizable labels. See the “About the Screens” below for more detail.

Working with the Matrix Pricing Method

Setting Up a New Matrix

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Click the Select/New button.

PrintPoint displays the Matrix Choice List dialog.

4 Click the New button.

NOTE

If you have already setup a matrix, that matrix will show in the Matrix Choice List and can be selected instead of clicking the New button.

PrintPoint displays the New Large Format Matrix Screen.

5 Go to the “Matrix of Total Area” or “Matrix or Area and Original” section below.

Setting a Matrix as the Default Matrix

Setting a matrix as the default means that the matrix will be used for the default pricing for all customers who do not have a customer specific matrix.

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Highlight the matrix you want to set as default.

4 Click the Set Default Matrix button.

5 The name of the matrix will now appear in the Default Matrix field.

Cloning a Matrix for a Customer

When you want customer specific pricing, you must create a matrix for that customer. Whenever you create a new estimate for that customer, this matrix will be used in place of the default matrix.

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Highlight the matrix you want to clone.

4 Click the Clone Matrix for Customer button.

PrintPoint displays the Customer Choice List.

5 Select the customer to associate with the matrix.

The matrix is displayed in the matrix list with an “*” after the name.

6 Double click on the new matrix to access and modify.

Modifying a Matrix

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Double click on the matrix, from the matrix list, you want to modify.

NOTE

You can also highlight the matrix and click the Edit button.

4 Modify the matrix as needed.

Deleting a Matrix

1 Click on the Pricing Tab.

2 Click on the Matrix radio button.

3 Highlight the matrix, from the matrix list, that you want to delete.
4 Click the Remove button.

Matrix of Total Area

NOTE

Follow these instructions if you have selected the Matrix of Total Area in the “Setting Up a New Matrix” section above.

1 Enter a Name for the matrix.
2 Enter a Description for the matrix.
3 If this will be a customer specific matrix, click on the Black Triangle in the Customer Code field to select the customer from the Customer Choice List. If this is not a customer specific matrix you can leave the Customer Code field blank.
4 Select the Matrix of Total Area from the Type drop-down menu.
5 In the Area Column enter the price breaks based on total area.
6 In the Price Column enter the total price for the area.

Matrix of Area and Originals

NOTE

Follow these instructions if you have selected the Matrix of Area and Originals in the “Setting Up a New Matrix” section above.

1 Enter a Name for the matrix.
2 Enter a Description for the matrix.
3 If this will be a customer specific matrix, click on the Black Triangle in the Customer Code field to select the customer from the Customer Choice List. If this is not a customer specific matrix you can leave the Customer Code field blank.
4 Select the Matrix of Area and Originals from the Type drop-down menu.
5 In the Area Column enter the price breaks based on total area.
6 In the Number Of Originals section enter the number of original you want to apply to the price break.
7 Enter the pricing into the corresponding field based on total area and number of originals.

Modifying a Large Format Device

From the List View

1. Select Navigator > Large Format.

   PrintPoint displays the Large Format List View.
2. Select the device you wish to modify.
3. Change the information you wish to modify.
4. Click the OK button.

From the Estimate

1. Open an existing or create a new Estimate.
2. Click on the Quick Link to the Media button.

   PrintPoint displays the Media Detail dialog.
3. Change the information you wish to modify.
4. Click the OK button.

Cloning a Large Format Device

1. Select Navigator > Large Format.

   PrintPoint displays the Large Format List View.
2. Select the Large Format Device you want to clone.
3. Click the Clone button.

   The cloned Large Format Device Detail Screen is displayed with an “*” after the Media Name.
4. Make any changes necessary and click OK.

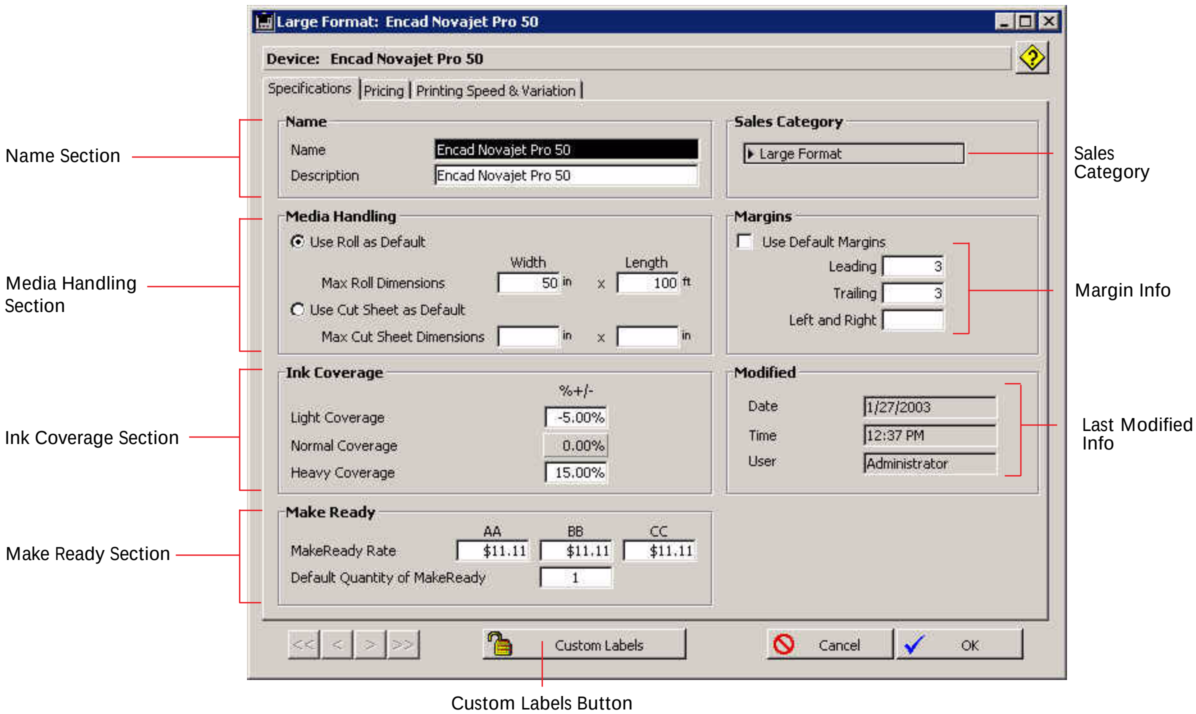
Deleting a Large Format Device

1. Select Navigator > Large Format.

   PrintPoint displays the Large Format List View.
2. Select the device you wish to delete.
3. Click the Delete button and confirm.

ABOUT THE SCREENS

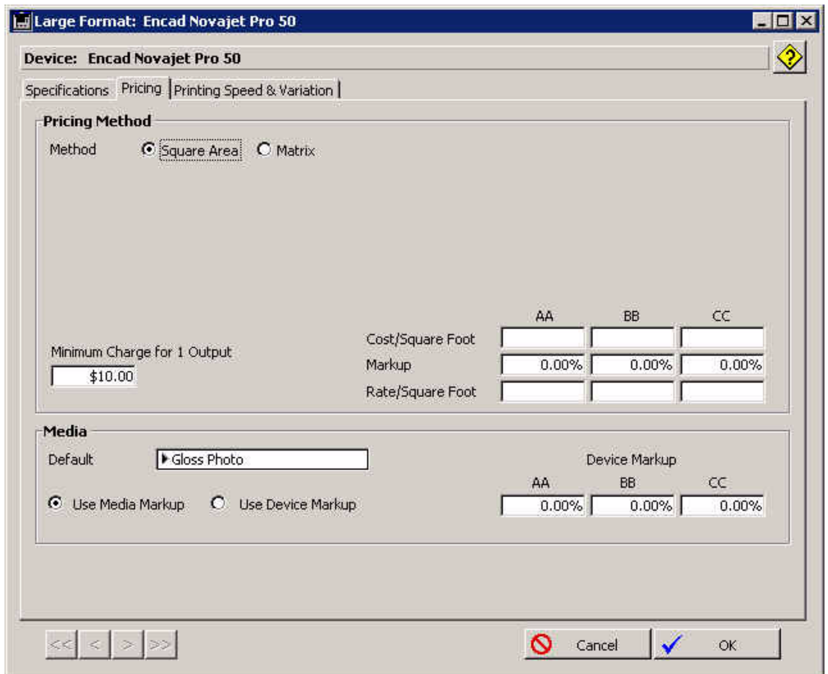
Specifications Tab



Button / Field	Definition
Name Section	The general specifications of the device.
Media Handling Section	Used to setup roll or cut sheet media defaults.
Ink Coverage Section	Used to setup the default ink coverages for the device.
Make Ready Section	The default setup cost and default number of setups required for the device.
Custom Labels (button)	Unlocks the custom label fields for editing. The fields that can be customized are: a. Light Coverage b. Normal Coverage c. Heavy Coverage d. MakeReady Rate e. Default Quantity of MakeReady
Last Modified Info	Displays the Date and Time of the last modification of the device and the user who did the modifications.

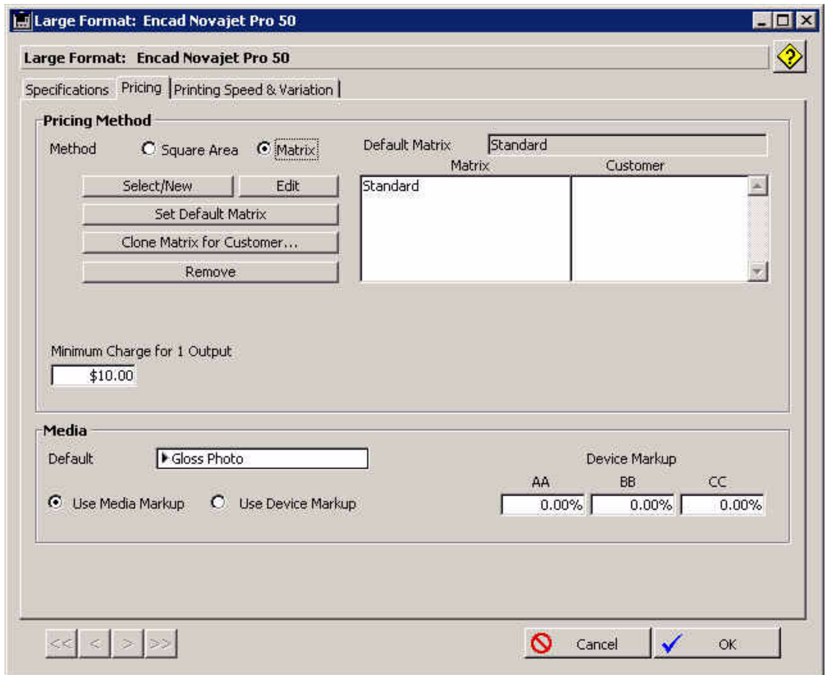
Button / Field	Definition
Margins	Used to set the default margins for the device.
Sales Category Sections	Used to assign the sales category for the device.

Pricing Tab Per Square Area



Button / Field	Definition
Pricing Method Square Area/ Matrix (radio buttons)	Above view is square area pricing. See below for Matrix detail.
Minimum Charge for 1 Output	Enter a minimum charge for one output. If this field is left blank, the Rate/Square Foot will be used to calculate 1 output.
Cost/Square Foot	Enter a cost per square foot in each field.
Markup	Enter a markup in each field. This markup is in addition to the overall estimate markup.
Rate/Square Foot	This is automatically calculated or you can enter in manually.
Media Section	Use to set default media and media vs. device markup for media.
Media vs. Device Markup (radio buttons)	Select which is to be used when calculating a the cost of the media.
Device Markup	Enter a markup in each field. This markup is in addition to the overall estimate markup.

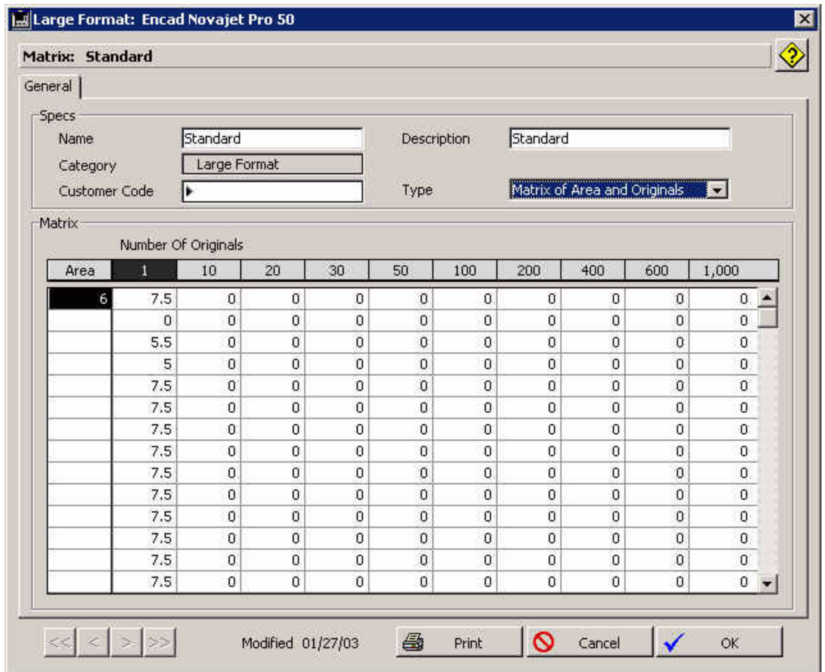
Pricing Tab Matrix



Button / Field	Definition
Select/New (button)	Use to select an existing or create a new matrix.
Edit (button)	Use to access the matrix and edit as needed.
Set Default Matrix (button)	Use to set the highlighted matrix as the default.
Clone Matrix for Customer... (button)	Use to clone the highlighted matrix and select that matrix for a specific customer.
Remove (button)	Use to delete a matrix.

If you choose the Matrix the pricing tabs changes to look like the above view. A sample view of a pricing matrix follows.

Matrix
Area and Originals

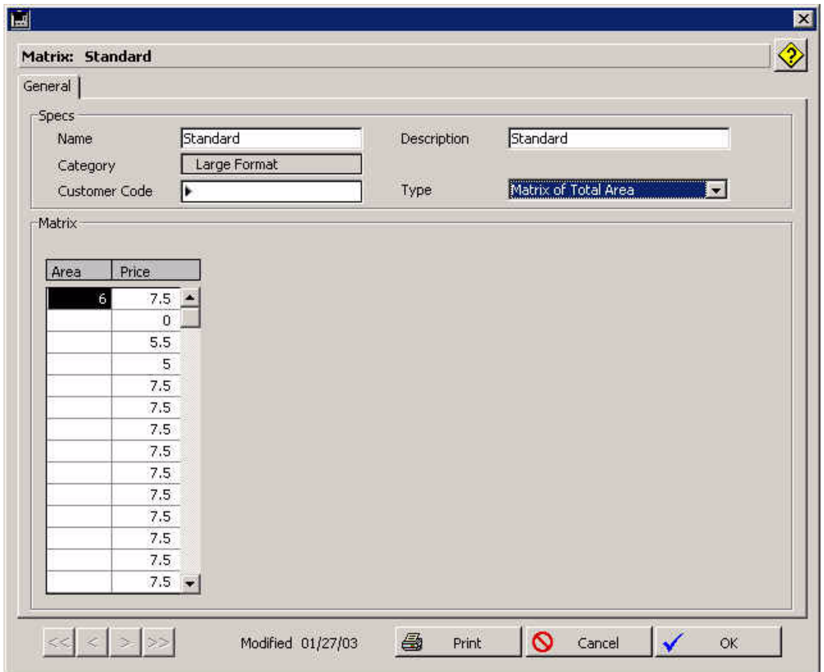


NOTE

A matrix can be setup as for a specific customer or a general pricing grid.

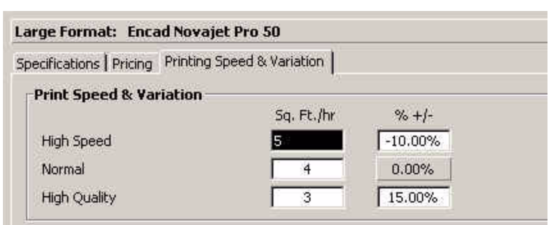
Button / Field	Definition
Specs Section	Use to enter the general information for the matrix.
Customer Code	Use this if you want this matrix to be customer specific.
Type	You can select a Total Copies matrix or a Copies and Originals matrix.

Matrix Detail Screen Copies and Originals



Button / Field	Definition
Specs Section	Use to enter the general information for the matrix.
Customer Code	Use this if you want this matrix to be customer specific.
Type	You can select a Total Copies matrix or a Copies and Originals matrix.

Printing Speed & Variation Tab



Use this tab to set maximum speed, normal speed and highest quality square foot per hour

Chapter 96
Post-Press

OVERVIEW

PrintPoint uses the Post-press area to handle any of the following activities:

- Bindery
- Finishing
- Outside Services (Brokered Services)
- Shipping/Messengers/Delivery
- Miscellaneous

TIP

Review PrintPoint's Post-Press Wizard which provides detailed instructions and extensive examples.

Before You Begin

You should...	Where this information is found...
Setup your Post-Press defaults	File Menu > Preferences > Post-Press Defaults
Set your Sales Categories	Accounting Menu > Sales Categories > Edit Sales categories

STEP-BY-STEP

This section includes the following topics:

- Activating the Post-Press Wizard
- Adding a New Post-Press Item
  - From the Post-Press List View
  - From the Estimate
- Cloning a Post-Press Item
  - From the Post-Press List View
  - From the Estimate
- Modifying a Post-Press Item
  - From the Post-Press List View
  - From the Estimate
- Deleting a Post-Press Item

Activating the Post-Press Wizard

PrintPoint has developed an On-Screen Wizard for setting up a new Post-Press Item.

Follow the steps below to activate the Wizard.

1. File Menu > Preferences.
2. Select Wizards from the Select drop-down list.
3. Place a mark in the checkbox for the Use Post-Press Wizard.
4. Click OK to save your Preferences.

NOTE

It is recommended that you use the Post-Press Wizard to setup new post-press items until you become familiar enough with the program to use the standard Post-Press Detail Screen.

Adding a New Post-Press Item

From the Post-Press List View

1. Select Navigator > Post-Press.

   PrintPoint displays the Post-Press List View.

2 Click the New button.

PrintPoint displays Post-Press Wizard Confirm dialog.

3 Click the Wizard button.

4 PrintPoint displays the Press Wizard.

5 Follow the on-screen instructions to setup the press.

NOTE

It is recommended that you use the Press Wizard to setup new press until you become familiar enough with the program to use the standard Press Detail Screen.

From the Estimate

1 Open an existing or create a new Estimate.

2 In the Post-Press subsection, click on one of the White Check Boxes.

PrintPoint displays the Post-Press Choice List.

3 Click the New button.

PrintPoint displays Press Wizard Confirm dialog.

4 Click the Wizard button.

5 PrintPoint displays the Press Wizard.

6 Follow the on-screen instructions to setup the press.

NOTE

It is recommended that you use the Press Wizard to setup new press until you become familiar enough with the program to use the standard Press Detail Screen.

Cloning a Post-Press

From the Post-Press List View

1 Select Navigator > Post-Press.

PrintPoint displays the Press List View.

2 Highlight the Post-Press item you want to clone.

3 Click the Clone button.

The cloned Post-Press Screen is displayed with an "*" after the post-press name.

4 Make changes as necessary and click OK.

From the Estimate

1 Open an existing or create a new Estimate.

2 In the Post-Press subsection, click on one of the White Check Boxes.

PrintPoint displays the Post-Press Choice List.

3 Select the Category of the item you want to clone.

4 From the Name section select the name of the item you want to clone.

5 Click the Clone button.

The cloned Post-Press Screen is displayed with an "*" after the post-press name.

6 Make changes as necessary and click OK.

Modifying a Post-Press Activity

From the Post-Press List View

1 Select Navigator > Post-Press

PrintPoint displays the Post-Press List View.

2 Select the item you wish to modify.

3 Change the information you wish to modify.

4 Click OK to save your changes.

From the Estimate

1 Open an existing or create a new Estimate.

2 In the Post-Press subsection, click on one of the White Check Boxes.

PrintPoint displays the Post-Press Choice List.

3 Select the Category of the item you wish to modify.

4 From the Name section double click the name of the item you wish to modify.

5 Change the information you wish to modify.

6 Click OK to save your changes.

Deleting a Post-Press Activity

1 Select Navigator > Post-Press

PrintPoint displays the Post-Press List View.

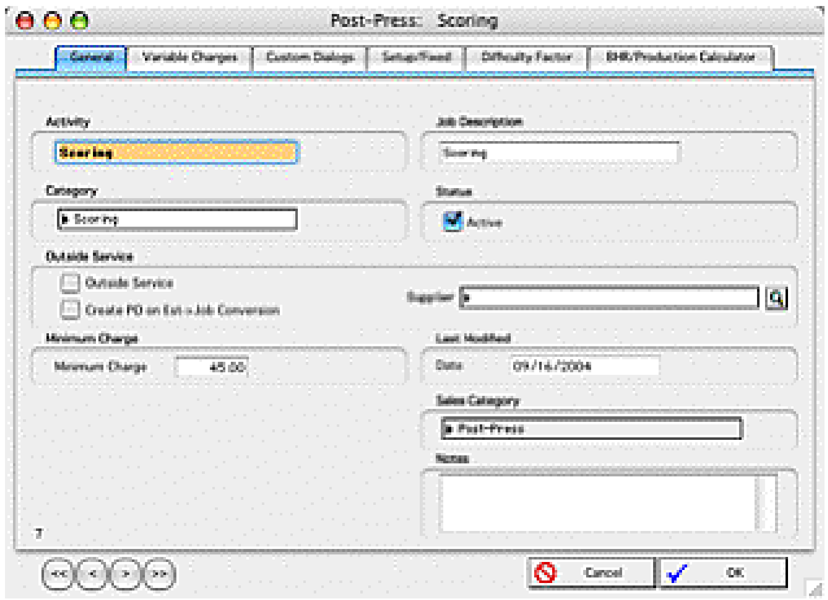
2 Select the Post-Press item you wish to delete.

3 Click the Delete button and confirm.

ABOUT THE SCREENS

Post Press Detail

General Tab

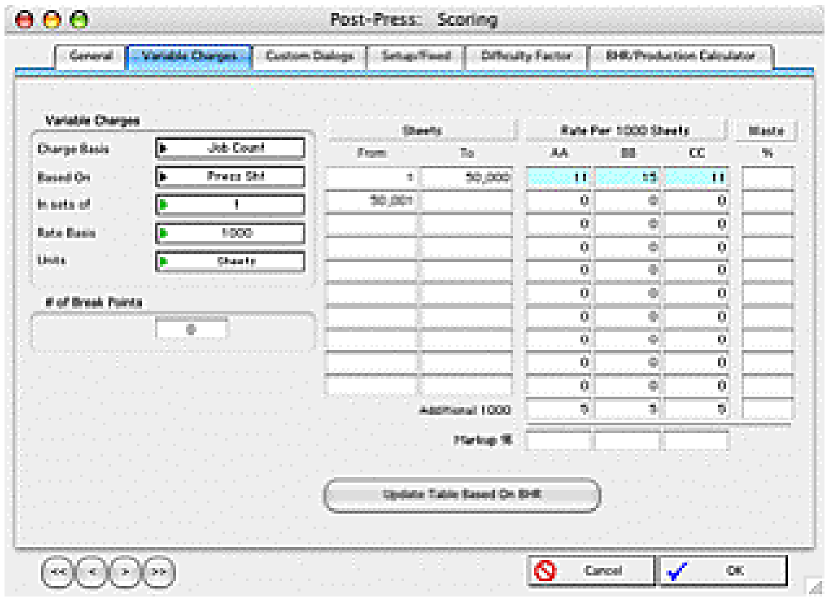


Field/Button Name	Definition	Properties
Activity	Name to identify this item in the Post-Press Selector dialog box.	30 characters
Job Description	This is the description that displays on quotes, invoices, and shipping documents. TIP This is useful when the item is an outside service and you do not want the description on quotes to indicate it is a purchased outside service.	30 characters

Field/Button Name	Definition	Properties
Category	Each post-press activity is assigned to a Category of post-press activities. Example Category is folding, Activity is Right-hand Folding.	Select from Category Choice List
Status	"Active' operations appear in the Post-Press Selector dialog box during estimating.	Checkbox
Outside Service	Place a check in the box to identify an Outside Service NOTE Will be used to identify that a purchase order may need to be generated (future PrintPoint expansion)	Checkbox
Supplier	Select the supplier for this outside service. NOTE Will be used to identify that a purchase order may need to be generated (future PrintPoint expansion)	Select from Supplier Choice List
Create PO on Est->Job Conversion	Place a check in the box to have a PO created for this post press item when the estimate is converted to a job	Checkbox
Magnifying Glass icon	Click to view details of the Supplier	Supplier details

Field/Button Name	Definition	Properties
Minimum Charge	Minimum Charge will override the total that was calculated for this post-press item, if the calculated total is lower than this minimum	Currency
Last Modified	Date Post-Press last modifed in any way.	Date field
Sales Category	Select the Sales Category to which this item should be assigned.	Choice List

Variable Charges Tab



Field/Button Name	Definition	Properties
Variable Charges Group Box		
Charge Basis	This selects the basis on which variable charges will be calculated for this post-press item. The following options are available:	n/a - not modifiable by users

Field/Button Name	Definition	Properties
	None: the charge is not based on any variable rates. Example — The charges for this activity are only based on Setup or Fixed charges.	
	Ask for Rate: estimating will always display a question asking for the run rate to be charged	
	Ask for Job Charge: estimating will always display a question asking for the price to be charged	
	Job Count: the rates to be charged will be based on a count Example — press sheets	
	Production Hours: the rates to be charged will be based on production hours	
	Paper Weight: the rates to be charged will be based on weight (calculated by estimating)	
	Sq Inch Coverage: the rates to be charged will be based on square inches (calculated by estimating)	
	Sq Feet Coverage: the rates to be charged will be based on square feet (calculated by estimating)	
	Linear Coverage: the rates to be charged will be based on linear coverage (calculated by estimating)	
	Other: the rates to be charged will be based on some other criteria.	

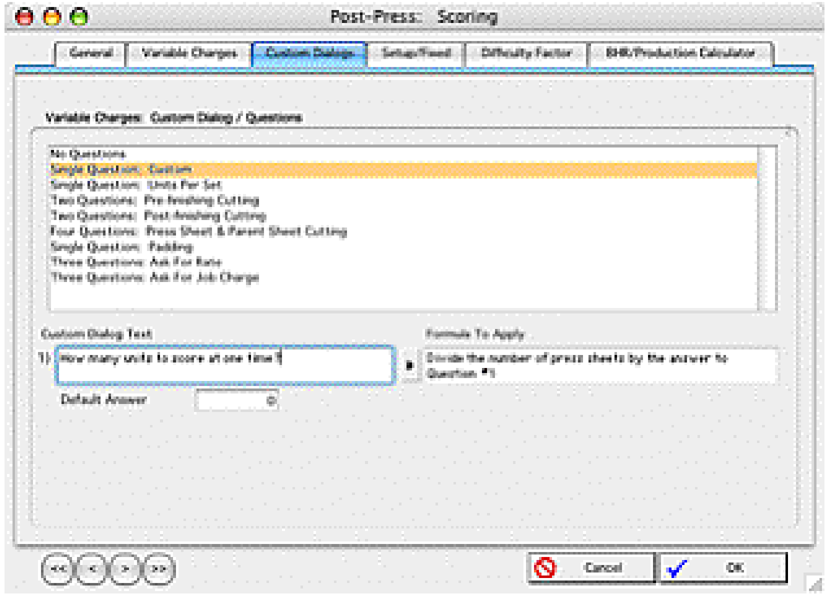
Field/Button Name	Definition	Properties
Based On	After selecting the Charge Basis, this selects the criteria on which the charges will be calculated. The following options are available:	n/a - not modifiable by users
	Quantity: the rates will be based on finished quantity.	
	Press Sheets: the rates will be based on number of press sheets.	
	Parent Sheets: the rates will be based on number of parent sheets.	
	Press Sheet + Printing Waste: the rates will be based on (press sheet + printing) waste.	
	Press & Parent Sheets: the rates will be based on (press + parent) sheets.	
	Action or Units: the rates will be based on an action or a unit.	
	Hours: the rates will be based on time.	
	Other: the rates will be based on some other criteria.	

Field/Button Name	Definition	Properties
In Sets Of	Select or enter the number of units per set if the activity is “set-” or “package-based”. Example Enter 25 to show that shrinkwrapping or padding will be done on packages of 25 finished pieces TIP If you prefer to be able to enter the “set” value for each estimate that uses this activity, leave this setting at 1 and use “Custom Dialog/ Questions”	Numeric (e.g., 1 or 10 or 1000)
Rate Basis (per)	This selects the numeric part of the rate basis on which charges will be calculated. Example Scoring will be charged $18.00 for each ***1000*** sheets	Numeric (e.g., 1 or 10 or 1000)
Units	This provides the description of the rate basis on which charges will be calculated. Example Scoring will be charged $18.00 for each 1000 ***sheets***	100+ characters (e.g., sheets)

Field/Button Name	Definition	Properties
# of Break Points	This number signifies how many of the breaks can be used as “fixed” rates for higher quantities. Example Breakpoints= 1= 1, and the first rate break is from 1 to 75,000, and the rate for that break is 18.00 per 1000. If quantity to be estimated is 80,000 (i.e., higher than the first break), then estimating will calculate the charge based on 18.00 for the first 75,000, then charge for the remaining 5000 based on the table.	Numeric
Multiply Qty by Number of Lots	When estimating lots (more than 1 original), put a mark in the checkbox if you want this post-press activity to be based on the total number of units, rather than on the quantity alone.	Checkbox
Units From...To Table	Breaks for Quantity for variable rates	Numeric TIP Could represent cuts, scoring impressions, quantity, etc.

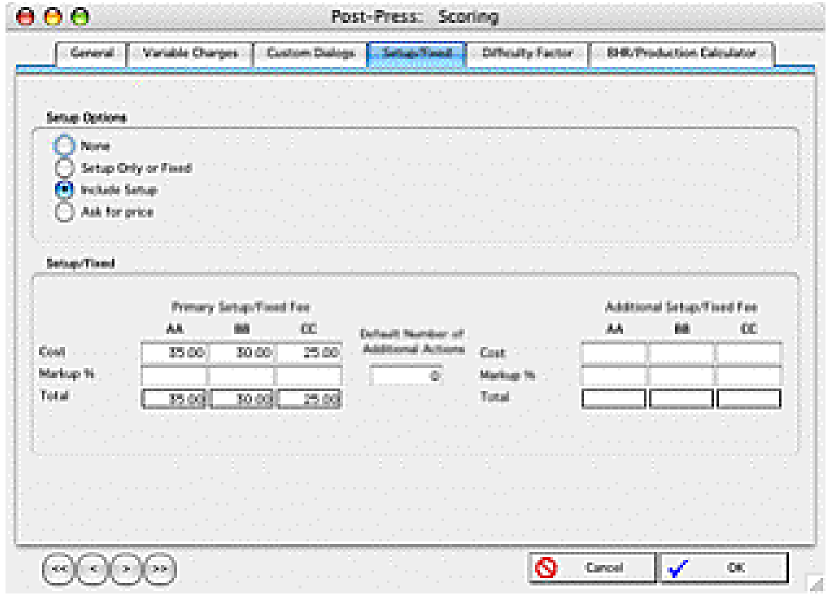
Field/Button Name	Definition	Properties
Rate Table	Calculated Rates for the specified “Rate Basis” and “Units” for this post-press activity, for each Customer Rating	Currency (e.g., 18 or .025)
Waste % Table	Post-Press waste is added to the estimate for each break in the From...To Table	Percentage (e.g., 3 or .5)
Additional ‘x’	This will add an additional charge for each ‘x’ units beyond the highest From...To break that was setup NOTE ‘x’ represents the Rate Basis that you selected for this activity TIP Make sure you fill in rates for these values	Numeric (e.g., 1 or 10 or 1000)
Markup %	Markup percentage to be applied to each rate for each customer rating	Numeric Percentage (e.g., 3 or .5)
Update Table based on BHR	Press to update the table because of a changed Budgeted Hourly Rate	Button

Custom Dialogs Tab



Field/Button Name	Definition	Properties
List of questions	Select the questions (if any) that the Estimating Post-Press Selector Dialog will display NOTE Up to 4 questions can be asked for each post-press activity	Choice List
Custom Dialog Text	Displays the question (s) that the Estimating Post-Press Selector Dialog will display. TIP User can modify the question.	80 Characters
Formula to Apply	Displays the formula (if any) that will be applied in the estimate	Choice List - Not modifiable by users
Default Answer	PrintPoint displays this value as the default	Numeric

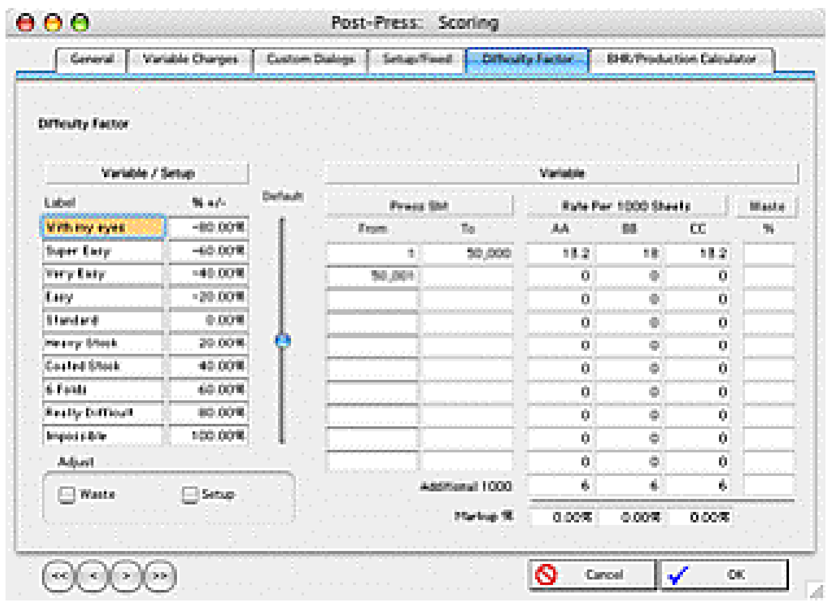
Setup/Fixed Tab



Field/Button Name	Definition	Properties
Setup Options Group Box	Select one of the following options:	Radio button
None	No setup will be charged for this post-press item	
Setup Only or Fixed	Estimating calculations for this post-press item will be based only on setup charges from this tab	
Include Setup	Estimating will include setup from this tab in calculating charges for estimates	
Ask For Price	Estimating will ask for the price to be charged for setup	
Primary Setup/Fixed Fee	Rates for primary setup for this post-press activity for each Customer Rating	Currency (e.g., 18 or .025)
Markup %	Markup percentage to be applied to each rate for each customer rating	Numeric Percentage (e.g., 3 or .5)
Total	Rates for primary setup plus Markup (based on Markup %)	Automatic calculation

Field/Button Name	Definition	Properties
Default Number of Additional Actions	Normal number of additional setup operations that are done for this post-press item	Numeric (e.g., 1 or 3)
Additional Setup/Fixed Fee	Rates for additional setup for this post-press activity for each Customer Rating	Currency (e.g., 18 or .025)
Markup %	Markup percentage to be applied to each rate for each customer rating	Numeric Percentage (e.g., 3 or .5)
Total	Rates for additional setup plus Markup (based on Markup %)	Automatic calculation

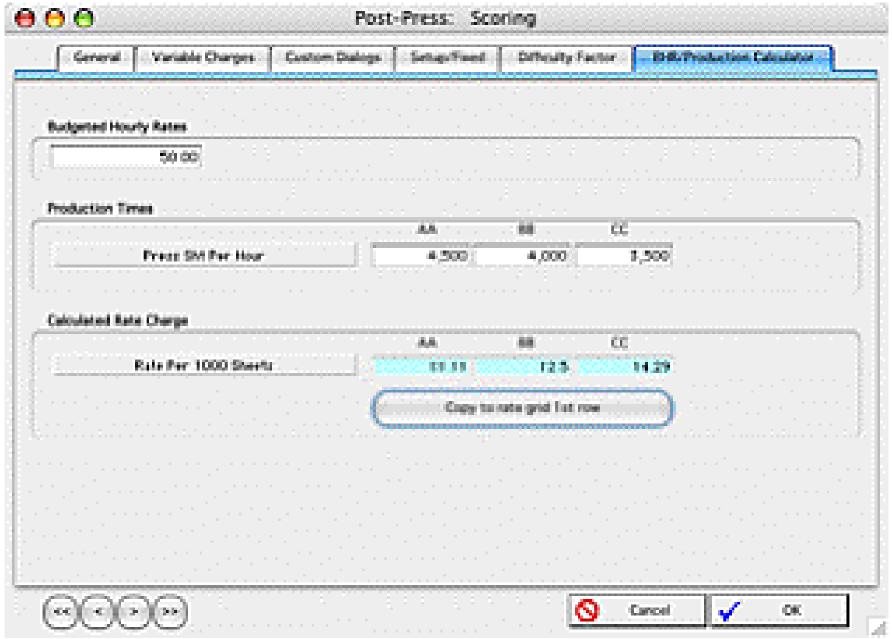
Difficulty Factor Tab



Field/Button Name	Definition	Properties
(Variable or Setup) Label	Descriptive title for this category Example Standard, Coated Stock	20 Characters
(Variable or Setup) % +/-	Positive or Negative Percentage from Normal	Percentage

Field/Button Name	Definition	Properties
Difficulty Factor Selector	Using the mouse, “slide” up or down to select a specific Difficulty Factor and display the rates for it	Slider
Units From...To Table	Breaks for Quantity for variable rates	Numeric
Rate Table	Calculated Rates for the specified “Rate Basis” and “Units” for the selected Difficulty Factor for each Customer Rating	Currency (e.g., 18 or .025)
Waste % Table	Post-Press waste that is added to the estimate	Percentage (e.g., 3 or .5)
Additional ‘x’	This will add an additional charge for each ‘x’ units beyond the highest From...To break that was setup NOTE ‘x’ represents the Rate Basis that you selected for this activity	Numeric (e.g., 1 or 10 or 1000)
Markup %	Markup percentage to be applied to each rate for each customer rating	Numeric Percentage (e.g., 3 or .5)
Adjust Waste	Estimating will use the Difficulty Factor to adjust Waste	Checkbox
Adjust Setup	Estimating will use the Difficulty Factor to adjust Setup	Checkbox

BHR/Production Calculator



Field/Button Name	Definition	Properties
Budgeted Hourly Rates	Hourly rate to be used to calculate the charge for this post-press item Example $30.00 per hour	Numeric
Production Times	Production or throughput speed for this post-press item for each Customer Rating Example 2000 press sheets per hour	Numeric
Calculated Rate Charge	Estimating will calculate the rate to be charged for the first quantity break for each customer rating Example $15 per 1000 sheets	Calculated automatically
Copy to rate grid 1st row	Click to copy the Calculated Rate Charge to the 1st row of the rate grid on the Variable Rates tab	Button

EXAMPLES

Example #1: Scoring Press Sheets

Setting up Scoring (in-house) based on Press Sheets with a Rate per 1000, with a $25.00 Minimum Charge, a $10.50 Setup Fee for Customer Rating AA, an $8.50 Setup Fee for Customer Rating BB, $6.50 Setup Fee for Customer Rating CC, with no Markup on the Setup Fee:

Screen Tab	Field/Button	Entry	Purpose
General Tab	Activity	Scoring	Appears in Post-Press Selector during estimating.
General Tab	Job Description	Scoring	Appears on Quotes, Invoices and Shipping forms for customer.
General Tab	Category	Scoring	Appears in the Post-Press Selector Dialog for easy selection.
General Tab	Status	‘Click’ in Checkbox	“Active’ operations appear in Post-Press Selector during estimating.
General Tab	Outside Service	unchecked	
General Tab	Supplier	blank	
General Tab	Minimum Charge	25.00	This will override the total that was calculated, if the calculated total is lower than this minimum
General Tab	Price Last Modified Date	Date this post-press item was last modified - Automatically set by PrintPoint	For information only
Variable Rates Tab	Charge Basis	Job Count	The estimate will use the count of Press Sheets, as selected in the following Based On field
Variable Rates Tab	Based On	Press Sheets	The estimate will use the number of press sheets

Screen Tab	Field/Button	Entry	Purpose
Variable Rates Tab	In Sets Of	1	Per Press Sheet
Variable Rates Tab	Rate Basis	1000	Rate for charging will be per 1000 Sheets, as selected in the following Units field
Variable Rates Tab	Units	Sheets	Estimating will use Rate per 1000 Sheets
Variable Rates Tab	# of Break Points	0	
Variable Rates Tab	Base Waste On	Press Sheets	Estimating will base the calculation of waste on press sheets
Variable Rates Tab	Override Qty - Use Press Sheets for Lots	"Click" in checkbox	
Variable Rates Tab	From...To Table	Enter the From...To quantity breaks for Press Sheets (e.g., 1 to 75,000, 75,001 to 150,000, 150,001 to 1,000,000)	Estimating will use these quantity breaks to select the rate from the Rate Table
Variable Rates Tab	Rate Table for each Customer Rating	Enter the rate to be used for each quantity breaks for each customer rating	Estimating will select the rate to charge from this table, based on the From...To Table
Variable Rates Tab	Waste%	Enter the percentage to be used	Estimating will use this % to calculate Waste
Variable Rates Tab	Additional 1000	Enter the rate to be used for each additional 1000 for each customer rating	Estimating will select the rate to charge for additional 1000, for quantities higher than the highest break that was setup
Variable Rates Tab	Markup %	Enter the Markup % for each customer rating	Estimating will use this % to calculate Markup

Screen Tab	Field/Button	Entry	Purpose
Variable Rates Tab	In Sets Of	1	Per Press Sheet
Variable Rates Tab	Rate Basis	1000	Rate for charging will be per 1000 Sheets, as selected in the following Units field
Variable Rates Tab	Units	Sheets	Estimating will use Rate per 1000 Sheets
Variable Rates Tab	# of Break Points	0	
Variable Rates Tab	Base Waste On	Press Sheets	Estimating will base the calculation of waste on press sheets
Variable Rates Tab	Override Qty - Use Press Sheets for Lots	"Click" in checkbox	
Variable Rates Tab	From...To Table	Enter the From...To quantity breaks for Press Sheets (e.g., 1 to 75,000, 75,001 to 150,000, 150,001 to 1,000,000)	Estimating will use these quantity breaks to select the rate from the Rate Table
Variable Rates Tab	Rate Table for each Customer Rating	Enter the rate to be used for each quantity breaks for each customer rating	Estimating will select the rate to charge from this table, based on the From...To Table
Variable Rates Tab	Waste%	Enter the percentage to be used	Estimating will use this % to calculate Waste
Variable Rates Tab	Additional 1000	Enter the rate to be used for each additional 1000 for each customer rating	Estimating will select the rate to charge for additional 1000, for quantities higher than the highest break that was setup
Variable Rates Tab	Markup %	Enter the Markup % for each customer rating	Estimating will use this % to calculate Markup

Screen Tab	Field/Button	Entry	Purpose
Custom Dialogs Tab	Use Custom Dialog Question (s)	n/a	
Custom Dialogs Tab	List of questions	n/a	
Custom Dialogs Tab	Custom Dialog Text	n/a	
Custom Dialogs Tab	Formula to Apply	n/a	
Setup/Fixed Tab	Setup Options: None	blank	n/a
Setup/Fixed Tab	Setup Options: Setup Only or Fixed	blank	n/a
Setup/Fixed Tab	Setup Options: Include Setup	selected	Estimating will include the Setup Fee which is specified in the Setup/Fixed Fee Table for each Customer Rating
Setup/Fixed Tab	Setup Options: Ask For Price	blank	n/a
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Cost	$10.50 setup fee for Customer Rating AA, $8.50 setup fee for Customer Rating BB, $6.50 setup fee for Customer Rating CC	Estimating will include these Setup Fees
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Markup %	0	No markup will be charged on the setup fee
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Total	$10.50 setup fee for Customer Rating AA, $8.50 setup fee for Customer Rating BB, $6.50 setup fee for Customer Rating CC	Calculated based on Setup Fee Cost + Markup
Setup/Fixed Tab	Default Number of Additional Actions	0	

Screen Tab	Field/Button	Entry	Purpose
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Cost	0	
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Markup %	0	
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Total	0	
Difficulty Factor Tab	Variable or Setup Labels		
Difficulty Factor Tab	Variable or Setup % +or-		
Difficulty Factor Tab	From...To Table		
Difficulty Factor Tab	Rate Table for each Customer Rating		
Difficulty Factor Tab	Waste %		
Difficulty Factor Tab	Adjust Waste or Setup		
BHR/Production Calculator Tab	Budgeted Hourly Rate	0	
BHR/Production Calculator Tab	Production Times for each Customer Rating	blank	
BHR/Production Calculator Tab	Calculated Rate Charge for each Customer Rating	0	
BHR/Production Calculator Tab	Copy to rate grid 1st row	n/a	n/a

Example #2: Cutting

Setting up Parent Sheet and Press Sheet Cutting (in-house) using PrintPoint's custom cutting dialog, based on rates per cut, with a $5.00 minimum charge, and no setup fee:

Screen Tab	Field/Button	Entry	Purpose
General Tab	Activity	Cutting	Appears in Post-Press Selector during estimating.
General Tab	Job Description	Cutting	Appears on Quotes, Invoices and Shipping forms for customer
General Tab	Category	Cutting	
General Tab	Status	'Click' in checkbox	"Active' operations appear in Post-Press Selector during estimating.
General Tab	Outside Service	unchecked	
General Tab	Supplier	blank	
General Tab	Minimum Charge	5.00	This will override the total that was calculated, if the calculated total is lower than this minimum
General Tab	Price Last Modified Date	Date this post-press item was last modified - Automatically set by PrintPoint	For information only
Variable Rates Tab	Charge Basis	Job Count	
Variable Rates Tab	Based On	Press Sht & Parent Sht	
Variable Rates Tab	In Sets Of	1	
Variable Rates Tab	Rate Basis	1000	
Variable Rates Tab	Units	Cuts	
Variable Rates Tab	# of Break Points	0	
Variable Rates Tab	Base Waste On	Press Sheets	
Variable Rates Tab	Override Qty - Use Press Sheets for Lots	X in checkbox	
Variable Rates Tab	From...To Table	Enter the From...To quantity breaks for Press Sheets	Estimating will use these quantity breaks to select the rate from the Rate Table

Screen Tab	Field/Button	Entry	Purpose
Variable Rates Tab	Rate Table for each Customer Rating	enter your price per cut e.g.	Estimating will select the rate to charge from this table, based on the From...To Table
Variable Rates Tab	Waste %		Estimating will use this % to calculate Waste
Variable Rates Tab	Additional 1000	enter	Estimating will select the rate to charge for additional 1000, for quantities higher than the highest break that was setup
Variable Rates Tab	Markup %	Enter the Markup % for each customer rating	Estimating will use this % to calculate Markup
Custom Dialogs Tab	Use Custom Dialog Question (s)	X in checkbox	
Custom Dialogs Tab	List of questions	Four Questions: Press Sheet & Parent Sheet Cutting	
Custom Dialogs Tab	Custom Dialog Text	How many press sheets per lift?	
Custom Dialogs Tab	Custom Dialog Text	How many cuts per press sheet?	
Custom Dialogs Tab	Custom Dialog Text	How many parent sheets per lift?	
Custom Dialogs Tab	Custom Dialog Text	How many cuts per parent sheet?	
Custom Dialogs Tab	Formula to Apply	automatic	
Setup/Fixed Tab	Setup Options Radio Button	None	Estimating will not include any Setup Fee.
Setup/Fixed Tab	Setup Options: Setup Only or Fixed	blank	n/a
Setup/Fixed Tab	Setup Options: Include Setup	blank	n/a
Setup/Fixed Tab	Setup Options: Ask For Price	blank	n/a

Screen Tab	Field/Button	Entry	Purpose
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Cost	blank	n/a
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Markup %	blank	n/a
Setup/Fixed Tab	Primary Setup/ Fixed Fee Table for each Customer Rating: Total	blank	n/a
Setup/Fixed Tab	Default Number of Additional Actions	0	n/a
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Cost	blank	n/a
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Markup %	blank	n/a
Setup/Fixed Tab	Additional Setup/ Fixed Fee Table for each Customer Rating: Total	blank	n/a
Difficulty Factor Tab	Variable or Setup Labels		
Difficulty Factor Tab	Variable or Setup % +or-		
Difficulty Factor Tab	From...To Table		
Difficulty Factor Tab	Rate Table for each Customer Rating		
Difficulty Factor Tab	Waste %		
Difficulty Factor Tab	Adjust Waste or Setup		
BHR/Production Calculator Tab	Budgeted Hourly Rate	Budgeted Hourly Rate	0
BHR/Production Calculator Tab	Production Times	Production Times for each Customer Rating	blank

Screen Tab	Field/Button	Entry	Purpose
BHR/Production Calculator Tab	Calculated Rate Charge	Calculated Rate Charge for each Customer Rating	0
BHR/Production Calculator Tab	Copy to rate grid 1st row	Copy to rate grid 1st row	n/a

Chapter 97
AAs (Author's Alterations)

OVERVIEW

Authors Alterations (AAs) take place when the customer asks for changes to be made to the job after it has been submitted to the shop for production. AAs are usually chargeable activities and/or materials that should be added to the price of a job.

This chapter deals with the creating/editing/deleting of AAs from your database and NOT the addition of AAs to jobs.

To learn about how to add AAs to Jobs, see the chapter:

Jobs - Electronic Ticket: Authors Alterations

BEFORE YOU BEGIN

Step	For more information
Set your Preferences	File Menu > Preferences > Authors Alterations

STEP-BY-STEP

The following tasks are included in this section:

- Creating a New Author's Alteration
  - From the AAs List View
  - From the Electronic Job Ticket
- Modifying AAs
  - From the AAs List View
  - From the Electronic Job Ticket
- Deleting AAs
- AAs On Invoices
  - Including AAs from the Job
  - Receiving an alert if Job Total differs from Estimate Total
  - Reviewing AAs directly from the Invoice

Creating a New Author's Alteration

From the AAs List View

1. Select **Navigator > AAs.**

   PrintPoint displays the AA List View.
2. Click the New button.

   PrintPoint displays the new AA Detail Screen.
3. Enter a Name for the AA.
4. Select a Rate Basis from the Rate Basis Choice List dialog or click on the New button to add a rate basis.
5. Enter the Rates for the new AA in the AA, BB and CC boxes.
6. Enter a Markup for each of the rates.

> NOTE
>
> This markup will be in addition the standard markup setup in preferences.

7. Enter an Invoice Description. This is the description that will print on your customers invoice.
8. Click the OK button.

From the Electronic Job Ticket

1. Open an Electronic Job Ticket.
2. Click on the AAs tab.
3. Click on the Black Triangle in the Alteration sub section.
4. PrintPoint displays the AAs Choice List dialog.

5 Click the New button.

PrintPoint displays the new AA Detail Screen.

6 Enter a Name for the AA.

7 Select a Rate Basis from the Rate Basis Choice List dialog or click on the New button to add a rate basis.

8 Enter the Rates for the new AA in the AA, BB and CC boxes.

9 Enter a Markup for each of the rates.

NOTE

This markup will be in addition the standard markup setup in preferences.

10 Enter an Invoice Description. This is the description that will print on your customers invoice.

11 Click the OK button.

Modifying AAs

PrintPoint allows you to modify the AA database directly or to modify it On-The-Fly, while working on a job.

From the AAs List View

1 Select **Navigator > AAs.**

PrintPoint displays the AA List View.

2 Select the AA item you wish to modify.

PrintPoint displays the AAs Detail Screen.

3 Change the information you wish to modify.

4 Click the OK button.

From the Electronic Job Ticket

1 Open an Electronic Job Ticket.

2 Click the **AAs** tab to display the list of AAs for this job.

3 Click the Magnifying Glass icon next to the AA you want to modify.

PrintPoint displays the AAs Detail Screen.

4 Make any necessary adjustments and click **OK.**

NOTE

The changes you make will not only affect the current job you are working on, but will update this AA record for future use with other jobs. Any AAs *already selected for other jobs* will not be affected.

Deleting AAs

1. Select **Navigator > AA.**

   PrintPoint displays the AA List.
2. Select the item you wish to delete.
3. Click the Delete button and confirm.

AAs on Invoices

Whenever you create invoice for a job that had AAs, you have the option of:

- Including AAs from the Job
- Receiving an alert if Job Total differs from Estimate Total
- Reviewing AAs directly from the Invoice

Including AAs from the Job

1. File Menu > Preferences > AAs
2. Put a mark in the checkbox if you want to automatically include Author's Alteration charges on invoices.

Receiving an alert if Job Total differs from Estimate Total

1. File Menu > Preferences > AAs
2. Put a mark in the checkbox Alert if Job Total differs from Estimate total.

Reviewing AAs directly from the Invoice

1. Create a new Invoice.
2. Enter the Job Number into the Job Number field of the Invoice Line Item
3. Click on the Review AAs button

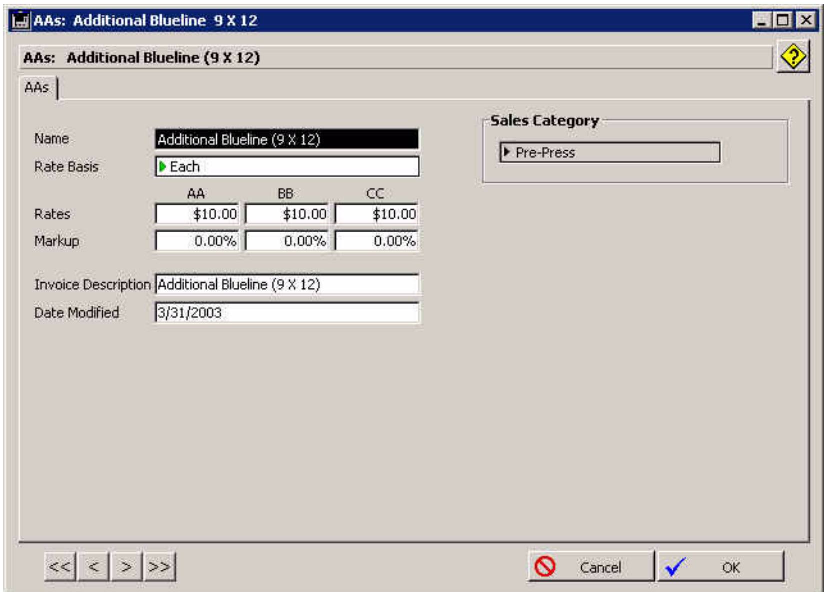
   PrintPoint will display the AAs Review Screen.
4. Check for approvals and make any changes if necessary.
5. If you have made changes, click OK...otherwise click Cancel.

NOTE

If you have made changes or clicked OK, you will possibly receive another alert reminding you that the Job Total differs from the Invoice Total. This is correct, since the changes you made did not remove the AAs charge, just adjusted them or checked for approval.

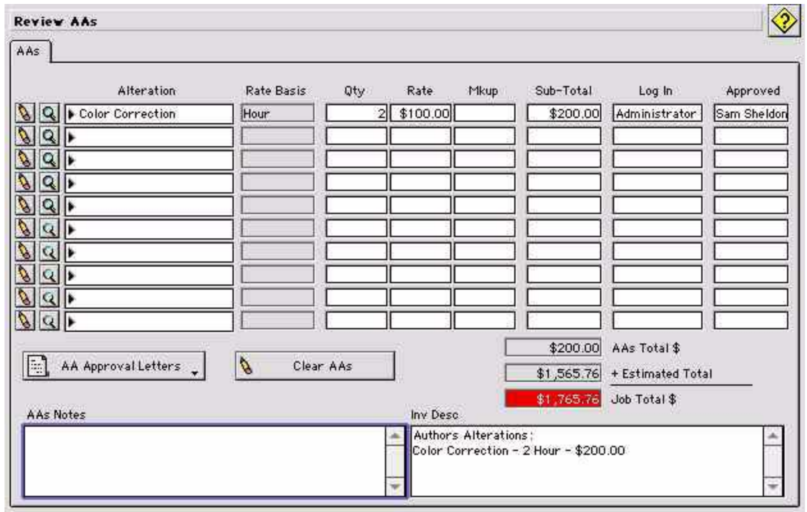
About the Screens

The AAs Detail Screen



Option	Description
Name	Name of the Author's Alteration.
Rate Basis	Unit of Measure for this AA (e.g. hours, scans)
Rates	The charge per unit for this alteration. Enter a charge for each of your three customer ratings.
Markup	The percentage markup above the rate for each of your three customer ratings.
Invoice Description	The text associated with this AA that will display on Invoices.
Date Modified	The date this AA was last modified.
Sales Category	Assign a Sales Category from the drop-down menu.

AAs Review Screen



See the chapter: Jobs - Electronic Ticket: Authors Alterations - About The Screens for details on this screen.

Chapter 98
Ink

OVERVIEW

PrintPoint ships with hundreds of inks, including most of the standard Pantone Matching System inks and all process color inks. These inks are stored as records in the Ink database, categorized by Name and Type.

Additionally, PrintPoint contains an Calculated Method Ink Table which stores coverage and pricing information for each ink type on different types of paper.

PrintPoint provides two methods of pricing inks on estimates: flat and calculated**.**

- The Flat Ink Method is associated with an individual press, and is typically used for smaller jobs.
- The Calculated Method for pricing ink is based on the Ink Table, which takes multiple factors into account, including the ink type, the paper type, and the amount of coverage.

Flat Pricing Method

The flat pricing method for ink is based on the quantity of ink used to fill the fountain.

Calculated Method

The Calculated pricing method is based on the data in the ink database, the Ink Table, and on several factors that vary from job to job:

- length of run
- size and area of coverage per sheet
- Ink Type.

Each ink charge is individually calculated using the **$**/Lb and %Waste fields from the Ink database in the formula below:

Cost of Ink = $/Lb x Lbs of Ink + % Waste

The Lbs. of Ink is calculated using the following formula:

Lbs. of Ink = Total inches / (divided by) number of inches of coverage x Percentage of Coverage.

Square inches of coverage for each Ink = Intersection of Ink Type and Paper Type on the Ink database.

Total inches = Width x Length of Press Sheet x Number of Press Sheets.

BEFORE YOU BEGIN

Step	For more information
Understand types of inks, percentage of coverages for different types of jobs (type, solids, pantones) and square measurement of coverage.	Ink supplier reference.

STEP-BY-STEP

This section includes the following topics:

- Accessing Frequently Used Inks During Estimating
- Adding New Inks
  - From the Ink List View
  - From the Estimate
- Modifying Inks and the Ink Table
  - Modifying Inks
  - Modifying the Ink Table
- Deleting Inks

Accessing Frequently Used Inks During Estimating

Inks that are used frequently during estimating can be sorted by order of usage. The Ink Sorter dialog box is a tool that can be used to specify the order of the inks available when selecting inks while estimating. Essential inks should be placed at the top of the sort list.

1. Select Navigator > Ink.

   The Ink List View is displayed.

   NOTE

   This list includes all inks which have had the Include in Estimating Ink Dialog List checkbox checked on the ink record.

2. To reposition an ink in the list, highlight the ink, click the Ink Sorter button, and click the Up or Down arrow.
3. When you are done arranging inks, click OK to save your changes.

NOTE

You can also sort inks On-The-Fly while estimating from within the Ink & Run Setup dialog box.

Adding New Inks

From the Ink List View

1. Select Navigator > Ink.

   PrintPoint displays the Ink List View.

2. Click the New button.

   PrintPoint displays the Ink Detail Screen.

3. Enter the ink's Name.

   NOTE

   For Pantones and other custom inks that use numerical names, we recommend using only the numerical part of the name (455, 1569, etc.). Do not name an ink Pantone 455 or Focoltone 222.

   NOTE

   You may also want to add several inks named "PMS 1", "PMS 2", etc. for situations when you don't know yet exactly which PMS ink will be used.

4. Enter the Job Description as you want it to appear on customer correspondence.
5. Click the Process Color drop-down to indicate if the ink is Not Process, Process Cyan, Process Magenta, Process Yellow, or Process Black.
6. Select one of the nine Type radio buttons.

   NOTE

   Ink types are used in the Calculated Method for pricing ink. They are used to calculate the coverage of a particular kind of ink.

7. Select the Include in Estimating Ink Dialog List checkbox if this ink is used frequently and you want it to be on the custom sorted "Ink List".
8. Click OK to save your changes.

From the Estimate

1. Open an existing or create a new ShortForm or WorkSheet estimate.
2. In the Ink section click on the Quicklink to Ink & Run Setup dialog.

   PrintPoint displays the Ink & Run Setup dialog.

3. Enter the Name or PMS Number of the new ink.

   PrintPoint displays the Ink Does Not Exist dialog.

4. Click OK.

   PrintPoint displays the Ink Detail Screen.

5 Enter the ink's Name.

NOTE

For Pantones and other custom inks that use numerical names, we recommend using only the numerical part of the name (455, 1569, etc.). Do not name an ink Pantone 455 or Focoltone 222.

NOTE

You may also want to add several inks named "PMS 1", "PMS 2", etc. for situations when you don't know yet exactly which PMS ink will be used.

6 Enter the Job Description as you want it to appear on customer correspondence.

7 Click the Process Color drop-down to indicate if the ink is Not Process, Process Cyan, Process Magenta, Process Yellow, or Process Black.

8 Select one of the nine Type radio buttons.

NOTE

Ink types are used in the Calculated Method for pricing ink. They are used to calculate the coverage of a particular kind of ink.

9 Select the Include in Estimating Ink Dialog List checkbox if this ink is used frequently and you want it to be on the custom sorted "Ink List".

Click OK to save your changes.

Modifying Inks and the Ink Table

Existing ink records can be modified from the Ink List View, or inks used in calculated method pricing can be changed using the Ink Table.

Modifying Inks

1 Select Navigator > Ink.

PrintPoint displays the Ink List View.

2 Double-click an ink in the Ink List View to display the ink record.

3 Modify the ink data.

4 Click OK to save your changes.

Modifying the Ink Table

1 Select List View Menu > Ink Table.

The Ink Table is displayed.

2 Update any of the fields to reflect the ink charges you want to use.

3 Click OK to save the Ink Table.

Deleting Inks

1. Select Navigator > Ink.
2. PrintPoint displays the Ink List View
3. Highlight the ink you want to delete.
4. Click the Delete button.
5. Click the Delete button in the confirmation box.

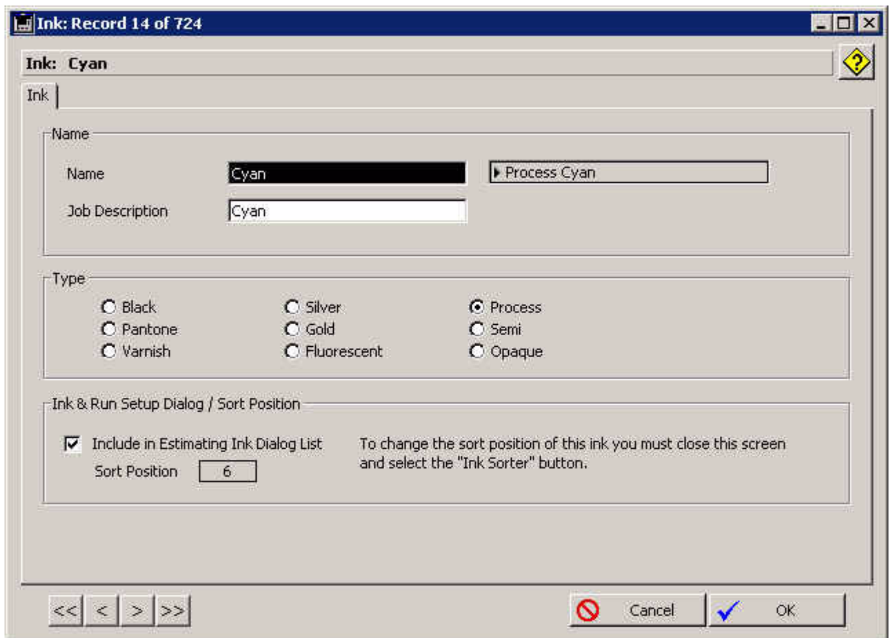
   The ink record is removed from the PrintPoint database.

ABOUT THE SCREENS

The following screens are used for Ink:

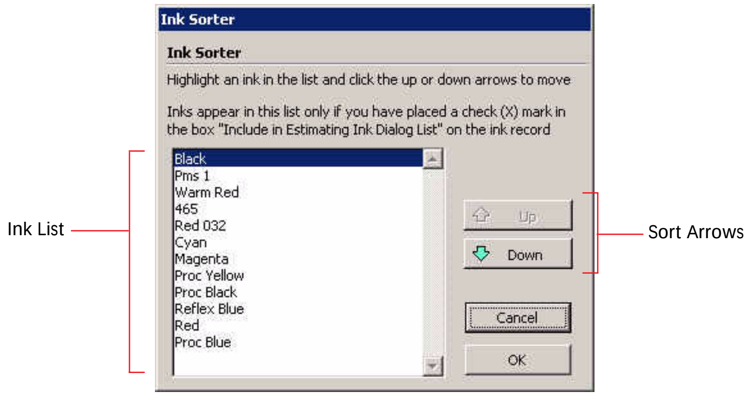
- Ink Detail Screen
- Calculated Method Ink Table
- Ink Sorter Dialog

The Ink Screen



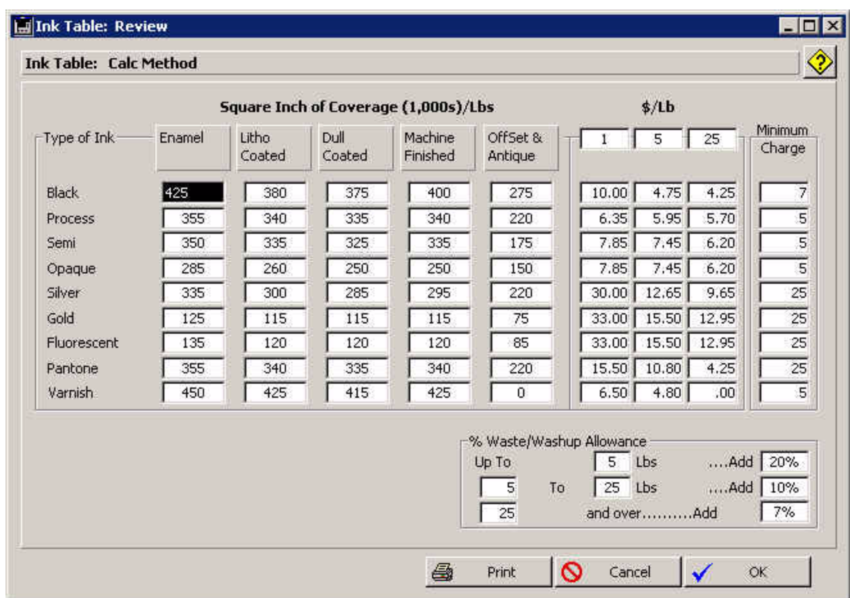
Field/Buttons	Contents/Usage
Name	The name of the ink for in-house estimating purposes.
Process Ink drop-down menu	Used to indicate if the ink is one of the 4 Process Color inks (Cyan, Magenta, Process Yellow, Process Black)
Job Description Name	The name of the ink for quotation to the customer.
Ink Type (radio buttons)	Type of ink used by the Calculated Ink Method Table to determine the number of square area of coverage for 1 pound (kilogram) of ink.
Include in Estimating Ink Dialog List	This ink will appear in the Choice List for inks in the Ink & Run Dialog during Estimating.
Sort Position	The position in the Ink Choice List...use the Ink Sorter Dialog to set this position.

The Ink Sort Dialog



Info/Buttons	Contents/Usage
Ink List	List of inks in preferred sort order.
Up (button)	Used to move an Ink up in the Sort List.
Down (button)	Used to move an Ink down in the Sort List.

Ink Table



Info/Buttons	Contents/Usage
Type of Ink	PrintPoint categorizes ink into the nine types listed.
Type of Paper	Each paper in the database is categorized as one of the five paper types based on it's ink absorbency.

Info/Buttons	Contents/Usage
Square Inches of Coverage	The user-modifiable numbers represent the number of square inches of coverage (1000's) for a particular ink type on a particular type of paper. In the sample above, Black Ink on Enamel Paper, one pound will cover 425,000 square inches.
Lbs.	The three Lbs are user-modifiable. Based on the number of Lbs required (with waste and washup) PrintPoint will find the appropriate price break to multiply the amount of ink by the Lbs.
Minimum Charge	Each ink cost is individually calculated and then compared to the minimum charge. If the calculated total falls below the minimum, the minimum charge will be used.
% Waste/Washup Allowance	User-modifiable percentages based on the breaks you setup in the Lbs area.

Chapter 99
Item Descriptions

OVERVIEW

PrintPoint allows you to build and maintain a table of Item Descriptions (examples: Announcement Card, Booklet, Brochure) which are used to identify and categorize estimates and jobs.

Item Descriptions can be categorized to display for:

- All Estimates
- Offset Estimates
- Copy Estimates
- Large Format Estimates
- Any combination of the above

STEP-BY-STEP

This section describes maintaining the Item Descriptions table:

- Accessing Item Descriptions
- Adding an Item Description
- Categorizing an Item Description
- Modifying a Item Description
- Deleting a Item Description

Accessing Item Descriptions

1 Select List View Menu > Item Descriptions.

PrintPoint displays the Item Descriptions List View.

2 Double-click to open the desired Item Description.

OR

3 See Adding an Item Description below.

Adding an Item Description

1 Click the New button.

PrintPoint displays the New Item Descriptions screen.

2 Enter the Name of the Item Description.

3 Enter the Finished Size of the Item Description.

NOTE

Only enter a Finished Size if you want that size to automatically load with the selection of the Item Description. There are times when an Item Description should not have an associated Finish Size, so you can use the Item Description for many Finished Sizes.

4 Click the OK button to Accept or click the Cancel button.

Categorizing an Item Description

An Item Description can be categorized in the following ways:

- General Item Description
- Copy Item Description
- Large Format Item Description
- All of the above
- Any combination of two descriptions

1 Select the Item Description you wish to modify or click New to create a new Item Description.

2 Place a check mark in the appropriate chec box(es).

The Item Description will only appear in the Item Description Choice List dialog of an estimate that corresponds with the check marked description.

3 Click the OK button.

Modifying an Item Description

1 Select the Item Description you wish to modify.

2 Change the information you wish to modify.

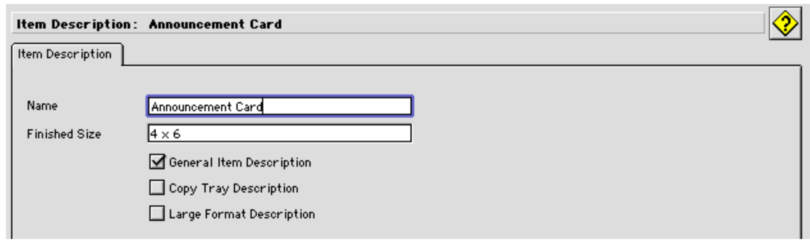
3 Click the OK button to Accept or click the Cancel button.

Deleting an Item Description

1 Select the item you wish to delete.

2 Click the Delete button and confirm.

ABOUT THE SCREENS



Option	Description
Name field	Name of the Item Description.
Finished Size field	Finished size of the Item Description. TIP Only enter a Finished Size if you want that size to automatically load with the selection of the Item Description. There are times when an Item Description should not have an associated Finish Size, so you can use the Item Description for many Finished Sizes.
General Item Description (checkbox)	Check this box to have the Item Description show in the Shortform and Worksheet Item Description dialog.
Copy Tray Description (checkbox)	Check this box to have the Item Description show in the Copy-Digital Item Description dialog.
Large Format Description (checkbox)	Check this box to have the Item Description show in the Large Format Item Description dialog.

Custom Reports

Chapter 100
Report Manager

OVERVIEW

The Report Manager is PrintPoint's tool for managing customized reports. It allows you to print, preview, and access the editors to create/edit the following kinds of reports:

- SuperReports*
- QuickReports†
- Labels†
- Charts†

NOTE

These editors are not "written" directly by PrintPoint, Inc. They have been included in our package as "plug-ins" much as you have plug-ins for Adobe Illustrator, Photoshop, etc.

* SuperReports is a 3rd party plug-in provided by ASGSoft, Inc.

† QuickReports, Labels and Charts are provided by 4D, Inc. makers of the Relational Database Engine used by PrintPoint.

Documentation for each of these report editors is found in the following chapter in this manual.

For a more detailed explanation of 4D's Editors, please follow the steps below to locate 4D's documentation on the QuickReports Editor, Label Editor and Chart Editor.

a. Open your web browser and type in the following URL: http://www.printpoint.com

b. Click on PrintPoint Central

c. Click on Documentation

d. Click on the appropriate PDF document.

Before You Begin

You should...	How to begin...
Understand how to display a List View for the table upon which the customized report will be based.	Navigator > Click the a List View button to display records for the table.
Create a selection of records upon which to base the report.	PrintPoint Basics chapter > List Views > Selecting Items In List Views or PrintPoint Basics chapter > List Views > Searching

STEP-BY-STEP

This section includes the following topics for working with the Report Manager from the Job List View:

- Accessing the Report Manager
- Selecting the Type of Report
- Creating/Editing a Report
- Renaming a Report
- Deleting a Report
- Printing/Previewing Reports

NOTE

The same techniques can be used for any <Tablename> List View.

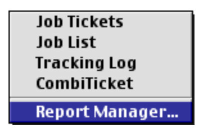
Accessing the Report Manager

1 Select Navigator > Jobs.

PrintPoint displays the Job List View.

2 Select the records for the report.

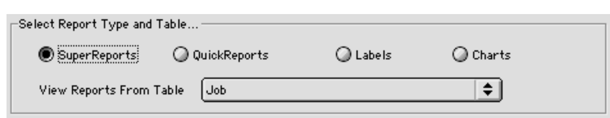
3 Click the Print button and select Report Manager... from the drop-down menu.



PrintPoint displays the Report Manager.

Selecting the Type of Report and Table

By default the Report Manger displays SuperReports as the selected Report Type and the Job Table as View Reports From Table option. The reason for this is so you will have sample data to work with when you are creating/editing reports based on that table.



1 Click one of the 4 radio buttons from the Select Report Type... to limit the listed reports to one of the following types:

• SuperReports	• Labels
• QuickReports	• Charts

2 Select the table (if the correct table is not already displayed) from the View Reports From Table drop-down menu where you want to store the new

reports or view reports that have already been created and stored with the table.

Creating/Editing a Report

Reports are created and edited by the individual editors for each type of report. The Report Manager provides you access to these editors.

Depending on the type of report selected and if there are any existing reports of this type for the selected table, the option for creating/editing a report will appear in one of the two forms:

New Reports

1. Select the type of report using the Report Type radio buttons.
2. Click on the Editor... button to open the editor of the type of report you are going to create.

TIP

The title of the button will change with each Report Type you have selected: “SuperReport Editor...”, “QuickReport Editor...”, “Label Editor...” or “Chart Editor...”.

Creation of the reports occurs inside the editors for each type of report. Refer to the following chapters: SuperReport Editor, QuickReports Editor, Label Editor, Chart Editor for each type of report following this chapter.

This table describes the editor button states for creating new reports:

Report Type	Button Appearance With Existing Reports	Button Appearance with No Existing Reports
SuperReport	SuperReport Editor... button with drop-down menu with New Report... or <Name of Report.srp...>	SuperReport Editor... button
QuickReport	QuickReport Editor... button	QuickReport Editor... button
Label	Label Editor... button	Label Editor... button
Chart	Chart Editor... button	Chart Editor... button

Existing Reports

1. Select the type of report using the Report Type radio buttons.
2. Select the report you wish to edit.
3. Click on the Editor... button to open the editor of the type of report you are going to create.

TIP

The title of the button will change with each Report Type you have selected: “SuperReport Editor...”, “QuickReport Editor...”, “Label Editor...” or “Chart Editor...”.

Editing of the reports occurs inside the editors for each type of report. Refer to the following chapters: SuperReport Editor, QuickReports Editor, Label Editor, Chart Editor for each type of report following this chapter.

This table describes the editor button states for editing existing reports:

Report Type	Button Appearance
SuperReport	SuperReport Editor... button with drop-down menu with New Report... or <Name of Report.srp...>
QuickReport	QuickReport Editor... button
Label	Label Editor... button
Chart	Chart Editor... button

Renaming a Report

1. Select the report you wish to rename.
2. Click the Rename button.
3. Type a new report name in the dialog box and click OK.

Deleting a Report

1. Select the report you wish to delete.
2. Click the Delete button.
3. Confirm the deletion by clicking the Yes button in the dialog box.

Printing/Previewing Reports

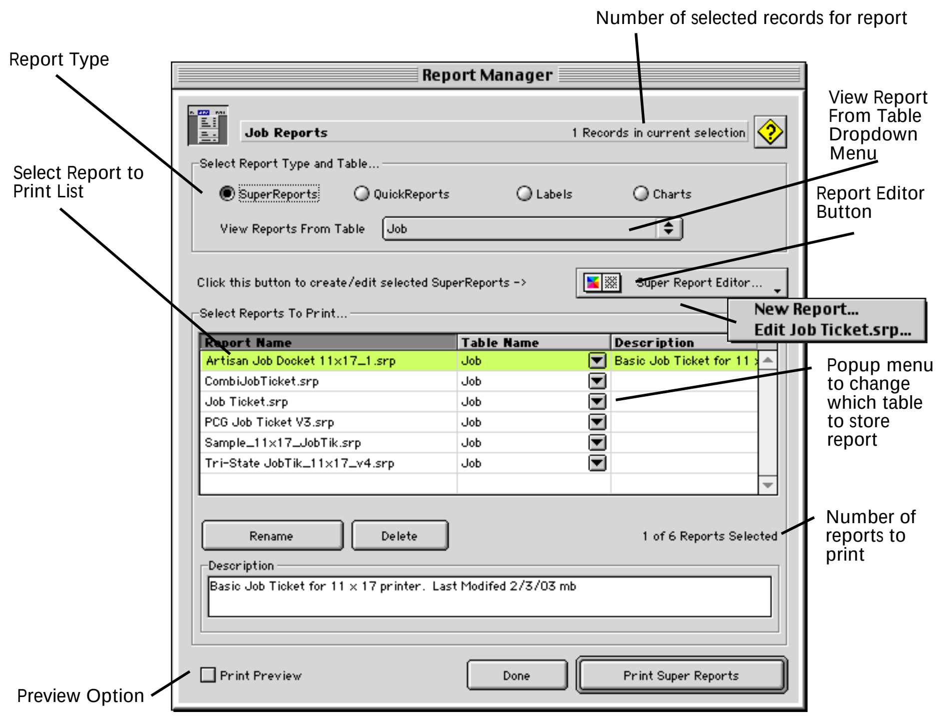
1. Select the report(s) you wish to print.
2. Click the Print (SuperReport/QuickReport/Label/Chart) button.

   OR
3. Place a mark in the Print Preview checkbox if you want to preview the report and click the Print (SuperReport/QuickReport/Label/Chart) button.

   The Printer dialog box displays.
4. Click the Print button.
5. If you selected to preview the report, PrintPoint displays the report in the Print Preview screen. Click the Printer Icon to send the report to the printer.

ABOUT THE SCREENS

Report Manager



Field Name	Contents
Report Type	Denotes what type of report that is listed in the Select Reports to Print list.
Select Report to Print List	List the reports available to print that is associated with the Report Type selected.
Number of selected records for report	Denotes how many records selected from the corresponding list.
View report from table dropdown menu	Denotes from what table the report is associated.
Number of reports to print	Denotes how many reports are available to in the Select Reports to Print list.
Preview Option	Used to view the selected report on screen instead of printing to a printer.

Field Name	Contents
Description	Brief description of the selected report
Report Editor (button)	Displays a drop-down menu or single button to select a new report or to edit the report currently highlighted in the Select Reports to Print list.

Chapter 101
QuickReports

OVERVIEW

The QuickReport Editor is one of PrintPoint's report designing/generating tools. Accessed through the Report Manager the QuickReport Editor (part of 4D's Editor Suite) is used to create and print columnar reports from a selection of records displayed in a List View.

With the QuickReport Editor you can:

- Produce lists of records
- Create break levels (subtotals)
- Define sort order
- Compute summary calculations
- Set page headers and footers
- Determine fonts, font sizes, style, column widths, and justification.
- Save and print your report.

First Name	Last Name	Department Name	Salary
Biff	Davis	Accounting	43780
Smeldorf	Garbando		19610
Alan	Hull		41460
Bryan	Pfaff		26440
Shirley	Ransome		36040
Marlys	Wilson		36500
		Sum for Department : Accounting	203830
Kathy	Forbes	Engineering	18840
Dennis	Hanson		40520
Mary	Smith		55000
Andy	Venable		43520
Lance	Wolfram		27300
		Sum for Department : Engineering	185180

TIP

If you need to create reports that contain "non-columnar" information or more complex "columnar" information, see the chapter on SuperReports.

For a more detailed explanation of 4D's QuickReport Editor, please follow the steps below to locate 4D's documentation on the QuickReport Editor.

a. Open your web browser and type in the following URL: http://www.printpoint.com
b. Click on PrintPoint Central
c. Click on Documentation
d. Click on 4D_QuickReport_Editor.pdf

BEFORE YOU BEGIN

You should...	How to begin...
Select the table (file) upon which to base the report.	Navigator > Click the button for the desired table to display records for the table.
Read the Report Manager Chapter for an overview of accessing the QuickReport Editor	Go back to the beginning of the Reports Section

STEP-BY-STEP

This section includes the following topics:

- Specifying Font, Font Size, Justification and Style
- Adding Rows and Columns
- Adding page headers and footers
  - Adding Page Headers and Footers
  - Adding Page Numbers, Time and Date
- Saving a QuickReport
  - Saving a QuickReport Design
- Printing a QuickReport
  - Selecting an Output Device
  - Printing to a Printer
  - Printing to a Disk File
  - Printing to a Graph
- Creating a Report: Step-by-Step

STEP-BY-STEP

Accessing the Quick Report Editor

1 Open one of PrintPoint's List Views.

2 Click the Print button and select Report Manager... from the drop-down menu.

PrintPoint displays the Report Manager screen for the selected list view.

QuickReport Basics

Loading an Existing QuickReport

1 From the QuickReport Editor select File menu > Open...

PrintPoint displays an Open File dialog. Go to PrintPoint Folder > Reports > QuickReports to see stored QuickReports.

NOTE

For the sake of consistency, save all QuickReports in the PrintPoint Folder > Reports > QuickReports folder.

2 Select a report from the list and click Open.

PrintPoint displays the QuickReport you selected.

Creating a New QuickReport

1 From the QuickReport Editor select File menu > New.

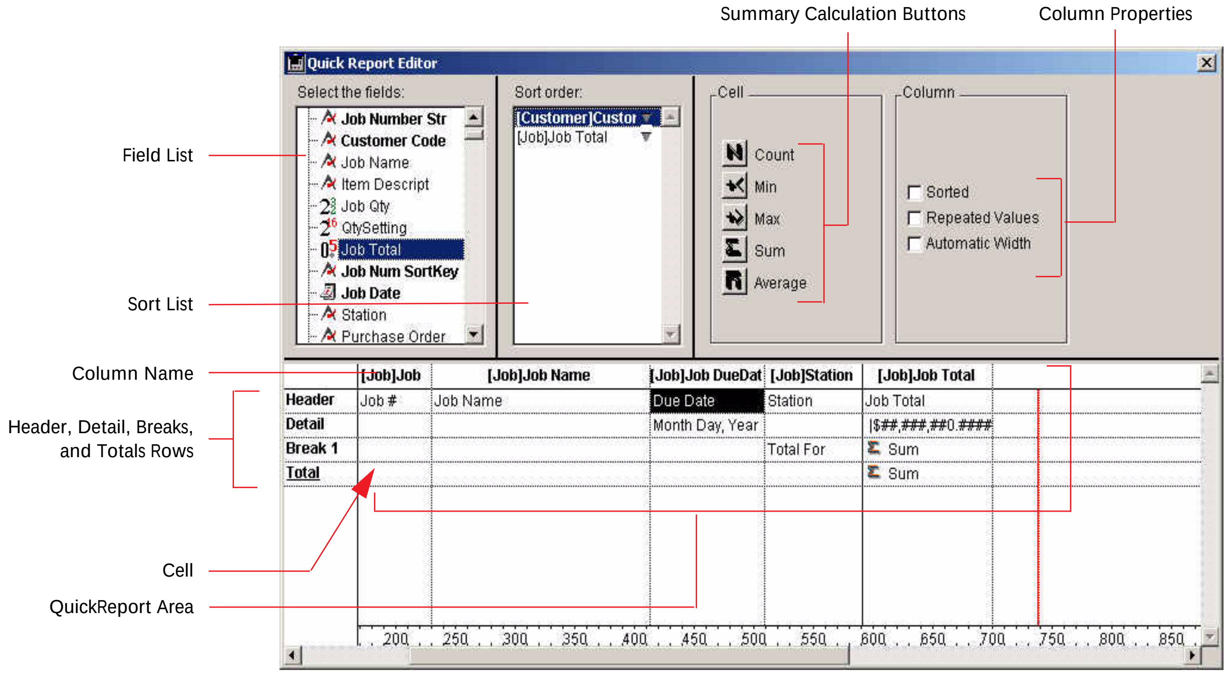
2 Follow the instructions below to add the necessary columns, breaks, etc., to create a QuickReport.

The QuickReport Editor

When you create a QuickReport, you can specify the following:

- Columns that display fields or formulas, either from the current table or from related tables
- Sort levels and order
- Break levels
- Summary calculations
- Text for labels
- Formats for numeric and Boolean data
- Font, font size, style, and justification for labels, summary calculations, and data
- Page header and footers

The following illustrations shows the major elements of the QuickReport Editor.



Field Name	Contents
Sort List	Displays the sort order assigned to the report and indicates whether each sort level is ascending or descending.
Field List	Displays fields in the current table.
Header Row	Contains information that appears in the printed report above the records.
Detail Row	Prints information from the individual records and will be repeated in the printed report for each break.
Breaks Row	Displays summary calculations for each subgroup in the report.
Totals Row	Displays summary calculations obtained from all records in the current selection.
Cell	A dell is the intersection of a row and a column
Column Header	Displays the names of fields or formulas added to the report.
Quick Report Area	used to design the report by dragging fields, adding formulas, adjusting column widths, and adding or deleting breaks
Column Properties	Use these check boxes to set characteristics for each column in the report.

Field Name	Contents
Sorted	Click this check box if you want the records to b e sorted on the selected column.
Repeated	use this check box to tell the QuickReport editor to repeat the values in the Break column.
Automatic Width	Click this check box to request that the QuickReport editor compute the width of the selected column based on the maximum length of the contents of the column.
Summary Calculation (buttons)	Use these buttons to place summary calculations in the Break and Total areas of the report.

Working With Columns

Adding Columns to a Report

1 Drag a field name from the Select the fields: box to the QuickReport layout.

PrintPoint creates a column for the field and places the table and field name in the column description row and places the field name in the column header row.

2 To add additional columns, drag another field name from the Select the fields: box to the right of last column in the QuickReport layout and release the mouse button.

NOTE

By default, PrintPoint prints the field names as column heads at the top of each page in the QuickReport.

Inserting Columns

1 Click and hold the mouse on any column heading.

2 In the drop-down menu that appears, select **Insert Column**.

PrintPoint displays the Formula Editor.

3 If you just want to add another field, you can select it from the list on the left and then click OK. If you want to create a formula for the new column, you can use the commands listed on the right to assemble your formula.

PrintPoint inserts a column to the left of the column you originally selected. You can assign a new field to the column by dragging a field name to the new column.

Deleting Columns

1 Click and hold on the column heading of the column you want to delete.

2 Select Delete Column from the drop-down menu.

PrintPoint removes the selected column from the QuickReport layout.

Replacing Columns

You can replace a column in the QuickReport by dragging another field over it. You can also replace a column with a formula.

1 Drag a field from the Select the fields: box to the column you want to replace.

Or

2 Select the column you want to replace and hold the mouse button down until the popup menu displays and select Edit Column...

When you print the QuickReport, PrintPoint prints the results of the formula for each record that appears in the Detail row.

Sizing Columns

By default, the QuickReport editor sizes columns automatically. It sizes each column based on the maximum length of the data displayed in the column and any labels typed into the column. The QuickReport editor sizes columns at the time the report is printed.

To view the width of each column, preview the report on the screen.

Because the Auto Column Width check box will change the width of a column based on the maximum width of the data in the record being printed, selecting different records can change the size of the columns.

Resizing a Column Manually

When you turn off Auto Column Width and set the column width manually, text in the column wraps within the specified area.

1 Select the column you want to resize.
2 Un-check the **Auto Column Width** check box.
3 Move the pointer over the column divider between two columns.
Now your pointer has changed into a double-headed arrow.
4 Drag the column divider to the left or right to re-size the column.

Sorting Records and Creating Breaks

An important feature of the QuickReport editor is the ability to sort the records in your report. You sort records for two reasons:

- To view records in a particular order.
- To create groups of records and Break areas in the report for the purpose of reporting summary calculations for groups.

Specifying a Sort Order

After you specify the columns for your report, you can specify a sort order. You can set a sort order using one of the following methods:

- By dragging the field name you want to sort by to the Sort order: box.

- By selecting the column in the report and clicking the Sorted check box.
- By clicking and holding on the column heading, and selecting Ordered by in the drop-down menu.

For example, if you wanted to sort the records of Jobs by the Station field, select the Station column in the report and click the Sorted button. The Station field is added to the Sort order: box.

You can also sort on a formula. Simply select the column containing the formula and click the Sorted button.

1. Drag the field name you want to use from the Select the fields: box to the Sort order: box

   Or
2. Highlight any column and click the Sorted check box in the Column box

   Or
3. Click the Sort Direction arrow to sort the column in descending order.

   NOTE

   The Sort Direction arrow is displayed to the right of the table and fieldname, [table]fieldname, in the Sort order: box.

4. You can drag additional fields to specify secondary sort levels.

   You can specify ascending or descending sort order for any of the fields or formulas you have included in your report.

   NOTE

   When you specify multiple sort levels, PrintPoint sorts the records on the first field in the Sort field list, then on the other fields in the order that they appear in the list.

Deleting a Field or Formula from the Sort Order

You can delete any field or formula from the Sort order list by clicking the field heading in the QuickReport layout and clicking the Sorted check box to clear the check box.

Selecting Rows, Columns, and Cells

The QuickReport editor allows you to select rows, columns, or cells. You will always precede any calculation or formatting specification by making a selection.

To select a row:

- click on the Header, Detail, Break, or Total markers on the row label bar to the left of the QuickReport layout

Or

- click in a row to the right of all columns in the QuickReport layout.

To select a column, click in the Heading (just above the Header row) of a column.

To select a cell, click once in the cell.

Setting Break Levels

In a QuickReport, you set break levels to separate or "break" records into groups according to values in one or more sort fields. At each break level, a subtotal is printed for that break area. You can print summary calculations in the break area. The summary calculations - Count, Min (minimum), Max (maximum), Sum, and Average - are computed for each group of records.

Break levels are determined by the sort levels and break rows. For example, if you tell PrintPoint to sort records by Station and create a break row, PrintPoint inserts a break between each group of records that have the same Station.

After you add a break row to the QuickReport, you can request summary calculations on each break. For example, you can insert a summary calculation in a break row to display subtotals for quantities for each station.

Inserting a Break Row

1. Click and hold on the Total row heading.
2. Select Duplicate Break from the drop-down menu.

   PrintPoint adds a Break row.
3. If desired, add additional Break rows by clicking and holding on an existing Break row and choosing Duplicate Break from the drop-down menu.

   PrintPoint adds a sequential number to each new break label in the row bar, for example, Break 1, Break 2, Break 3, and so forth.

NOTE

You need to have at least as many sort levels as break levels. If you create too many break levels they appear in red and they will not be used on your report.

Using the Values of Break Fields in Labels

You can improve the appearance and comprehensiveness of your reports by labeling each break row using the name of the break field.

To request that the value of a break field be printed in the break label, use the number sign (#) in the label text. For example, the text "Total jobs for customer #" will insert the department name (in this case, the value of the Customer_Code field) in place of the number sign when the report is printed.

NOTE

The number sign (#)does not need to be placed in the same column as the break field. It will display the value of the break field in any cell in the break row.

Adding Formulas to a QuickReport

You can add a formula to a column in a QuickReport. For example, you can add a formula that computes the sub-total of all estimates for each customer in a selection, and a grand total of all estimates listed.

Adding a Formula

1. Click and hold on an existing column and select Edit Column... from the drop-down menu. Or, if you want to insert a new column with a formula, select Insert Column.

   PrintPoint displays the Formula editor where you can build a formula.
2. Assemble the formula in the blank area at the top by clicking fields, operators, and commands, or typing in values.
3. To save the formula as a file that you can recall and use in another column or in another report, click Save... and enter a file name in the Create File dialog box.
4. Click OK to assign the formula to the column.

PrintPoint adds a new label to the column that identifies it as a formula. You can re-label the column by typing a label into the header cell for that column.

NOTE

Formulas are labeled C1 through C*n*. The labels are the names of the variables that contain the column's value. You can use these variables in other formulas.

Adding Summary Calculations

Summary calculations on the contents of fields and formulas can be added to each Break row and to the Totals row.

The check boxes in the Cell area of the QuickReport editor identify the summary calculation options available for QuickReports.

The following types of summary are available:

- Count

  This calculates the number of records in the report or break.
- Min(imum)

  This displays the lowest value in the report or break.
- Max(imum)

  This displays the highest value in the report or break.
- Sum

  This totals the values in the report or break.

- Average

  This calculates the average of the values in the report or break.

NOTE

When you place a summary calculation in the totals row, the calculation is done for all records in the report. If you place the summary calculation in the break row, the calculation is done only for the records in the break.

Adding a Summary Calculation

1. Select a cell — the intersection between a row and a column—in a break row or in the totals row where you want to insert the summary calculation.

   NOTE

   The Sum, Minimum, Maximum, and Average calculations work only on numeric fields or formulas.

2. Click as many summary calculation check boxes as you like.

   PrintPoint displays a calculation icon in the selected cell for each type of summary calculation you request.

   NOTE

   If you add more than one summary calculation to a cell, PrintPoint stacks the calculation icons on top of each other.

Displaying Repeated Values for Break Columns

In a report with breaks, Break Columns are the columns that are used to group records so that summary calculations can be done.

When this type of report is printed, the values for the break column are printed only once per break. In other words, a department name is printed only for the first record in the group and is not repeated until the department changes.

In some cases you may want to repeat the values for the break columns so that they appear for every record in the break area.

Displaying Repeated Values for Fields in the Break Columns

1. Select the break column by clicking above the header row for that column. The column is highlighted.
2. Select the **Repeated Values** check box.

   When the report is printed, values for the break column are repeated for every record.

Setting Display Formats

You can specify display formats for columns that contain numeric, alphanumeric, or Boolean data. For example, if you are displaying Paid_Amount in a column, you can add a numeric format to the Detail cell for the Paid_Amount field. If your report includes Alpha fields such as a telephone number or job number, you can use an Alpha format. If your report displays values for a Boolean field such as male/female or yes/no, you can use a Boolean format.

This section explains how to use numeric, Alpha, and Boolean formats. It then shows you how to specify a format for a particular field by entering the format into a QuickReport layout.

Numeric Formats

The following format places a dollar sign to the left of the number and allows up to 6 digits:

$###,###

This format can display dollar amounts up to $999,999.

Alpha Formats

You can use Alpha format for fields that contain string information. For example, social security number fields can be formatted with an Alpha format.

The following format would be used to format Social Security numbers:

###-##-####

You can also create styles for Alpha display formats.

Boolean Formats

You can specify a Boolean format for fields that contain information that can be evaluated as either TRUE or FALSE or as only one of two values (i.e., male or female).

If you do not apply a display to a Boolean field, the values are displayed as either TRUE or FALSE.

To substitute different values for the TRUE and FALSE, separate the two values you want to display with a semicolon.

Entering the Display Format for a Numeric, Alpha, or Boolean Field

1 Click and hold the mouse button down in the Detail cell for a numeric, alpha, or Boolean column.
2 Select Format and the display format of the style that you want to use as the display format.

NOTE

If you have also requested summary calculations for that column, the format specified in the Detail cell will automatically be applied to the summary calculation. The count is always displayed as an integer without formatting symbols such as the dollar sign.

Different formats can be applied to different columns in the report.

You can add or modify text in the QuickReport layout. Text can be used to label parts of the report. For example, if you requested summary calculations, you can add text to other cells in the break and total rows.

You can do the following:

- Edit the text that PrintPoint automatically adds to the header row of the report.
- Insert text in empty cells of the break and total rows.
- Insert the value of a break field in the break rows.
- Specify the font, font size, justification, and style for any text that appears in the report.

Adding and Modifying Text

Adding Text

1. Click twice on an empty cell in the QuickReport layout. A text insertion point appears in the cell.
2. Type the text in the cell.

Modifying Text

1. Drag across the text in the cell you want to modify.

   PrintPoint highlights the selected text.
2. If you are entering a label for a summary calculation, select a cell in the same row as the cell containing the calculation icons.

   NOTE

   You cannot enter text into the same cell that contains a summary.

3. Type the new text in the cell.

Specifying Font, Font Size, Justification, and Style

While designing your QuickReport, you can specify different fonts, font sizes, justification, and styles. You can apply these specifications to rows, columns, or cells in the QuickReport. These specifications can be applied to text, data, and summary calculations. If you assign specifications to the Detail row of the report, you will not see the results until you preview or print the report.

1. Click and hold on the column, row, or cell where you want to apply the font.
2. Choose a font, size, style, or alignment from the drop-down menu.

   PrintPoint applies the font to any text, data, or summary calculations that appear in the selected area.

Riding Rows and Columns

PrintPoint lets you hide rows or columns when printing a QuickReport. Hiding rows is useful, for example, when you want the report to include only summary calculations. Hide the detail row if you want to display only the summary calculations that appear in the totals and break rows. You can also use this feature to hide a break row or the totals row.

You can hide a column, for example, if you need to use the column as a sort column, but do not want the report to display the column.

1 Click and hold on the row or column you want to hide.
2 From the drop-down menu, select Hide.
  PrintPoint displays the column in gray to remind you that it will not appear when you print or preview the QuickReport.

Adding Page Readers and Footers

Before printing a QuickReport, you can add page headers and footers. You specify page headers and footers in the Headers & Footers dialog box. Use this dialog box to do the following:

- Add page header and footer text.
- Specify the size of the page header and footer areas.
- Specify fonts, font sizes, and font styles for page header and footer text.
- Insert codes that add page numbers and the data and time to your reports.

NOTE

Page headers can only be specified when printing to a normal or Direct ASCII printer.

Adding Page Headers and Footers

1 Select File menu > Headers & Footers.
  The Headers & Footers dialog box is displayed.

  NOTE

  By default, **Headers** is selected for you to edit. You can edit the page footers by selecting **Footers** from the drop-down list.

2 Enter header text that will appear on the left, center, or right of the page.
  As you enter the header and footer height, the page preview area gives you an indication of how the header will appear on the printed report.
3 Specify a height for the header area. You can express the height in points, centimeters, or inches.
4 If you want to adjust the default font settings, click in the Left:, Center:, or Right: text boxes, and then select font attributes from the bottom of the Headers & Footers dialog box.

Adding Page Numbers, Time, and Date

You can add page numbers and the time and date variables to the QuickReport by entering the codes shown below in the header or footer text areas.

- #p adds a sequential page number
- #H adds the time of printing
- #D adds the date of printing

To insert the header and footer codes:

1. Click in one of the header or footer text areas where you want to insert the code.
2. Click the down arrow to the right of the text area and select one of the three choices.

   The code will be inserted in the text area.

Saving a QuickReport

After you have completed your report design, you can save and print the QuickReport. If you want, you can preview the report on screen before printing it.

Saving a QuickReport Design

You can save a QuickReport design as a file that you can open from the QuickReport editor. The QuickReport design includes all your specifications, but not the data. By saving report designs, you can maintain a library of QuickReports that will be available to you when you need them.

1. Select File Menu > Save.

   PrintPoint displays a Create File dialog box.
2. Enter a filename for the QuickReport and click Save.

   PrintPoint saves the report as a file that you can open with the QuickReport editor.

   NOTE

   For the sake of consistency, save all QuickReports in the PrintPoint folder > Reports > QuickReports folder.

   NOTE

   If you save a report with the same name as a previously saved report, the older report will be replaced.
3. Close the QuickReport Editor.

Printing a QuickReport

Selecting an Output Device

By default, PrintPoint is set to print to your normal network printer. You can select a different output option from the QuickReport Editor.

1. Select File Menu > Print Destination >, and select one of the following three choices:
   - Printer
   - Disk File
   - Graph

Printing to a Printer

The Print option uses the default printer you have selected.

1. Select File Menu > Print.
2. Click OK and follow the standard PrintPoint procedure for previewing and printing your report.

Printing to a Disk File

This option sends your QuickReport to a disk file that you can open and modify with other applications, including text editors and spreadsheets. Using this option essentially exports the records in the QuickReport to another file.

1. Select File Menu > Print.

   PrintPoint displays the standard Export data dialog box and asks you to enter a filename.
2. Enter a filename and click Save.

   PrintPoint displays a dialog box that keeps you informed of the progress of the operation. Click the Stop Printing button to cancel the operation.

After the report is printed to a file, PrintPoint returns you to the QuickReports editor.

NOTE

Remember to change the output device if you want to resume sending a QuickReport to a standard printer.

Printing to a Graph

This option directs the report to the Graph editor. The Graph editor uses the data in the Break row. You can use this option to graph the contents of the report using any of eight graph types. Your graph can then be printed using the Graph editor.

1. Choose File menu > Print Destination > Graph.
2. Select File menu > Print.

PrintPoint graphs your data as a column graph.

You can use the Graph editor to select another graph type and print or preview the graphed data.

When you choose the graph option from the Print Destination menu, your report is graphed rather than presented in tabular form. The Graph editor uses only the summary calculations and the labels in the Break row. It uses the furthest left, non-numeric column for the x-axis.

To use this feature, your report should do the following:

- Include from one to five numeric fields or formulas, These columns will be assigned to the y-axis in the graph.
- Use one type of summary calculation per numeric field.

For example, if you want to graph average salary by department, you should create a QuickReport with two columns, Department Name and Salary. Use the Average summary calculation for Salary.

Creating a Report: Step-by-Step

Here is an example of how to create a Job Station report for your currently active jobs.

1. Open the Jobs List View.
2. Click the Print pop-up button and select Report Manager....

   PrintPoint displays the Report Manager for the Jobs List View.
3. Click the **QuickReports** radio button in the Select Report Type... box to select the type of report you want to create.
4. Click the QuickReport Editor... button to open the editor.

   PrintPoint displays the QuickReport Editor. The QuickReport menu bar replaces the PrintPoint menu bar at the top of the screen. You can now create a new QuickReport
5. Drag the following four fields into the report area: Station, Job_Number_Str, Customer_Code, and Job_DueDate.

   NOTE

   Each field will occupy one column.
6. Drag the Station field, Job_DueDate field, and Job_Number_Str field into the Sort order: column. This will sort your report first by station, then by job due date, and then by job number.

   NOTE

   You can repeat this step for multiple columns if you want a multi-level sort.
7. Click in the cell where the Customer_Code column intersects the Totals row, and then click the Count check box in the Cell area. This will print a total for the number of active jobs.
8. Modify the header text by double-clicking a cell in the Header row and typing the new text. For example, you can replace the text “Job_Number_Str” with “Job Number,” which would be more understandable by someone reading the report.
9. Select File Menu > Headers & Footers. In the Center: box, type Job List by Station as the title of the report.
10. Click OK to set your changes and return to the report.
11. Select File menu > Print to print the report. Click the Preview on Screen check box if you want to see your report before printing.

Chapter 102
SuperReport

OVERVIEW

SuperReport is PrintPoint's most sophisticated report generator. SuperReport gives the user the ability to replace the "built-in" PrintPoint reports such as Estimates, Quotes, Job Tickets and Invoices with their own custom-designed reports. It can be used in either of two ways:

- modify existing SuperReports by adjusting simple design elements, typeface and layouts.

  OR
- create your own reports with sophisticated programming code.

Although you can use SuperReports and the SuperReport Editor without having a deep understanding of the underlying database functions behind the PrintPoint data structure, advanced users will want to probe deeper to be able to create customized reports on their data. SuperReports takes advantage of all of the hidden capabilities of the underlying "4th Dimension relational database language."

SuperReport documents contain text objects, fields, variables, pictures, printing sections, scripts and many other objects used at print time to determine what to print and where to print it on the page.

SuperReports allows you to preview your reports prior to printing and to batch print reports.

NOTE

SuperReports is an advanced feature. Support for this area is fee-based.

SuperReport documents contain text objects, fields, variable, pictures, printing section, scripts, and many other objects used at print time to determine what to print and where on the page to print it. The document contains more information than just the objects displayed within the page editor area. It also contains details of how many sections (header, body, subtotal, footer etc.) the report contains, what value changes will trigger break processing, which fields or variables are to be subtotalled, and what scripts are to be executed before, during and after the report is generated. The report document also contains the Page Setup information for the report, the positions of any guides along with the ruler units (point, mm or inches) used by the report.

BEFORE YOU BEGIN

You should...	Explanation...
Decide the *table* (*file*) upon which the SuperReport is going to be based.	If your are making a quote, select the Quote or Quote Items table; if you are making a job ticket, select the Jobs table. You will make your choice based on which *table* contains the majority of *fields* for the report.
Decide if the report is a full page detail report such as a Job Ticket or Estimate...or a repeating line report such as a Quote or Invoice.	Certain reports fill up an entire page of information with fields from a single record in the database. Other reports contain information from *parent* and *child* tables (also called *many* and *one*). An invoice is an example of a parent/child report – the Invoice itself is the parent, while the Line Items are the children. In this case, the Invoice Line Items are part of the PrintPoint table called "[InvItems]".
Review sample reports to get a better understanding of the "4D programming language" that is used to create the reports.	• Table (synonymous with File) names are show in "square brackets." For instance the Invoice table is written as [Invoice]. • Fields are shown with the table name first followed by the actual field name. For example, [Invoice]Invoice_Date refers to the Invoice table's Invoice Date field. • Commands are 4D language instructions that tell different parts of the application how to "talk" to each other.

STEP-BY-STEP

This section includes the following topics:

- Creating a new Super Report from Scratch
- Accessing The SuperReport Editor
- Loading & Saving SuperReports
  - Loading a SuperReport from disk
  - Saving a SuperReport to disk
- Using Your New SuperReport
  - From the Report Manager
  - Selecting a SuperReport as the Default Report
- About the Screens
  - Toolbar
  - Layout Area
  - Sections
- Adding or Deleting Sections
- Break Processing Reports
- Graphics in SuperReports (Macintosh only)

Creating a new SuperReport from Scratch

1. Decide on the "base table" for the report and select that table from the Navigator. If you report is about "Jobs", then click on the Jobs button on the Navigator to display the Jobs List View.
2. Select several records or a single record for testing purposes. Without a selection, the report will not show any "data" in preview mode for testing how well you've made the report.

NOTE

The "Select Table" group box and its associated pop-up/drop-down list are used for grouping reports, not for setting the "base table" for the report.

Click the OPEN editor button for the SuperReport Editor.

From the Database Menu select the "base table"

Accessing The SuperReport Editor

The SuperReport Editor is where you will do all your work. The SuperReports™ Editor contains its own menu bar, toolbar, zoom box, rulers, and scroll bars. When you create a report you'll select items from the menus and toolbar and click and drag objects in the layout area.

1. Click on any one of the tables from the Navigator that you have decided the report is based on.

   For example, if you want a report of information in the estimate, you would click on the Estimate button from the Navigator to display the Estimate List View. Then when you create the SuperReport, it will be based on the estimate table.
2. Click the Print button.
3. Select the Report Manager from the Print popup menu.

Loading & Saving SuperReports

Loading a SuperReport from Disk

One of the most common activities a SuperReport user will perform is to load a report from disk that you have received via e-mail or downloaded from the web or an ftp site. Although you can create your own reports, it is often easier to begin with a sample report and modify it for your own shop.

1. Open a List View for the table upon which you want to base the report.

   Example — If you are creating a report for the job table, the you should display the Job List View.
2. Click the Print button and select Report Manager... from the drop-down menu.

   PrintPoint displays the Report Manager screen for the selected list view.
3. Click the SuperReports radio button in the Select Report Type... group box to select the type of report you will create.
4. Click the SuperReport Editor... button and select New Report... to open the editor.

   PrintPoint displays the SuperReport Editor.

   TIP

   You'll notice that SuperReports™ has its own menu bar.
5. Select File Menu ➤ Open From Disk...

   A standard open file dialog box will be displayed.

6 Navigate to and select the report you want to open.

The report is now open in the SuperReport Editor.

Saving a SuperReport to Disk

In the previous section we discussed how to open a SuperReport from disk. In this section we outline the steps to save a report to disk. You will want to save reports for the following two reasons:

- To save them in order to send them to PrintPoint Tech Support to review your work and help you complete a report that you may be having trouble with.
- To back them up for future reference.

NOTE

PrintPoint automatically saves all SuperReports in the datafile. In order to be printed, they are also automatically copied into the SuperReports folder inside the Reports folder.

1 Open the List View upon which you based the report.
2 Click the Print button and select Report Manager... from the drop-down menu.
3 Click the SuperReports radio button in the Select Report Type... group box to select the type of report you will create.
4 If you have already created the report you want to save, highlight the report in the list of reports, click the SuperReport Editor... button and select Edit MyReport... to open the editor.

   PrintPoint displays the SuperReport Editor.
5 Select File Menu ➤ Save To Disk...

   A standard save file dialog box will be displayed.
6 Save your report to disk.

   TIP

   We suggest that you save your SuperReports in the following location:

   On Macintosh
   `Hard Drive:PrintPoint 4.5 Folder :Reports :SuperReports`

   On Windows
   `C:\My Computer\Program Files\PrintPoint 4.5 Folder\Reports\SuperReports`
7 Close the Editor.
8 Close the Report Manager window.

You must activate the report in File Menu > Preferences > SuperReports.

Using Your New SuperReport

From the Report Manager

1. Create and save a SuperReport.
2. From the list view the report is based on, select the records you want to have included in the report.
3. Click on the Print button.
4. Select Report Manager from the list.

   The Report manager is displayed.
5. Click on the SuperReport radio button.

   The available reports are displayed in the Select Reports to Print section of the Report Manager.
6. Click the Print SuperReports button.

Selecting a SuperReport as the Default Report

PrintPoint gives you the option of making a SuperRepots the default report for specific function. For example, you can create a SuperReport Job Ticket that is custom to your needs. Then, following the steps below, make that SuperReport the default job ticket.

1. Create and save a SuperReport.
2. Click on File > Preferences > SuperReports.
3. Find to the item in the Report column that you want to change from the default ticket.
4. Double click on the On/Off box that's next to the report you to change.
5. Click on the Drop-down arrow in the Name column and choose the report you want to use for the default from the list.
6. Click OK to close preferences.

ABOUT THE SCREENS

Toolbar

Tool	Action
arrow tool	for selecting, resizing and dragging objects
text tool	for adding new static text items
field tool	for adding new fields from the database
variable tool	for adding new variable from the database
line tool	for drawing either horizontal or vertical lines
box tool	for drawing rectangles (and/or grids)
circle tool	for drawing circles
alignment tool	for aligning selected objects (a pop-up menu appears)

Layout Area

The layout area is where you design the layout for your reports. It includes Header, Body, Section, Total, and Footer areas.

Sections

What are Sections

Sections are areas of the SuperReport which perform special functions. The default sections are Header, Body, Total and Footer.

Section	Function
Header	For example everything between the top of the page and the Header section control line will print on the top of each new page in the document.
Body	Everything between the Header control line and the Body control line will print for each record to be printed.
Total	Everything between the Body control line and the Total line will print when a total is required.
Footer	Everything between the Total control line and the Footer line will print at the bottom of the report.
Subheaders and Subtotals	Everything between the Body control line and the Total line will print when a total is required.

The SubHeader and SubTotal sections are optional and are only used when break processing is to take place - in fact these two types of section are used to define the number of break levels and when the breaks will occur.

Sections occur on a report in the following order:

Header
SubHeader1
SubHeader2
SubHeader3
SubHeader4
SubHeader5
SubHeader6
Body
SubTotal6
SubTotal5
SubTotal4
SubTotal3
SubTotal2
SubTotal1

Total
Footer

The sections are delimited by control lines which carry labels naming the sections. The control lines can be moved up and down by click and drag on the control line label. (The label can be moved out of the way by click and drag sideways).

Adding or Deleting Sections

Depending on the nature of the document, there may be a need for only some of the sections or you may need to add to the sections to include Subheaders and Subtotals along with the other sections.

1 Select SuperReports Edit > Add/Delete sections....

The Activate Section dialog is displayed and you can check the sections you want to add to the document.

NOTE

The Header, Body, Total and Footer sections cannot be unchecked.

SuperReport Pro generates reports in the following sequence (in pseudo-code):

Execution Cycle of a SuperReport
Execute StartProcedure
Determine how many records will be printed in the body section
Execute BodyProcedure
If (Any Break Values)
Process appropriate SubHeader sections
Process appropriate SubTotal sections
End if
Process Body section
Process Total section
Execute EndProcedure
Section Processing
In processing any section, the following sequence of events takes place:
Execute section script

For (i = 1 to number of objects in this section) do

Execute object script

Get object (field/variable/array) value

End for

Break Processing Reports

SuperReport's break processing capability will enable you to print report subheadings, subtotals and grand totals for the entire record or array selection to be printed provided that the record or array selection is sorted appropriately.

Assume the following record information sorted alphabetically by region, and by customer name within region:

Field 1	Field 2	Field 3
[Customer]Customer_Code	[Customer]City	[Customer]Total_Sales
Mission Computers	New York	15,000
GTec Systems	London	100,000
MacGregorTech	London	85,000
Dartmouth Shipping	Los Angeles	8,000
Great Combe Systems	Los Angeles	25,000
River Down Ltd	Los Angeles	156,000

And that a report is required in the following format:

City New York

Mission Computers15,000

______

Total for City New York15,000

City London

GTec Systems100,000

MacGregorTech85,000

Total for City London185,000

City Los Angeles

Dartmouth Shipping8,000

Great Combe Systems25,000

River Down Ltd156,000

_____

Total for City Los Angeles189,000

_____

Grand Total389,000

For SuperReport to produce the above printed output would require only a single break level using both a SubHeader1 section and a SubTotal1 section.

The record selection also needs to be sorted on the [Customer]City and [Customer]Customer_Code fields prior to the report being printed otherwise the break processing will not function correctly. This can be done by creating a Start Script for the report to sort the selection using the following code:

ORDER BY([Customer]; [Customer]City;>;[Customer]Customer_Code;>)

The maximum number of SubHeader and/or SubTotal sections indicates the number of break levels that are to be used - one in this case, since there is only one SubHeader, and one SubTotal section. If there has been one SubHeader section used, but two SubTotal sections, then there would have been two break levels.

The last thing that remains when creating this report is to indicate to SuperReport the field value that SuperReport is to “watch” in order to generate the correct SubHeader and SubTotal sections.

The field value (in this example) that determines when to generate the appropriate SubHeader and SubTotal sections is the [Customer]City field - whenever its value changes, SuperReport will generate a break level. Setting the field or variable that SuperReport is to “watch” in order to generate breaks is described below.

Setting a SubHeader or SubTotal Section’s Breaking Value

In order to make use of SuperReport’s break processing capability, you must define the field or variable that SuperReport is to “watch” for each of the break levels (SubTotal1, SubTotal2 etc.). You can define the “breaking” field or variable name in either the SubHeader section, SubTotal section or in both sections. When SuperReport calculates the number of break levels, and the “breaking” field or variables names for each level, it checks the SubTotal sections first, and then the SubHeader sections. The reason that you can define the “breaking” field or variables names in either the SubTotal section or the SubHeader section is because you may have a report that uses only SubHeader sections or SubTotal sections, or a mixture of the two.

In the example above, if no subtotals for the sales figures was required, but a breakdown of the customers by regions was, then only the SubHeader1 section might be defined - there would be no need for the SubTotal1 section.

To set the breaking field or variable name that SuperReport is to watch, either double-click on the section marker, or select its name from the hierarchical menu that appears when you select the Modify Section command on the Edit menu. This will produce the section options dialog shown below.

To set the breaking field or variable name select the Only Use This Section On Value Changes Of… radio button.

Clicking on the pop-up menu to the right of the text “Object” will allow you to specify whether the object to be “watched” is a field, a variable or an array variable.

To select the field or variable name, click on the small pop-up menu icon between the text “Name” and the entry field that contains the text “[Customer]City”. Doing so will produce a pop-up menu listing the available fields or arrays depending upon which object type you have selected. You are also able to enter the name directly into the entry field if you so wish.

As SuperReport processes the report, it will “watch” each of the specified breaking fields or variables, and will generate a break (and print the appropriate SubHeader and SubTotal sections) when it detects that its value has changed.

Setting the Section Options

To display the section options dialog, either double-click on the section marker within the report, or select its name from the hierarchical menu that appears when you click on the Modify Section command on the Edit menu. If the section you wish to modify is disabled, then this is because it has not yet been defined on the report. For example, if you have a single break level because you have only created a SubHeader1 and a SubTotal 1 section, then the SubHeader2 … SubHeader6 and SubTotal2 … SubTotal6 menu items will be disabled.

The Section Options dialog will then be displayed. A complete description of setting the breaking value is described in the previous section Setting a SubHeader or SubTotal Section’s Breaking Value.

The Section Options dialog also allows you to control page breaking. Using the Page Breaking Options radio buttons, you can determine whether the current section is to be printed on the current page, or whether a new page is to be generated before or after the current section is printed.

The Adjust Section At Print Time For Clipping Margin checkbox is only used for the Footer section. Checking this option causes SuperReport to automatically “lift” the footer section area, when it is printed, above the clipping margin at the bottom of the report page. This feature is useful since it means that you can define the height of your Footer section to accommodate your footer objects without having to calculate the additional height required to allow for the clipping margin.

If you do not set the Adjust Section At Print Time For Clipping Margin checkbox then the footer objects will be printing within the page’s clipping area - i.e. they will not be printed.

If however the Adjust Section At Print Time For Clipping Margin checkbox is set then the Footer section will be increased in height by the size of the clipping region at the bottom of the printed page causing the footer objects to be printed above the clipping boundary as you would expect.

If you have defined your report in terms of the physical page and if you do not set the Adjust Section At Print Time For Clipping Margin checkbox then you will have to set the Footer section height tall enough to accommodate both the printer's clipping margin and the objects that you wish to place in the footer area of the report.

Section Scripts

SuperReport allows you to attach an object script to any defined section. To access the script editor window, click on the Script… button in the section options dialog. If the section already has a script associated with it, or if you create a new script for the section then the text of the Script… button will be preceded by a (tick mark). The (tick mark) is a quick way of seeing that an object has a script associated with it.

When an section is viewed on the report page, it is also possible to tell whether it has a script attached to it or not. If it does have a script, then the section marker name will be drawn with an inverted triangle at the top left hand side of the marker.

When the report is generated, section scripts are executed 'just before' their objects are printed on the report. For example, if a Body section of a report has a script attached to it, and the report prints the Body section five times (because the report is printing a selection of five records), then the section script will be executed five times - each time prior to the section's object being "printed" on the page.

Section scripts like object scripts can be used to make selections of records in other files, to fill variables with data, or to perform any other action that the command set will allow. The script editor window that the Script… button produces is described in more detail above.

Graphics in SuperReports (Macintosh only)

Placing a Graphic in SuperReports

To place an EPS graphic (created in Illustrator 8.0 and higher) into SuperReports (for Macintosh only):

1. Open Microsoft Word.
2. Insert Menu > Picture > From File...
3. Select your EPS graphic.
4. Select the graphic in Microsoft Word and “drag” it to the Macintosh desktop.

   TIP

   This will create a picture clipping file

5. Double-click the just-created picture clipping file.
6. Select Copy (Command-C) from the Edit Menu.
7. Open the SuperReport Editor and Paste (Command-V).

Scaling the Graphic

1. Double-click the pasted-in graphic.
2. Select the “Scaled to Fit (Prop., Centered)” radio button.
3. Click the ok button.
4. Resize the graphic.

Chapter 103
Label Editor

OVERVIEW

The Label Editor is one of PrintPoint's report designing/generating tools. Accessed through the Report Manager the Label Editor (part of 4D's Editor Suite) lets you create any kind of label for all tables. Common usages would be for the customer or supplier mailing labels.

If you want to print shipping labels for individual jobs, we recommend that you see the Shipping Chapter for details.

The Label Editor allows you to:

- Select the desired records for the labels from a List View
- Either load an existing template or setup the label from scratch
- Set up the layout for your labels
- Drag and drop the fields and the static text you will be using
- Save the label format for later use.

For a more detailed explanation of 4D's Label Editor, please follow the steps below to locate 4D's documentation on the Label Editor.

a. Open your web browser and type in the following URL: http://www.printpoint.com
b. Click on PrintPoint Central
c. Click on Documentation
d. Click on 4D_Label_Editor.pdf

Before You Begin

You should...	Where this information is found...
Know how to user the Report Manager	See the Report Manager Chapter
Know how to list your customers	See the Customers Chapter

STEP-BY-STEP

This section includes the following topics:

- Accessing the Label Editor
- Setting up the layout
- Designing a label
- Loading templates
- Saving templates
- Printing
- Using labels to create Avery 5150 Mailing Labels

NOTE

This example will build a simple mailing address label for selected group of customers.

Accessing the Label Editor

1 Select Navigator > Customers.

PrintPoint displays the Customer List View.

2 Create a selection of customers for whom you want to print labels.

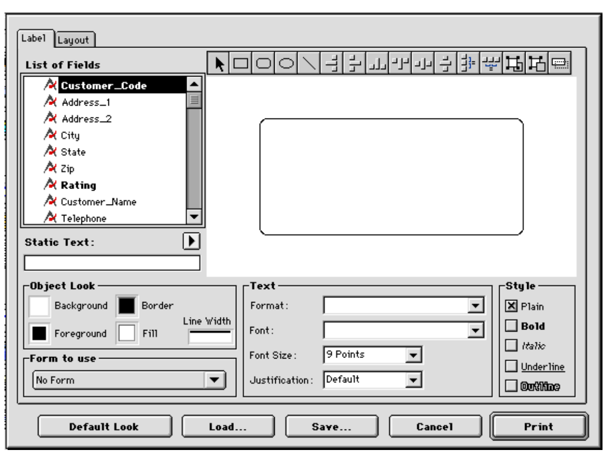
3 Click the Print button and select Report Manager... from the drop-down menu.

PrintPoint displays the Report Manager screen for the selected list view.

4 Click the Labels radio button in the Select Report Type... box to select the type of document you will create.

5 Click the Label Report Editor... button to open the editor.

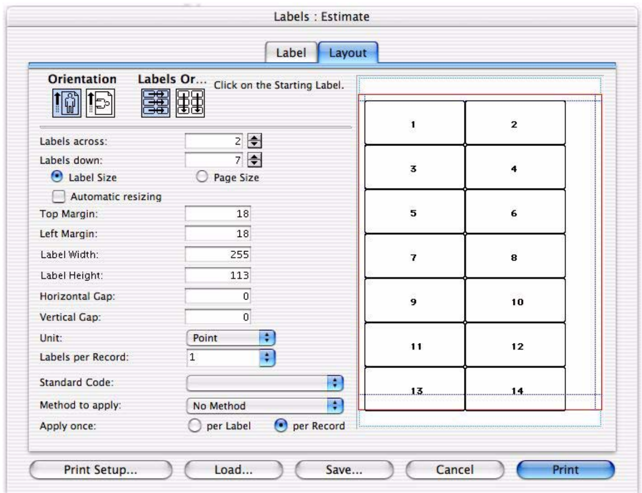
PrintPoint displays the Label Editor.



Setting Up the Layout

1 Click the Layout tab.

The Layout screen has an entry area on the left and a preview grid on the right which provides an approximation of how the labels will print on the page.



2 Click the Print Setup... button to select the Paper size.

3 Chose the paper size from the Paper: drop-down menu.

4 Click OK in the Page Setup box to return to the Layout screen.

5 Click on your page Orientation and the Labels Order.

6 Enter the numbers for Labels across and Labels down.

7 Select either the Label Size or Page Size radio button.

NOTE

If you later decide to reset the margins, you can click the other Size radio button and enter new dimensions for the margins.

8 Enter the label margins, width, and height, and the gaps between the labels.

NOTE

If you check Automatic resizing, the dimensions are adjusted, depending on the number of labels across and down that you specified.

9 Select the measurement Unit you want to use. (This entry box is about two-thirds of the way down the screen.)

10 Select a number of Labels per Record. The default is 1 - meaning that one label is printed for each customer.

11 Standard Code: Leave blank under normal circumstances.

12 Method to Apply: No Method should be used under normal circumstances.

13 Apply once: Click the per Label or per Record radio button.

Designing a Label

1. Click on the Label tab.

   PrintPoint displays the Label Editor.
2. Click and drag the field Cust_Mail_Addr to select all the information stored in the Mailing Address on the customer's database.

NOTE

You can also click and drag each field that you want on your label from the List of Fields scrolling window onto the label layout area. You will probably want the Customer_Name, Address_1, and Address_2, City, State, and Zip fields.

3. To add static text, such as a comma between the city and state fields, type it in the Static Text: box and click the right arrow.
4. The text will be added to the layout area. Select the new static text field in the label area and drag it to the appropriate location.
5. You can resize any field in the layout area by clicking it once to select it. Then drag one of the field's corner handles to resize it.
6. Set the Object Look, Text, and Style settings, by first selecting a field or static text object and then choosing the desired settings.
7. The Default Look button returns the selected field to its default format, removing all Object Look settings you had previously chosen.
8. If you want to include a logo or custom piece of artwork, you can copy it to the clipboard and then paste it into the layout editor.

You can use the toolbar above the label layout area to assist you in arranging the objects in the label and adding additional graphic enhancements.

Loading Templates

1. Click the Load... button in the Label or Layout editor.

Saving Templates

1. When your template is set up the way you want, click the Save... button in the Label or Layout window.
2. In the Save dialog box, go to the PrintPoint > Reports > Labels folder.
3. Name your new template by typing a meaningful name in the Save as: field and click **Save**.

Printing

1. Click the Print... button.
2. Specify the number of copies and the pages to be printed in the Print dialog box and click OK.

NOTE

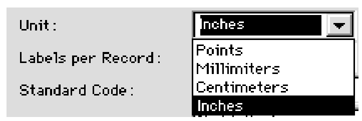
Click Print Preview if you want to preview your labels before printing.

Using Labels to Create Avery 5150 Mailing Labels

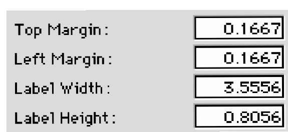
1. Select List View Menu > Customers to open the Customer List View.
2. Create a selection of customers, or highlight the customers you want to create labels for.
3. Click the Labels button to open the Label Editor.

   The Label Editor displays.
4. Click the Layout tab.
5. Set up the label layout by entering 3 in the Labels Across box and 10 in the Labels down box.

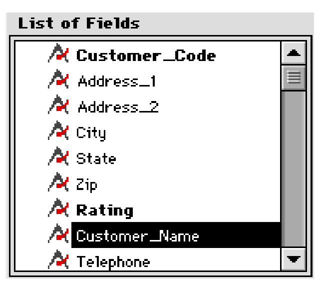
6. Click the Unit: drop-down list and select the appropriate units, either Inches or Millimetres.



7. If you have the Automatic resizing checkbox selected, the margins, dimensions, and gaps should be set correctly.



8. Click the Label tab to return to the Label screen.
9. On the left portion of the screen is a list of all the fields you can put in the label.



10. Drag the Customer_Name, Address_1, and Address_2 fields into the layout area so they are roughly positioned where you want them.
11. Click each of these fields and drag the corners to resize them to the proper size.
12. Drag the City, State, and Zip fields into the layout area.

13 Resize and move these fields so they are in approximately the correct position.

14 Type a comma in the Static Text: box and click the right arrow to move it to the layout area. Then position the comma between the City and State fields.

NOTE

If you want to change the Object Look or the Text and Style, you can click any field, or hold down the shift key while clicking multiple fields, and then select the attributes from the bottom half of the layout window.

NOTE

Use the alignment tools in the tool bar to correctly align the objects on your label. For example, you can hold down the shift key and click the Customer_Name, Address_1, and City fields, and then click the left align tool to align the left edges of these objects.

15 Click Save to save the template.

16 Click Print to print the labels.

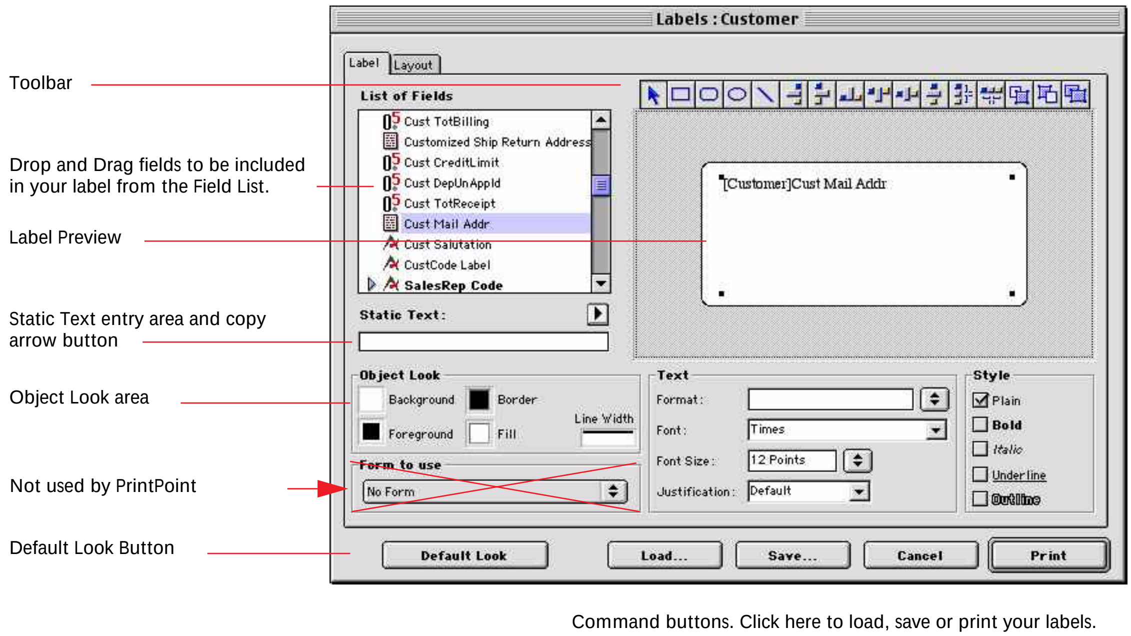
17 The Printer screen is displayed.

NOTE

You can preview the document by selecting the Print Preview box and clicking the Print button.

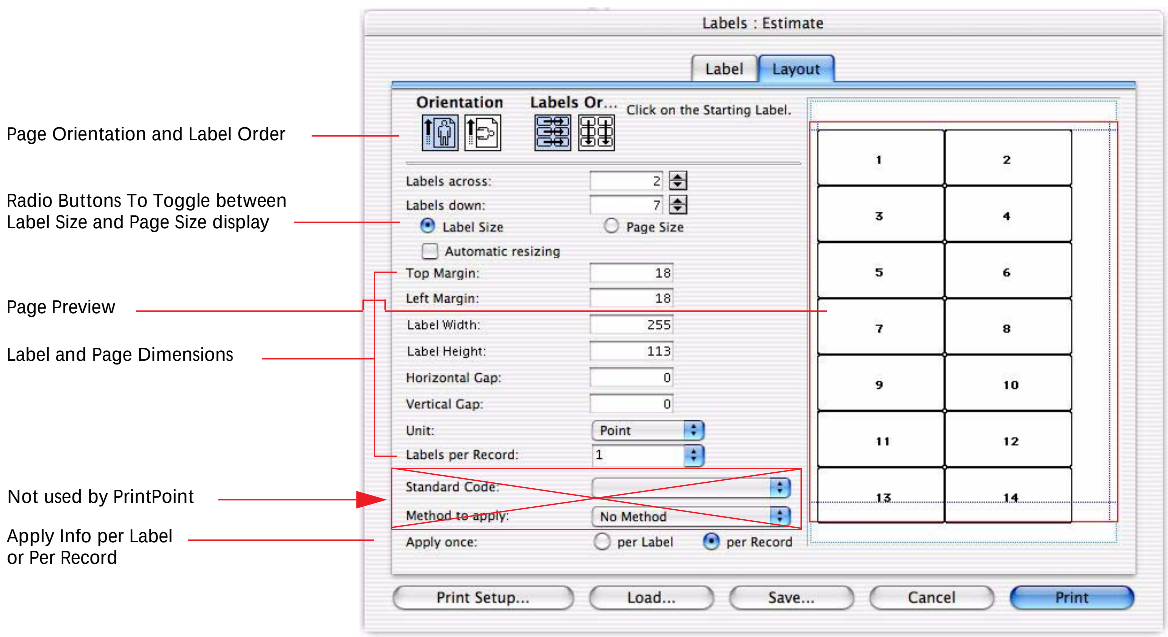
About the Screens

Label Tab



Button / Option	Definition
Toolbar (buttons)	Used to align fields and objects which have been added to the label.
List of Fields	List of available fields which can be added to the label.
Static Text	Enter text in the field then click the copy button to add the text field to the label.
Object Look Area	Used to set the display features of the fields added to the label.
Font Area	Used to set the field format, font and justification.
Style Area	Used to set the font style for the selected field.
Default Look (button)	Applies the default set of Object Look attributes to the selected object.
Load (button)	Click to load a previously setup label.
Save (button)	Click to save this label.
Print (button)	Click to print this label.

Layout Tab



Command buttons. Click here to load, save or print your labels.

Button / Option	Definition
Page Orientation and Label Order (button)	Used to set the page orientation and the way the order in which the labels will be printed on the page.
Label Across and Down	Used to enter the number of labels per row and column.
Label Size and Page Size (radio buttons)	Used to switch between label and page view.
Page Preview	Shows the label setup page preview.
Label and Page Dimensions	Use the fields to enter information needed in setting-up the label.
Apply Info per Label or Per Record (radio buttons)	morrie
Print Setup (button)	Click to print the label setup. It will print like the Page Preview so you can match to your actual label sheet.
Load (button)	Click to load a previously setup label.
Save (button)	Click to save this label.
Print (button)	Click to print this label.

Chapter 104
Charts

OVERVIEW

The Chart Editor is one of PrintPoint's report designing/generating tools. Accessed through the Report Manager the Chart Editor (part of 4D's Editor Suite) is used to create and print a wide variety of standard business graphs. Using the Chart Editor, you can plot your data without having to export the data to a graphics package. You can print your graphs or copy them to the Clipboard and paste them into another application.

PrintPoint's Chart Editor is one of the several plug-in tools that are packaged with the 4D Database Engine used at the core of PrintPoint. We provide access to this tool for your convenience, but do not support the use of it. For further information on documentation, see the note at the end of this overview..

The Chart Editor can produce the following types of graphs:

- Column graphs which represent values as columns.
- Proportional column graphs which represent values as columns and stacks the columns to represent percentages of a total.
- Stacked column graphs which represent values as stacked columns.
- Line graphs which represent values as points and connect the points with a line.
- Area graphs which represent values as the shaded area below a line.
- Scatter graphs which display values as points on an x-y grid.
- Pie charts which display data in a circular chart where each value is represented by a slice of a pie.
- Picture graphs which represent each value with a picture; you can specify the picture to be used.

For a more detailed explanation of 4D's Chart Editor, please follow the steps below to locate 4D's documentation on the Chart Editor.

a. Open your web browser and type in the following URL: http://www.printpoint.com
b. Click on PrintPoint Central
c. Click on Documentation
d. Click on 4D_Chart_Editor.pdf

STEP-BY-STEP

This section includes the following topics:

- The X- and Y-axis
- Using QuickReports to Generate a Graph
- Creating a Graph
- Viewing the Graph
- Displaying the Graph
- Printing a Graph
- Copying a Graph.

The X- and Y-Axis

The X-Axis

The Chart Editor produces two-dimensional graphs. The horizontal axis is referred to as the x-axis and the vertical axis is referred to as the y-axis. A graph is created by assigning a field to the x-axis and one or more numeric fields to the y-axis.

The field assigned to the x-axis can be:

- alphanumeric
- numeric
- date
- time.

PrintPoint automatically groups together “like” x-axis values. For example, in the Estimate file, you can assign the Customer_Code field to the x-axis. PrintPoint would automatically sum all the values of each y-axis field (Total Dollars A for example) for each customer for the selection of estimates.

TIP

This feature is referred to as grouping on the x-axis and can be disabled when necessary. When the Group on the x-axis checkbox is deselected, each record (in this example - each Estimate) is treated as a separate group.

NOTE

Up to one hundred groups can be plotted on the x-axis. There is no limit to the number of records that can be graphed.

The Y-Axis

In all graph types, the fields assigned to the y-axis must be numeric. Up to five fields can be assigned to the y-axis. For example, if you are graphing Estimates, the x-axis field could be Customer/Department and the y-axis fields could be Paper Dollars, Post-Press Dollars, and so forth.

Using QuickReports to Generate a Graph

Data for a graph can be generated from a QuickReport.

With this option, you use the QuickReport Editor to do preliminary data processing prior to graphing the data. If you direct a QuickReport to the Chart Editor, the columns in the QuickReport are treated as fields in the Chart Editor.

For more information on designing a QuickReport for the Chart Editor, see "Selecting an Output Device" in the QuickReport chapter.

Creating a Graph

1. Select the records you want to graph from any List View.
2. Click the Print button.
3. Select Report Manager.

   PrintPoint displays the Report Manager screen.
4. Click on the Charts radio button.
5. Click the Chart Editor button.

   PrintPoint displays the Graph Editor.
6. Click on the New Chart button.
7. Select a chart type from the twelve templates.
8. Click on the Chart Style tab.
9. Select a chart style from the styles displayed.
10. Click on the Data Selection tab.
11. Select the Source Table from the drop-down list.

    PrintPoint displays the fields that are available from the selected table.
12. Assign a field to the x-axis by clicking on a field in the Select Fields from the Table list and dragging it to the Category (X-axis) window.

    NOTE

    For pie charts, the x-axis field is used to label slices of the pie.

TIP

If you want the graph to display values from low to high or from high to low on the x-axis, sort the current selection by the x-axis field before displaying the Graph Editor or use the proportional x-axis option. For information on the proportional x-axis option, see the section "Viewing the Graph" later in this chapter.

13 Assign one or more numeric fields to the y-axis by clicking on a field or fields in the Select Fields from the Table list and dragging them to the Values window.

TIP

For all graph types except pie charts, you can assign up to five numeric fields to the y-axis.

14 Click the Formula button to create your own formula.

Displaying the Graph

1 Click OK to view the graph.

PrintPoint displays the graph.

TIP

When a graph is displayed, you can also change the graph types, assign colors or patterns to elements of the graph, add pictures, and choose scaling options.

Printing a Graph

1 While the graph is displayed, choose Print from the File menu.

The standard Print dialog box for your selected printer is displayed.

2 Choose any desired options and click the OK button.

Copying a Graph

You can copy a graph to the Clipboard and paste it into a Picture field in PrintPoint or into another application.

1 When the graph is displayed, choose Copy from the Edit menu.

PrintPoint places the graph on the Clipboard.

2 Choose Paste from the Edit menu to copy the graph into another field in PrintPoint or another application.

Editors

Chapter 105
Import/Export

OVERVIEW

PrintPoint's Import/Export Editor has been designed to provide the simplest interface possible for importing and exporting data. All importing and exporting is accomplished by clicking on the Imp/Exp pop-up button on the List View for the file you have chosen.

After the import/export parameters have been configured, they can be saved to disk for quick and easy retrieval. The import and export editors have been developed to have a consistent interface with each other so that the import/export process is a simple one. The import editor provides an additional option which allows the user the ability to preview the data before they begin their import process.

With the preview option, you can reduce the amount of preconfiguration work to assure that your import process completes successfully.

STEP-BY-STEP

This section includes the following topics:

- Importing
- Exporting

Importing

NOTE

This example show how to import paper from a correctly formatted tab delimited excel file of paper.

1. Open the List View for the table into which you want to import data.
2. Click and hold the Imp/Exp button and select Import.

   The Import dialog box is displayed.
3. Click All to add all fields.

   OR
4. Select individual fields for import and click the Append or Insert button.
5. Select the type of Delimiters t for the fields and records he file your importing from is using.
6. If the data file your using has a header, check the Skip First Record check box.
7. If the data file your using is a text file that quotation marks in each field, check the Strip Quotes check box.
8. Click Save Script to store this setup for possible future use.
9. Click the Browse/Preview tab.

   PrintPoint displays the Select File alert dialog.
10. Click OK.

    PrintPoint displays the Open File dialog box.
11. Locate and select the file you want to import click Open.
12. Use the Import Fields drop-down to map the data file fields to the proper PrintPoint fields if they do not match the order of the fields previously set in the earlier steps.

TIP

Many times it is easier to select the Browse/Preview Tab first, select your file and then map the fields to sample records.

13 Click the Options tab.

For more information on the Options Tab see the “About the Screens” section below.

Exporting

1. Open the list view from which you want to export a file.
2. Export all records or create a selection of the records you want to export.
3. Click and hold the Imp/Exp button and select Export.

   The Export dialog box is displayed.
4. Click the Load Script button to lad a previously saved export script...

   OR
5. Click All to add all fields.

   OR
6. Select individual fields for export and click the Append or Insert button.
7. Click Save Script to store this setup for possible future use.

   PrintPoint displays the Save File dialog box to save the export script.
8. Click Export.

   PrintPoint displays the Save File dialog box for the export file.
9. Enter a file name and click Save.

About the Screens

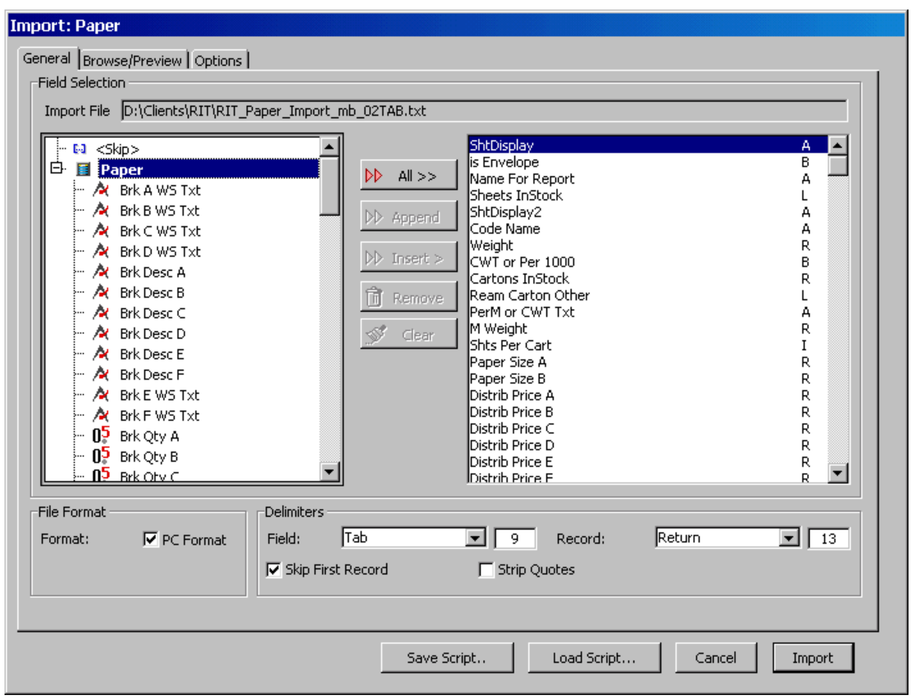
Import Editor

NOTE

There will be times when the data you are importing is inconsistent. If your exported data is inconsistent, you are likely to experience errors during the import process. PrintPoint Import/Export has been designed to assist in this problem by allowing the previewing of data. Before you begin your imports, we recommend that you preview the data to be sure you are importing to the proper fields.

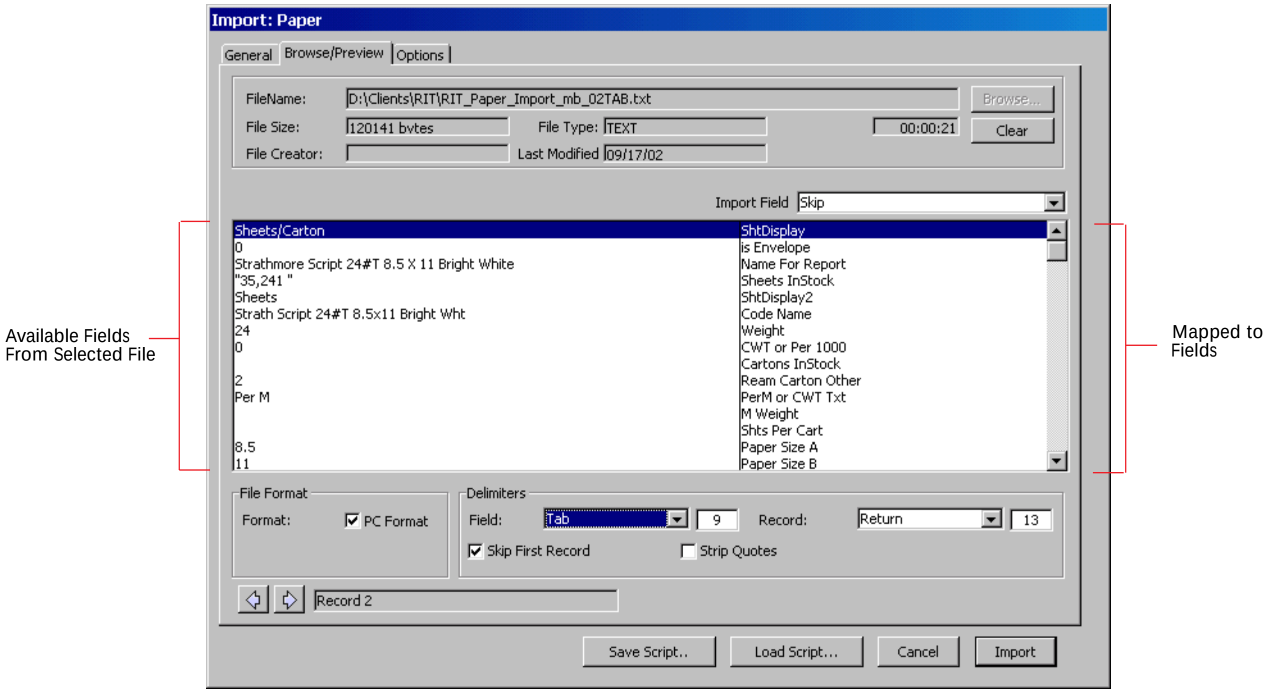
Import Editor General Tab

The first tabbed page of the import editor allows you to select fields to import, files formats options and field and record delimiters (separators between fields and records).



Button/List	Action
Field Selection List	This list represents all the fields which are available for the export process.
Selected Field List	This list will contain the fields which you have selected to be exported.
All >> (button)	Moves all the fields in the Field Selection List to the Selected Field List.
Append >> (button)	Adds the selected item in the Field Selection List to the bottom of the Selected Field List.
Insert >> (button)	Click to insert the selected field from Field Selection List before the highlighted field in the Selected Field List.
Remove (button)	Removes the selected field from the Selected Field List.
Clear (button)	Clears all the fields from the Selected Field List.
File Format - PC Format (checkbox)	If you select to export the data in PC format, an additional Line Feed character (ASCII 10) will be added to the record delimiter.
Field and Record Delimiters	Allows the configuration of Field and Record delimiters to be used when exporting the data. The Standard Format assigns the ASCII character 9 for a Tab and 13 for a Carriage Return.
Save Script (button)	Saves the current Export parameters defined in the Export Editor for later retrieval.
Load Script (button)	Loads a previously saved Export script.
Cancel (button)	Cancels the export dialog.
Export (button)	Click to begin the actual export process. When you have properly configured the Export Editor this item will become enabled. When you select Export, you will be presented with the standard dialog where you can name and save the location of the file you are exporting

Import Editor Browse/Preview Tab



Button/List	Action
File Name Field	List the file chosen for import
File Size Field	List the size of the file chosen (in bytes).
Tile Type Field	List the type of file chosen.
File Creator Field	List who created the file.
Last Modified Field	List the date the file was last modified.
Import Field Drop-Down List	Use to select the field you want to map the Available Fields From Selected File to.
Available Fields From Selected File	List the fields that are in the chosen file.
Mapped to Fields	List the fields in PrintPoint that the fields from the chosen file are mapped to.
File Format - PC Format (checkbox)	If you select to export the data in PC format, an additional Line Feed character (ASCII 10) will be added to the record delimiter.
Field and Record Delimiters	Allows the configuration of Field and Record delimiters to be used when exporting the data. The Standard Format assigns the ASCII character 9 for a Tab and 13 for a Carriage Return.
Save Script (button)	Saves the current Export parameters defined in the Export Editor for later retrieval.

Load Script (button)	Loads a previously saved Export script.
Cancel (button)	Cancels the export dialog.
Import (button)	Click to begin the actual import process. When you have properly configured the import editor this button will become enabled.

- Options: Provides the facility to modify data during the import process. When the preview button is selected, you will be presented with the Options screen.
  - Click Advanced Options checkbox to activate the options page.
  - Click on a line in the list and use the Default Value entry field to change the value of the field being imported.

TIP

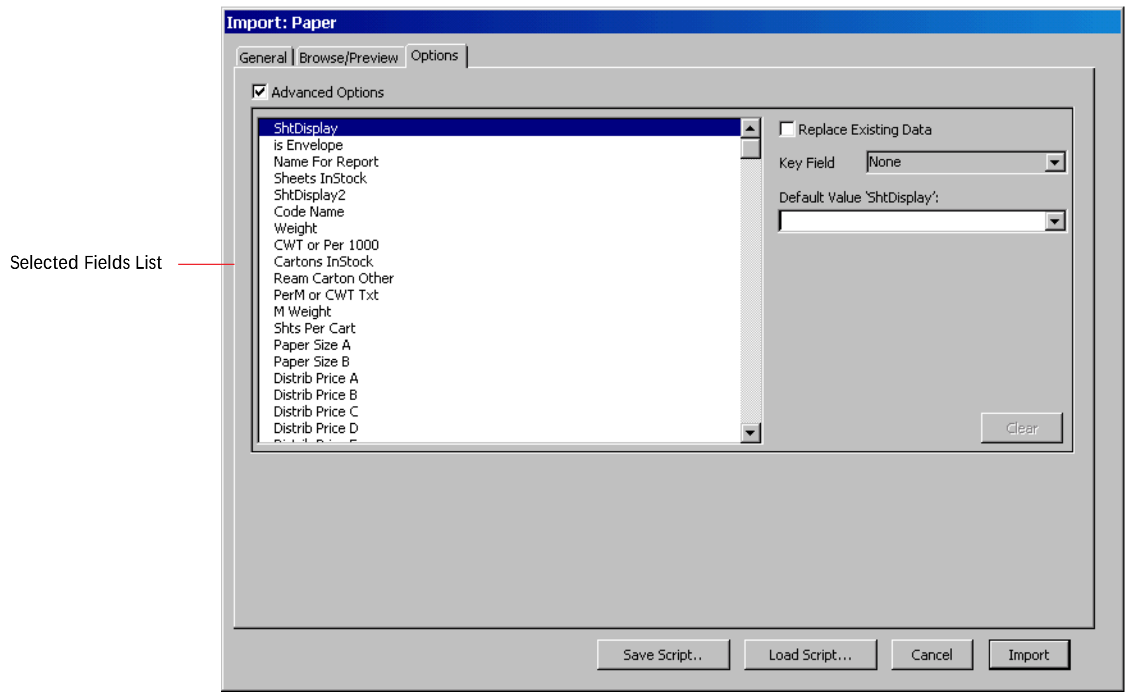
The scrollable list on the left contains all the fields you selected to be imported. The popup button on the right of the Default Value field allows you to assign one of several standard values.
You can also enter a formula in the default value entry area

  - Click Replace Existing Data if you want the imported data to replace existing data, such as updating customer information.
  - The Key Field popup becomes active and you must select the field used as the unique identifier for the fields to be matched when determining whether the imported record is to replace an existing record.
  - Custom Operations is reserved for future use.
  - The Clear button at the bottom left corner of the dialog clears any default value entries in the scrollable list.

- Preview: Provides the facility to preview data before beginning the import process. When the preview tab is selected, you will be taken to the Preview dialog.
  - Format is either Internal Format: 4D format or Text: Most common format for exchanging data with other applications.
  - Field and Record Delimiters: Allows the configuration of Field and Record delimiters to be used when exporting the data.
  - File Information holds information about the file name and size of the file being imported. The button beside the file name allows you to redefine the file to be imported.
  - The Preview Data area shows the file contents on the left hand side and the matching fields on the right. This allows you to inspect the data and verify that the import matches the correct fields in the datafile.

- The specified fields can be changed by highlighting the field to be altered in the right hand column and selecting from the Import Field popup to redefine the highlighted field.
- The two arrow buttons at the bottom left corner of the dialog allow you to step through the records to be imported.

Import Editor Options Tab

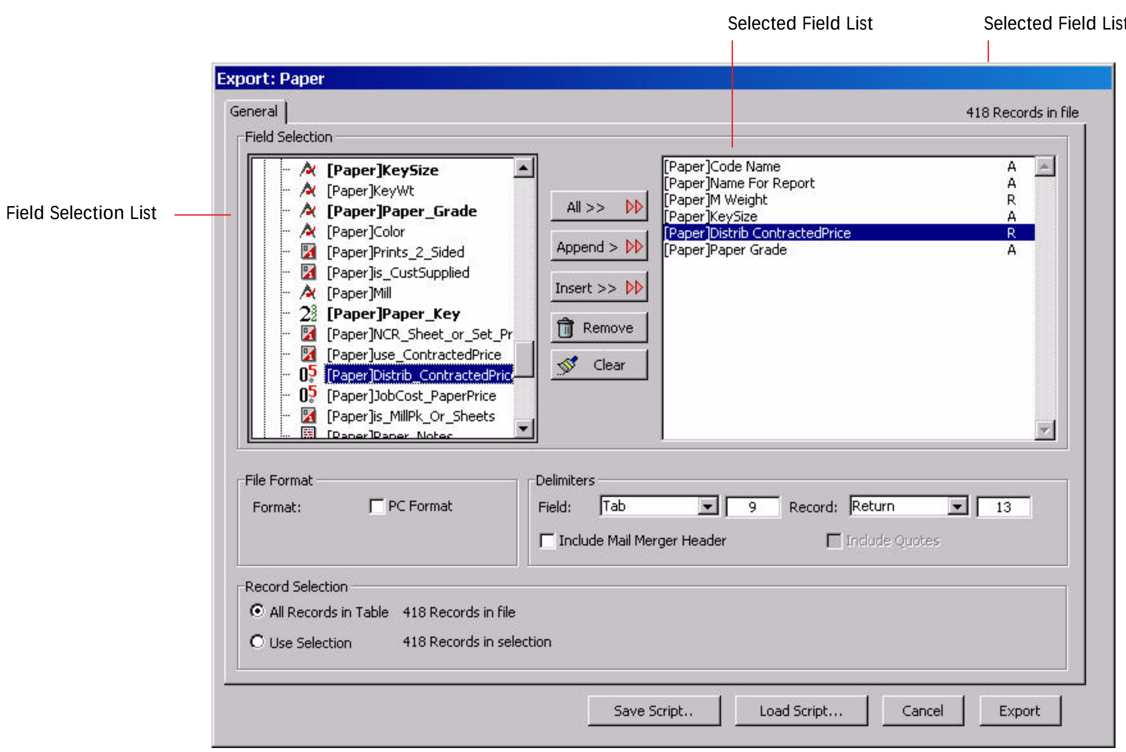


Button/List	Action
Advanced Options (check box)	Check to activate the available advanced options.
Selected Field List	Displays the PrintPoint fields that were selected to have data imported into.
Replace Existing Data (check box	Check to have existing data replaced on the selected fields.

Key Field	The key field is the “unique” value stored with each record that PrintPoint will lookup in the database to match against the imported data. For example, the Vendor Part Number would be a unique value for each paper that PrintPoint would use to get the proper record in the Paper database and then replace all the other “price fields” to update your prices.
Default Value Field	Each field can be assigned a default value on import. An example of this would be the “Date Price Modified” filed being set to the current date.

Export Editor

Export Editor



Button/List	Action
Field Selection List	This list represents all the fields which are available for the export process.
Selected Field List	This list will contain the fields which you have selected to be exported.

All >> (button)	Moves all the fields in the Field Selection List to the Selected Field List.
Append >> (button)	Adds the selected item in the Field Selection List to the bottom of the Selected Field List.
Insert >> (button)	Click to insert the selected field from Field Selection List before the highlighted field in the Selected Field List.
Remove (button)	Removes the selected field from the Selected Field List.
Clear (button)	Clears all the fields from the Selected Field List.
File Format - PC Format (checkbox)	If you select to export the data in PC format, an additional Line Feed character (ASCII 10) will be added to the record delimiter.
Field and Record Delimiters	Allows the configuration of Field and Record delimiters to be used when exporting the data. The Standard Format assigns the ASCII character 9 for a Tab and 13 for a Carriage Return.
Include Mail Merge Header (checkbox)	Places the titles of the fields into the exported file.
Record Selection (radio buttons)	All records in Table or Records that are selected in the List View.
Save Script (button)	Saves the current Export parameters defined in the Export Editor for later retrieval.
Load Script (button)	Loads a previously saved Export script.
Cancel (button)	Cancels the export dialog.
Export (button)	Click to begin the actual export process. When you have properly configured the Export Editor this item will become enabled. When you select Export, you will be presented with the standard dialog where you can name and save the location of the file you are exporting

Chapter 106
List Editor

OVERVIEW

PrintPoint has two types of lists:

- Lists that come from "database" tables such as paper, press, ink, etc.

  These kinds of lists are built directly from the database tables and are editable from List Views. The items in these lists (when selected) automatically link the rest of the data stored in the database.

- Lists with no associated data connected.

  The second kind of lists have no associated data and are purely used for automating data entry.

The List Editor is used to add, delete and modify items in drop-down/popup lists and Choice Lists that are not associated with other data. The following lists are edited using the List Editor:

- Bindery Category
- Bindery Rate Basis
- Bindery Sets
- Bindery Units
- Bleed Size
- Booklet Pages
- Customer Service Reps
- Finished Size
- Item Description
- Job Station
- Job Station - Internet
- Material Units
- Number of Originals/Lots
- Outside Service
- Pages per Signature
- Parent Sheet Size
- Press Sheet Size
- Quantity Popups
- Run Size
- Salutation
- Surname
- Template Type
- Title
- Vendor Category

BEFORE YOU BEGIN

You should...	Where this information is found...
Use PrintPoint and see where some of these lists are used.	Throughout the program.

STEP-BY-STEP

This section includes the following topics:

- Accessing the List Editor
- Adding new entries
- Deleting entries
- Renaming entries
- Sorting the list
- Re-ordering the list (moving entries up or down).

Accessing the List Editor

1. File Menu > List Editor.

   PrintPoint displays the List Editor dialog with the available lists.

Adding a New Item

1. From the Available List click on the list you want to add a new item to.
2. Click on the New button.

   PrintPoint displays the Request dialog.
3. Enter the name for the new item.
4. Click OK to accept.

Deleting an Item

1. From the Available List click on the list you want to delete an item from.
2. Scroll down the item list on the right hand column and click on the item that you wish to delete.
3. Click on the Delete button.

Renaming an Item

1. From the Available List click on the list you want to edit.
2. Scroll down the item list that you wish to rename.
3. Click on the Rename button.

Sorting the List

1. Click on the Sort button.
2. PrintPoint sorts the List.

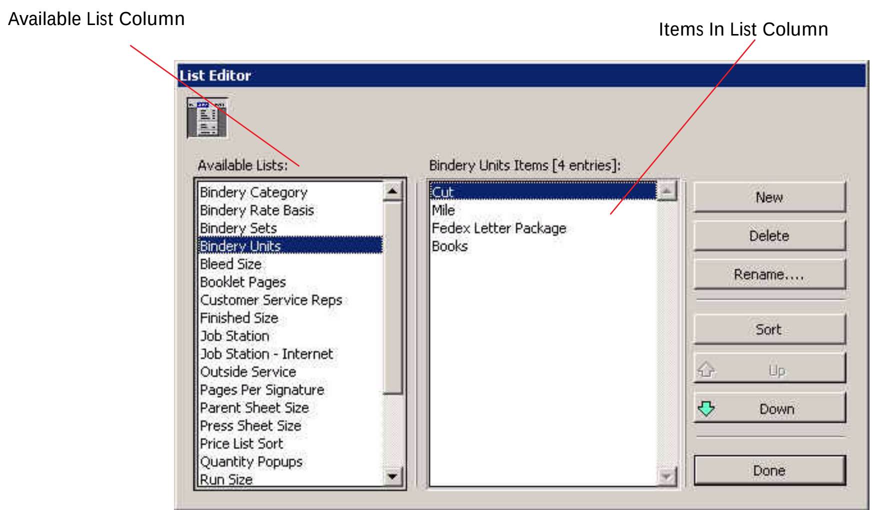
Re-Ordering the List

1. From the Available List click on the list you want to re-order.
2. Scroll down the item list and click on the item that you wish to move.
3. Click on the Up or Down button.
4. Click on the Done button when complete.

NOTE

Manually sorting a list can be very helpful, especially when you prefer certain items to appear close to the top of the list. However, the negative side of this manual sort is that "type-ahead" (jumping to a place in the list when you type the first few characters) no longer function. It has no way of knowing where to jump, because there is no alphabetical order.

ABOUT THE SCREENS



Button / List	Contents/Use
Available List Column	List of available categories which can be edited.
Item List Column	List of items within each category.
New (button)	Used to add a new item to the Item List.
Delete (button)	Used to delete an item from the Item List.
Rename (button)	Used to rename an existing item in the Item List.
Sort (button)	Used to sort the Item List.
Up and Down (buttons)	Used to move an item up or down in the Item List.
Done (button)	Used to close the List Editor.

Chapter 107
List View Editor

OVERVIEW

PrintPoint's List View Editor tool gives you the ability to customize your List Views and to develop your own List Views Layouts to display the fields and columns in the order and styles to can view your data the way you want.

NOTE

Each List View is unique to each user. They cannot be traded amongst users unless the are set as the default by the Admin.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup Users	See Users and Passwords Chapter
Open a List View window	Navigator > Estimate (example)

STEP-BY-STEP

This section includes the following topics:

- Accessing the List View Editor
- Changing the Active List View
- Creating a New or Modifying an Existing List View
- Sorting the List View
- Customizing the List View
- Using the “Lock After Columns” Option

Accessing the List View Editor

TIP

The List View Editor is accessed from any PrintPoint List View.

1 Click on the List View Editor icon in the upper right corner of the List View (just to the left of the yellow Help icon (the Question Mark).

PrintPoint displays the following:

- A list of the available List Views.
- The List View that is currently active with a check mark next to it.
- Define List Layout, which is used to create a new List View or change an existing one.

2 Select the List you want to edit (if you have not yet edited the list, select Define List Layout...

Changing the Active List View

NOTE

This is only applicable if list other than the default have been created. To create a new list see the section Creating a New or Changing an Existing List View.

1 From the Define List Layout window, under the Layout section, choose an available list from the dropdown menu.

Creating a New or Modifying an Existing List View

Creating a List View

1 Click on the List View Editor icon in the upper right corner of the List View (just to the left of the yellow Help icon (the Question Mark).

PrintPoint displays the Define List Layout screen.

2 Click either the New or Duplicate button.

PrintPoint displays the Enter New Name window.

3 Enter a name for the new list.

NOTE

If you select New, you will get a blank list of Selected Display Fields on the right. If you select Duplicate, you will get a copy of the list of Selected Display Fields from the original list.

4 Highlight the field in the Available Fields List on the left that you want to add to the new list.

5 Click the Add button.

The field selected will be moved into the Selected Display Fields List.

NOTE

When you choose to add a non-indexed field (a field that will sort more slowly than an indexed field) an alert will be displayed giving you the option of including or not including the field in your list.

6 Repeat steps 4 and 5 for all the fields you want to be displayed.

NOTE

The Rename and Delete buttons are used to change to name of or remove a layout from the layout list

Sorting the List View

After you have added or removed fields from the list, you may want to re-sort this list.

1 Highlight the field in the Available Fields List.
2 Click the Sort Up or Sort Down Arrows to reposition the field.

Customizing the List View

After you have added or removed fields from the list, you may want to customize the way you view this list.

1 From the Selected Display Fields column select the field you want to customize.
2 In the Alias box type the name of the field heading as you want it displayed in the list view.
3 In the Display Font box choose the font type from the dropdown menu as you want it displayed in the list view.
4 In the Font Size box choose the font size from the dropdown menu as you want it displayed in the list view. This is the font size for the text within the column not the column heading.
5 In the Heading Size box choose the font size from the dropdown menu as you want it displayed in the list view. This is the font size for the column heading.
6 In the Header Style box choose the font style from the dropdown menu as you want it displayed in the list view.
7 In the Field Align box choose the font alignment from the dropdown menu as you want it displayed in the list view.
8 In the Width box enter the field width as you want it displayed in the list view.

NOTE

The width is measured in pixels.

9 Use the Display Filter indicate how date fields, time fields, number fields, dollar fields, etc. are displayed.

Example A date field can be displayed using the “Short” filter to show 1/02/03 or “mm/dd/yyyy Forced” filter to show 01/02/2003.

Using the Lock After Columns Option

1. From the Define List Layout window select the Additional Information Tab.
2. Click on the dropdown Combo box in the Lock After Columns section.

   Printpoint displays a dropdown window with all the fields available for locking.
3. Select the field you want to be locked.

NOTE

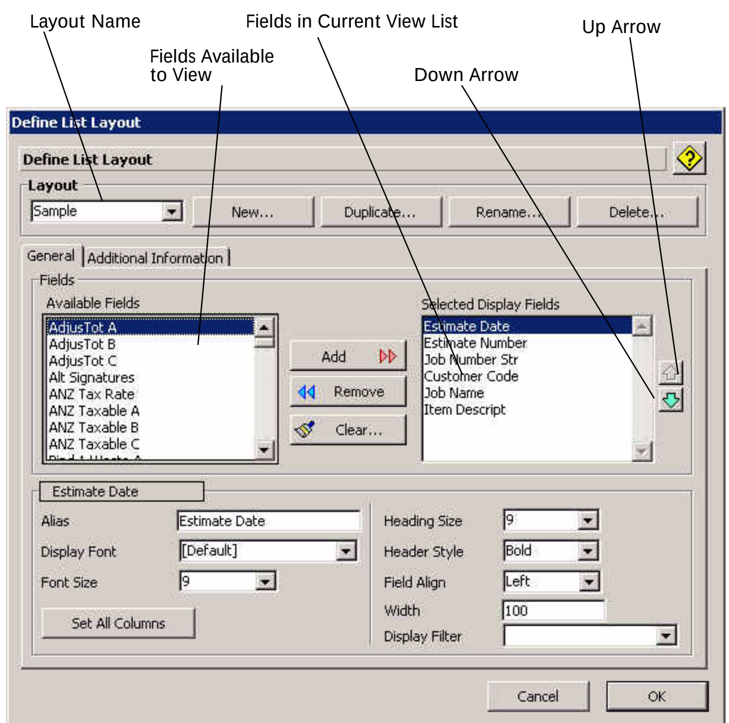
For further explanation of this feature see the section on About the Screens.

ABOUT THE SCREENS

The following screens are used for the List View Editor:

- List View Editor
- Adding a Non-Indexed Field Dialog
- Additional Information Tab
- List View With Locked Column

List View Editor

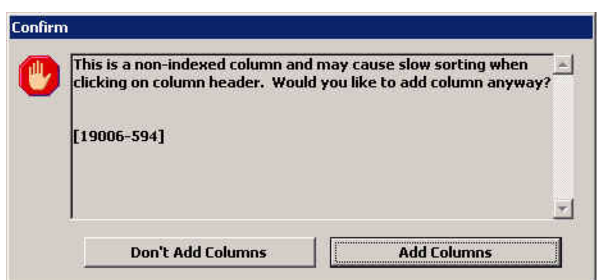


Field / Button/ Tab	Contents/Use
Layout Name	The name of the current list layout
New (Button)	Used to create a new list
Duplicate (Button)	Used to duplicate the current list layout
Rename (Button)	Used to rename the current list layout
Delete (Button)	Used to delete the current list layout
Available Fields	Scrollable list of all fields that are available for viewing (from the table selected for the Review list)

Add (Button)	Click to add a selected field
Remove (Button)	Click to remove a selected field
Clear (Button)	Click to clear all selected fields
Selected Display Fields	Scrollable list of all fields that were selected for viewing
Up Arrow	Select a field and click on the icon to move the field “up” the list
Down Arrow	Select a field and click on the icon to move the field “down” the list
Alias	Enter a label (title) as you want it to appear in the list
Display Font	Used to select the list font
Font Size	Used to select the field font size
Set All Columns	Click the button to update all display fields to use the selected font and size
Heading Size	Used to select the list heading font size
Heading Style	Used to select the list heading font style
Field Align	Used to select the list heading font alignment
Width	Used to select the field width (uses pixels)
Display Filter	Select a display filter from the dropdown list

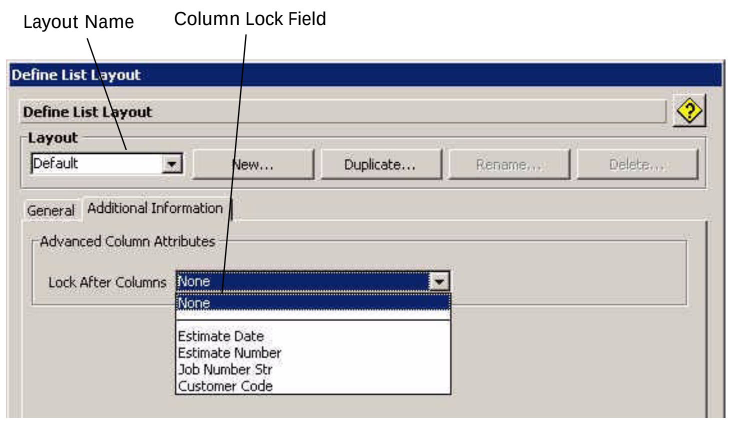
Adding a Non-Indexed Field Dialog

When you choose to add a non-indexed field the following window will pop-up.



Additional Information Tab

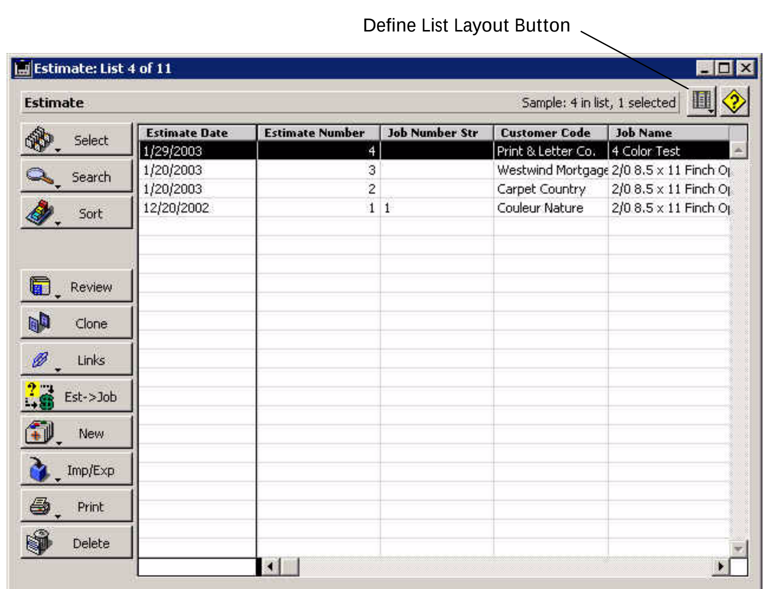
The main function within the Additional Information Tab is to se a Locked Column. In the Locked After Columns dropdown list you will see the field available which can be locked. See the List View with Locked Column section below for an example of what the list will look like with this feature activated.



Field Name	Contents/Use
Layout Name	The name of the current list layout
Lock After Columns	Used to “freeze” all columns to the left of the selected column from scrolling

List View with Locked Column

In this view the Estimate Date column has been locked. When scrolling across the window, the Estimate Date column will not move.



Chapter 108
Custom Fields Editor

OVERVIEW

PrintPoint's Custom Fields Editor allows you to customize numerous fields and tab (subsection) linking customers, jobs and estimates. The specific intent of this customization is to enable you to create customized Electronic Job Tickets, Printed Job Tickets, Job Reports and Estimate Reports.

The following areas are editing using the Custom Fields Editor:

- 8 user modifiable fields stored with each customer that carry forward estimates and jobs.
- 11 Tabs Titles on the Electronic Job Tickets for Offset, Copy, and Large Format.
- Almost 100 Fields Titles and Defaults Fields on the Electronic Job Tickets for Offset, Copy, and Large Format.

Example

You may want to track the Division, Cost Center, Region, Part Number, etc., for each of your customers, and later include that information on your custom-designed job tickets or on other customized reports.

By setting up these fields at the customer level as "labels" that will appear on the Estimate "Additional Information" area, you will be able to print this specific information on the job tickets and reports.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup at least one customer	See the Customers Chapter
Review the Electronic Job Ticket for Offset or Copy/Digital or Large Format Printing	See Jobs - Electronic Job Ticket Introduction
Review the Chargeback features	See the Chargebacks Chapter

STEP-BY-STEP

The following tasks are included in this section

- Customizing Customer Field Labels and Field Contents
  - Customizing field labels for Customers
  - Modifying the Customer's Custom fields
- Customizing Job Ticket Info
  - Adding or changing custom fields and tabs for job tickets for Offset, Copy, and Large Format Printing.

Customizing Customer Field Labels and Fields

Customizing Field Label for a Customer

You can customize 8 user modifiable fields stored with each customer that carry forward to estimates and jobs for the eventual purpose of sorting, searching, grouping, summarizing and reporting.

1 Select File menu > Custom Fields Editor.

PrintPoint displays the Custom Fields Tab for Customers.

2 Insert or change information in any of the 8 available fields.

NOTE

Each custom field accepts 80 alphanumeric characters.

TIP

If you are going to use these fields as numbers, format the number with the largest possible number of characters, since sorting will be by string sort, not numeric sort.

Example   If your largest possible number will be 9999, start numbering with 0001, 0002, 0003,...

3 Click the OK button to save your changes.

NOTE

Your changes are saved and all custom fields will displayed on the Additional Info Tab of the Customer Detail Screen and the Additional Info Dialog of Estimate Screens.

Modifying the Customer's Custom Fields

4 Select Navigator > Customer.

PrintPoint displays the Customer List View.

5 Double-click a customer in the list view to display a customer record.

6 Click on the Additional Information Tab.

7 The customized field labels will appear to the left of the custom fields.

Customizing Job Ticket Info

Modifying the Electronic Job Ticket Tabs

1 Select File menu > Custom Fields Editor.

PrintPoint displays the Custom Fields Tab for Customers.

2 Locate the Select Layout drop-down menu and select Offset Printing Electronic Job Ticket.

PrintPoint displays the Tab Labels tab for the Offset Printing Electronic Job Ticket.

3 Insert or change information in any of the tab titles.

4 Click OK to save your changes.

Changing Default Field Contents & Labels

1 Select File menu > Custom Fields Editor.

PrintPoint displays the Custom Fields Tab for Customers.

2 Locate the Select Layout drop-down menu and select Offset Printing Electronic Job Ticket.

PrintPoint displays the Tab Labels tab for the Offset Printing Electronic Job Ticket.

3 Click on the Custom Field Tab.

NOTE

Each custom field accepts 80 alphanumeric characters.

4 Enter the customized values for:

- Checkbox field content for Creative, Pre-Press and Print areas of the job ticket. (The names may vary depending on your previous customizations)
- Due Date, Due Time and Notes Labels for each of the Job Ticket tabbed subsections.

5 Click on the More Custom Fields tab.

6 Enter the names and the heading text for the checkboxes for the remainder of the Electronic Job Ticket.

7 Click OK to save your changes.

WHERE THIS INFORMATION FITS INTO THE PUZZLE

These custom fields are valuable tools to assist in the extraction of information. The fields can be accessed to extract more detailed information by:

- Changing the tab headings in the Electronic Job Ticket then referring to those customized tab "headings" in a SuperReport Job Ticket to divide your job ticket into sub-sections such as Creative, Pre-press, etc.
- Changing the Checkbox headings on each of the Electronic Job Ticket then referring to those customized tab "headings" in a SuperReport Job Ticket for a more detailed view of the job.
- Changing the Notes Title on each of the notes heading on the Electronic Job Ticket then referring to those customized tab "headings" in a SuperReport Job Ticket.
- Changing the Customer Custom Fields then using those additional areas to access more detailed information about your customer on each estimate and/or job.

Example

a. Customize a Custom Field Label "Part #" in the Custom Field Editor.
b. Open a customer record and click on the Additional Info tab to verify that the new field label is there.
c. Create a new estimate...
d. Click on the text "Code Name" to access the QuickLink to Customer Record.
e. Select Edit Additional Customer Info... from the drop-down menu.
f. PrintPoint displays the Additional Information dialog.
g. Enter the information for the Custom Field.
h. Generate an Electronic Job Ticket and print a Job Ticket.
i. Use a SuperReport to access the Custom Field information for your Job Ticket, Shipping /Delivery report, etc.
j. Inplants can use the Custom Fields to customize the Chargeback Reports to group jobs by Division, Department, Cost Center, etc.

These are just a few of the possibilities. Every one of the custom fields and the data associated with it can be put on a report. By using the Custom Field Editor and your imagination, you can access data in a multitude of ways.

About the Screens

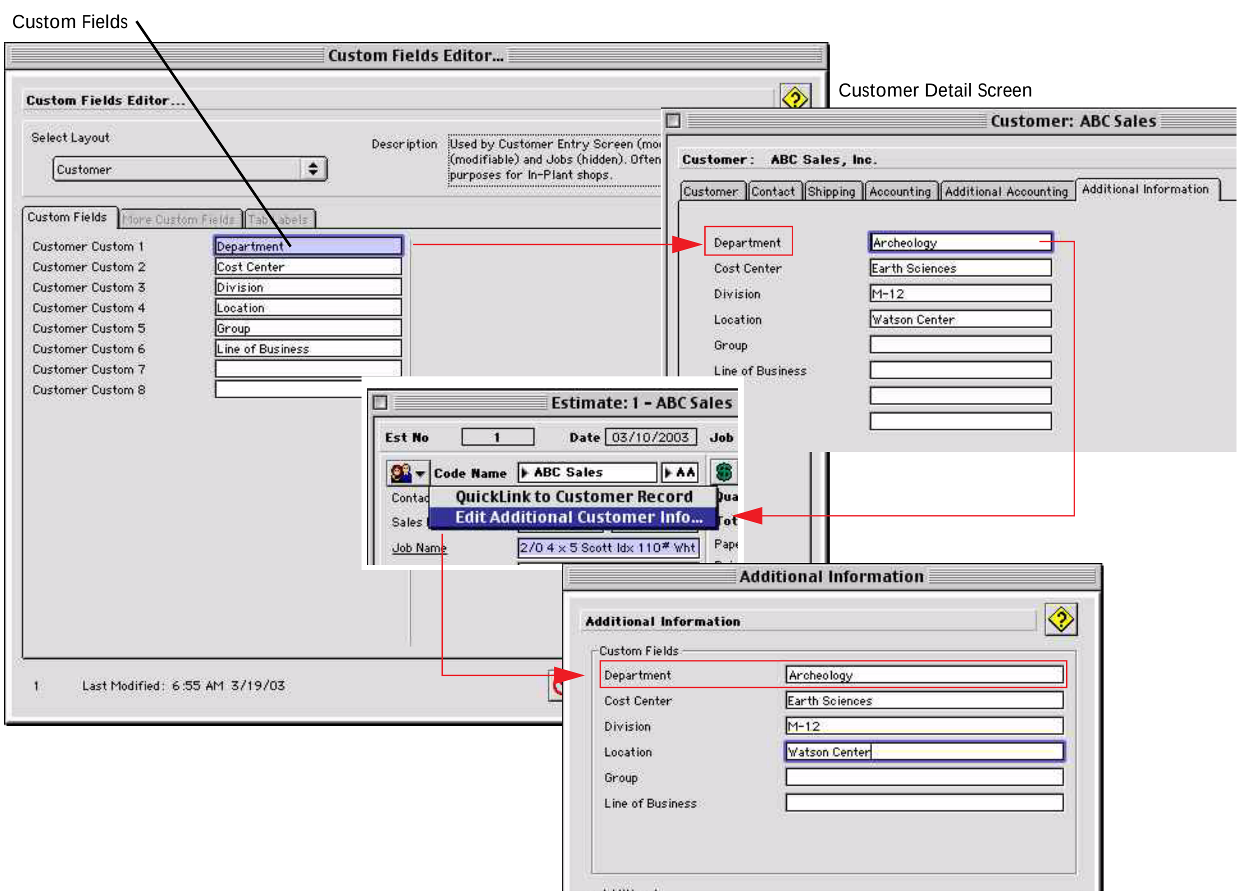
Select Layout Drop-Down Menu

Button / Option	Definition
Select Layout (Drop-Down Menu)	
Description (Text)	Description of the selection from the Select Layout drop-down menu

Customer Fields Tab

The entry in the custom field editor for Customer Custom 1 - 8 flow as follows:

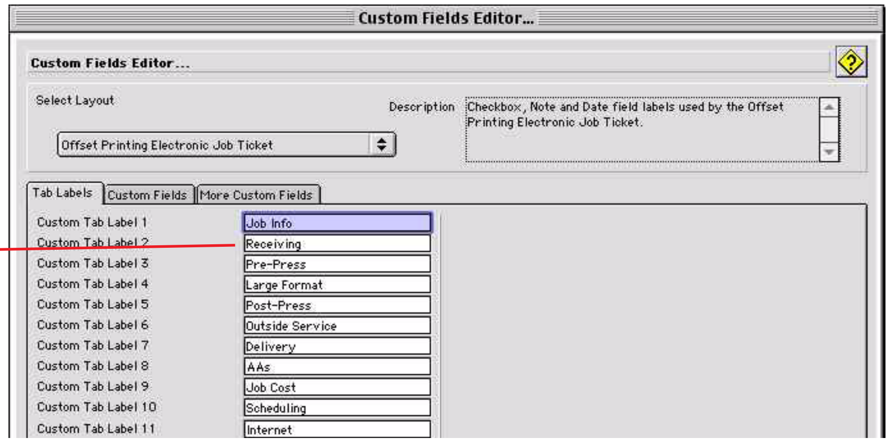
- Customer Detail Screen
- Additional Info Dialog for Estimate Detail Screens (accessed through the button)
- Customized Job Reports



Electronic Job Ticket Custom Tabs

From this tab you can set the Tab titles for each of the Electronic Job Ticket Styles. These entries can then be used to display on printed Job Tickets.

Custom Tab Label 2 has been modified to “Receiving” from the default “Creative”



Electronic Job Ticket Custom Fields, Titles, Checkbox Defaults Tab

From this tab you can set the Custom Fields, Labels and Default Checkbox text content for each of the Electronic Job Ticket style. These entries can then be used to display on printed Job Tickets.

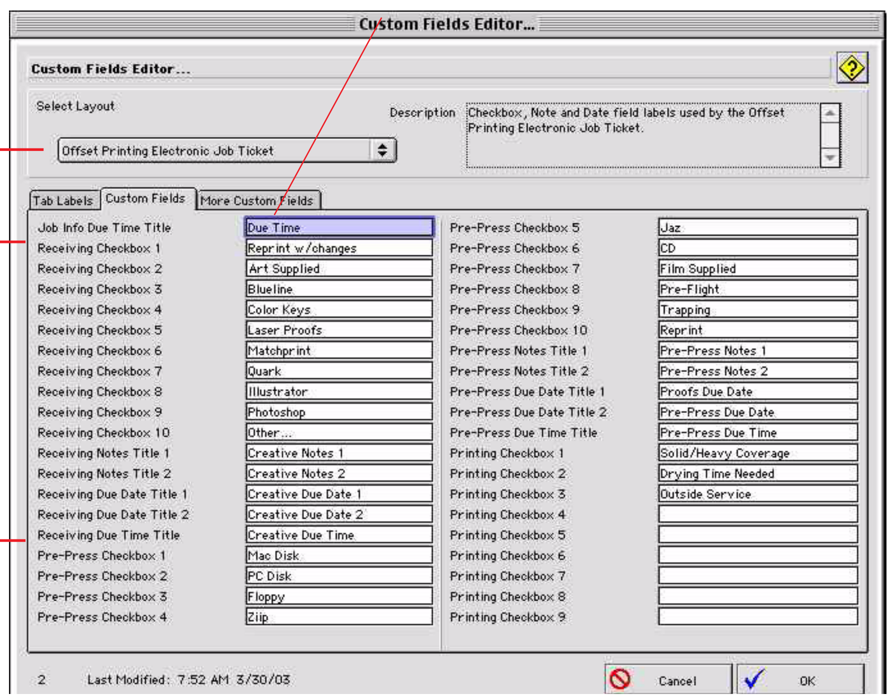
More Custom Fields for each type of Job Ticket

Electronic Job Ticket Options:

You can set the custom labels, titles, check box defaults for each of the following:

Offset
Copy / Digital
Large Format

Label Text in the Editor Reflects Change in the previous Tab Labels above.

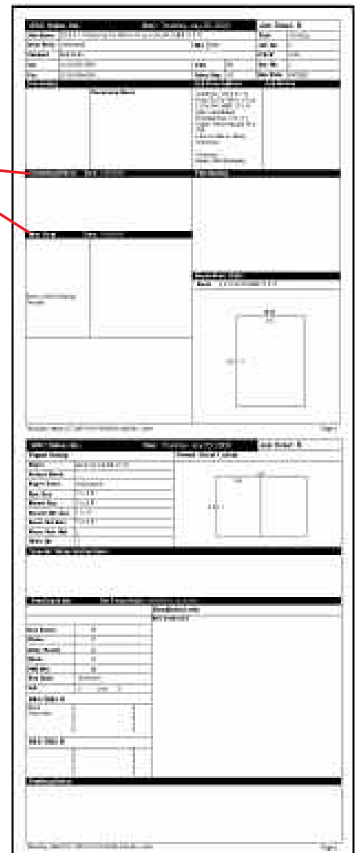


Customized Job Ticket

This Job Ticket can includes all the Tab Titles and custom entries made in the Custom Fields Editor and Electronic Job Ticket.

Custom Text on SuperReport Job Ticket is “pulled” from the Electronic Job Ticket.

The content for all these “customizations” began with the Custom Field Editor.



Chapter 109
Language Editor

OVERVIEW

The Language Editor is one of the many PrintPoint editors that allows you to customize PrintPoint for your own shop. It has two fundamental purposes:

- To set a specific language for a user (such as English or Spanish)
- To modify to label on many screens to suit the specific terminology used by your shop.

Example The following on screen items can be modified for individual users: Field Labels, buttons, radio buttons, menu/dropdown list labels, combo box labels, checkboxes.

BEFORE YOU BEGIN

You should...	Where this information is found...
Setup Users	See Users and Passwords Chapter
Make a default language selection	File Menu > User Settings

STEP-BY-STEP

The following tasks are included in this section

- Modifying a Language
- Creating a New Language
- Deleting a Language
- Selecting a Language for Users
- Language File Backups
- Creating and Installing a Common Company-wide Language File

Modifying a Language

1 Select **File menu > Language Editor**.

The Language Editor screen opens with the current language selection displayed.

TIP

All windows must be closed to be able to open the Language Editor.

2 Click on the **Select Language** drop-down menu and choose a language.

NOTE

Sort either the English Term or Current Language word lists by clicking on the column title.

TIP

You can sort columns by ascending or descending order by holding down your Option (Macintosh) or Alt (Windows) key and clicking on the column title

NOTE

Use “type ahead” to go directly to the row of the word you want to edit.

3 Double-click on the word in the **Current Language** column that you wish to change.

4 Type the new word that will become the label.

5 Continue to modify the labels until you have completed all your changes.

6 Click **OK** to save your changes.
7 Click **Save** in the confirmation box.

Your changes are saved and any new labels will display at the appropriate locations.

Creating a New Language

To create a new language file in PrintPoint, you begin by duplicating an existing file and then modifying that file.

1. Select **File menu > Language Editor**.

   The Language Editor screen opens with the current language selection displayed.
2. In the Language Editor, click on **Select Language** and select **Duplicate...**.
3. Type a new language name at the prompt **Enter New Name:**
4. Click the **OK** button to perform the duplication of the current language.

Now you are ready to modify the Current Language settings in your new, duplicated language.

Deleting a Language

At the present time, there is no way to delete a language you have created. Simply don’t select it.

Selecting a Language For Each User

PrintPoint allows each user to work in a different language.

1. Select **File menu > User Settings**.
2. Select a language for screen objects from the dropdown list.
3. Select a language for the menus and notifications from the dropdown list.
4. Click the **OK** button to save your settings.

Language File Backups

If PrintPoint crashes during a session, occasionally your language file will become corrupted and the program will fail to open.

To protect against this condition, when you modify your language file, PrintPoint updates the version stored in the Languages folder and also creates a backup just in case the original file becomes corrupted. This backup file is stored in a folder called Language_Backup stored in your PrintPoint 4.x Folder or PrintPoint 4.x Client Folder (if you are running client/sever).

During PrintPoint's startup procedure, the program first looks at the Language Folder to get your current version of the language file. If that fails for any reason it then looks at the Language_Backup folder for the backup file. If that fails it then looks into the Mac4DX or Win4DX folder in single user mode or the 4xxx_cs Folder found in the ACI Folder.

Creating and Installing a Common Company-wide Language File

If, in a multi-user configuration, as the network administrator, you decide to create a common company language file, you should:

1. Create the custom language file on an client machine.
2. Move a copy of the current language file(s) from the clients to the following locations:

   `PrintPoint_4.x_Server_Folder > Win4DX or Mac4DX folder`.

   NOTE

   If you are running a cross-platform installation you must copy the files to both the Win4DX and Mac4DX folders.

3. Throw out the Languages Folder and the Language_Backup Folder on all clients. These folders are found inside the PrintPoint 4.x Client Folder.

PrintPoint will start from scratch at that point and create all new copies of the “customized” language over the network.

WHERE THIS INFORMATION FITS INTO THE PUZZLE

What can be modified?

The Administrator or a user with access to the Language Editor can modify the following screen items:

- Field labels
- Buttons
- Radio buttons
- Menu/dropdown list labels
- Combo box labels
- Checkboxes

What cannot be modified?

The following items cannot be modified, however the language in which they appear can be selected at the “user level” through by selecting File > User Settings > Language Tab.

- Alerts
- Confirms
- Messages
- Wizard Text
- Menus

ABOUT THE SCREENS

When working with language settings you will use the following screens and dialog boxes:

- Language Editor
- User Settings Dialog

Language Editor

English Term

Option	Description
Language Menu/Dropdown List	Select the language to edit.
English Term	The list of words used in PrintPoint for field labels, checkboxes, radio buttons, menu/ dropdown lists, combo boxes, etc.
Current Language	The corresponding list of word labels, currently in use by PrintPoint for this language selection. All items in this column can be modified. This is the only column that can be changed.
Length	This is the recommended total length allowed for each label.
Print Button	You may print out a list of the current language in order to work away from the computer.

User Settings Dialog

English Term

Option	Description
Dropdown List for Form Layout Language	The selection is used for Screen Objects
Dropdown List for Language for Menus and Modifications	This selection is used for Alerts, Messages and Menus

Chapter 110
Structure Editor

OVERVIEW

PrintPoint's Structure Editor allows you to customize the system by renaming internal tables and fields to display text that is meaningful to your own shop.

BEFORE YOU BEGIN

You should...	Where this information is found...
Set your Preferences	File Menu > Preferences

STEP-BY-STEP

This section includes the following topics:

- Accessing the Structure Editor
- Renaming a table
- Renaming a field
- Saving the Structure

Accessing the Structure Editor

1 File Menu > Structure Editor.

PrintPoint displays the Structure Editor screen with the available tables, the number of fields in the selected table, and the current name for each field.

Renaming a Table

1 Scroll down the Available Tables List and double-click the table name to rename.

PrintPoint displays the Rename Table dialog box.

2 Rename the table.

3 Click Cancel to cancel or OK to save.

Renaming a Field

1 Scroll down the Available Tables List and select the table which contains the field you wish to rename.

PrintPoint displays the field list for the selected table and the number of fields in the right hand list.

2 Scroll down the list and double-click on the field name that you wish to rename.

PrintPoint displays the Rename dialog box.

3 Rename the field.

4 Click Cancel to cancel or OK to save.

NOTE

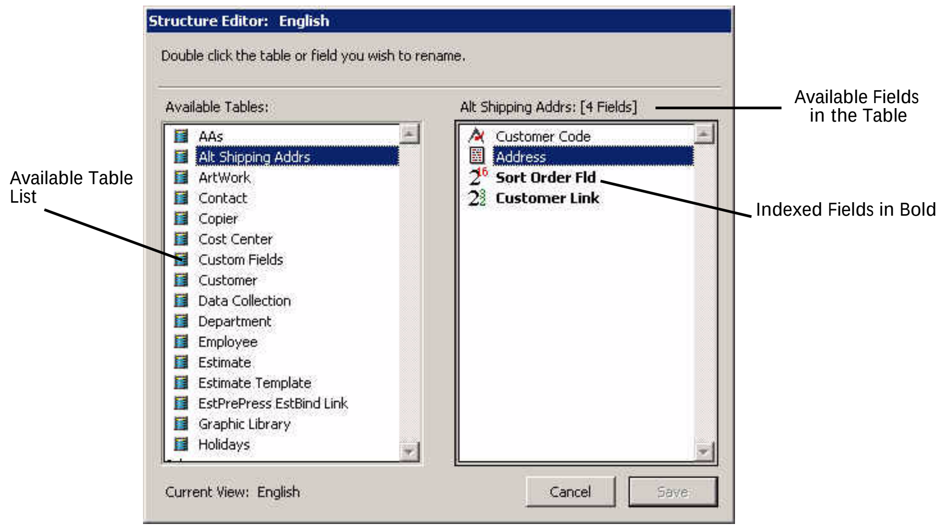
Fields displayed in bold type are indexed fields (they are optimized for searching and sorting).

Saving The Structure

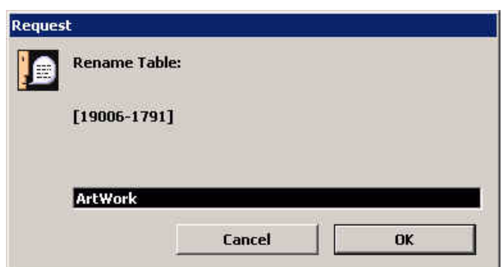
1 Click the Save button.

About The Screens

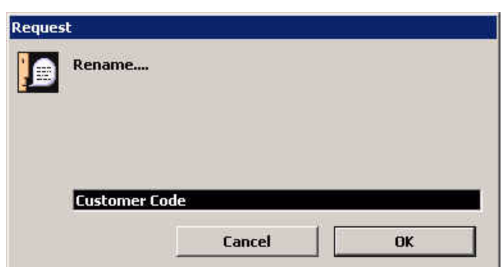
Structure Editor



Rename Table Dialog



Rename Field Dialog



Chapter 111
Mail Merge

OVERVIEW

PrintPoint's Mail Merge feature enables you to create form letters for contacts and draw data from the contact file to personalize letters for sales promotions, etc.

NOTE

Full details on using PrintPoint's Word Processor (4D Write) are available from PrintPoint Central under the Documentation section. The 4D Write User Reference Manual is called: 4D_Write_UserRef.pdf

BEFORE YOU BEGIN

You should...	Where this information is found...
Decide which customers are going to receive the letter.	Internal marketing decision created by your marketing team.
Check the accuracy of the Contact and Mailing Address information	Each contact record from the Contact List View.

STEP-BY-STEP

This section describes the steps to create a “simple” marketing letter containing the Primary Contact and the Mailing Address from a selection of customers.

The step-by-step includes the following:

- Accessing the Contact List to begin a Mail Merge
- Creating a Mail Merge Letter
- Saving a Mail Merge Letter
- Printing a Mail Merge

Accessing the Contact List to begin a Mail Merge

All mail merge letters begin with selection of contacts from the Contact List View.

1. Select Navigator > Contact.

   PrintPoint displays the Contact List View.
2. Select the contacts who will be receiving the mail merge letters.
3. Click the Mail Merge button.

Creating a Mail Merge Letter

1. The Mail Merge Wizard should be open. (See *Accessing the Contact List to begin a Mail Merge* section above).
2. If creating a New Letter enter a name and subject.

   OR

   If using an existing letter click the Use Existing Letter radio button and highlight the letter from the list.
3. Click the Next button.
4. In the General drop-down menu choose the items needed for the letter.

NOTE

If you need more than one item from the General drop-down menu you just need to choose from the list multiple times.

5 In the Contact drop-down menu choose the items needed for the letter.

NOTE

If you need more than one item from the General drop-down menu you just need to choose from the list multiple times.

6 Insert a carriage return and begin to create you letter.

7 Select File Menu > Print Preview to view the first record in your list of customers as a full mail merge letter.

8 Click the Next button.

9 Click the Select Jobs for??? button to choose a job from that contacts job history that you want added to the letter.

10 Click the Next button.

11 Click the Select Quotes for??? button to choose a job from that contacts quote history that you want added to the letter.

12 Click the Print Merge button to print the letters.

CAUTION

Be careful to make sure you are happy with what you are about to print, because the mail merge will attempt to merge all the selected customers in your list.

The print dialog is displayed

13 Verify the printing information is correct and click the Print button.

14 The mail merge will begin printing.

Saving a Mail Merge Letter

As any other word processing document, it would be a good idea to save the letter from time to time.

1 File Menu > Save...

OR

2 File Menu > Save As... if you have decided to save the letter with a different name.

OR

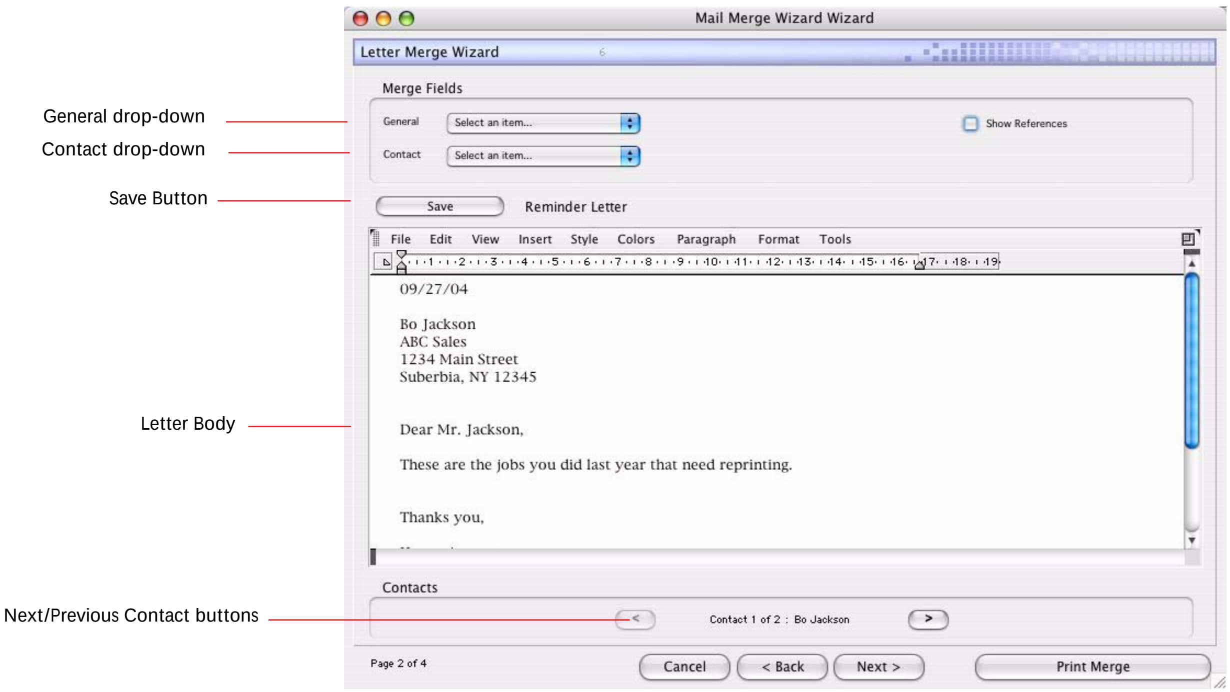
3 Click the Save button.

CAUTION

“Save as Template” is an advanced concept and does not apply to this process of mail merge.

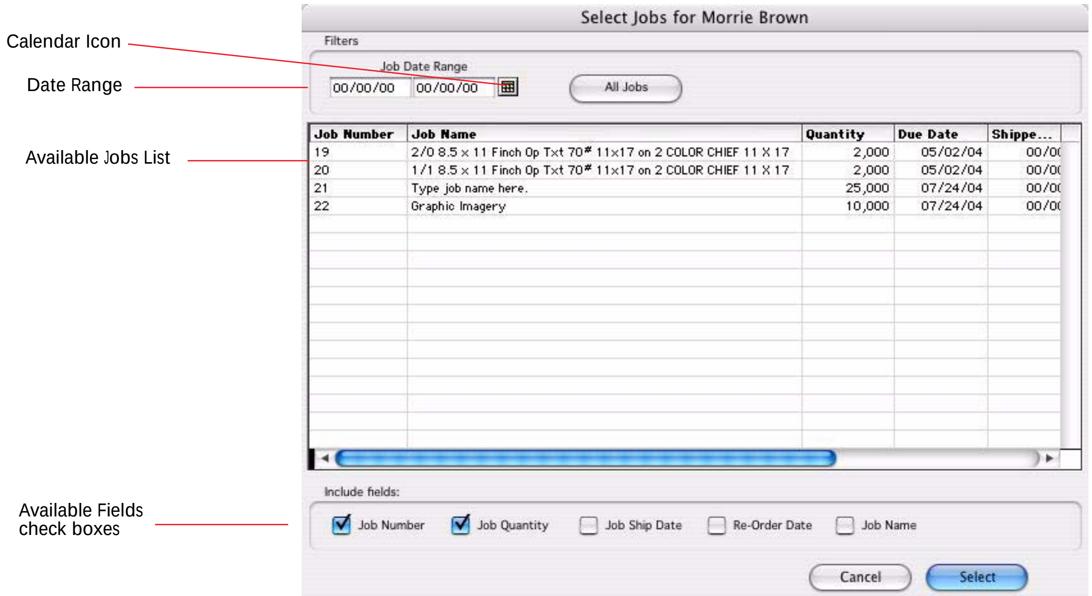
About the Screens

Merge Field Screen



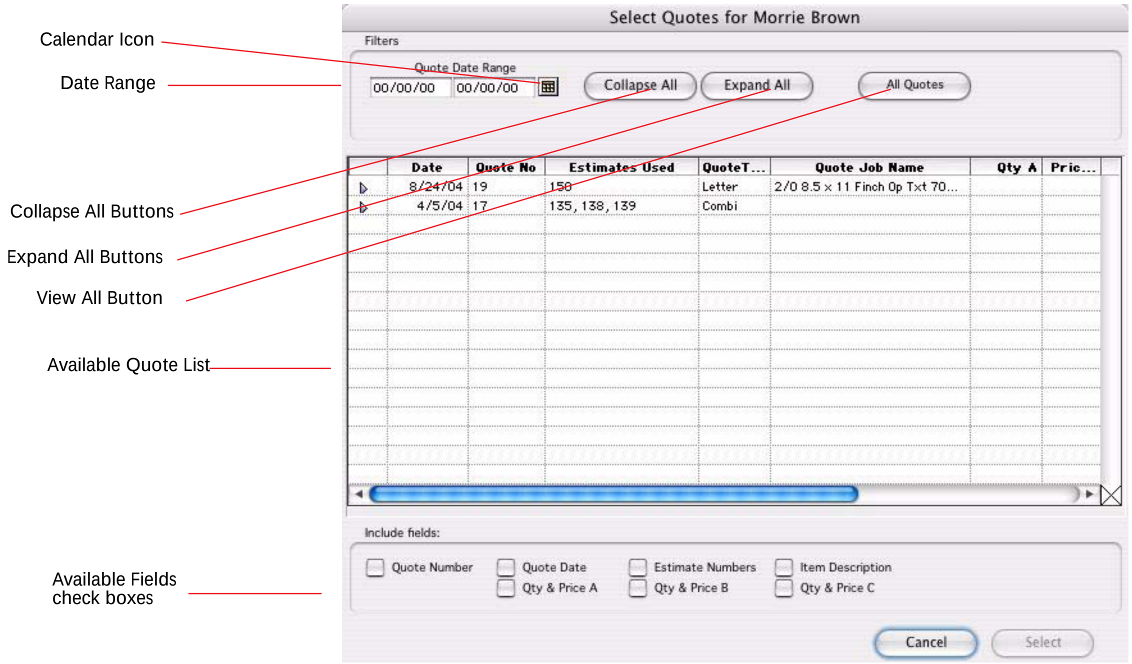
Field Name	Contents/Use
General drop-down menu	Click to choose general formatting items to add to the report
Contact drop-down menu	Click to choose information about the contact to add to the report.
Save button	Click to save the letter
Letter Body	Area used to enter the context of the letter
Next/Previous buttons	Click to move forward or backward in to the available contacts chosen for the letter.

Select Jobs Screen



Field Name	Contents/Use
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
All Jobs button	Click to view all available jobs for the contact
Select button	Click to add the selected items to the letter
Available Job List	List of available jobs for the contact based on the date range selected
Available Field check boxes	Check to add the field to the letter.

Select Quotes Screen



Field Name	Contents/Use
Calendar Icon	Click to display the date range calendar.
Date Range	Enter manually or click on the Calendar icon to select.
Collapse All button	Click to collapse the view
Expand All button	Click to expand the view
View All buttons	Click to view all available quotes
All Jobs button	Click to view all available jobs for the contact
Select button	Click to add the selected items to the letter
Available Quote List	List of available quotes for the contact based on the date range selected
Available Field check boxes	Check to add the field to the letter.

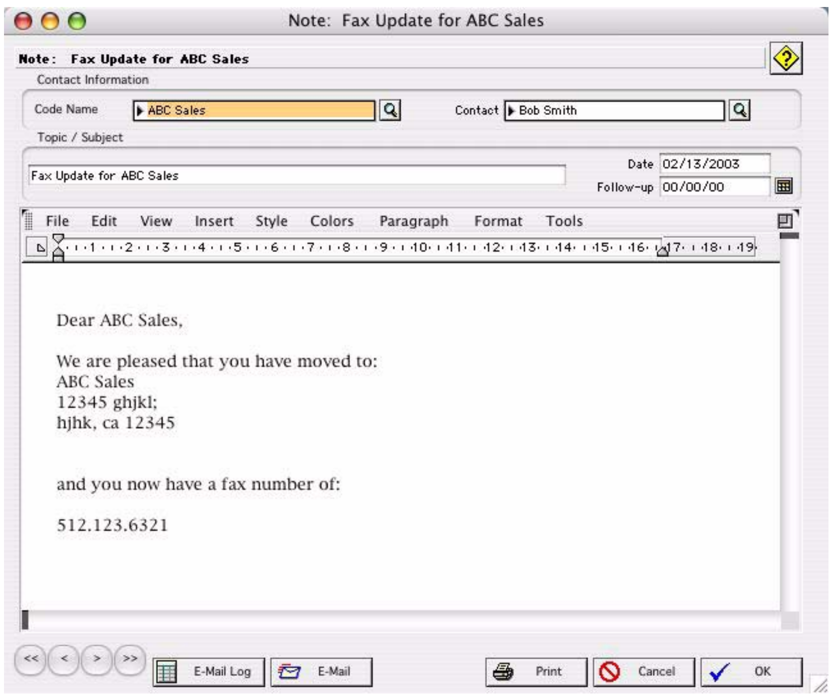
Chapter 112
Notes

OVERVIEW

PrintPoint integrates 4D Write (the built-in Word Processor included with the 4D database engine) which allows you to include documents such as letters, reports, memos, and notes and save them as Notes inside of PrintPoint.

4DWrite documents can use data from PrintPoint records. You can write reports and letters that automatically import or extract information from the database.

Example The following code entered into a Note looks up the current customer entered in to the Note Entry screen, extracts the appropriate information and then prints the letter below:



Dear Bob Smith,

We are pleased that you have moved to:

ABC Sales, Inc.
123 Broadway
New York, NY 10964

and confirm you new fax number as:
(212) 345-6789

STEP-BY-STEP

This section describes maintaining the Notes file:

- Adding a new Note
- Modifying a Note
- Deleting a Note

Adding a Note

1 Select **Navigator > Daily Tab > Notes**.

PrintPoint displays the Notes List.

2 Click the New button.

PrintPoint displays the New Notes screen.

3 Enter information into the fields for the Note Record: Code Name, Contact, Topic/Subject, Date.

4 Create your note/letter/document using standard word processing techniques and the Insert > 4D Expression... feature to include fields from the PrintPoint database.

The Mail Merge Chapter has an example of these steps and screen snapshots.

5 Click the OK button to Accept or click the Cancel button.

Modifying a Note

1 Select **Navigator > Daily Tab > Notes**.

PrintPoint displays the Notes List.

2 Select the Note you wish to modify.

3 Change the information you wish to modify.

4 Click the OK button to Accept or click the Cancel button.

Deleting a Note

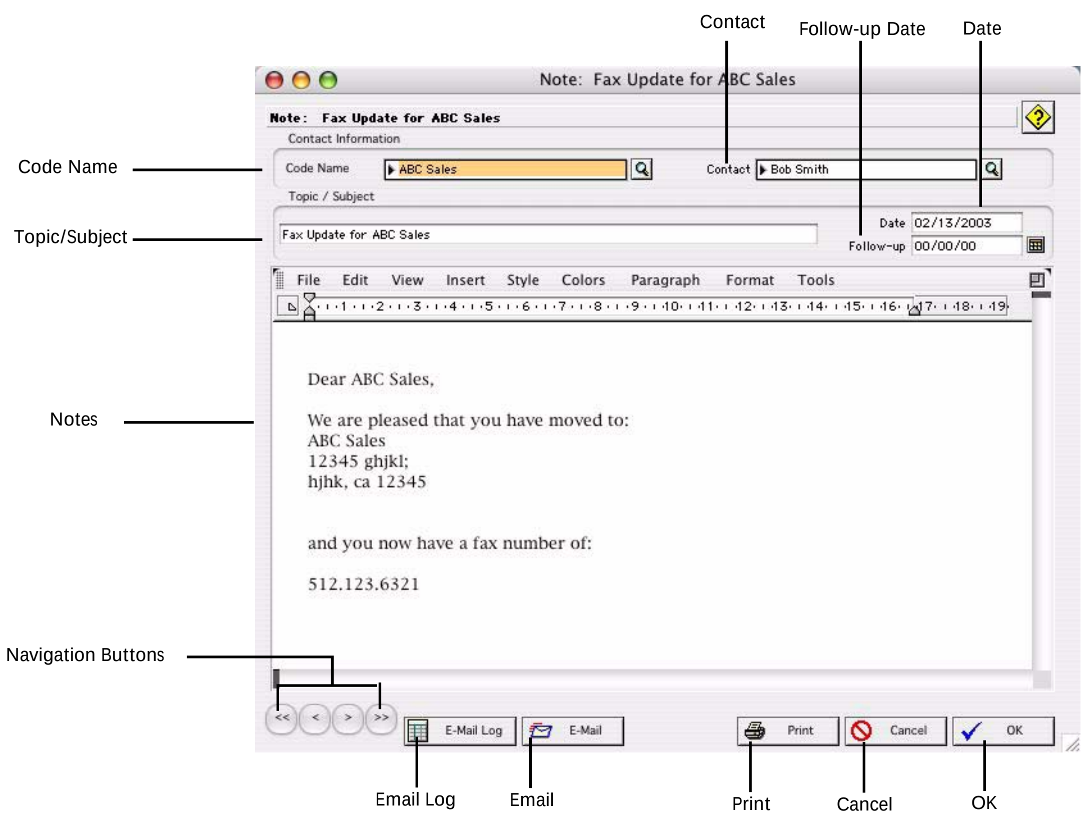
1 Select **Navigator > Daily Tab > Notes**.

PrintPoint displays the Notes List.

2 Select the item you wish to delete.

3 Click the Delete button and confirm.

ABOUT THE SCREENS



Field Name	Contents
Code Name	Enter the Customer Code if this note will go to a customer.
Contact	Enter the Contact at the selected Code Name if this note will go to a customer.
Topic/Subject	Choose a topic so you can view them easily in the Notes List View.
Date	The current date is automatically placed in this field. User can override the date.
	NOTE This will be entered on the calendar

Field Name	Contents
Follow-u[p Date	Enter the date to follow-up on this note NOTE This will be entered on the calendar
Note	Text area for any kind of note.
Navigation buttons	Use to move to Next, Previous, End or Beginning note.
Email Log button	Click to view the email log
Email buttons	Click to email the note
Print buttons	Click to print the note
Cancel buttons	Click to close the note with out saving changes
OK buttons	Click to close the note saving the changes

Appendix

Appendix A: Keyboard Shortcuts

Modifier Key	Action	Where to Use
Command/Control + A	Select All	All items in List Views, all text
Command/Control + B	Review Quotes / Booklets & Lots	List View Menu / WorkSheet or ShortForm
Command/Control + C	Copy text or pictures	Edit Menu
Command/Control + D	New Data Entry Record	Anywhere
Command/Control + E	New Estimate / Review Estimates	Anywhere / List View Menu
Command/Control + F	Find Est # / Find from lists	Search Menu/List Views
Command/Control + H	Select Highlighted Records	List Views
Command/Control + I	Open Ink & Run Dialog	WorkSheet/ShortForm
Command/Control + I	New Invoice	Anywhere
Command/Control + J	New Job / Review Jobs	Anywhere / List View Menu
Command/Control + K	Clone	WorkSheet/ShortForm
Command/Control + M	New ShortForm	Anywhere
Command/Control + N	New WorkSheet	Anywhere
Command/Control + Q	Quit	Anywhere
Command/Control + R	Revert	WorkSheet
Command/Control + S	Save	WorkSheet
Command/Control + V	Paste text or pictures	Edit Menu
Command/Control + X	Cut text or pictures	Edit Menu
Command/Control + Z	Undo Edit menu functions	Edit Menu
Command/Control + (.)	Cancel or Close completely	WorkSheet/List Views
Command/Control + (;)	New Shipping Record	Anywhere
Command/Control+ ([)	Review Invoices	Main Menu

NOTE

References to the Command Key on Macintosh computers equate to the Control Key on Windows computers.

NOTE

Some Macintosh users refer to the Command key as the Apple Key.

Appendix B: Configuring Your PrintPoint Network for Windows Servers

OVERVIEW

Under most circumstances, the network configuration for PrintPoint Server and Clients does not require any special configuration. If you are running TCP/IP or IPX/SPX on both the server and clients, then the client will automatically detect the presence of the server and make a connection. If this connection is not automatic, you will need to follow the instructions in this chapter.

CAUTION

In several instances, Windows 98 users have reported very slow performance running TCP/IP as the network protocol. If you are using a Windows 98 server we suggest using the IPX/SPX components.

In order for your server and client machines to communicate with each other, they need to have compatible network components installed. If you have a Windows 95 or Window NT server, we recommend using TCP/IP, unless you already have a Novell network running, in which case you can use IPX/SPX.

NOTE

If you are running a Novell network, keep this in mind: The PrintPoint Server application cannot reside on a Novell Server. It must reside on a Windows 95/98/NT Workstation/NT Server machine and can use IPX/SPX as its network protocol.

Installing Network Components

Installing TCP/IP networking

1 Go to Start Menu ➤ Settings ➤ Control Panel and double-click the Network control panel.

The Select Network Protocol control panel is displayed.

If you already see TCP/IP listed, proceed to the next section, “Setting a static IP address.”

2 Click Add...

3 Double-click Protocol.

4 Double-click Microsoft.

5 Select TCP/IP.

Setting a static IP address

In order for the computers on your network to communicate correctly, they each need to have a unique IP address. To set your computer's IP address:

1. In the Network control panel, click once on TCP/IP and click Properties...
2. Click the IP Address tab. and click the Specify an IP Address radio button.
3. Enter a unique IP address for each machine on your network. We recommend entering 100.100.100.1 for your server machine. and 100.100.100.2, 100.100.100.3, and so on, for each of your client machines.
4. On all machines, enter a Subnet Mask of 255.255.255.0.
5. Click OK to exit the TCP/IP settings and then OK to exit the Network control panel.

   You'll need to restart your computer for the changes to take effect.

Installing IPX/SPX networking

1. Go to Start Menu ➤ Settings ➤ Control Panel and double-click the Network control panel.

   The Select Network Protocol control panel is displayed.
2. If you already see IPX listed, your computer should already be set to communicate properly with the other machines on the network and you can proceed to "Configuring IPX."
3. Click Add...
4. Double-click Protocol.
5. Double-click Novell.
6. Select Novell IPX Protocol.

Configuring IPX

Set the different options depending on your hardware and network configurations. You may need the assistance of a network administrator to perform this task.

NOTE

If you do not have a Novell Netware server on your network and if you also plan to work with a Windows and Macintosh 4D Client/Server system, select Ethernet 802.3 as Frame Type on you server as well as all your client machines. Otherwise select Auto-detected.

Although 4D Server and 4D Client include broadcasting capabilities over the network using IPX/SPX, it is useful to know how to manually obtain the IPX address of your server machine. To do so, you need to find the Internal Network Number and the Adapter Card Number (also called Node Address) of your server machine.

Finding the Internal Network Number and the Node Address for IPX/SPX

To obtain the network number:

1 Click the Advanced button in the NWLink IPX/SPX Protocol Configuration window. *If you do not have a Novell Netware Server, it must be 00000000.*

To obtain the adapter card number:

1 Open the Windows NT Diagnostic utility program (its icon is located in the Administrative Tools program group at the Program Manager level).

The Windows NT Diagnostics window will be displayed.

2 Click the Network button.

The Network dialog box will be displayed.

3 In the Transports table, find the line corresponding to the NWLink service.

The Address column gives the hexadecimal adapter card number.

4 After you have these two numbers, concatenate them.

This gives the IPX address of your server machine. Using the example above, the address is 0000000000AA0030D26D.

Macintosh TCP/IP Installation

If you have Macintosh clients on a TCP/IP network you will need to properly configure TCP/IP networking for each machine.

The minimum requirements for running the 4D Client on a Macintosh are as follows:

- Mac OS 8.6 or later
- Open Transport 2.0.3 or higher
- PowerPC Interrupt Extension

To configure TCP/IP networking:

1 Select Apple Menu ➤ TCP/IP Control Panel control panel.

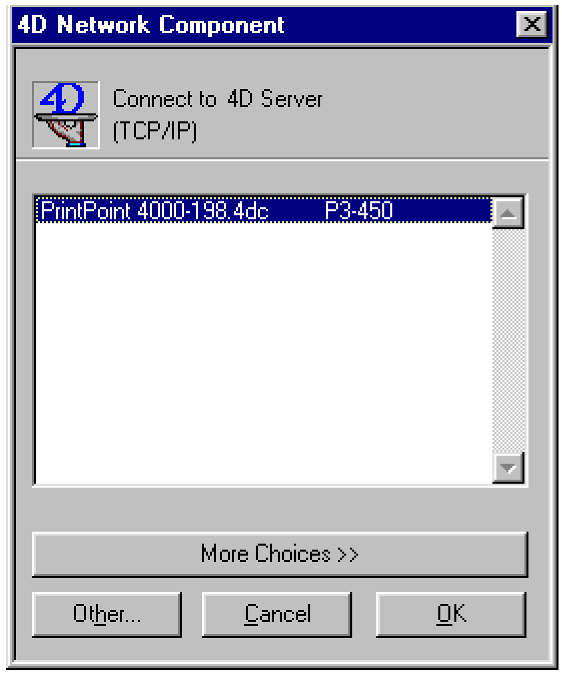
2 Enter the information.

Each machine should be set to connect via Ethernet with the Configure method set to Manually. Specify a unique static IP address to every computer on your network. These should be in the form 100.100.100.x, where *x* is a unique number for each machine on your network. The Subnet Mask should be 255.255.255.0 for all computers on the network.

Network Connections from Clients

When you launch a client, the Network Connection Dialog is displayed.

The default connection is usually TCP/IP. However you have other options.

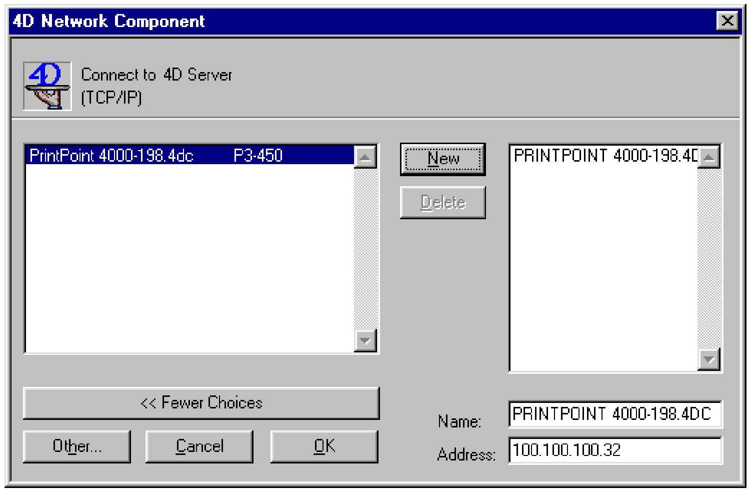


TCP/IP Client Connection

If the PrintPoint_45xx_cs.4dc file does not appear in the dialog and you have configured TCP/IP follow these steps to create the connection between the PrintPoint Clients and PrintPoint Server:

1. When the Network Connection Dialog is displayed, click the More Choices... button in the Connect to data Server dialog box.

   The TCP/IP Network Connection dialog box is displayed.



2 Enter “PrintPoint_45xx_cs.4dc” in the Name field.

3 Enter the IP address of the server machine into the Address field.

4 Click the New button.

5 Click the OK button.

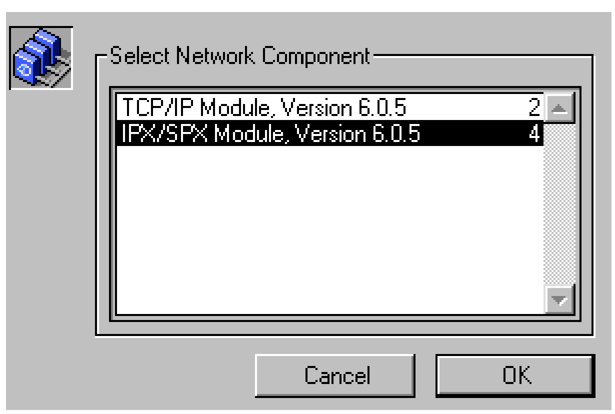
The next time you log onto PrintPoint the Network connection dialog on the previous page will be displayed with the proper server application to choose.

IPX/SPX Client Connection

If you need to connect to the server via IPX/SPX follow these steps:

1 At the Network Connection dialog click the Other... button.

2 Select IPX/SPX Module.



3 If you still don’t see the PrintPoint Server, then follow the steps above for setting the server in the TCP/IP instructions.

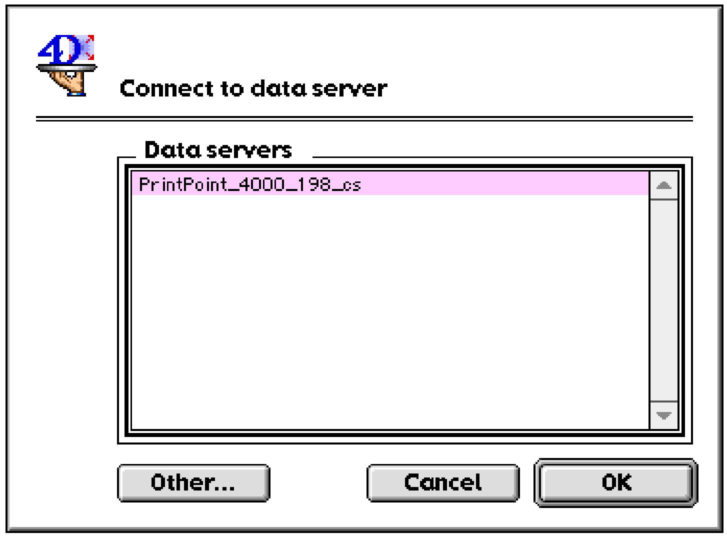
Appendix C: Configuring Your PrintPoint Network for Macintosh Servers

OVERVIEW

Under most circumstances, the network configuration for PrintPoint Server and Clients does not require and special configuration. By default Macintosh machines run ADSP (Apple Data Stream Protocol) or TCP/IP. The client will automatically detect the presence of the server and make a connection. If this connection is not automatic, you will need to follow the instructions in this chapter.

Network Connections from Clients

When you launch a client, the Network Connection Dialog is displayed. The ADSP (Apple Data Stream Protocol) is the default connection.



ADSP Client Connection

Apple Data Stream Protocol (ASDP) configuration is automatic in PrintPoint client/server installations. You will simply select the PrintPoint 4.5 Server from the list of data servers since PrintPoint is the only 4D database on your network.

Configuring TCP/IP

If you choose to connect to the PrintPoint database via TCP/IP you will need to configure TCP/IP on your network. The client and server machines must be configured for TCP/IP.

1. Select Apple Menu ➤ TCP/IP Control Panel control panel.
2. Enter the information.

Each machine should be set to connect via Ethernet with the Configure method set to Manually. Specify a unique static IP address to every computer on your network. These should be in the form 100.100.100.x, where *x* is a unique number for each machine on your network. The Subnet Mask should be 255.255.255.0 for all computers on the network.

NOTE

Your ethernet configurations may be different. Just as long as they are consistent throughout your network, you should not experience any difficulties.

The only difference between the each machine is the last digit of the IP Address. For the server we recommend making the last digit “1”. For each client assign another number such as “2”, “3”, “4”, etc.

TCP/IP Client Connection

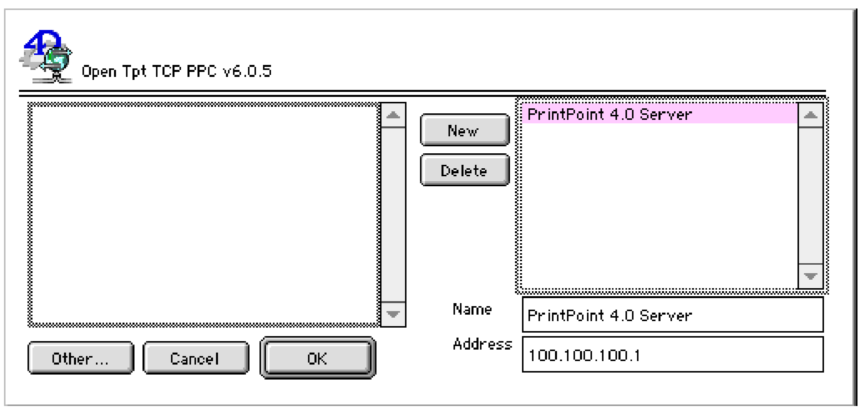
Once you have configured TCP/IP follow these steps to create the connection between the PrintPoint Clients and PrintPoint Server:

1 Double-click the PrintPoint Client.

2 When the ADSP Network Connection Dialog is displayed, click the Other... button in the Connect to data Server dialog box.

3 Choose Open Transport PPC from the Select a Network Component dialog box.

The TCP/IP Network Connection dialog box is displayed.



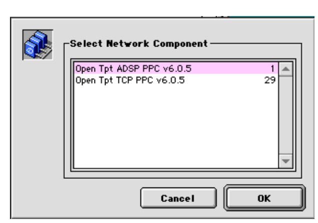
4 Enter “PrintPoint 4.5 Server” in the Name field.

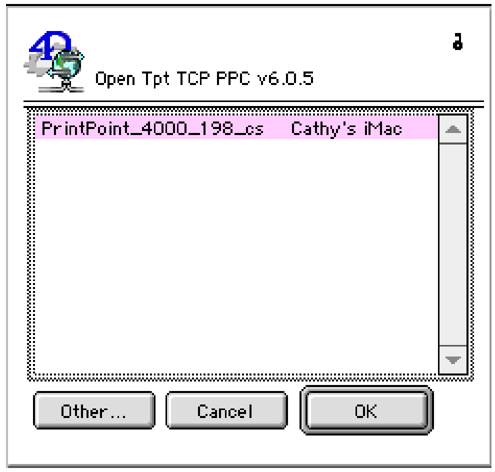
5 Enter the IP address of the server machine into the Address field.

6 Click the New button.

7 Click the OK button.

The next time you log onto PrintPoint the following dialog will be displayed:





If you need to modify the TCP/IP setup, click on the small “key” icon in the upper right corner of the dialog to return to the configuration dialog box.

Appendix D: 4D Tools

OVERVIEW

The primary function of 4D Tools is to help you repair a damaged PrintPoint database. Databases can become damaged when, for instance, there is a crash or power failure while PrintPoint is attempting to store information and is interrupted before the task is fully accomplished.

BEFORE YOU BEGIN

You should...	Where this information is found...
Backup your datafile	Your normal backup procedures

STEP-BY-STEP

This section includes the following topics:

- Accessing 4D Tools
- Using 4D Tools Check Structure Option
- Using the Recover by Tags Option
- Using 4D Tools Compact Option
- Relaunching PrintPoint with the Repaired Datafile

CAUTION

Before running 4D Tools make sure PrintPoint is not running. If you are running the program on a mult-user invironment, quit PrintPoint on all clients and quit the server application.

Accessing 4D Tools

1. Locate the PrintPoint 4.x Folder > Additional Tools > 4D Tools Folder.
2. Double-click on the 4D Tools application icon.

   4D Tools displays the Open dialog.
3. Select the PrintPoint application and click Open.

   The name may vary depending on computer platform and whether you are running single user or client/server:

Platform	Name
Windows Single User	PrintPoint_4.x.4dc
Windows Client/Server	PrintPoint_4.x_cs.4dc
Macintosh Single User	PrintPoint 4.x
Manitoxh Client/Server	PrintPoint_4.x_cs

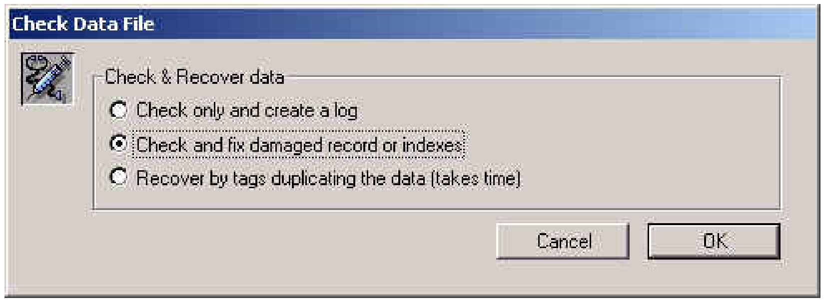
NOTE

If the dialog box for selecting your data file did not appear, start the process again by quitting 4D Tools and make sure you hold down your ALT (Windows) or OPTION (Mac) key in step 3 above when you are selecting the application. This will force the “Open Data File” dialog to appear.

Using 4D Tools Check Data Option

1 Click on the Check Data... button.

4D Tools displays the Check Data File dialog box.



2 Select Check and fix damaged record or indexes.

3 Click the OK button.

4D will begin the process.

4 After the activity is done, quit 4D Tools.

NOTE

If necissary, 4D will begin a Recovery by Tags operation. See the section on Recover by Tags.

Using 4D Tools Recover by Tags Option

1 Click on the Check Data... button.

4D Tools displays the Check Data File dialog box. Select Recover by Tags.

Replace the default name that 4D Tools enters with one that you will recognize as your “repaired file.” (Example: PrintPoint Data Recover).

2 Click the Save button.

4D will begin the operation

3 After the activity is done, quit 4D Tools.

4 Go to the section “Relaunching PrintPoint with the Repaired Datafile.”

Using 4D Tools Compact Option

After you have made changes to your data file you should compact the file. For instance, if you have deleted old estimates or job tickets to free up space in the data file, you would need to compact the data file after deleting the records.

1 Click the Compact... button.

4D displays the Create a data file... dialog. This will save the datafile under a new name.

2 Replace the default name that 4D Tools enters with one that you will recognize as your “repaired file.” (Example: PrintPoint Data Compact)

3 Click Save.

4 After the activity is done, quit 4D Tools.

TIP

You will notice that a Journal File has been created. You can open this file with NotePad or SimpleText. If you have any questions about the contents, please print out a copy and call PrintPoint Support. You may trash this file when you have read it.

Allow the process to complete and go to the section “Relaunching PrintPoint with the Repaired Datafile.”

Relaunching PrintPoint with the Repaired DataFile

1 Double click the PrintPoint application while holding down your OPTION (Macintosh) or ALT (Windows) key.

TIP

Keep the key down until the standard Open dialog has been displayed.

2 Select the newly repaired data file.

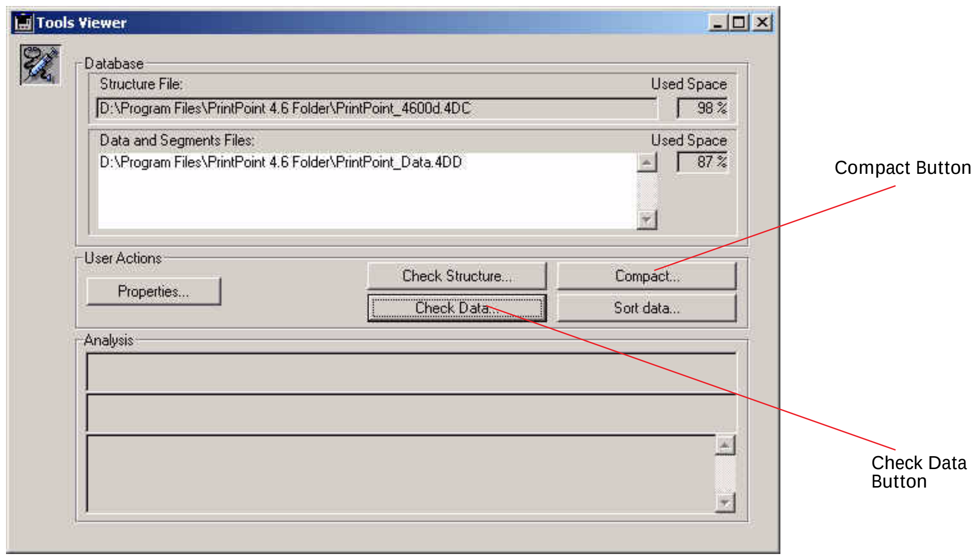
3 Click Open Datafile.

NOTE

From this point forward, PrintPoint will automatically open the correct data file.

4 If you are satisfied that you now have a fully repaired data file, you should throw out the old damaged data file.

About The Screens



Info/Buttons	Contents/Usage
Check Data(button)	Click to check data.
Compact (button)	Click to compact data.

CAUTION

All other buttons are not to be used!

Appendix E: Registering PrintPoint as a Service

OVERVIEW

The PrintPoint (4D) Server can be launched as a Window Service.

A Windows Service is an executable object that is installed in a registry database maintained by the service control manager. The services database includes information that determines whether each installed service is started on demand or is started automatically when the system starts. The database can also contains logon and security information for a service so that a service can run even though no user is logged on. It also enables system administrators to customize security requirements for each service and thereby control access to the service.

CAUTION

No more than one instance of a service can be running at a time.

CAUTION

Warning: The full pathname for your database structure file cannot exceed 250 characters and should not include any spaces. If you have done a standard install, your server folder will be inside the “Program Files” folder, which by default includes spaces in the name. Move the PrintPoint_5_Server_Folder to another location so that you will not have spaces in the path.

CAUTION

If you plan to register PrintPoint as a service, you must have a default “local” printer. It CANNOT be a network printer because Windows Services load before network printers are checked and the PrintPoint Server will not see the network printer at load.

To work around this problem we suggest that you create a “virtual” local printer by adding any common printer using the Add Printer Wizard. You do NOT need to actually have the printer connected to the computer. Just adding the drivers will be sufficient.

When a the PrintPoint (4D) Server database is registered as a service, it can be launched automatically at system startup and is not shut down when the user terminates the current Windows Log session.

To register the PrintPoint (4D) Server database as a Windows Service

1. Launch the PrintPoint (4D) Server.
2. Select File Menu > Select Register as Service.

NOTE

Note: Registering the PrintPoint (4D) Server as a service is only available on Windows Server operating software. The three menus are disabled on other Windows versions.

At this point, you can open the Windows Services Control Panel and see an entry for your database.

3. Double-click on the entry to display the Service window in which you set the properties for the service.
4. Using this window, you can request that the PrintPoint (4D) Server's service to be automatically started at system startup and provide login information.

   You can also ask for 4D Server to be hidden (so it doesn't interact with the Desktop).

To unregister your database

1. Launch the PrintPoint (4D) Server.
2. Select File Menu > Unregister Current Database.

NOTE

Note: Registering the PrintPoint (4D) Server as a service is only available on Windows Server operating software. The three menus are disabled on other Windows versions.

You cannot change the service registration status of the PrintPoint (4D) Server from within the PrintPoint (4D) Server if the application has been launched as a service when Windows was started. In this case, the three menu items are disabled.

Starting and Stopping the Service Automatically for Backup

Since your PrintPoint data files cannot be backed up when the PrintPoint Server Application is running, you may need to stop the service prior to backup.,

1 You would first need to have 4D Server running as a Windows Service.

2 Make up 2 batch files, one for stopping the service, and one for starting the service.

   The commands are:

   ```
   net stop "4DServer: PrintPoint_50xx_cs.4dc"
   net start "4DServer: PrintPoint_50xx_cs.4dc"
   ```

   where xx is the current version of you PrintPoint application.

3 Finally, you use the Windows scheduler to run these batch files at the appropriate time, using the "AT" command from a Windows command prompt window.

   For example:

   ```
   AT 18:00 /every:M,T,W,Th,F "C:\BAT\SHUTDOWN.BAT"
   ```

   would run the batch file to shut down your 4D Server at 6:00pm every weekday night.

You should generally use a user account with Administrator level privileges. This would allow it (the App) to access remote volumes, printers, etc. that are network resources by giving it the ability to authenticate from the service.

Appendix G:

Password Groups

This chapter provides technical information about each group that is available in the Users & Passwords dialog box. This section is provided for the system administrator to help you decide how to assign each user's access privileges.

Group	Access
AAs	• Reviewing AAs List • Modifying AAs
Accounting Menu	• Exporting POs (not implemented yet) • Sales Commission Review • Adding new Customers from Accounting menu • Listing Customers from Accounting menu, with accounting information • Edit Sales Categories • Terms...
Adjustments	• Enables user to change: a. Exported Checkbox on Invoice b. Dates and flags on Electronic Job Ticket c. Invoice Corrections d. Customers on Job List View, Estimate List View, Quotes List View e. Adjust Estimate Numbers, Job Number s in Estimate and Job tables f. Clear Estimate Notes, History g. Exported Status of Customers h. Sales Rep Totals i. Exported Status of Invoices j. Clear Job Tracking Log k. Data Collection Records Adjustments
Admin	• Unrestricted access to all Functions
Bindery Estimate	Reserved Status
Bug Reporter	• Reporting Bugs from Extras menu
Change Sales Reps	• Access to changing Sales Rep Codes on Estimates, Jobs, Invoices and the Customer Record.
Chargeback Reporting	• Create Chargeback reports
ChartMaker	Reserved Status
Check Website For Updates	• Extras menu - Check Printpoint website for updates
Cloning	•Cloning from List screens (On-the-fly Cloning of Paper always allowed)

Group	Access
CombiQuote	•New combi-quote from List screen •New Combi-quote from New Menu
Copier Estimate	•New Copier Estimate from List screen •New Copier Estimate from New Menu
Create Estimate Templates	• Create new Estimate templates from Estimate WorkSheet, Short Form, Copier Estimate, Large Format Estimate
Create Price Lists	• Create new Price Lists from Estimate WorkSheet, Short Form, Copier Estimate, Large Format Estimate
Custom Fields Editor	• Modify Custom Fields, Customers and Tabs
Data Collection	• Job Costing Menu - Data Collection • Navigator - Data Collection
Delete Records	• Record deletion from Listing screens
Digital Press Estimate	Reserved Status
Edit Sales Categories	• Accounting Menu - Edit sales categories
Employees	• Job Costing Menu - Add Employees • Job Costing Menu - Review Employees
Export	Reserved Status
Export To Accounting Packages	• Invoice Listing export popup Export To MYOB
Import	Reserved Status
Invoices	• Access to Invoicing Listing Screen
Job Cost Express Setup	• Job Cost Menu - Job Cost Express Setup
Job Cost Reporting	• Job Cost Menu - Reports
Job Done Status	• Job List View, Status button Assign Job Done and Assign Job Not Done • Electronic Job Ticket - Job Done
Labels	Reserved Status
Language Editor	• File Menu - Language Editor
Large Format Estimate	• New Menu - Large Format Estimate • New button - Estimate listing screen
LetterQuote	• Estimate sheets - New LetterQuote (if barred, no item in popup menu)
List Configuration Editor	• Listing Screens - Configuration editor • File Menu - List Editor
List Editor	• File Menu - List Editor
Materials	• Job Costing Menu - New Material • Job Costing Menu - Review Material
NCR Uncollated Estimate	Reserved Status

Group	Access
New AAs	• New menu - AAs • Navigator - AAs- New Button
New Copier	• New menu - Copier device • Navigator - Copier List - New Button
New Customer	• New menu - Customers • Navigator - Copier List - New Button
New Graphic	• New menu - Graphic • Navigator - Graphic - New Button
New Ink	• New menu - Ink • Navigator - Ink - New Button
New Item Description	• New menu - Item Description • Navigator - Item Description - New Button
New Layout	• New menu - Layout • Navigator - Layout - New Button
New Matrix	• New or List View Menu - Copier - New/ Select button • New or List View Menu - Large Format Printer - New/Select button
New Media	• New menu - Large Format media
New Menu	Reserved Status
New Notes	• New menu - Notes • Navigator - Notes - New Button
New Paper	• New menu - Papers • Navigator - Papers - New Button
New Post-Press	• New menu - Post-Press Items • Navigator - Post-Press - New Button
New Pre-Press Item	• New menu - Pre-Press Items • Navigator - Pre-Press - New Button
New SheetFed Press	• New menu - SheetFed Press • Navigator - SheetFed Press - New Button
New Supplier	• New menu - Suppliers • Navigator - Suppliers - New Button
New Large Format Device	• New menu - Large Format Printer
Number Out	• Extras Menu - Number out function

Group	Access
On-The-Fly	• Create entries for related tables during estimate creation and other operations, without interrupting the primary task. User must restart Printpoint to activate this function. Depending on other password settings, the user may still be able to create new entries manually where On-The-Fly is prohibited.
Outside Services	Reserved Status
Passwords	• File Menu - Users & Passwords
Phonebook	• Extras Menu - Phonebook
Preferences	• File Menu - Preferences
Profit & Quantity Review	• All Estimating forms- Profit & Quantity Review
Purchase Orders	Reserved Status
Quick Reports	• Report Manager - Modify or Create Quick Reports
Rebuild Lists	• File Menu - Rebuild Lists
Register	• File Menu - Register... (Registration of PrintPoint)
Report Manager	• Listing Screens - Print Button - Report Manager
Review Calculated Ink Table	• List View Menu - Ink Table
Review Copiers	• List View Menu - Copier • Navigator - Copier
Review Customers	• List View Menu - Customer • Navigator - Customer
Review Est from Job List	• Review Esitmate from job Listing Screen
Review Estimate Templates	• Navigator - Review Estimate Templates
Review Estimates	• List View Menu - Estimates • Navigator - Estimates (if user does not have access to Review Estimates but does have access to review from Job List, access is permitted that way)
Review Graphic Library	• List View Menu - Graphic Library • Navigator - Graphic Library
Review Ink	• List View Menu - Ink List • Navigator - Ink
Review Item Descriptions	• List View Menu - Item Descriptions
Review Jobs	• List View Menu - Jobs • Navigator - Jobs

Group	Access
Review Layout Library	• List View Menu - Layout Library • Navigator - Layout Library (if user does not have access to Review Layout Library but can edit and add to Layout Library from the Booklet & Lots and the Drawing Dialogs)
Review Matricies	• Adding of matrices for Copier and large Format devices from Copier and Large Format Device Detail and List Views • Editing of matrices for Copier and large Format devices from Copier and Large Format Device Detail and List Views
List View Menu	Reserved Status
Review Notes	• List View Menu - Notes • Navigator - Notes
Review Paper	• List View Menu - Notes • Navigator - Notes • Review Paper lookup from WorkSheet, Short Form, Copier Estimate and Large Format Estimate Media
Review Post-Press	• List View Menu - Post-Press • Navigator - Post-Press • Post Press Database button, Clone Button and New Button on Post-Press Selector Dialogs
Review Pre-Press Items	• List View Menu - Pre-Press Items • Navigator - Pre-Press • Estimate WorkSheet Pre-Press lookup • ShortForm Pre-Press lookup • Copier Pre-Press lookup • Large Format Pre-Press lookup
Review Pre-Press Table	• List View Menu - Pre-Press table • Navigator - Pre-Press table
Review Price Lists	• List View Menu - Price Lists • Navigator - Price Lists
Review Quotes	• List View Menu - Quotes • Navigator - Quotes
Review SheetFed Presses	• List View Menu - SheetFed Press • Navigator - Press • Estimate WorkSheet Review Press lookup • Shortform Review Press lookup

Group	Access
Review Suppliers	• List View Menu - Suppliers • Navigator - Suppliers (Suppliers can be reviewed and edited from within Paper or Post Press, New Menu - Paper or New Menu - Post-press)
Review Large Format Devices	• List View Menu - Large Format Printer • Navigator - Large Format
Review Large Format Media	• List View Menu - Large Format media • Large Format Estimate - Media button
Sales Categories Reports	•Accounting menu - Sales Categories Reports
Sales Reps	• Accounting menu - New Sales Rep • Accounting menu - Review Sales Rep
Setup Wizard	• File menu - Setup Wizard
Shipping	• Extras menu - Shipping • Navigator - Shipping
ShortForm	•New menu - ShortForm • Estimate List - Review Estimate Button (Note: If user does not have permission to open as ShortForm he can still double click the estimate listing screen and open in ShortForm)
Speciality Estimate	Reserved Status
SuperReport	•Report Manager - Modify or Create Super reports
Switcher	Reserved Status
TechSupport	Reserved Status
Tracking	• Navigator - Tracking / AAs (If user has permission for AAs but not Tracking, tracking will be available)
User Settings	• File Menu - User Settings
Web Press Estimate	Reserved Status

Group	Access
WorkSheet	• New Menu - WorkSheet • Estimate List - Review Button - Open as WorkSheet (Note: if User has permission to open in ShortForm but not WorkSheet then the estimate opens in ShortForm) (Note if the user does not have permission to Open as WorkSheet or create new WorkSheet, they can still open as a worksheet by double clicking in list)
X-Ray ShortForm	• ShortForm estimate - X-Ray button

Appendix H:

Customizer Plus

OVERVIEW

Customizer Plus is one of the several database tools supplied by 4D, Inc., manufacturer of the database engine behind PrintPoint.

Customizer Plus allows you to customize PrintPoint Single User, PrintPoint Client and PrintPoint Server to optimize the use of PrintPoint, in relation to your software and hardware environment.

CAUTION

Although there are many customizations that can be made, only a few apply to PrintPoint. Unless otherwise directed by PrintPoint Tech Support, DO NOT make any changes other than those below.

BEFORE YOU BEGIN

You should...	Where this information is found...
Quit PrintPoint.	You cannot customize any components of PrintPoint while it is running. TIP It's like trying to change your oil in your car while you are driving on the highway :-)
Contact PrintPoint Technical Support before attempting to use Customizer Plus.	Locate the tech support numbers for you territory.

STEP-BY-STEP

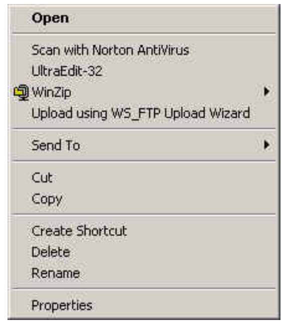
This section discusses the following settings in Customizer Plus:

- Windows Single User
  - Running Customizer Plus
  - Editing the Preferences
  - Editing the Properties
- Windows Server
  - Running Customizer Plus
  - Editing the Preferences
  - Editing the Properties
- Windows Client
  - Running Customizer Plus
  - Editing the Preferences
  - Editing the Properties
- Macintosh Single User
  - Running Customizer Plus
  - Editing the Properties
- Macintosh Server
  - Running Customizer Plus
  - Editing the Properties

Windows Single User

Running Customizer Plus

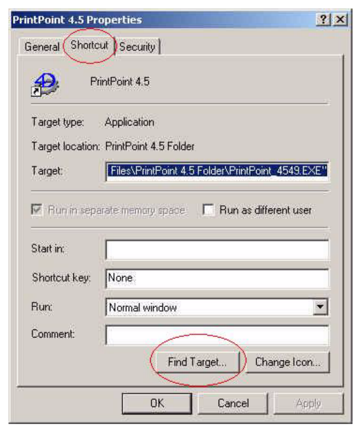
1 From your desktop right click on the PrintPoint 4.x shortcut icon and select Properties.



The Properties dialog is displayed.

2 From the Shortcut tab click Find Target

.

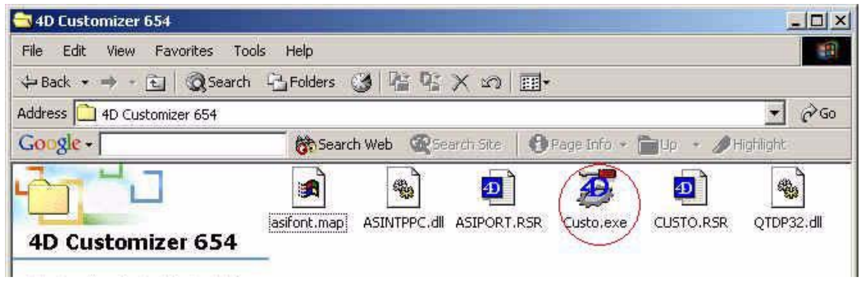


The PrintPoint 4.x Folder is displayed.

3 Open the Additional Tools folder.

4 Open the 4D Customizer 654 folder.

5 Double-click the Custo.exe icon.



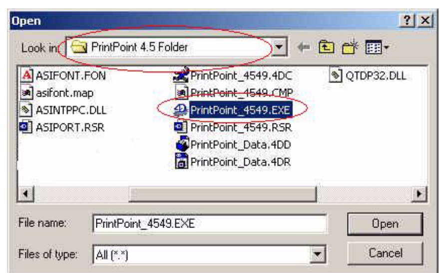
4D Customizer Plus is opened with a blank screen and a menubar at the top.

Editing Preferences

1 Select File Menu > Open.

The Open File dialog is displayed

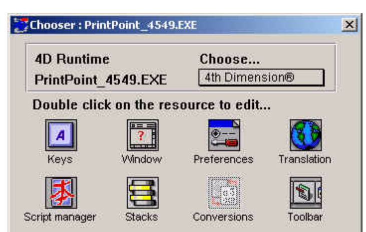
.



2 Navigate to the PrintPoint 4.x Folder and select PrintPoint_4.x.EXE

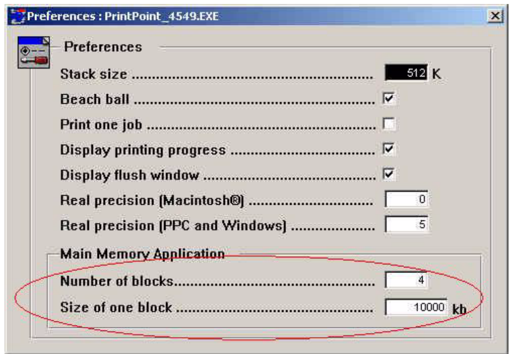
3 Click the Open button.

The Chooser dialog is displayed.



4 Double-click the Preferences button.

5 In the Main Memory Application section make the appropriate changes to the Number of blocks and the Size of one block.



CAUTION

Do NOT make any other changes in the Preference dialog.

6 When finished click the “X” in the upper right hand corner of the dialog to close the window.

7 At the Chooser dialog click the “X” to close the window.

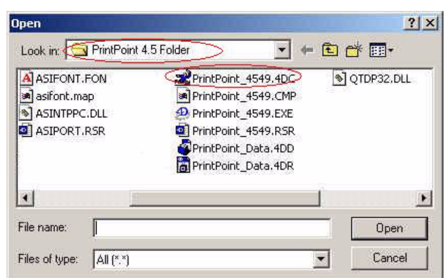
The Save prompt is displayed.

8 Click the Save button.

Editing Properties

1 Select File Menu > Open.

The Open File dialog is displayed.

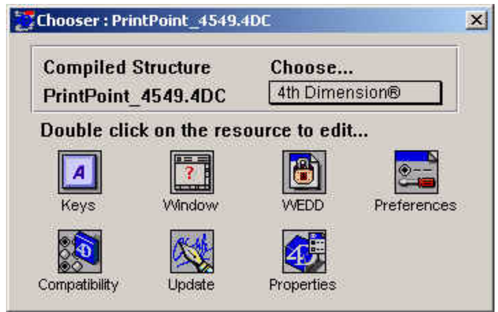


2 Navigate to the PrintPoint 4.x Folder select PrintPoint_4.xxx.4DC.

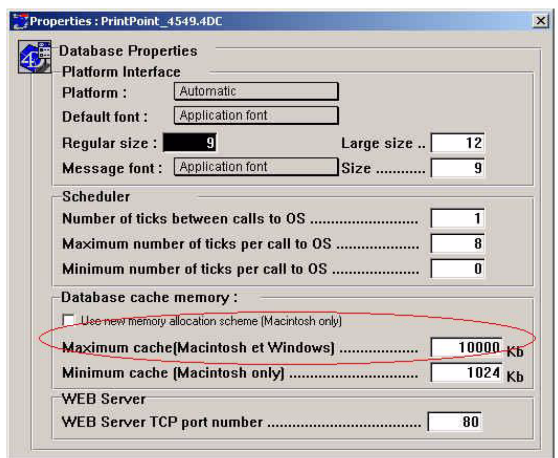
3 Click the Open button.

The Chooser dialog is displayed.

4 Double-click the Properties button.



5 Make the appropriate changes to the Maximum cache [Macintosh et Windows].



CAUTION

Do NOT make changes to any other area of the Properties dialog.

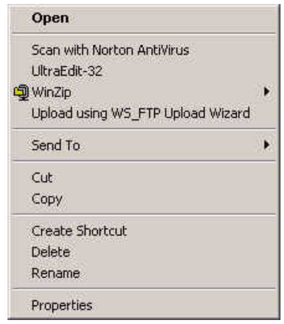
6 When finished select File Menu > Quit.

7 Click Save to save changes.

Windows Server

Running Customizer Plus

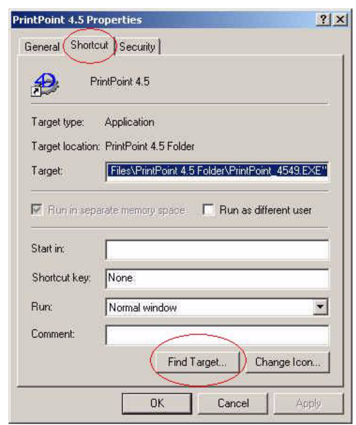
1 From your desktop right click on the PrintPoint_4.x_Server shortcut icon and select Properties.



The Properties dialog is displayed.

2 From the Shortcut tab click Find Target

.

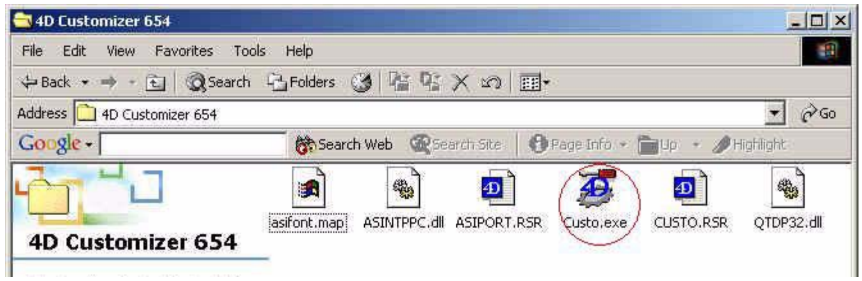


The PrintPoint 4.x_Sever_Folder is displayed.

3 Open the Additional Tools folder.

4 Open the 4D Customizer 654 folder.

5 Double-click the Custo.exe icon.



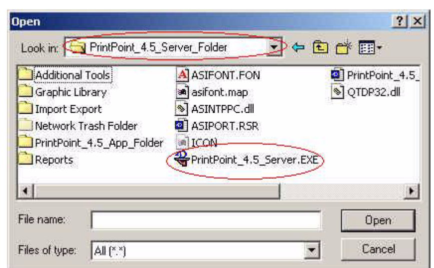
4D Customizer Plus is opened with a blank screen and a menubar at the top.

Editing the Preferences

1 Select File Menu > Open.

The Open File dialog is displayed

.



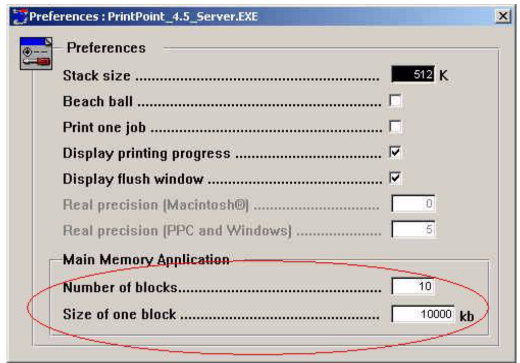
2 Navigate to the PrintPoint_4.x_Server_Folder and select PrintPoint_4.x.EXE

3 Click the Open button.

The Chooser dialog is displayed.

4 Double-click the Preferences button.

5 In the Main Memory Application section make the appropriate changes to the Number of blocks and the Size of one block.



CAUTION

Do NOT make any other changes in the Preference dialog.

6 When finished click the “X” in the upper right hand corner of the dialog to close the window.

7 At the Chooser dialog click the “X” to close the window.

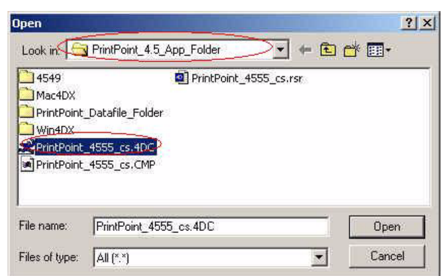
The Save prompt is displayed.

8 Click the Save button.

Editing the Properties

1 Select File Menu > Open.

The Open File dialog is displayed.

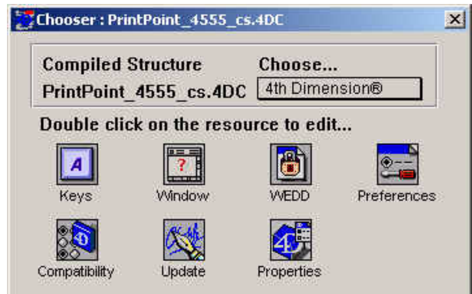


2 Navigate to the PrintPoint 4.x Folder > PrintPoint_4.x_App_Folder and select PrintPoint_4.x_cs.4DC.

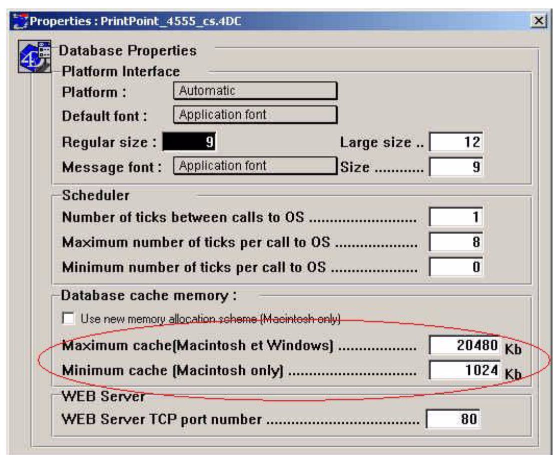
3 Click the Open button.

The Chooser dialog is displayed.

4 Double-click the Properties button.



5 Make the appropriate changes to the Maximum cache [Macintosh et Windows].



CAUTION

Do NOT make changes to any other area of the Properties dialog.

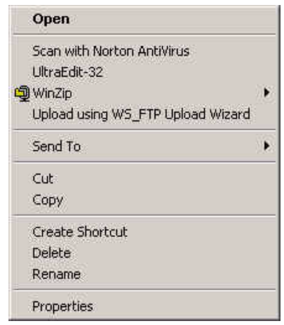
6 When finished select File Menu > Quit.

7 Click Save to save changes.

Windows Client

Running Customizer Plus

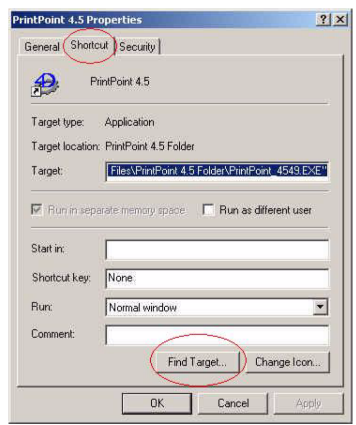
1 From your desktop right click on the PrintPoint 4.x Client shortcut icon and select Properties.



The Properties dialog is displayed.

2 From the Shortcut tab click Find Target

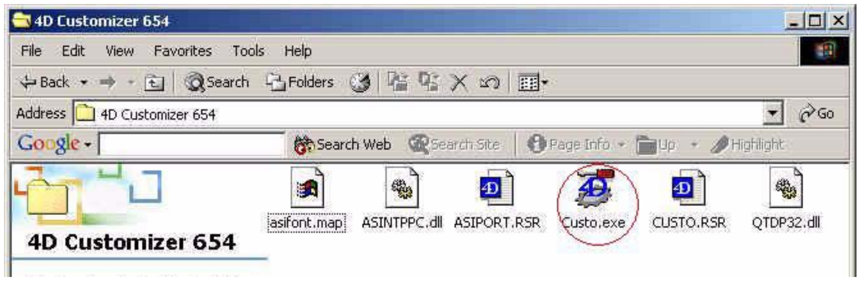
.



The PrintPoint_4.x_Client_Folder is displayed.

3 Open the 4D Customizer 654 folder.

4 Double-click the Custo.exe icon.



4D Customizer Plus is opened with a blank screen and a menubar at the top.

Editing the Preferences

1 Select File Menu > Open.

The Open File dialog is displayed

.

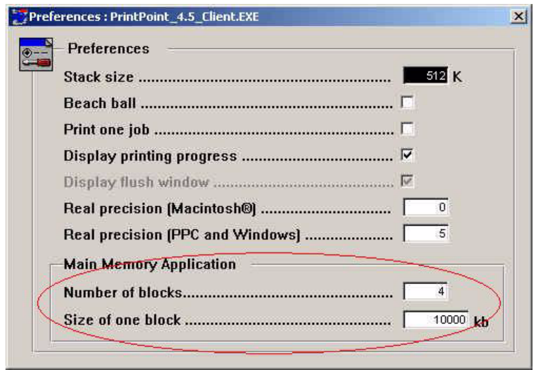
2 Navigate to the PrintPoint_4.x_Client_Folder and select PrintPoint_4.x_Client.EXE

3 Click the Open button.

The Chooser dialog is displayed.

4 Double-click the Preferences button.

5 In the Main Memory Application section make the appropriate changes to the Number of blocks and the Size of one block.



CAUTION

Do NOT make any other changes in the Preference dialog.

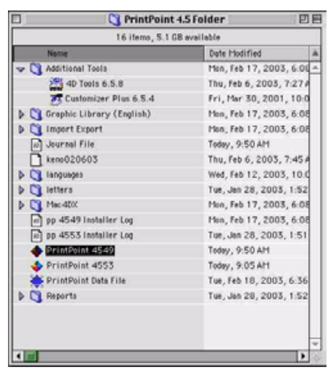
6 When finished select File Menu > Quit.

7 Click Save to save changes.

Macintosh Single User

Running Customizer Plus

1 From your desktop highlight the PrintPoint 4.x shortcut icon and press your “Cmd+R” keys to display the PrintPoint 4.x folder.



2 Open the Additional Tools folder.

3 Open the 4D Customizer 654 folder.

4 Double-click the Customizer Plus 6.5.4 icon.

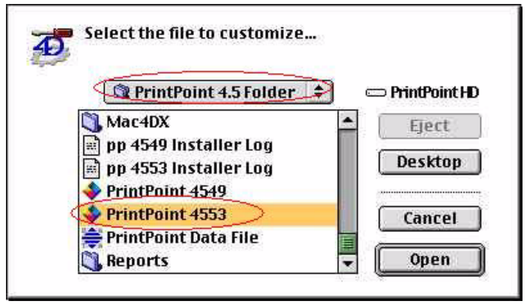
4D Customizer Plus is opened with a blank screen and a menubar at the top

Editing the Properties

1 Select File Menu > Open.

The Open File dialog is displayed

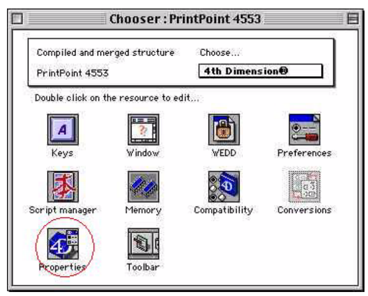
.



2 Navigate to the PrintPoint 4.x Folder and select PrintPoint 4.x.

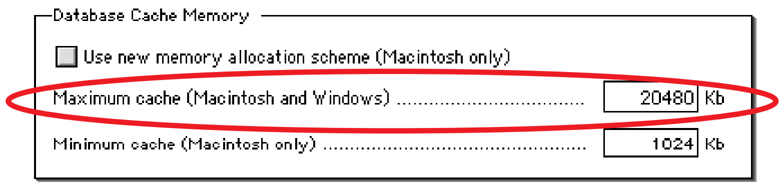
3 Click the Open button.

The Chooser dialog is displayed.



4 Double-click the Properties button.

5 In the Database Cache Memory section make the appropriate changes to the Maximum cache.



CAUTION

Do NOT make any other changes in the Properties dialog.

6 When finished select File Menu > Quit.

7 Click Save to save changes.

Macintosh Server

Running Customizer Plus

1 From your desktop highlight the PrintPoint 4.x shortcut icon and press your “Cmd+R” keys to display the PrintPoint 4.x folder.

2 Open the Additional Tools folder.

3 Open the 4D Customizer 654 folder.

4 Double-click the Customizer Plus 6.5.4 icon.

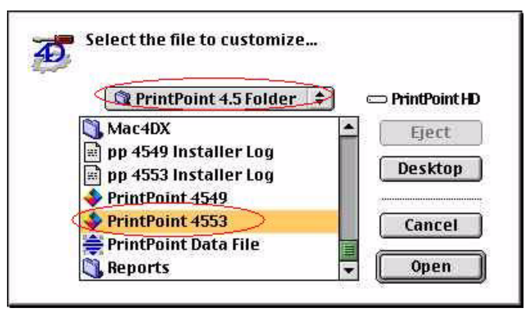
5 4D Customizer Plus is opened with a blank screen and a menubar at the top.

Editing the Properties

1 Select File Menu > Open.

The Open File dialog is displayed

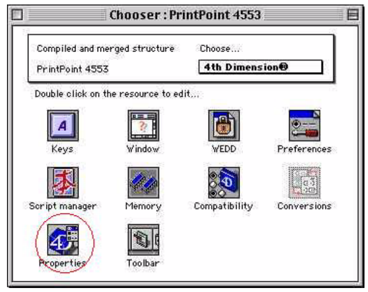
.



2 Navigate to the PrintPoint 4.x Folder and select PrintPoint 4.x.

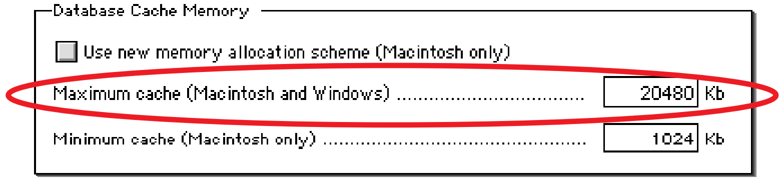
3 Click the Open button.

The Chooser dialog is displayed.



4 Double-click the Properties button.

5 In the Database Cache Memory section make the appropriate changes to the Maximum cache.



CAUTION

Do NOT make any other changes in the Properties dialog.

6 When finished select File Menu > Quit.

7 Click Save to save changes.

Appendix I:

Page Setup for Letters

OVERVIEW

PrintPoint's Quote, Confirmation and Approval Letters use scripts to build custom letters for each users and printers. This section describes how to make sure that the Page Setup is correct for each user and printer.

STEP-BY-STEP

Most of the activities performed in this section will be from the small menubar of PrintPoint's built-in word processor.

On Windows Computers

1 From the PrintPoint's New Menu select LetterQuote (Ctrl-4).

2 In the small menubar built into the word processor, select File Menu -> Open ...

3 In the file browser, navigate your way to the Letters Folder inside your PrintPoint Folder and select either:

- Letter_PageSetup_US.4W7 for US paper sizes
  or
- Letter_PageSetup_ANZ.4W7 for users who use A4 size paper

4 Click Open.

5 Select File Menu -> Page Setup...

6 In the Page Setup dialog choose the your printer.

7 In the Page Setup dialog, select the paper size.

8 Click OK

9 Select File Menu -> Save

10 Click the Cancel button to close the Quote Letter screen.

NOTE

In Client Server mode each client needs to perform this operation as each client can be using a different printer.

On Macintosh Computers

1 From the PrintPoint's New Menu select LetterQuote (Cmd-4).

2 In the small menubar built into the word processor, select File Menu -> Open ...

3 In the file browser, navigate your way to the Letters Folder inside your PrintPoint Folder and select either:

- Letter_PageSetup_US.ltr for US paper sizes
  or
- Letter_PageSetup_ANZ.ltr for users who use A4 size paper

4. Click Open.
5. Select File Menu -> Page Setup...
6. In the Page Setup dialog choose the your printer.
7. In the Page Setup dialog, select the paper size.
8. Click OK
9. Select File Menu -> Save
10. Click the Cancel button to close the Quote Letter screen.

NOTE

In Client Server mode each client needs to perform this operation as each client can be using a different printer.

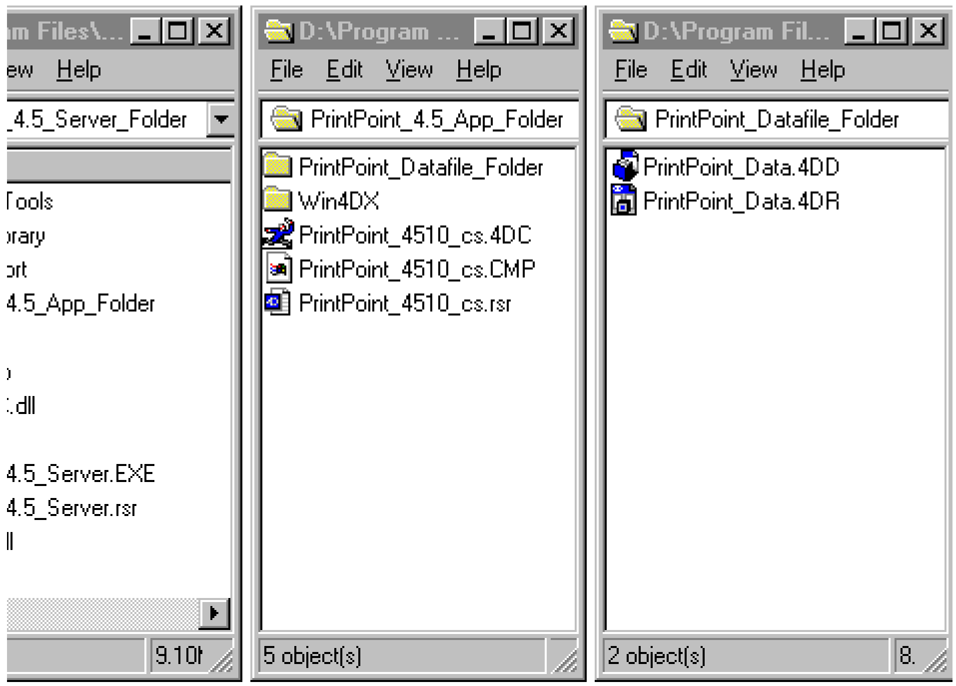
Appendix F:

Folder Contents

OVERVIEW

This chapter provides technical information about each of the components that are placed on your hard drive when you first install PrintPoint or are created during the process of using PrintPoint.

About The Screens



ABOUT THE SCREENS

PrintPoint 4.5 Folder	Function
File	Function
4dwrite.4dx	
4dwrite.rs	
aciack.4dx	
acipack.rsr	
alpro7.4dx	
alpro7.rsr	
Calset.4dx	
Calset.4dx	
choosr4d.4dx	
choosr4d.4dr	
FilePk.4dx	
FilePk.4dr	
Fmtpack.4dx	
Fmtpack.4dr	
htk.4dx	
htk.4dr	
ioextras.4dx	
ioextras.4dr	
menupack.4dx	
menupack.4dr	
msgtools.4dx	
msgtools.4dr	
MsgTools.dll	
NetLink.4dx	
NetLink.4dr	
ppdraw.4dx	
ppdraw.4dr	
ppreg.4dx	
ppreg.4dr	
qp.4dx	
qp.4dr	
SRPro.4dx	
SRPro.4dr	

PrintPoint 4.5 Folder	Function
File	Function
Timer.4dx	
Timer.4dr	
ToolChst.4dx	
ToolChst.4dr	
VS.4dx	
VS.4dr	
WinTools.4dx	
WinTools.4dr	
W4d_drag.dll	
English.lan	
Master.lan	
Spanish.lan	
English.vsv	
Master.vsv	
Spanish.vsv	
language.srp	
struct.srx	
settings.ini	
approval.ltr	
confirm.ltr	
quote.ltr	

Win4Dx	Function
4dwrite.4dx	
4dwrite.rs	
aciack.4dx	
acipack.rsr	
alpro7.4dx	
alpro7.rsr	

Win4Dx	Function
Calset.4dx	
Calset.4dx	
choosr4d.4dx	
choosr4d.4dr	
FilePk.4dx	
FilePk.4dr	
Fmtpack.4dx	
Fmtpack.4dr	
htk.4dx	
htk.4dr	
ioextras.4dx	
ioextras.4dr	
menupack.4dx	
menupack.4dr	
msgtools.4dx	
msgtools.4dr	
MsgTools.dll	
NetLink.4dx	
NetLink.4dr	
ppdraw.4dx	
ppdraw.4dr	
ppreg.4dx	
ppreg.4dr	
qp.4dx	
qp.4dr	
SRPro.4dx	
SRPro.4dr	
Timer.4dx	
Timer.4dr	
ToolChst.4dx	
ToolChst.4dr	
VS.4dx	
VS.4dr	
WinTools.4dx	
WinTools.4dr	
W4d_drag.dll	
English.lan	

Win4Dx	Function
Master.lan	
Spanish.lan	
English.vsv	
Master.vsv	
Spanish.vsv	
language.srp	
struct.srx	
settings.ini	
approval.ltr	
confirm.ltr	
quote.ltr	

Win4Dx	Function
4dwrite.4dx	
4dwrite.rs	
aciack.4dx	
acipack.rsr	
alpro7.4dx	
alpro7.rsr	
Calset.4dx	
Calset.4dx	
choosr4d.4dx	
choosr4d.4dr	
FilePk.4dx	
FilePk.4dr	
Fmtpack.4dx	
Fmtpack.4dr	
htk.4dx	
htk.4dr	
ioextras.4dx	
ioextras.4dr	
menupack.4dx	

Win4Dx	Function
menupack.4dr	
msgtools.4dx	
msgtools.4dr	
MsgTools.dll	
NetLink.4dx	
NetLink.4dr	
ppdraw.4dx	
ppdraw.4dr	
ppreg.4dx	
ppreg.4dr	
qp.4dx	
qp.4dr	
SRPro.4dx	
SRPro.4dr	
Timer.4dx	
Timer.4dr	
ToolChst.4dx	
ToolChst.4dr	
VS.4dx	
VS.4dr	
WinTools.4dx	
WinTools.4dr	
W4d_drag.dll	
English.lan	
Master.lan	
Spanish.lan	
English.vsv	
Master.vsv	
Spanish.vsv	
language.srp	
struct.srx	
settings.ini	
approval.ltr	

Win4Dx	Function
confirm.ltr	
quote.ltr	