



User Guide

Book Estimating - Complete
Add On
V21.1.0200

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EFI PrintStream | V21.1.0200 Book Estimating - Complete Add On User Guide

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Introduction

Overview

The Complete Book Estimating User Guide provides user guides for all EFI PrintStream modules related to Book.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Book Estimating - Complete

Overview

Book Estimating shares some elements with traditional Print but requires additional set up and the use of three new programs (Master Files Book, Master Files Signature, Master Files Book Quote Letter) in order to function. To enter Jobs into production from estimates created in Book Estimating, another program, Print Order Entry is used. Import of all data from Book Estimating to Print Order Entry means no redundant data entry is required.

Book Estimating expands to encompass much more than estimating for books. The unique feature is the data layer. This differs from the traditional print system in that Book Estimating is SPEC DRIVEN. This means once the user enters the specifications, the system evaluates all available templates and selects the production path, including bindery considerations, that is the least expensive option. Users can also view **All Options** to see the cost differences of the various signatures that were evaluated. Users will not need to tell the system which signatures to use, or which cartons to use, unless you wish to override the system's selection.

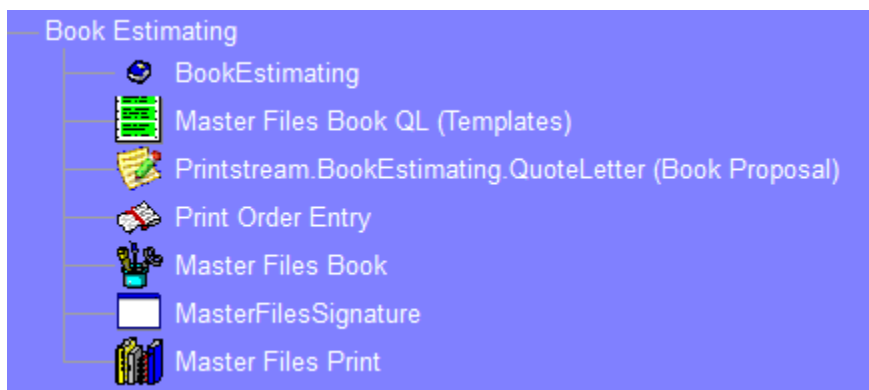
Another huge advantage of a Spec Driven estimating system is in multi plant environments. Users can now estimate the same job in more than one plant, by changing the plant setting on the header screen, assuming similar papers and equipment exist in both plants.

Another new aspect is the creation of Bind Styles and Spine Types that automatically brings in all the sections you need to add information to in the estimate component screen, calculates spine widths, and brings in bindery processes without estimator intervention at the estimate stage, except to override if desired. Prepress workflows and Section Finishing workflows allow users to make a single entry which pulls in a number of individual processes linked to that workflow.

Before using this User Guide, please read and complete set up as shown in Master Files Book User Guide, Master Files Signature Users Guide, and Master Files Print users guide. There is additional set up required in the Master Files Print area beyond what is required for traditional print.

All signatures (templates) that are considered in Book Estimating must first be created in Master Files Signature. Users are not able to create a template "on the fly" as is true in traditional print estimating.

Once you have the setups completed in Master Files Book, Master Files Print, Master Files Signature, you are able to use Book Estimating by following this user guide.



Book Estimating



From this screen, we start a new estimate (blank paper icon) or open an existing estimate (folder icon). Header Screen

Header Screen

New estimate, this is the opening screen, the Header screen.

Book Estimating

File Quote Window Help

Quote No. 3405 [Components] Quote No. 0 [Header]*

Quote No. Title Cust Code Customer

Customer

Customer Add Customer Cust. Contact

Address Credit Details Sales

City State ZIP CSR Estimator

Header

Title

Author

Product Size

Product Type

Est. Required (none) Reprint

Old Job All Text in Single Run Sections

Requested Schedule

Production Facility

Estimate Only

Requested Schedule

Standard Order

Versions

Add Delete

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
			08/19/2009								

* MODIFIED *

<< Back Next >> Close

Header Screen, Customer Information

Begin by selecting an existing customer by typing in the Acct Code number, or begin typing the customer name, or using the drop-down list. The system accesses all active customers set up in Master File Customer from here. Highlight the customer to select.

Customer Code	Name	Csr	Contact
50067	NewCustomer		NewContact
12345	12345678912345678	Sue Smith	ME
111	A company	New Rep	
50021	A very important new	House Account	Jerry Jessup
AAA	AAA Insurance	Monika Rynkiewicz	John L. Smith
ABBA1	Abba Inc.	Sue Smith	Betty Receivable
ABBAPOST	Abba Sub Customer	Sue Smith	
0200	ABC Company		

To add a new customer prospect on the fly, select the **Add Customer** button. You may set the system up to allow quote only, no job conversion, or to allow job conversion and process ONE job only, before this new customer is officially added in Master File Customer, usually done by accounting, setting up credit approvals and limits.

Zip code entry field allows 10 characters.

GL Company for use only in Multi Company environments.

Acct No populates when accounting creates this as a customer in accounting.

For existing customers, Credit Details are available.

The **Credit Details** button populates credit information on the selected customer after the estimate has been calculated. You may set up your system in Master Files Print, Misc, Estimating parameters, to prevent job conversion if customer is over their credit limit.

Credit Information For 'AAA Insurnace'

Page Count: 320 Quantity: 5000

Account Status: Net 5 days.

Unpaid Invoices: No invoices unpaid for more than 500 days.

Open Invoices: \$-1,800.00

Jobs In Progress: \$1,448,057.11

This Quote's Price: \$10,663.53

Unallocated Receipts: \$1,000.00

Total Commitment: \$1,445,257.11

Credit Limit: \$9,999,999.00

Over Credit Limit:

Close

Customer Contact pulls in from Master Files Customer.

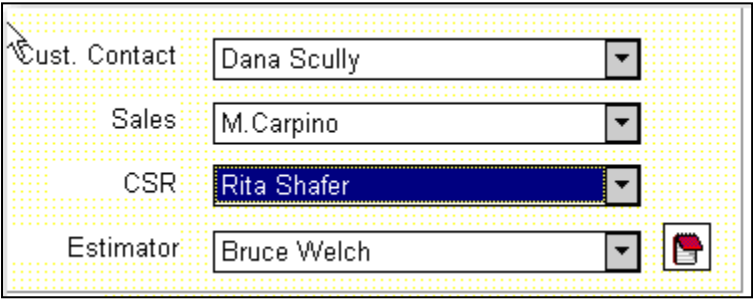
We support more than one contact, and each can have a unique address, use the drop-down arrow and highlight one to override the default.

Cust. Contact: Barnes

Contact	Address1	Address2	City	
	12401 S. 450 E.	suite A-1	Draper	UT
Barnes	Loading Dock	12300 S Alley Way	Sandy	UT
Contact Name	Address #3		Cuty	Stat
Sally Samster	123 West Main	Suite 7	Watertown	UT
suel	txtShipAddr	txtShipAddr2	txtCity	txtS

Sales and **CSR** assigned to this account display by default or can be selected here by using down arrow.

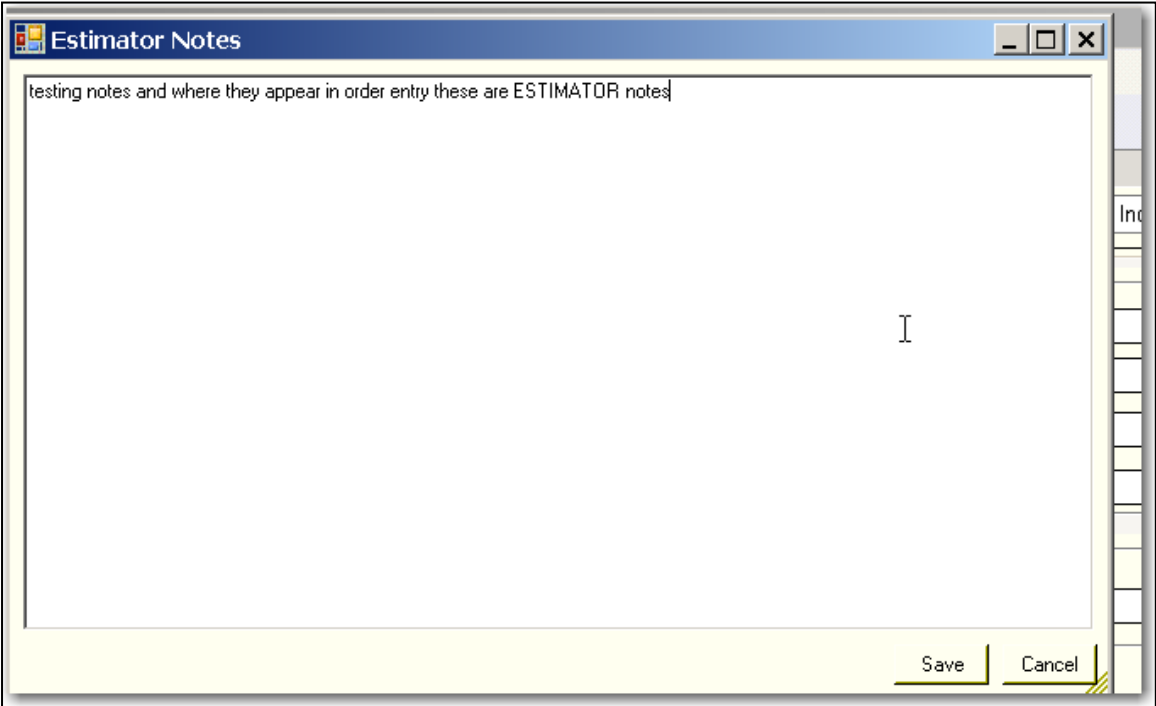
Estimator is a mandatory field, select by using down arrow.



A screenshot of a software interface showing four dropdown menus for user selection. The first menu is labeled 'Cust. Contact' and has 'Dana Scully' selected. The second is labeled 'Sales' and has 'M. Carpino' selected. The third is labeled 'CSR' and has 'Rita Shafer' selected, with this menu highlighted by a blue border. The fourth is labeled 'Estimator' and has 'Bruce Welch' selected. To the right of the 'Estimator' dropdown is a small icon of a notepad with a red pencil.

Cust. Contact	Dana Scully
Sales	M. Carpino
CSR	Rita Shafer
Estimator	Bruce Welch

The **Notebook** icon, when selected, opens Estimator Notes viewable in order entry. This is a text area you may enter as much as you like.



A screenshot of a window titled 'Estimator Notes'. It features a large text area with the text 'testing notes and where they appear in order entry these are ESTIMATOR notes'. At the bottom right of the window are two buttons labeled 'Save' and 'Cancel'. The window has a standard title bar with minimize, maximize, and close buttons.

Estimator Notes

testing notes and where they appear in order entry these are ESTIMATOR notes

Save Cancel

Header Screen, Job Header Information

The screenshot shows the 'Book Estimating' software window. The title bar reads 'Book Estimating'. The menu bar includes 'File', 'Quote', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is divided into sections. The top section shows 'Quote No. 3405 [Components]' and 'Quote No. 0 [Header]*'. Below this, there are input fields for 'Quote No.' (0), 'Title' (Maui Beaches Revisited), and 'Cust Code'. The 'Customer' section includes a dropdown for 'Customer' (ALASKA), a text field for 'Customer' (Alaska Inc.), a text field for 'Address' (123 West Main), a text field for 'Suite 7', a text field for 'City' (Watertown), a dropdown for 'State' (UT), and a text field for 'ZIP' (84601). There are buttons for 'Add Customer' and 'Credit Details'. The 'Header' section includes a text field for 'Title' (Maui Beaches Revisited), a text field for 'Author', two text fields for 'Product Size', a dropdown for 'Product Type', a dropdown for 'Est. Required' (none), a checkbox for 'Reprint', and a text field for 'Old Job'. There is also a checkbox for 'All Text in Single Run Sections'.

Title is a required field and identifies this product or Book. It can include an ISBN number, title, or any other description.

The **Author** field allows users to search by author.

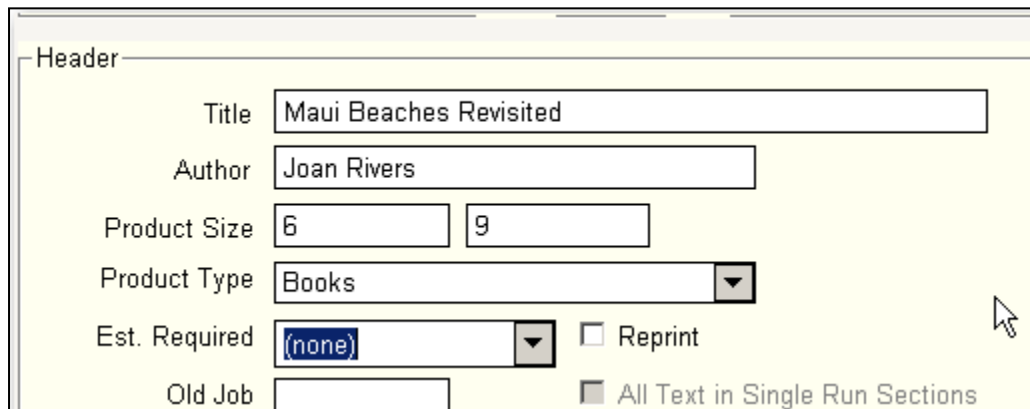
Product Size carries into the estimate on the component screen, generally the trim size.

Product Type is set up for sales analysis and reporting purposes, if users want to see sales volume or some P&L on Annual Reports for example, they would set up Annual Reports as a Product Type. Product Types are also linked to Bind Styles in Master Files Book.

Est Required is the Estimate required date. It is designed to measure estimate turnaround times indicate when estimates are due.

Old Job and **Reprint** check box allow users to enter an old job or file number to pull into Print Order Entry from this field.

The **All Text Run in Single Run Sections** check box is an option at create job spec stage only.



Header

Title: Maui Beaches Revisited

Author: Joan Rivers

Product Size: 6 9

Product Type: Books

Est. Required: (none)

Old Job:

☐ Reprint

☐ All Text in Single Run Sections

Header Screen, Requested Schedule Information

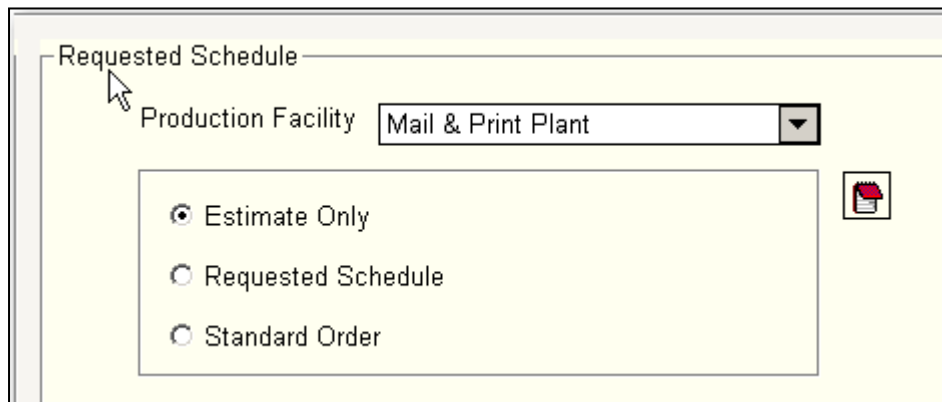
Production Facility: In a Multi Plant environment, select the plant from the drop-down menu.

Estimate Only cannot be used to create a job until this status is changed to Standard Order or Requested Schedule.

Standard Order: No special schedule is requested by customer, normal turnaround time is acceptable.

Requested Schedule: The date the customer is requesting this job is entered here. This flows to MR Scheduler in a **Requested Schedule** area so a tentative schedule can be established and communicated at the point the estimate is given to the customer.

The **Notebook** icon here is used for Scheduler notes. Estimators could use this to convey paper availability or other estimating issues that could impact the Schedule.



Requested Schedule

Production Facility: Mail & Print Plant

☒ Estimate Only

☐ Requested Schedule

☐ Standard Order

Notebook icon

Header Screen, Versions Information

Versions											
VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
			09/20/2006								

Versions are mandatory, you may have only one, or each quote can include numerous versions. These are versions within a quote that have a different bind style, but share some common elements. An example could be a hard cover and soft cover (perfect bound) version of a book with common text.

Once you enter a **Version Name**, you will need to select a **Bind Style** and **Spine Type** for each version.

Bind Styles and **Spine Types** have been created in Master File Book, and are available here from the drop-down options.

3 Piece Hard Cover POS	(Coated: 0 - 0 Uncoated: 0 - 0)
3 Piece Hard Cover SOP Sewn	(Coated: 5/8 - 1 1/2 Uncoated: 3/16 - 2)
Big Perfect Bind Book	(Coated: 0 - 0 Uncoated: 0 - 0)
Hard Cover	(Coated: 0 - 0 Uncoated: 0 - 0)
Hard Cover with Spine Board	(Coated: 0 - 0 Uncoated: 0 - 0)
HCSEW	(Coated: 0 - 0 Uncoated: 0 - 0)
Mechanical Binding (GBC)	(Coated: 0 - 0 Uncoated: 0 - 0)
Perfect Binding	(Coated: 1/4 - 1 3/4 Uncoated: 1/4 - 2 1/2)

Once a **Bind Style** has been selected, only the **Spine Types** associated with that bind style show as available.

Versions			
VersionName	BindStyle	SpineType	JobIn Date
student version	Perfect Binding	Adhesive - Soft Cover	09/20/2006

FIED *

Bind Styles and **Spine Types** drive logic for calculating spine width, carton size requirements, and determine which components default for input on the next screen.

Versions											
VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
student version	Perfect Binding	Adhesive - Soft	09/20/2006			1,000	1,500	2,500	5,000	7,500	10,000

Job in Date defaults to the date the estimate is created, can be deleted, or changed if known.

Requested Schedule is the date the customer is requesting delivery for this job, only used if **Requested Schedule** has been chosen in the previous screen.

Promised Date is populated only when the tentative job is scheduled, by the Scheduler when using Requested Schedule feature.

Quantity we accommodate up to 6 quantities for each version per estimate. You may change or add quantities to any estimate after it has been calculated and simply recalculate.

To add a second version, select the **Add** icon and a new row displays for input on the next version.

Product Type: Books
 Est. Required: 8/19/2009 ☐ Reprint
 Old Job: ☐ All Text in Single Run Sections

☐ Requested Schedule
☐ Standard Order

Versions
 Add Delete

Ver	Add	Name	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
1		Travel book	Perfect Bound	Soft Cover	08/19/2009			1,000	2,500	5,000	7,500	10,000	15,000

Book Estimating
 File Quote Window Help

Quote No. 3405 [Components] Quote No. 0 [Header]*

Quote No. 0 Title Maui Beaches Revisited Cust Code ALASKA Customer Alaska Inc.

Customer
 Customer ALASKA Alaska Inc. Add Customer Cust. Contact Sally Samster
 Address 123 West Main Suite 7 Sales House Account
 City Watertown State UT ZIP 84601 CSR Sue Smith
 Estimator

Header
 Title Maui Beaches Revisited
 Author Joan Rivers
 Product Size 6 9
 Product Type Books
 Est. Required (none) ☐ Reprint
 Old Job ☐ All Text in Single Run Sections

Requested Schedule
 Production Facility Print Plant
☒ Estimate Only
☐ Requested Schedule
☐ Standard Order

Versions
 Add Delete

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
Travel book	Perfect Bound	Soft Cover	08/19/2009			1,000	2,500	5,000	7,500	10,000	15,000
Teachers editio	HC 1 Piece Bl	Case Bound -	08/19/2009			100	250	500	750	1,000	1,500

* MODIFIED * << Back Next >> Close

Once this screen is completed, click **Next**. If there is required information not filled in, you are prompted to enter the missing information before you can proceed.

Note Once you leave this screen, you are not able to make changes to the Bind Styles that were selected. You can rename the versions.

Component Screen, Component Specifications

Soft cover bind style

This is the opening view of the Components screen. Bases on the Bind Style selected, these sections display by default. We display a default page count for the cover, and when a Dust Jacket is added or included the section the size of the flap displays as the default size as well.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Perfect Binding	Soft Cover	4					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --	-- NONE --
Text 1	Text 1	0					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --	-- NONE --

The bind style of **Perfect Bound**, and spine type of **Adhesive Soft Cover**, on the header screen, means these components (Sections) automatically pull in on the component screen, as these sections were linked to this Bind Style in Master Files Book.

To complete the input, add page count for text, and select papers and inks in the top half of this screen.

PC1 means Page Count 1, or first page count in this estimate. We accommodate up to 4 page counts per estimate.

Bind As column enables you to run a different number of pages per text signature than you bind. Example print text as 32 pg signatures and bind as 16 pg signatures.

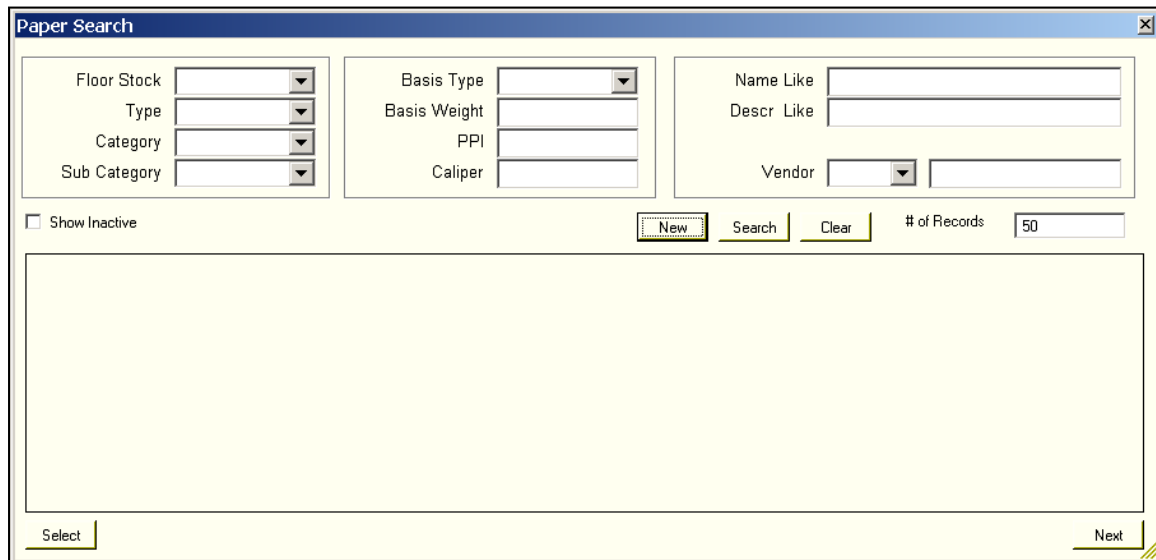
Flaps is for use with Dust Jackets only, it is the depth of the flap that wraps around the front cover and back cover, 3" here would be 3" for front flap, and 3" for back flap. There is a default setting for flaps on Dust Jackets in Master Files Book for Dust Jacket sections.

Bleeds select to add trim margin for bleeds in signature selection, Bleed margins are set up in Master Files Signature.

Paper Name select from the drop-down menu. This reflects all papers set up in Master Files Print, Paper. To select, highlight and it populates the paper name box and color box.

Paper Color populates automatically for papers other than Special Order. Add the paper cost and size in the bottom half of the component screen (do this and show it)

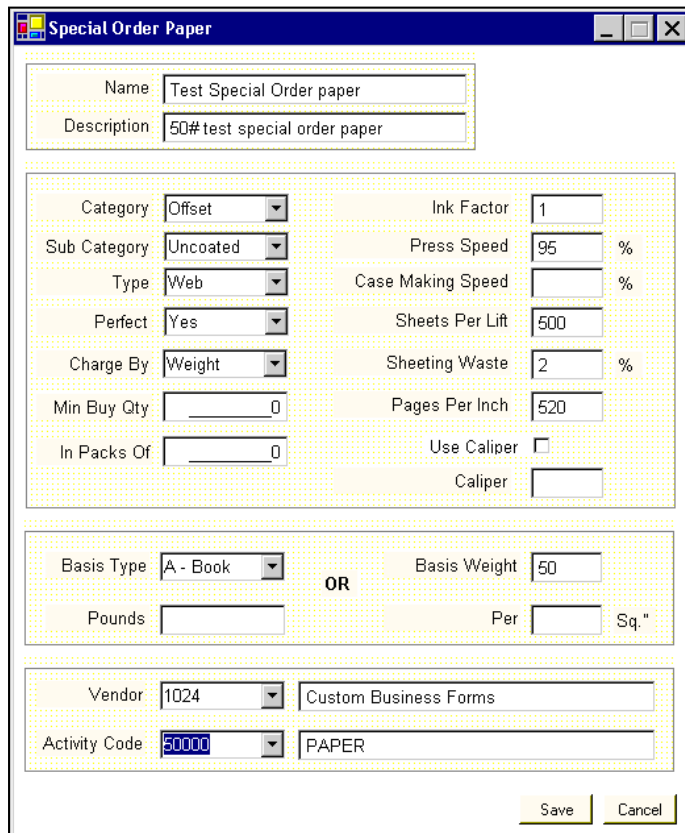
Special Order Paper can be added on the fly here by clicking **New** in the area between **Bleeds** and **Paper Name**. This opens this Paper Search screen. From here, click **New**.



The **Paper Search** dialog box contains the following fields and controls:

- Left Column:** Floor Stock (dropdown), Type (dropdown), Category (dropdown), Sub Category (dropdown).
- Middle Column:** Basis Type (dropdown), Basis Weight (text), PPI (text), Caliper (text).
- Right Column:** Name Like (text), Descr Like (text), Vendor (dropdown and text).
- Bottom Left:** ☐ Show Inactive.
- Bottom Center:** **New** (button), **Search** (button), **Clear** (button).
- Bottom Right:** # of Records (50) (text).
- Bottom Bar:** **Select** (button) on the left, **Next** (button) on the right.

Next, this Special Order paper input area displays. Here you enter all Special Order Paper info except size, color and price, see more on the **Paper** tab section of this document.



The **Special Order Paper** dialog box contains the following fields and controls:

- Top Section:** Name (Test Special Order paper), Description (50# test special order paper).
- Middle Section (Left):** Category (Offset), Sub Category (Uncoated), Type (Web), Perfect (Yes), Charge By (Weight), Min Buy Qty (0), In Packs Of (0).
- Middle Section (Right):** Ink Factor (1), Press Speed (95 %), Case Making Speed (text %), Sheets Per Lift (500), Sheeting Waste (2 %), Pages Per Inch (520), Use Caliper (checkbox), Caliper (text).
- Bottom Section (Top):** Basis Type (A - Book) OR Basis Weight (50), Pounds (text), Per (text) Sq. ".
- Bottom Section (Bottom):** Vendor (1024), Custom Business Forms (text), Activity Code (50000), PAPER (text).
- Bottom Bar:** **Save** (button), **Cancel** (button).

Inks you select here from the drop-down, which have been set up in Master Files Book, Ink Templates. This means you do not need to make 4 entries for 4 color process inks. You may remove or add other inks by using the **Inks** tab at the bottom of this screen. See more on the Inks Tab section of this document.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Perfect Binding	Soft Cover	4					6 x 9	0	<input type="checkbox"/>	C1S Cover 10 PT	White	4 color process	-- NONE --
Text 1	Text 1	160	336	176	480		6 x 9	0	<input type="checkbox"/>	Offset - Wht - 50#	White	Black Only	Black Only

The completed component spec screen looks like this for a soft cover book. After you have completed the Component Specifications, you can edit or add to this input in the Component Details Section on the bottom half of this same screen.

Customer Furnished Sections

After you select **Customer Furnished** section to add, a new input is required on this screen, under **Supplied Sections** tab on the bottom half of the screen. The first example deals with customer supplied items that will print. This comes up automatically.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4					8 1/2 x 11	0	<input type="checkbox"/>	10 PT C1s Cover	White	Process Inks	-- NONE --
Text	Text	248					8 1/2 x 11	0	<input type="checkbox"/>	50# Offset Opaque	White	Black Ink Only	Black Ink Only
Customer S							8 1/2 x 11	0	<input type="checkbox"/>	-- NONE --		-- NONE --	-- NONE --

Title		SubSectionType	Include in PC
cust supplied insert		Insert	<input type="checkbox"/>
No Of Pages		BasisType	
Size		Basis Weight	
Bound as		PPI	
Number Up		Item #	
		Date On Hand	(none)

Title: Input a name for this section.

Subsection Type: Select one from the drop-down menu. These were defined in Master Files Book.

Include in PC: Select this check box if this section should be included in the Page Count.

Book Estimating

FileQuoteWindowHelp

Quote No. 1401 [Components]

Quote No. 1401Title test perfect bindCust Code SLCC01Customer Salt Lake Community College

Component Specifications

AddDelete

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4					8 1/2 x 11	0	<input type="checkbox"/>	10 PT C1s Cover	White	Process Inks	-- NONE --
Text	Text	248					8 1/2 x 11	0	<input type="checkbox"/>	50# Offset Opaque	White	Black Ink Only	Black Ink Only
Customer S							8 1/2 x 11	0	<input type="checkbox"/>	-- NONE --		-- NONE --	-- NONE --

PrePressInksSection FinishingOverridesPaperSupplied Section

Title cust supplied insertSubSectionType Insert☐ Include in PC

No Of Pages16BasisTypeA - Book

Size23 x 35Basis Weight70

Bound as1 sigsPPI420

Number Up1Item #

Date On Hand(none)

<< BackNext >>Close

No of Pages: Enter the number of pages for the customer furnished section. Remember a single sheet is entered as 2 pages (for front and back).

Size: Input the unfolded furnished size. This could be paper you will print on or furnished flat press sheets from a different printer.

Bound As: Input the number of folded signatures this furnished section is bound as. If this cuts to (2) 8-page signatures, you would enter “2” in this example.

Number Up: Number up on the sheet. This tells the engine whether cutting is required.

Basis Type: Select from the drop-down choices.

Book Estimating

File Quote Window Help

Quote No. 1401 [Components]*

Quote No. 1401 Title test perfect bind Cust Code SLCC01 Customer Salt Lake Community College

Component Specifications

Add Delete

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4					8 1/2 x 11	0	<input type="checkbox"/>	10 PT C1s Cover	White	Process Inks	-- NONE --
Text	Text	248					8 1/2 x 11	0	<input type="checkbox"/>	50# Offset Opaque	White	Black Ink Only	Black Ink Only
Customer S							8 1/2 x 11	0	<input type="checkbox"/>	-- NONE --		-- NONE --	-- NONE --

PrePress Inks Section Finishing Overrides Paper Supplied Section

Title cust supplied insert SubSectionType Insert ☐ Include in PC

No Of Pages 16 BasisType A - Book

Size 23 X 35 Basis Weight 70

Bound as 1 sigs PPI 420

Number Up 1 Item #

Date On Hand (not)

☐ A - Book
☐ B - Writing
☐ C - Wrap
☐ D - Cover
☐ E - P.Bristol
☐ F - Index
☐ G - V.Bristol
☐ H - Card

<< Back Next >> Close

Basis Weight: Enter the basis weight for the furnished section.

PPI: Stands for Pages Per Inch, this is a required entry.

Item #: If this is an inventory item enter that item number here. If you are not certain you can select the ellipsis box to bring up the inventory item search screen.

Item Search

InvType

Classification

Item Desc Like

Inv Code Like

Item

Customer

Search Clear Cancel

Items/Page

Next

Every drop-down box acts as a filter for inventory search. In the fields, **Item Desc Like** and **Inv Code Like** input what you know or think it may be listed as.

Item Search

InvTypePaper

ClassificationCustomer Owned

Item Desc Like

Inv Code Like

Item

Customer

Search

Clear

Cancel

Items/Page50

Item No	Inv Code	Rev	Details	On Hand	On Order	Alloc
---------	----------	-----	---------	---------	----------	-------

Next

If you find this item, you can select by double-clicking the item. If you do not find this item it does not exist in inventory, having it in inventory is mandatory only if you wish to receive, track, and issue this item. Otherwise leave this blank.

Once you have completed this input, go back up to the Components Specifications (top) portion of the screen, and input page count, paper, and ink if printing this customer furnished section. If you did not enter an inventory item for customer supplied paper, enter **None** as the paper name from the drop-down selection.

Date On Hand: Enter this if known. It helps in the scheduling process.

Quote No. 1401 [Components]

Quote No. 1401 Title test perfect bind Cust Code SLCCD1 Customer Salt Lake Community College

Component Specifications

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4					8 1/2 x 11	0	<input type="checkbox"/>	10 PT C1s Cover	White	Process Inks	--
Text	Text	248					8 1/2 x 11	0	<input type="checkbox"/>	50# Offset Opaque	White	Black Ink Only	B
Customer Sup	cust supplied i	16					8 1/2 x 11	0	<input checked="" type="checkbox"/>	-- NONE --		-- NONE --	--

PrePress | Inks | Section Finishing | Overrides | Paper | Supplied Section

Title cust supplied insert SubSectionType Insert ☐ Include in PC

No Of Pages 16 BasisType A - Book

Size 23 x 35 Basis Weight 70

Bound as 1 sigs PPI 420

Number Up 1 Item #

Date On Hand (none)

<< Back Next >> Close

From this point on, Customer Supplied Sections that print get the same input as any other section. You can add Prepress, Section Finishing, Inks, and Paper and Overrides as described below In Component Details Section.

Customer Furnished non printed items

These have different input requirements.

Add a Customer Supplied Section as shown above, then at the bottom, select the **Supplied Section** tab, and choose **Supplied Non Printed** as the section type. This Sub Section type cannot be estimated to have printing added to them with this subsection type

Title: Enter a title here.

Size looks for a press sheet size if a preprinted press sheet is furnished, or a final trimmed size in the case of a CD sleeve.

Thickness and **Wt per piece** are required and inform carton selection.

Item #: You can search for an existing customer inventory item here by choosing the **ellipsis** button as described above, and Date on hand assists us in scheduling should we win this bid.

Enter a page count, in the top area highlighted in Pink.

Next **Save** by selecting the **Disk** icon, 3rd from left at top in the toolbar.

Book Estimating

File Quote Window Help

Quote No. 3406 [Components]*

Quote No. 3406 Title Maui Beaches Revisited Cust Code ALASKA

Component Specifications

Add Delete

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper
Soft Cover	Soft Cover	4					6 x 9	0	<input type="checkbox"/>	50# Off
Text	Text	48					6 x 9	0	<input type="checkbox"/>	50# Off
Customer Sup		2					6 x 9	0	<input type="checkbox"/>	-- NON

PrePress Inks Section Finishing Overrides Paper Supplied Section

Title cd sleeve SubSectionType Supplied Non-Print ☐ Include in PC

Size 4 x 5

Thickness .025

Weight Per Piece .00125 Lbs

Item #

Date On Hand (none)

You can add section finishing processes to this section but cannot print. See more on **Section Finishing** tab area of this document.

Input 3 piece Case Bound Bind Style

The top half of the header screen input is identical to input for Soft Cover Bind Style.

Header screen, Versions section

Under Bind Style, the drop-down choices reflect what you have set up in Master Files Book for this bind style, choose the one you will use for this estimate from here.

HC 1 Piece No BIS	(Coated: 0 - 0 Uncoated: 0 - 0)
HC 1 Piece No BIS Sewn	(Coated: 0 - 0 Uncoated: 0 - 0)
HC 3 Piece BIS POS	(Coated: 0 - 0 Uncoated: 0 - 0)
HC 3 Piece BIS SOP	(Coated: 0 - 0 Uncoated: 0 - 0)
HC 3 Piece No BIS POS	(Coated: 0 - 0 Uncoated: 0 - 0)
HC 3 Piece No BIS SOP	(Coated: 0 - 0 Uncoated: 0 - 0)
Perfect Bound	(Coated: 0 - 0 Uncoated: 0 - 0)
Saddle Stitch	(Coated: 1/8 - 1 1/2 Uncoated: 1/8 - 1 3/4)

These can be named anything. These abbreviations stand for:

- Hard Cover 1 piece No Board in Spine
- Hard Cover 1 piece No Board in Spine, Sewn
- Hard Cover 3 piece Board In Spine, Panel Over Spine (meaning the panels overlap the spine on the finished 3 piece case)
- Hard Cover 3 piece No Board In Spine, Spine Over Panel (Meaning the Spine overlaps the panels on the finished 3 piece case)

These were set up in Master Files Book, under Bind Style definitions, names are user defined.

The screenshot shows the 'Book Estimating' software interface. At the top, there's a menu bar with 'File', 'Quote', 'Window', and 'Help'. Below it is a toolbar with various icons. The main window is divided into several sections:

- Quote No. 1401 [Components]***: This section contains fields for 'Quote No.' (0), 'Title' (Amazing Books), 'Cust Code' (SLCC01), and 'Customer' (Salt Lake Community College).
- Customer**: This section contains fields for 'Customer' (SLCC01), 'Address' (4250 Redwood Rd.), 'City' (Taylorsville), 'State' (UT), 'ZIP' (84313), 'Cust. Contact' (Harold Showalter), 'Sales' (sandra), 'CSR' (Sue Smith), and 'Estimator' (Bryan Burrell).
- Header**: This section contains fields for 'Title' (Amazing Books), 'Product Size' (6 and 9), 'Product Type' (Books), 'Est. Required' (none), 'Reprint' checkbox, and 'Old Job' field.
- Requested Schedule**: This section contains a 'Production Facility' dropdown (Print Plant) and radio buttons for 'Estimate Only', 'Requested Schedule' (selected), and 'Standard Order'.
- Versions**: This section contains a table with columns for VersionName, BindStyle, SpineType, JobIn Date, Req ShipDate, Promised Date, Qty1, Qty2, Qty3, Qty4, and Qty5. The first row shows 'vol 1 case', 'HC 3 Piece', and '07/16/2007'.

At the bottom of the window, there's a status bar with '* MODIFIED *' and navigation buttons: '<< Back', 'Next >>', and 'Close'.

Spine Type: Select from the drop-down. Only spine types that have been linked to this bind style are available for selection. These were set up in Master Files Book, Spine Type Definition.

Book Estimating

FileQuoteWindowHelp

Quote No. 1401 [Components]*

Quote No. 0 [Header]*

Quote No. 0

Title Amazing Books

Cust Code SLCC01

Customer Salt Lake Community College

Customer

Customer SLCC01Salt Lake Community CollegeAdd Customer

Address 4250 Redwood Rd.

City TaylorsvilleState UTZIP 84313

Cust. Contact Harold Showalter

Sales sandra

CSR Sue Smith

Estimator Bryan Burrell

Header

Title Amazing Books

Product Size 69

Product Type Books

Est. Required (none)Reprint

Old Job

All Text in Single Run Sections

Requested Schedule

Production Facility Print Plant

Estimate Only

Requested Schedule

Standard Order

Versions

AddDelete

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5
vol 1 case	HC 3 Piece No	Case Bound - Round Back	07/16/2007							

* MODIFIED *

<< Back

Next >>

Close

Next input up to 4 quantities for this estimate. When finished, click **Next**.

Component Specifications Screen 3 piece case

Quote No. 1401 [Components]* Quote No. -1 [Components]*

Quote No. -1 Title Amazing Books Cust Code SLCC01 Customer Salt Lake Community College

Component Specifications

Add Delete

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front
HC 3-Piece SO	CC Spine - SO	4					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
	CC Front Panel	2					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
	CC Back Panel	2					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
	Brd Front&Bac	4					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
Text	Text	0					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
Endsheet	Endsheet	8					6 x 9	0	<input type="checkbox"/>	-- NONE --		-- NONE --
Dust Jacket	Dust Jacket	4					6 x 9	3 1/2	<input type="checkbox"/>	-- NONE --		-- NONE --

PrePress Inks Section Finishing Overrides Paper Supplied Section

Work Flow

PrePress Processes

Add Insert Delete

Process	Auto	Size	Qty	Buyouts

<< Back Next >> Close

This is how Components Screen looks when opened. These elements populated automatically based on the set up in Master Files Book. Note the page counts on all but text has auto populated due to default page count set up in Master Files Book.

The Hard Cover 3 piece, Spine Over Panel Bind style, has 4 subsections linked to it, all requiring input here. Cover Cloth, spine, Cover Cloth Front Panel, Cover Cloth Back Panel, and Binder Boards, Front and Back. These are all user defined.

Select paper on each sub section from the drop-down under paper name at the right. A 3 piece case can have a completely different cloth material for the front, back and spine, or all the same paper.

Cover Cloth Costs

When calculating cover cloth costs, the system looks at the price breaks. If using more cloth than is required for the job yields a better overall cost, buying the additional paper is selected.

Example, 50 yards at 10.00/yard (500.00 total) vs. 75 yards at 6.00/yard (450.00 total), the system bases the cloth material on purchasing 75 yards. However it will not calculate to run the additional paper through the production process.

For users that do cloth slitting in house, logic exists to find the most economical cut from the cloth roll, and the cloth sheeter can be automatically pulled in under these conditions:

- The template has **Slitting** set to **Yes**
- The paper type is set to **Material**
- The selected material size is a **Roll** and not a sheet
- Also there must be a Section Finishing process with a Calc Method of **Pre-Slit**. This process must also be set as the **Default Process**.

Board Cutting Costs

The Book estimating calculation engine calculates board cutting, on a board splitter, from both dimensions of a parent sheet of board material. Set Up is required in Master Files Print, Section finishing processes, and this process must be linked to this section in Master Files Book.

You can set the maximum number of boards you will handle in this way vs. purchasing cut to size boards. Users will get a message saying this threshold has been reached.

Input the papers, Inks, and page counts for all sub sections as described for Soft cover. Completed input in the top half of this screen can look like this.

The screenshot displays the 'Book Estimating' software interface. The top section, 'Component Specifications', contains a table with columns for Section, Subsection, PC1, PC2, PC3, PC4, BindAs, Trim Size, Flap, Bleeds, Paper Name, Paper Color, Inks - Front, and Inks - Back. The table lists components like HC 3-Piece SO, Text, Endsheets, and Dust Jacket with their respective specifications. Below this is the 'PrePress' section with tabs for Inks, Section Finishing, Overrides, Paper, and Supplied Section. The 'Section Finishing' tab is active, showing a 'Work Flow' dropdown and a 'PrePress Processes' table with columns for Process, Auto, Size, Qty, and Buyouts. The bottom of the window has navigation buttons: '<< Back', 'Next >>', and 'Close'.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
HC 3-Piece SO	CC Spine - SO	4					6 x 9	0	<input type="checkbox"/>	Pearl Linen Cover	White	-- NONE --	-- NONE --
HC 3-Piece SO	CC Front Pane	2					6 x 9	0	<input type="checkbox"/>	Permalin Cloth Cov	White	-- NONE --	-- NONE --
HC 3-Piece SO	CC Back Panel	2					6 x 9	0	<input type="checkbox"/>	Pearl Linen Cover	White	-- NONE --	-- NONE --
HC 3-Piece SO	Brd Front&Bac	4					6 x 9	0	<input type="checkbox"/>	Board .088 Natural	Natural	-- NONE --	-- NONE --
Text	Text	176	248	320	336		6 x 9	0	<input type="checkbox"/>	50# Offset Opaque	White	Black Ink Only	Black Ink Only
Endsheet	Endsheet	8					6 x 9	0	<input type="checkbox"/>	Endsheet 80# Whit	White	-- NONE --	-- NONE --
Dust Jacket	Dust Jacket	4					6 x 9	3 1/2	<input type="checkbox"/>	80# DJ Gloss	White	Process Ink	-- NONE --

Process	Auto	Size	Qty	Buyouts

Input for Split Bound Estimates

You can create an estimate with more than one bind style.

Enter the header screen as usual. Under versions, input your first bind style including all quantities. BEFORE LEAVING THIS SCREEN, click the **Add** button, and you are asked for input on another line under **Version Name**.

Book Estimating

File Quote Window Help

Quote No. 1394 [Components] Quote No. 1376 [Components]* Quote No. 0 [Header]*

Quote No. 0 Title California State Beaches Book Cust Code ALASKA Customer Alaska Inc.

Customer

Customer ALASKA Alaska Inc. Add Customer Cust. Contact Sally Samster

Address 123 West Main Suite 7 City Watertown State UT ZIP 84601 Sales House Account CSR Sue Smith Estimator Joe Mason

Header

Title California State Beaches Book

Product Size 9 12

Product Type Books

Est. Required 5/18/2007 Reprint

Old Job All Text in Single Run Sections

Requested Schedule

Production Facility Print Plant

Estimate Only
Requested Schedule
Standard Order

Versions

Add Delete

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
pb	Perfect Bound	Soft Cover	05/17/2007			1,000	2,500	5,000	7,500	10,000	
			05/17/2007								

* MODIFIED *

<< Back Next >> Close

Book Estimating

FileQuoteWindowHelp

Quote No. 1394 [Components]Quote No. 1376 [Components]Quote No. 0 [Header]

Quote No. 0Title California State Beaches BookCust Code ALASKACustomer AAA Insurance

Customer

CustomerALASKAAlaska Inc.Add Customer

Cust. ContactSally Samster

Address123 West MainSuite 7

SalesHouse Account

CityWatertownStateUTZIP84601

CSR Sue Smith

Estimator Joe Mason

Header

TitleCalifornia State Beaches Book

Product Size912

Product TypeBooks

Est. Required5/18/2007Reprint

Old JobAll Text in Single Run Sections

Requested Schedule

Production FacilityPrint Plant

Estimate Only

Requested Schedule

Standard Order

Versions

AddDelete

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
pb	Perfect Bound	Soft Cover	05/17/2007			1,000	2,500	5,000	7,500	10,000	
case	HC 1 Piece No	Case Bound -	05/17/2007			250	500	1,000	2,500	5,000	

* MODIFIED *

<< BackNext >>Close

Component Specifications screen, Split Bound estimate. With the input above, fill in the component specifications screen for each component as described previously.

Book Estimating

FileQuoteWindowHelp

Quote No. 1401 [Components]Quote No. 1418 [QuotePricing]Quote No. 0 [Header]Quote No. 1398 [Components]

Quote No. 1398Title California State Beaches BookCust Code ALASKACustomer Alaska Inc.

Component Specifications

AddDelete

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4				8 1/2 x 11	0			10 PT C1s Cover	White	Process Inks	-- NONE --
Text	Text	176	248	320	336	8 1/2 x 11	0			80# Centura Gloss	White	Process Inks	Process Inks
HC 1-Piece No	CC - 1 Piece	4				8 1/2 x 11	0			Pearl Linen Cover	White	Process Inks	-- NONE --
	Brd Front&Bac	4				8 1/2 x 11	0			Board .088 Natural	Natural	-- NONE --	-- NONE --
Endsheet	Endsheet	8				8 1/2 x 11	0			Endsheet 80# Whit	White	-- NONE --	-- NONE --
Dust Jacket	Dust Jacket	4				8 1/2 x 11	3 1/2			80# DJ Gloss	White	Process Inks	-- NONE --

PrePressInksSection FinishingOverridesPaperSupplied Section

Work FlowCTP - Cover

PrePress Processes

AddInsertDelete

Process	Auto	Size	Qty	Buyouts
---------	------	------	-----	---------

<< BackNext >>Close

Note Split bound quotes can work on the assumption that the TEXT IS COMMON. You simply delete one of the text sections that pulls in by default. When you have text sections that are NOT common, you will need to link the quantities in the Component Override screen.

For each quantity, for each bind style, synchronize the quantities needed for each of the text sections with the bind style as shown. You edit in the fields to the right of the “balance” row.

Section	SubSection	Total Qty	Balance	notch Qty :100000	case Qty :10000
Text	Text	110,000		0	10,000
Endsheets	Endsheets	10,000	0		10,000
3 Piece Case PO	CC Back Panel P	10,000	0		10,000
	CC Front Panel P	10,000	0		10,000
	CC Spine POS	10,000	0		10,000
	Binder Boards	10,000	0		10,000
Soft Cover	Cover	100,000	0	100,000	
Text	Text	100,000	0	100,000	

Note When you add a section to a split bound estimate, you are asked which version the added section is to be linked to. This box opens for your selection.

Link Versions

☒ pb

☐ case

Link

After this stage, enter the component details described below. These are the same for all sections except customer supplied.

Component Details Section

The bottom half of this screen is where more detail can be added to each section. Input here is required for Prepress to pull in Prepress processes. If you have section finishing processes attached to templates, and you accept the default set up for inks and ink coverage, no other input in this section is required, unless you have selected a Special Order paper.

Prepress tab: highlight the section, then select the Workflow drop-down, and choose a prepress workflow for this section.

Book Estimating

Quote No. 7087 [Components]*

Quote No. 7087 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

Component Specifications

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Perfect Binding	Soft Cover	4					6 x 9	0	<input checked="" type="checkbox"/>	C1S Cover 10 PT	White	4 color process	-- NONE --
Text 1	Text 1	160	336	176	480		6 x 9	0	<input type="checkbox"/>	Offset - Wht - 50#	White	Black Only	Black Only
Insert	Insert						6 x 9	0	<input type="checkbox"/>	-- NONE --	-- NONE --	-- NONE --	-- NONE --

PrePress | Inks | Section Finishing | Overrides | Paper | Supplied Section

Work Flow: **Application Files - Covers**

PrePress Processes

Process	Auto	Size	Qty	Buyouts
Pre-Flight	<input checked="" type="checkbox"/>			0
Create Text	<input checked="" type="checkbox"/>			0
Impose - Out	<input checked="" type="checkbox"/>			0

<< Back Next >> Close

Book Estimating

Quote No. 7087 [Components]*

Quote No. 7087 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

Component Specifications

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Perfect Binding	Soft Cover	4					6 x 9	0	<input checked="" type="checkbox"/>	C1S Cover 10 PT	White	4 color process	-- NONE --
Text 1	Text 1	160	336	176	480		6 x 9	0	<input type="checkbox"/>	Offset - Wht - 50#	White	Black Only	Black Only
Insert	Insert						6 x 9	0	<input type="checkbox"/>	-- NONE --	-- NONE --	-- NONE --	-- NONE --

PrePress | Inks | Section Finishing | Overrides | Paper | Supplied Section

Work Flow: **Application Files - Co**

PrePress Processes

Process	Auto	Size	Qty	Buyouts
Pre-Flight	<input checked="" type="checkbox"/>			0
Create Text	<input checked="" type="checkbox"/>			0
Impose - Out	<input checked="" type="checkbox"/>			0

<< Back Next >> Close

This brings in all associated prepress processes linked to that Workflow in Master Files Book. You can add or delete any processes here.

Add button: Shows available selections, double-click to add.

Delete button: Highlight a selection and click the **Delete** button.

Insert: To insert a process between other processes, put the cursor where you want it to go, then select **Insert**, Sequence will matter in MR Scheduler.

Buyouts

To enter Buyouts, a process must be set up for Buyouts in each area in Master Files Print, and linked to the plant in Master Files Book. Once this is completed, the buyouts display in the drop-down in each area and are available for selection. (Prepress, Section Finishing, Bindery, and Bindery Finishing.)



For Buyouts set up in Master Files Print, you may want to have one buyout process set up with a default quantity of "1" (buyout stamping die for example) and a second process with a default quantity same as the job quantity (buyout binding for example).

See Master Files Print for more on the setup details.

Prepress Buyout

In the component screen, at the top, highlight the section this buyout applies to, then at the bottom,



Once you select this process, it displays like this. Click the gray space to the far right to access the Buyout Detail screen.

New Buyout

Page Count

344

Default to all Page Counts

Buyout Bids For Buyout Prep

Add

Delete

Quote #	Vendor Code	Vendor Name	Vendor Contact	Ref #	Date		0
1	010014	About Your Be			07/17/2007	<input checked="" type="checkbox"/>	\$150

Details for bid #1

	0
NumUp	1
Setup Cost	\$150
Run Cost (Per Unit)	\$
Measure	1
Run Cost	\$
Sub Total	\$150
Tax	\$
Frieght	\$
Total Cost	\$150
Accepted	<input checked="" type="checkbox"/>

Notes

prepress buyout, file conversion

OK

Cancel

Vendor: You select the vendor from the drop-down. This pulls in from Master Files Vendor. Then enter their bid for this buyout.

Default to All Page counts: Select if applicable. Otherwise entry is required for each page count.

Cancel abandons the input.

OK to accept this buyout price and have it apply to the estimate. You can enter different vendors with different bids and can select different vendors for different page counts or quantities if desired. This is ruled by the **Accepted** check box at the bottom of this details screen.

New Buyout

Page Count: ☐ 160 ☐ 336 ☐ 176 ☐ 480 ☒ Default to all Page Counts

Buyout Bids For test buyout step

Quote #	Vendor Code	Vendor Name	Vendor Contact	Ref #	Date	1	1	1	1	1	1
1	1000	Accudata	Linda Guagliata		09/20/2006	\$150	\$150	\$150	\$150	\$150	\$150

Details for bid #1

	1	1	1	1	1	1
NumUp	1	1	1	1	1	1
Setup Cost	\$150	\$150	\$150	\$150	\$150	\$150
Run Cost (Per Unit)	\$	\$	\$	\$	\$	\$
Measure	1	1	1	1	1	1
Run Cost	\$	\$	\$	\$	\$	\$
Sub Total	\$150	\$150	\$150	\$150	\$150	\$150
Tax	\$	\$	\$	\$	\$	\$
Freight	\$	\$	\$	\$	\$	\$
Total Cost	\$150	\$150	\$150	\$150	\$150	\$150
Accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

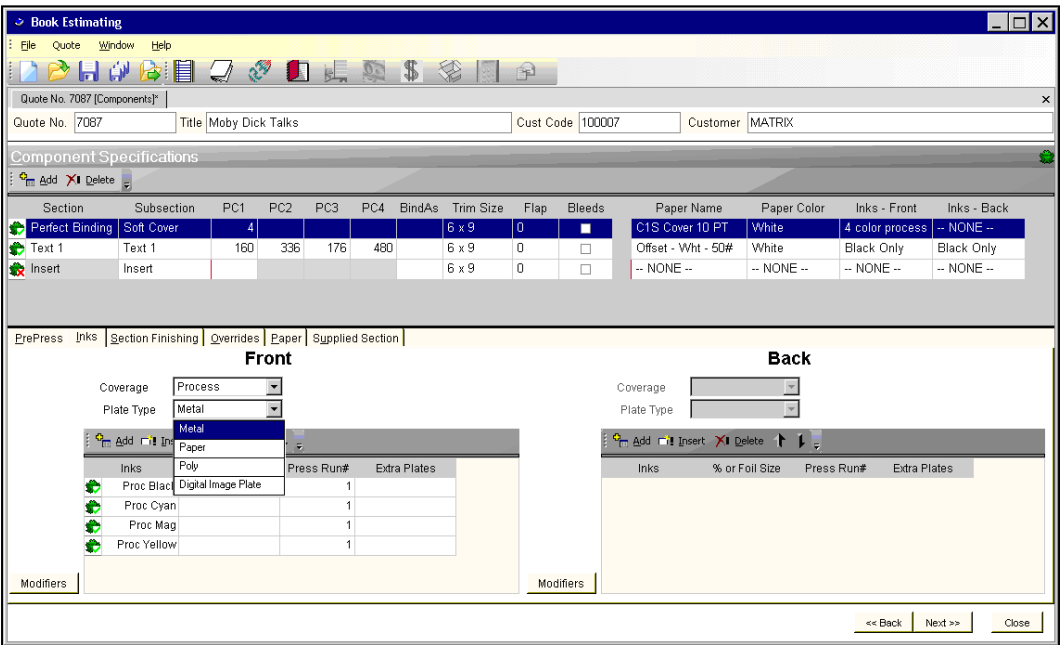
Notes

Convert to PDF from hard copy

OK Cancel

Inks tab, is where you can change the choices made at the top of this screen, You can delete any inks from the selected Ink Template, add new or different inks, or add the inks selected, or change the coverage and plate type.

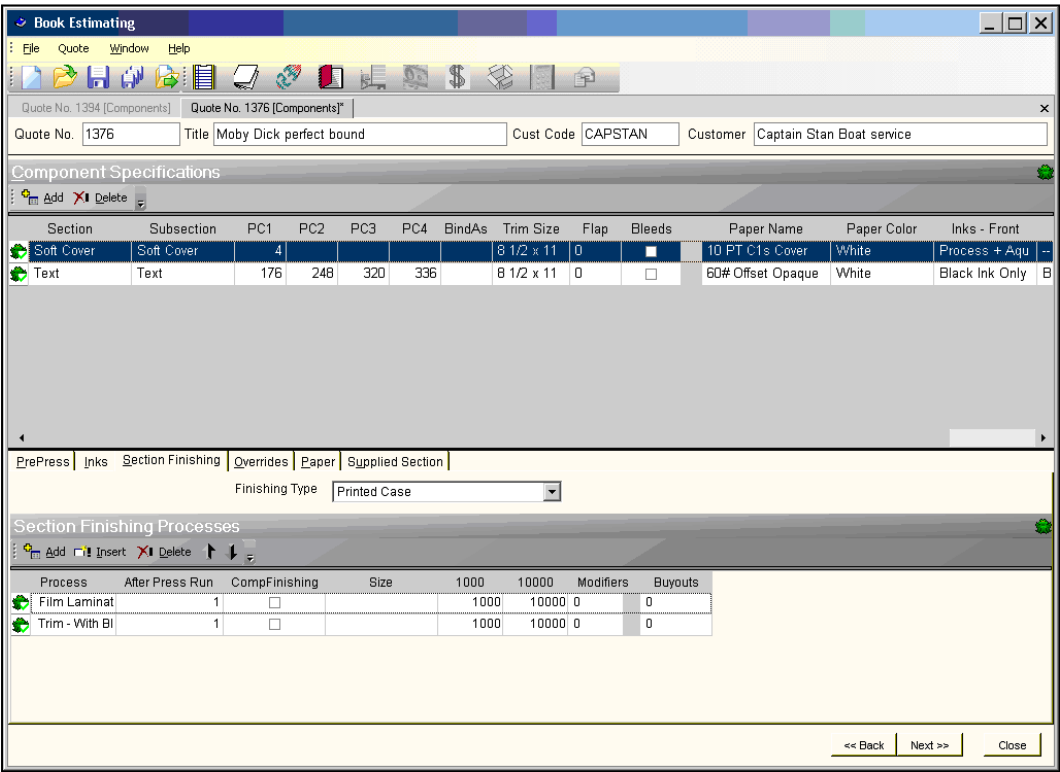
Extra Plates: You can also add additional plates here, note that length of run plate replacements are automatic. This could be for a simple code change within a press run, etc.



Section Finishing tab, allows you to add Section Finishing processes not already linked to this Bind Style in Master File Book.

Section Finishing Workflow: Select from the drop-down here to pull in numerous processes that comprise that workflow in Master Files Book, and/or you can add or remove individual section finishing processes here

For **Customer Supplied** sections, printed or non printed, the section has been selected in the top half of this screen. Highlight that section to select, then apply any section finishing processes you like by selecting from the drop-down choices.



Component Finishing use this check box if the section finishing process involves more than one section. Example you make a case, then foil stamp. You would want waste for the cover cloth and the boards for both the case making process, and possibly the foil stamping process, if your plant foil stamps assembled cases. But you would not want foil running time applied to both sections.

For this to work you would enter this component finishing process to each section involved, with identical input, and select the **Comp Finishing** check box for each.

Buyouts for Section Finishing add a process for Section Finishing buyout in Master Files Print, link in Master Files Book which makes it available from the drop-down menu, then follow the same steps outlined in Prepress buyouts.

Overrides tab allows you to force a press from available signatures (templates), or to override the system selected template after you calculate and view the results, or to force a specific press to be used. All templates are set up in Master Files Signature. Note that if you set up a signature (aka Template) in Master File Signature that is assigned to a specific press, the override here will not use that template on a different press.

The screenshot displays the 'Book Estimating' software window. The 'Quote No. 7087 [Components]*' is entered. The 'Title' is 'Moby Dick Talks', 'Cust Code' is '100007', and 'Customer' is 'MATRIX'. The 'Component Specifications' table is visible, showing sections like 'Perfect Binding', 'Text 1', and 'Insert'. The 'Overrides' tab is selected, showing 'PrePress' and 'Section Finishing' options. The 'Page Count' is set to '160' and 'Rerun #' is 'Original'. The 'Available Templates' list includes various signatures like '32 Page Text web', '16 Page Text Web 2 up', and '38" Timson, 32 Page, W/Mill'. The 'Selected Templates' section shows '38" Timson, 32 Page, W/Mill' selected. The 'Front Press' dropdown is set to 'Itek', and the 'Back Press' dropdown is set to '240 Heidelberg'. Other settings like 'Coverage', 'PlateType', 'Press Size', 'Number Out', and 'Paper Size' are also visible.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Perfect Binding	Soft Cover	4					6 x 9	0	<input type="checkbox"/>	C1S Cover 10 PT	White	4 color process	-- NONE --
Text 1	Text 1	160	336	176	480		6 x 9	0	<input checked="" type="checkbox"/>	Offset - Wht - 50#	White	Black Only	Black Only
Insert	Insert						6 x 9	0	<input type="checkbox"/>	-- NONE --	-- NONE --	-- NONE --	-- NONE --

Override for All Runs

There are many choices available for override. If there is a template available, you can select Override for All Runs, input only a press and a run method, from the drop-down choices, and the program uses that override.

The screenshot shows the 'Book Estimating' application window. The 'Overrides' tab is active. The 'Available Templates' list on the left includes 'Override for All Runs' and 'Soft Cover'. The 'Selected Templates' table shows 'Override for All Runs' is selected. The 'Run Method' is set to 'Sheetwise'. Other settings include 'Page Count' 4, 'Rerun #' 'Original', and 'Do not add section finishing' unchecked.

Section	Subsection	PC1	PC2	PC3	PC4	BindAs	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
Soft Cover	Soft Cover	4					8 1/2 x 11	0	<input type="checkbox"/>	10 PT C1s Cover	White	Process Inks	-- NONE --
Text	Text	200	248	320	336		8 1/2 x 11	0	<input type="checkbox"/>	60# Offset Opaque	White	Black Ink Only	Black Ink Only

Note the check boxes:

Active allows estimators to view and select only templates marked as ACTIVE in Master Files Signature when selected

POE Use Only allows estimators to view and select templates that have been marked as for POE use Only in Master Files Signature.

Combo each signature in Master File signature can be set up as a combination signature. You can have many options to print sheet fed layouts in one number up configuration, but trim and fold in many different ways. The Combinations set up in Master Files Signature are available from the drop-down if they exist.

Number of Runs NOTE If you force a template that calculates out as even signatures, you do not need to put a number into the No of Runs column. If the template you are forcing will not calculate out as even signatures, you will need to spell out how many signatures needed and which sizes to add up to the total text page count. This varies by page count. Select a page count from the drop-down and repeat this process for each page count.

Paper tab is where specifics are entered for Special Order paper if this was selected above. This includes color, size, price, minimum mill order.

This area is also used for paper overrides, to change the min order, size, or price that pull in from Master Files Print, Paper information.

Each quantity allows a different size, price, and Minimum order quantity to be input here.


Use In Qty: This selects to which quantities this override applies.

PrePress | Inks | Section Finishing | Overrides | **Paper** | Supplied Section

Name:

Color:

Quantity: ☒ 1000 ☐ 10000 ☐ UseInQty

Paper Size	Price	Min Order Qty
 0 x 0	0	0

The **View** button is available if what you have selected is not a stocking item, but a special order paper. When you select this it allows you to view what you entered for this Special Order Paper.



Book Estimating

File Quote Window Help

Quote No. 5541 [Components]*

Quote No. Title Cust Code Customer

Component Specifications

Section	Subsection	PC1	PC2	PC3	PC4	Trim Size	Flap	Bleeds	Paper Name	Paper Color	Inks - Front	Inks - Back
 Perfect Binding	Soft Cover	4				6 x 9	0	<input type="checkbox"/>	C1S Cover 10 PT	White	4 color process	-- NONE --
 Text 1	Text 1	160				6 x 9	0	<input type="checkbox"/>	Streamline Offs		Black Only	Black Only

PrePress | Inks | Section Finishing | Overrides | **Paper**

Special Order Paper

Name:

Color:

	2500	5000	10000	15000
Size	37 1/2 X 0	37 1/2 X 0	37 1/2 X 0	37 1/2 X 0
Price/Weight	100	100	100	100

<< Back Next >> Close

You may also enter different prices and different roll sizes for different quantities here.

Special Order Paper

Name

10 PT C1s Cover

Description

Springhill 10PT C1S Cover

Category

Coated Co

Sub Category

Type

Sheet

Perfect

No

Charge By

Sheets

Min Buy Qty

0

In Packs Of

0

Ink Factor

0.8000

Press Speed

100

%

Case Making Speed

1

%

Sheets Per Lift

500

Core Waste

0

%

Pages Per Inch

200

Use Caliper

☐

Caliper

Basis Type

D - Cover

OR

Basis Weight

80

Pounds

0

Per

0

Sq."

Vendor

REP01

Red Paper Supply

Activity Code

2400000000

Paper

Save

Close

If you are not using Special Order Paper, instead of saying **View** this tab will say **Edit**.

You may use this feature to Edit the price, minimum purchase quantity required.

Supplied Section tab: see Customer Supplied sections earlier in this document.

The Override Estimated Component Quantity Screen allows you to print additional quantity of any component. Overruns for covers or Dust Jackets, beyond normal waste requirements, to be used for promotional purposes is an example

Change the quantity in the far left column to the total quantity of that component you want, then click the **Balance** column.

Book Estimating

File Quote Window Help

Quote No. 7087 [Override Component Qty] | Quote No. 7086 [Header]

Quote No. 7087 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

1000 | 1500 | 2500 | 5000 | 7500 | 10000

Override estimated Component quantity

Section	SubSection	Total Qty	Balance	student version Qty :1000
Perfect Binding C	Soft Cover	1,000	-500	1,500
Text 1	Text 1	1,000	0	1,000

You can do this for any section and can vary the number of overs on each quantity by selecting the **Quantity** tab. In this case I added 500 covers to produce a total of 1500. The system knows it can only bind 1000 of these, so the additional 500 show in the **Balance** column.

For a Split Bound estimate, this shows which components are shared (in this case text) and the quantity applied to each.

Book Estimating

File Quote Window Help

Quote No. 1394 [Components] | Quote No. 1376 [Components]* | Quote No. -1 [Override Component Qty]*

Quote No. -1 Title California State Beaches Book Cust Code ALASKA Customer Alaska Inc.

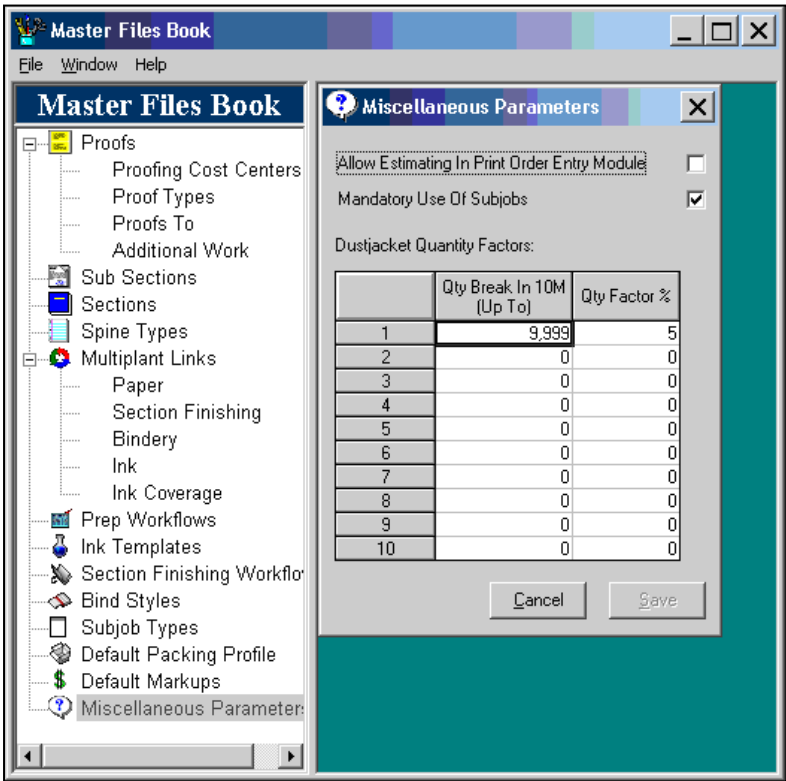
1250 | 3000 | 6000 | 10000 | 15000

Override estimated Component quantity

Section	SubSection	Total Qty	Balance	pb Qty :1000	case Qty :250
Soft Cover	Soft Cover	1,000	0	1,000	
Text	Text	1,250	0	1,000	250
HC 1-Piece No BI	CC - 1 Piece	250	0		250
	Brd Front&Back	250	0		250
Endsheet	Endsheet	250	0		250
Dust Jacket	Dust Jacket	262	0		262

<< Back Next >> Close

Also note the Dust Jacket quantity is 262, not 250. This is due to the setting in Master Files Book, Miscellaneous Parameters, Dust Jacket Quantity Factors, set at 5%.



This sets the system to always add an additional 5% to the Dust Jackets for use as promotion purposes.

Binding and Finishing Processes

The Binding and finishing processes attached to the selected bind style in Master Files Book, or linked to the template in Master Files Signature automatically populates this screen.

Users may edit, delete, or add processes here.

Quote No. 1398 [Header] Quote No. -1 [Binding and Finishing processes]*

Quote No. -1 Title test perfect bind Cust Code SLCC01 Customer Salt Lake Community College

Perfect Bound

Binding and finishing processes

Process	Unit	Measure	Size	1,000	2,500	5,000	Modifiers	Buyouts
Perfect Bind				1,000	2,500	5,000	0	0
Carton Pack				1,000	2,500	5,000	0	0

<< Back Next >> Close

To add, select the **Add** button, and select the process from the drop-down choices. Note the processes must be set up in Master Files Print AND linked to the Plant in Master Files Book to display here for selection.

Quote No. 1398 [Header] Quote No. -1 [Binding and Finishing processes]*

Quote No. -1 Title test perfect bind Cust Code SLCC01 Customer Salt Lake Community College

Perfect Bound

Binding and finishing processes

Process	Unit	Measure	Size	1,000	2,500	5,000	Modifiers	Buyouts
Perfect Bind				1,000	2,500	5,000	0	0
Carton Pack				1,000	2,500	5,000	0	0

Affix CD
Aster Sewing
Carton Pack
Encase and Jacket
Gather
Glue Trim Smyth CB
Perfect Bind
saddle stitch

<< Back Next >> Close

To delete, highlight the process and click the **Delete** button, or right-click and select **Delete**.

Note On the sequence of Binding and finishing processes....the order you input here needs to match the PRODUCTION SEQUENCE ORDER, because this informs the WASTE ALLOCATIONS. Do this with care. The sequence that automatically populates here is the same sequence that was input in Master Files Book, Bind Styles, Bindery tab, so the sequence needs to be correct there before it pulls in correctly to Book Estimating.

To change the sequence of any process, highlight the process and click the up or down arrow.

You need to close and reopen Book Estimating to see this change take effect.

Modifiers: For each process, you can add a modifier to slow down that process, click to the right of Modifier after you select the section.

The screenshot shows the 'Book Estimating' window with the 'Binding and finishing processes' tab selected. The table below lists the processes and their associated values for different book sizes.

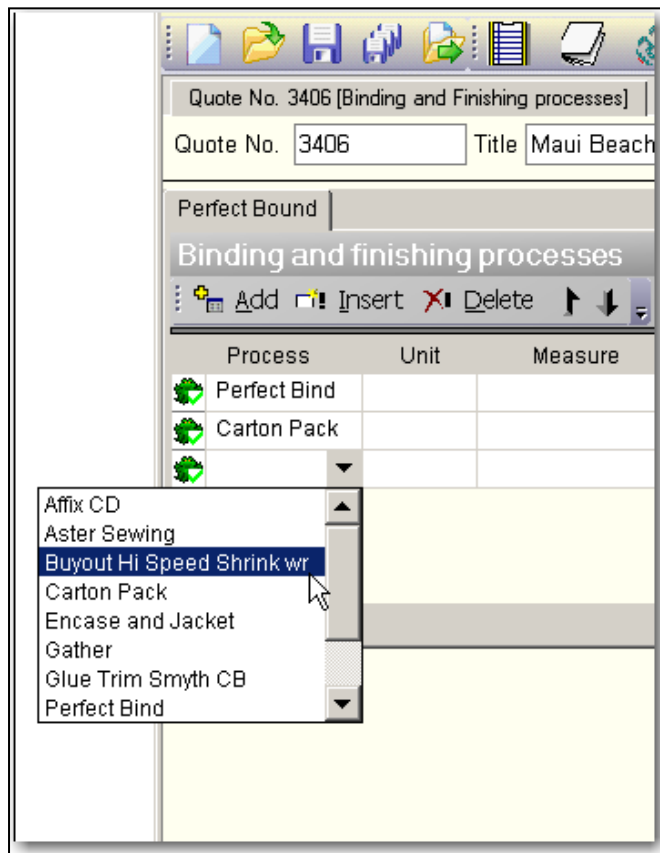
Process	Unit	Measure	BooksPerWrap	Size	1,000	1,500	2,500	5,000	7,500	10,000	Modifiers	Buyouts
Perfect Bind		NoOfSigs			1,000	1,500	2,500	5,000	7,500	10,000	0	0
Shrinkwrap I		ItemsPerPack			1,000	1,500	2,500	5,000	7,500	10,000	0	0
Carton Pack					1,000	1,500	2,500	5,000	7,500	10,000	0	0

The screenshot shows the 'Modifiers' dialog box. The 'Perfect Bind & Trim (SC) M' process is selected, and a list of modifiers is displayed. The 'Quantity' is set to 1, and the '# of Helpers' is empty.

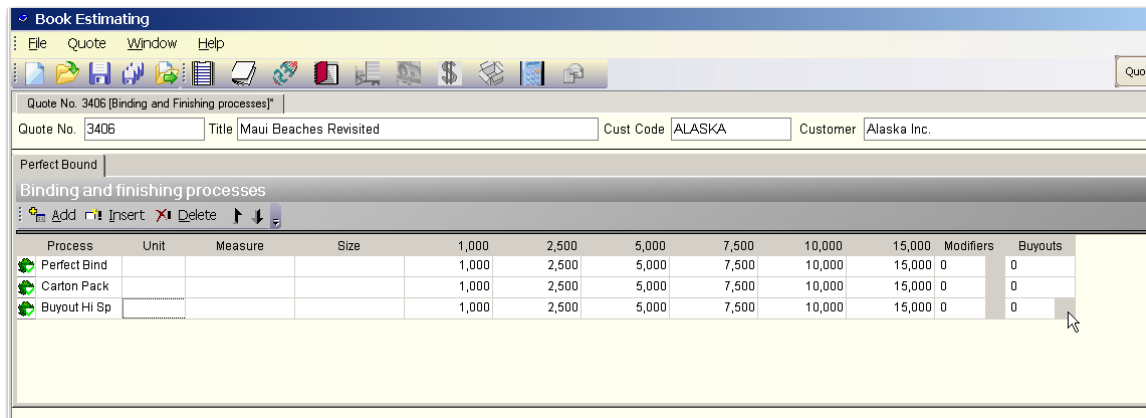
Modifier	Quantity	# of Helpers
Perfect Bind & Trim (SC) M	1	
3 Hole Drill - In Line		
Extra Setup		
Extra Waste		
PUR Binding		
Digital Job Binding		
Soft Cover With Flaps		

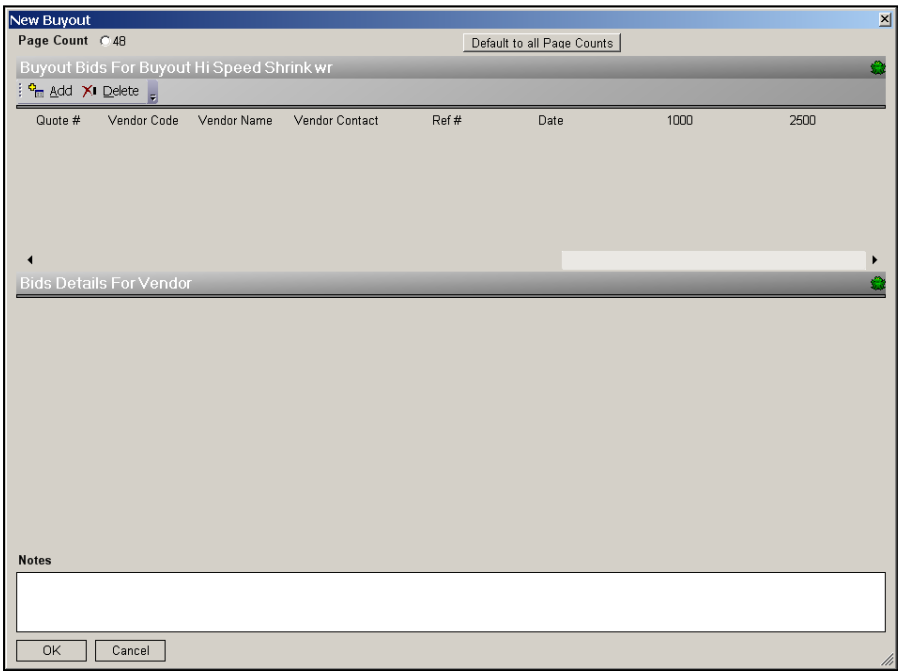
These modifiers are set up in Master Files Print and impact the run speeds, waste, etc that impact estimated costs. Applied estimate by estimate.

Buyouts When a process for Bindery Finishing Buyout has been set up in Master Files Print and linked in Master Files book, it is available here for selection.



Selecting this gray box opens the buyout screen.





The same buyout screen opens that was used for Prepress and Section Finishing buyouts.

Carton and Pallet Profiles and Selection

Highlight the Carton Packing Process, and the Company Packing Profile displays.

IF the customer has packaging requirements and these are set up in Master Files Customer, that is the Packing Profile used for their estimates.

Note If a change has occurred in the customer packing profile since an existing quote was created, you receive a warning message. To update the profile, click the **Refresh Profiles** button as shown below.

We use your carton formulas per bind style to come up with the best fit carton and pallet, then compare to existing cartons and pallets. Based on entries you make regarding maximum amount of filler material allowed, maximum weight per box, etc, our logic determines the best available fit for the book. If no standard carton is found, a custom carton is used. This selection can change per quantity, as best cost is also considered. Example a 1 stack box may be the best fit in terms of size and selected for the 1000 quantity, but this would not be cost effective at a 100,000 quantity.

The screenshot shows the 'Book Estimating' software window. The 'Quote No. -1' is selected, and the 'Title' is 'test perfect bind'. The 'Cust Code' is 'SLCC01' and the 'Customer' is 'Salt Lake Community College'. The 'Perfect Bound' tab is active, and the 'Binding and finishing processes' table is displayed. Below this, the 'Packing Profile' section contains various input fields for carton dimensions, weights, and strength requirements. A 'Refresh Profile' button is located at the bottom of the profile section.

Process	Unit	Measure	Size	1,000	2,500	5,000	Modifiers	Buyouts
Perfect Bind				1,000	2,500	5,000	0	0
Carton Pack				1,000	2,500	5,000	0	0

Packing Profile

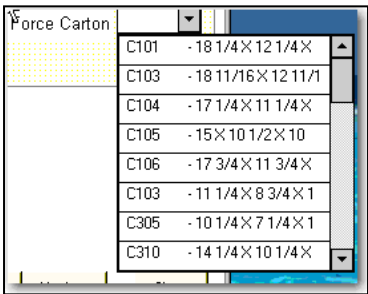
Max Carton Width	12 3/4	Min Carton Width	8 5/8	Skid Width	52	<input checked="" type="checkbox"/> Single Wall
Max Carton Length	19	Min Carton Length	8	Skid Length	0	<input type="checkbox"/> Double Wall
Max Carton Depth	10 1/8	Min Carton Depth	5 3/4	Max Skid Depth	54	<input checked="" type="checkbox"/> 200lb Burst Strength
Max Packed Weight	45	Stacks Across Width		Max Packed Skid Weight	3000	<input type="checkbox"/> 275lb Burst Strength
Min Fill Height	0	Stacks Across Length		Inhouse Breakdown Qty	9999999	<input type="checkbox"/> Custom Printed
Addl Bulk Height	0	Books Per Carton		Custom Breakdown Qty	500	Force Carton ▼
Addl Book Weight		Refresh Profile				

[<< Back](#)
[Next >>](#)
[Close](#)

You can override any entries in this field which are used for THIS ESTIMATE ONLY. Changes here will not impact the Packing Profiles in any other areas.

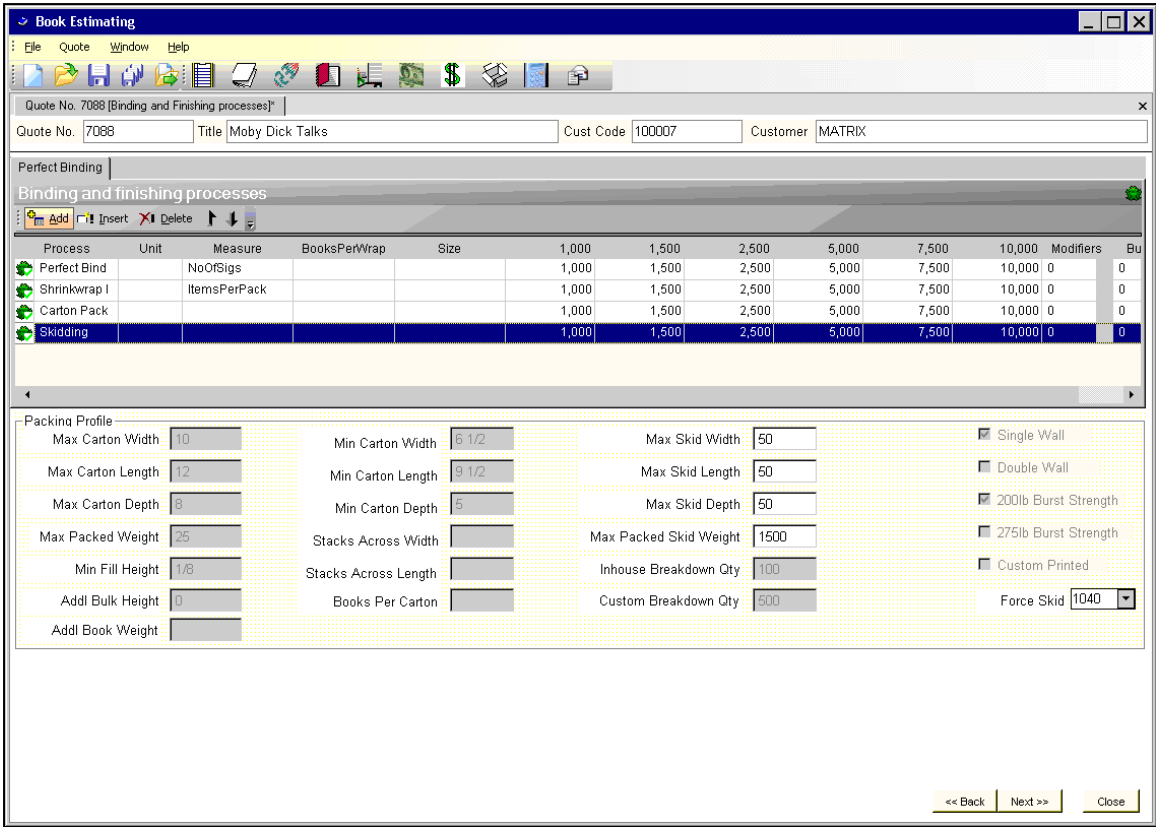
Add'l Book Height and Add Book Weight were added to accommodate more than one volume packed into a single carton. The height and weight of the volume(s) not on this estimate are input here.

Force Carton: You can force the exact carton you want to be used, select from the drop-down choices.



In addition to or instead of forcing a specific carton, you have the option to force the number of stacks across width or across length, and this informs the carton choice when no carton is forced

Following shot shows Skid Packing Profile.



The choice here overrides the best fit carton and skid logic and uses the carton or skid that was forced unless it physically cannot be done.

Users can also set up pallets or cartons for specific customers use only, as in the case of customers furnishing their own pallets, or special pallets or cartons purchased only for one customer. This is set up in Master File Print, Carton Definitions, or Skid Definitions.

Custom breakdown quantity is the quantity after which the system calculates a custom carton with less fill than the cartons available in house. This is set up in Master Files Print, Carton Definitions.

Estimating Master File Setup for the Company : (01) Alaska - (SBI) Sheridan Books - [Carton Definitions]

File New View Window Help

Master File - Print

Click column header to sort. Carton Type: Standard Define new carton types

	Product Number	Carton Number	Length	Width	Depth	Wall	Min Fill Depth	Burst Strength	Max Weight/Box	Cost/Box	Weight of	Max Fill Qua
1	101	C101	18 1/4	12 1/4	7	Single	0	200lb	60	1	1	150
2	103	C103	18 11/16	12 11/16	7	Single	0	200lb	60	1	1	150
3	104	C104	17 1/4	11 1/4	7	Single	0	200lb	60	1	1	150
4	105	C105	15	10 1/2	10	Single	0	200lb	60	1	1	150
5	106	C106	17 3/4	11 3/4	7	Single	0	200lb	60	1	1	150
6	300	C103	11 1/4	8 3/4	10	Single	0	200lb	60	1	1	150
7	305	C305	10 1/4	7 1/4	10	Single	0	200lb	60	1	1	150
8	310	C310	14 1/4	10 1/4	10	Single	0	200lb	60	1	1	150
9	315	C315	12 1/4	9 1/4	7	Single	0	200lb	60	1	1	500
10	320	C320	9 1/4	6 1/4	10	Single	0	200lb	60	1	1	150
11	350	C350	18 1/4	12 1/4	7	Single	0	275lb	90	1	1	150
12	10001	Doug1	14 1/2	9 1/2	10	Single	1/4	200lb	90	1	1	500
13	400	ct1	17 1/8	11 1/4	8	Single	0	200lb	60	1	1	500
14	401	ct test	18 1/8	12 1/8	8	Single	0	200lb	60	1	1	500
15	402	ct test 2	17 1/8	11 1/4	12	Single	0	200lb	60	1	1	2000
16	500	D PUB 1	12 1/2	9 1/2	11	Single	0	200lb	60	1	1	2000
17	501	new test	12 1/8	9 1/8	7	Single	0	200lb	60	1	1	2000
18	399	ct test 3	18 1/8	12 1/8	7 3/16	Single	0	200lb	60	1	1	2000
19												
20												
21												
22												
23												
24												
25												
26												
27												
28												

Cancel Save

After calculation, click carton packing, on the specific quantity, to view the carton or pallet selected.

One Piece Folder cartons – logic exists to pack books in One Piece Folder (OPF) and then pack these OPF's into master cartons. Set up is required as a Binding Finishing Process in Master Files Print for packing OPF's and the One Piece Folders must be set up in Master Files Print, Misc, Carton Definitions. There is also a formula that needs to be created in Master Files Book per each bind style.

Carton Results screen

The following shot shows Best Fit Carton results for the 1000 quantity. A different carton is selected for different quantities when thresholds are crossed that were set up in Master Files print, Carton Definitions, i.e., max quantity before special order cartons are considered. Special Order cartons must set up in Master Files Print, Misc, Carton definitions to be considered.

The Carton Results screen lists the Book Weight (weight of a single book) Spine Size (spine width) and Book Bulk (thickness of the book). These also display after calculation in Print Order Entry program.

Quote No. 7088 [Carton Results]

Quote No. 7088 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

Perfect Binding

Page Count 160 Show Error Log Book Weight : 0.48548 Spine Size : 0.31000 Book Bulk : 0.32000

Process	1,000	1,500	2,500	5,000	7,500	10,000
Carton Pack	42	63	105	209	313	417
Skidding	1	1	1	2	3	4

Best Fit carton 1000 books:

Carton Type	Custom	No Of Cartons	42	Book Thickness	0.32000
Carton Number		Packed Carton Weight	11.65 Lbs	Last Carton Has Less Books	<input checked="" type="checkbox"/>
Product Number	try	Books Per Carton	24	Weight Of Last Carton	8 Lbs
Carton Size	9 1/8 X 6 1/8 X 7 13/16	# Stacks Across Width	1	Books In Last Carton	16
Burst Strength	200	# Stacks Across Length	1	Shrink Wrapped	<input type="checkbox"/>
Carton Wall	Single Wall	Book Size Across Width	Width	Books / ShrinkWrap	
Unit Cost	1.1	Total Cost	46.2		

<< Back Next >> Close

Choosing the **Show Error Log** button shows all cartons or pallets considered, the formula result for best fit, and the reason each was not selected.

CartonNo	ProductNo	Size	Books to Pa	Error Message
100	100	Carton = 9 1/4 x 6 1/4 x 7	1000	Carton width (6 1/4) is less than the minimum width (8 5/8) specified in the packing profile
500	500	Carton = 11 1/4 x 8 1/4 x 10	1000	Carton width (8 1/4) is less than the minimum width (8 5/8) specified in the packing profile
501	501	Carton = 17 1/4 x 11 1/4 x 10, Formula = 12 1/4 x 9 1/4 x 10	1000	Actual fill length(5) exceeds maximum fill length(1) specified in the carton definition
502	502	Carton = 22 1/4 x 17 1/4 x 10	1000	Carton width (17 1/4) is more than the maximum width (12 3/4) specified in the packing profile
700	700	Carton = 15 x 10 1/2 x 10, Formula = 12 1/4 x 9 1/4 x 10	1000	Actual fill length(2 3/4) exceeds maximum fill length(1) specified in the carton definition
710	710	Carton = 14 1/4 x 10 1/4 x 10 1/8, Formula = 12 1/4 x 9 1/4 x 10 1/8	1000	Actual fill length(2) exceeds maximum fill length(1) specified in the carton definition
102	102	Carton = 18 1/2 x 12 1/2 x 7	1000	Filtered out because of Side Fill Volume (53.8125)
100	100	Carton = 9 1/4 x 6 1/4 x 7	2500	Carton width (6 1/4) is less than the minimum width (8 5/8) specified in the packing profile
500	500	Carton = 11 1/4 x 8 1/4 x 10	2500	Carton width (8 1/4) is less than the minimum width (8 5/8) specified in the packing profile
501	501	Carton = 17 1/4 x 11 1/4 x 10, Formula = 12 1/4 x 9 1/4 x 10	2500	Actual fill length(5) exceeds maximum fill length(1) specified in the carton definition
502	502	Carton = 22 1/4 x 17 1/4 x 10	2500	Carton width (17 1/4) is more than the maximum width (12 3/4) specified in the packing profile
700	700	Carton = 15 x 10 1/2 x 10, Formula = 12 1/4 x 9 1/4 x 10	2500	Actual fill length(2 3/4) exceeds maximum fill length(1) specified in the carton definition
710	710	Carton = 14 1/4 x 10 1/4 x 10 1/8, Formula = 12 1/4 x 9 1/4 x 10 1/8	2500	Actual fill length(2) exceeds maximum fill length(1) specified in the carton definition

Select and highlight the skid or pallet process to display the Pallet profile. This works the same as cartons these values can be overridden, and pallets also display on the carton error log.

Book Estimating

Quote No. 7088 [Carton Results]

Quote No. 7088 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

Perfect Binding

Page Count 160 Book Weight : 0.48548 Spine Size : 0.31000 Book Bulk : 0.32000

No of Boxes

Process	1,000	1,500	2,500	5,000	7,500	10,000
Carton Pack	42	63	105	209	313	417
Skidding	1	1	1	2	3	4

Best Fit Skid 1000 books

Product Number	1040	# Stacks Across Width	4	<input checked="" type="checkbox"/> Last Skid Has Less Cartons
Skid Size	40 X 40 X 39 1/1	# Stacks Across Length	6	Weight of Last Skid
Skid Unit Cost	2	Carton Size Across Width	Length	Cartons in Last Skid
Packed Skid Weight	1400 Lbs	Cartons Per Skid	120	
Total Cost	2	No Of Skids	1	

<< Back Next >> Close

For further information on Carton Set up, see the Book Estimating Carton Setup document.

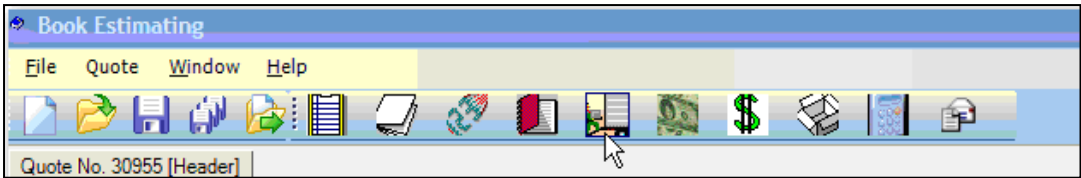
Freight

After the quote is calculated and total weight is determined, freight costs from many carriers can be pulled in over the internet. Contact your freight carrier, they provide the dll for this. We accommodate accessorial charges, fuel surcharges, and markups for each, if these are provided by the freight carrier. THIS FEATURE WILL NOT WORK unless the dll is provided by your freight carrier.

Note To get this to work, you must have pallet (skid) packing included in the estimate and you will have to calculate the estimate once before using this feature to determine the weight.

To add Freight

- 1. Click the icon 6th from the right.



Clicking this icon opens this screen.

Quote No. 30955 [Header]

Quote No. 30955 Title misc build tests, overrides, freight Cust Code 001007 Customer About Books, Inc.

Page Count 248

Zip City State County ShipFrom Carrier Accessorial

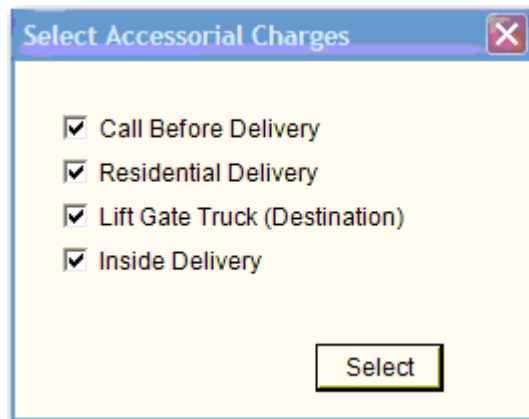
VersionName	Books/Carton	Weight/Box	1000	5000	10000	Qty4	Qty5	Qty6
test	32	32.19	1000	5000	10000			

No Of Skids	1	5	10
Average Skid Weight	1070.08	1000.564	1000.564
Cost Based On	Weight	Weight	Weight
No Of Trucks	0	0	0
Total Weight	1070.08	5002.82	10005.64
Weight Used	1070.08	5002.82	10005.64
UOM	1	1	1
Freight Rate	0.00	0.00	0.00
Freight Cost	0.00	0.00	0.00
Markup	20.00	20.00	20.00
FuelSurcharge	0.00	0.00	0.00
Other Charges	0.00	0.00	0.00
Fuel Sch Markup	0.00	0.00	0.00
Other Chgs Markup	0.00	0.00	0.00
Total Freight Charges	0.00	0.00	0.00

Get Rates

<< Back Next >> Close

- 2. Input the Destination in **ZIP** field, and the Origination Zip Code in the **Ship From** field.
- 3. Select the carrier from the drop-down selections. These are your own carriers.
- 4. Select Accessorial Box to bring up the carriers' extra charges (these come from your carrier).



5. Select any check boxes that apply and click **Select**.
6. When ready, click **Get Rates**. The freight rates populate.

Book Estimating

Quote No. 30955 [Freight]

Quote No. 30955 Title misc build tests, overrides, freight Cust Code 001007 Customer About Books, Inc.

Page Count 248

Add X Delete

Zip	City	State	County	ShipFrom	Carrier	Accessorial
94118	San Francisco	CA	San Francisco	45405	Con-Way	<input type="checkbox"/>

VersionName	Books/Carton	Weight/Box	1000	5000	10000	Qty4	Qty5	Qty6
test	32	32.19	1000	5000	10000			

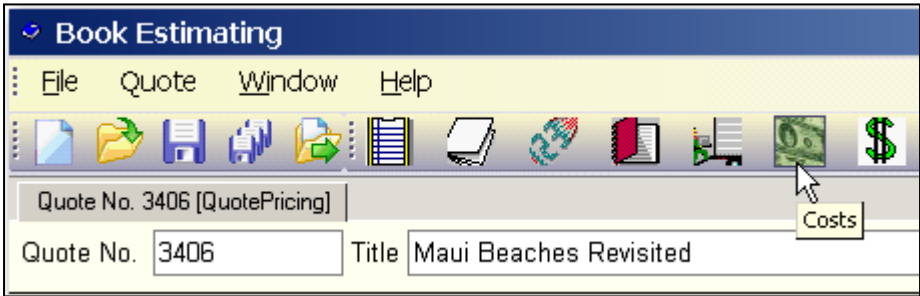
No Of Skids	1	5	10
Average Skid Weight	1070.08	1000.564	1000.564
Cost Based On	Weight	Weight	Weight
No Of Trucks	0	0	0
Total Weight	1070.08	5002.82	10005.64
Weight Used	1070.08	5002.82	10005.64
UOM	1	1	1
Freight Rate	0.00	0.00	0.00
Freight Cost	833.82	3400.89	5517.91
MarkUp	20.00	20.00	20.00
FuelSurcharge	159.26	649.57	1053.92
Other Charges	242.63	504.15	879.30
Fuel Sch MarkUp	0.00	0.00	0.00
Other Chgs MarkUp	0.00	0.00	0.00
Total Freight Charges	1402.47	5234.78	8554.71

Get Rates

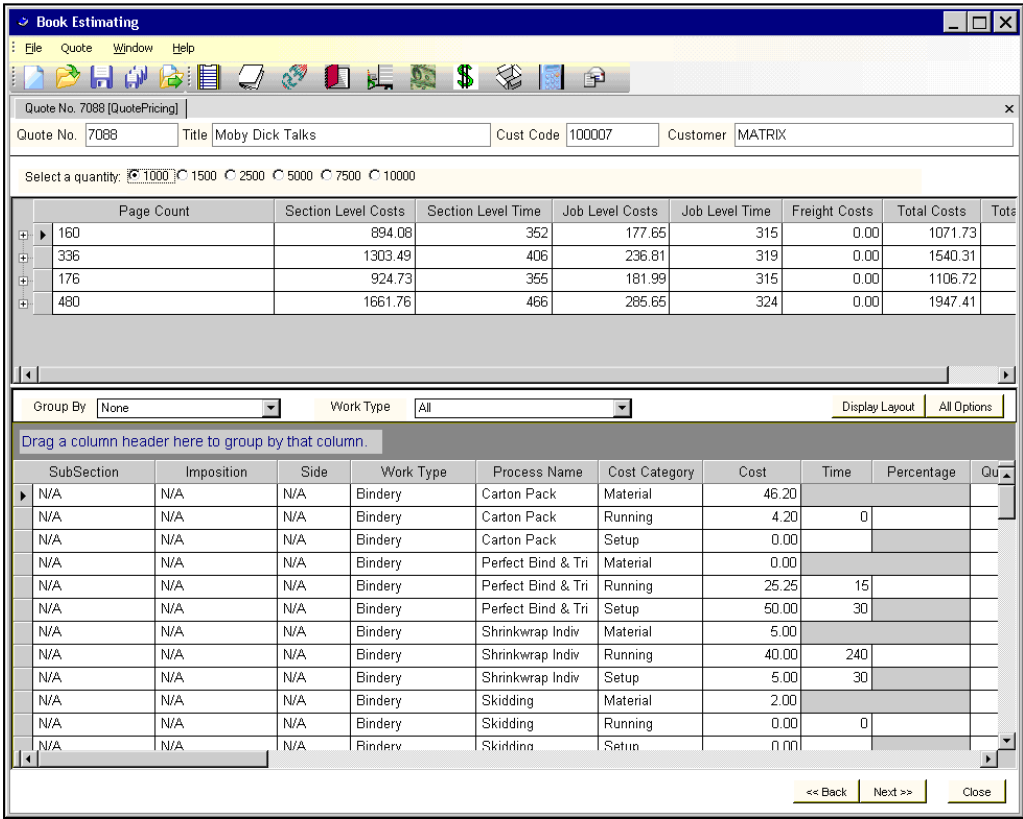
<< Back Next >> Close

Calculation and Cost Review

When all input is complete, click the **Calculator** icon to calculate the estimate. When calculation is completed, review costs by selecting the **Dollar Bill** icon from the top toolbar.



To see the details, select a quantity and page count. The default work type is **All**.
You can highlight each section at the top and the details for that section display at the bottom.
Or you can drill down by section to see totals by work type.



Book Estimating

File Quote Window Help

Quote No. 30967.9 [Components]* Quote No. 30977 [QuotePricing]

Quote No. 30977 Title 205732 - Plains Village Archaeology (PARALLEL) Cust Code 601601 Customer Univer

Select a quantity: ☒ 650 ☐ 1000 ☐ 1500 ☐ 2000

SubSection	Cost	Time
Text	2000.16	2017
Imposition		
6 - 48pg Sigs 1 Up Tims	1618.62	1940
Side		
Front	1434.03	1901
Work Type		
Pre-Press	466.83	1822
Plate Making	120.73	21
Plate	63.86	18
Job Make Ready	42.57	12
Running	97.79	28
Ink	0.00	
Washup	0.00	0
Blank	642.25	

Group By: None Work Type: All

Drag a column header here to group by that column.

Imposition	Side	Work Type	Process Name	Cost Category	SubSection	Cost
1 - 24pg Sigs 2 U	Back	Ink	N/A	Material	Text	0.00
1 - 24pg Sigs 2 U	Back	Job Make Ready	N/A	Setup	Text	0.00
1 - 24pg Sigs 2 U	Back	Plate	N/A	Setup	Text	10.64
1 - 24pg Sigs 2 U	Back	Plate Making	N/A	Material	Text	15.20
1 - 24pg Sigs 2 U	Back	Plate Making	N/A	Setup	Text	4.92
1 - 24pg Sigs 2 U	Back	Running	N/A	Running	Text	0.00

For ease of viewing, the columns can be rearranged by dragging and dropping their position as desired.

Book Estimating

File Quote Window Help

Quote No. 7088 [QuotePricing]

Quote No. 7088 Title Moby Dick Talks Cust Code 100007 Customer MATRIX

Select a quantity: ☒ 1000 ☐ 1500 ☐ 2500 ☐ 5000 ☐ 7500 ☐ 10000

Section	Cost	Time
Perfect Binding Cover	451.53	255
SubSection	Cost	Time
Soft Cover	451.53	255
Imposition	Cost	Time
1 - 4pg Sigs 2 Up Komor	451.53	255
Side	Cost	Time
Front	451.53	255
Work Type	Cost	Time
Plate Making	25.04	30
Plate	40.00	24
Job Make Ready	100.00	60
Running	9.70	6
Ink	7.04	
Washup	200.00	120
Paper	44.75	
Section Finishing	25.00	15

Group By: None Work Type: Ink Display Layout All Options

Drag a column header here to group by that column.

SubSection Imposition Side Process Name Cost Category Cost Quantity Measure MarkUp Act. Cost

<< Back Next >> Close

Display Layout: To see a layout of the press sheet, highlight the imposition line and select **Display Layout**.

Book Estimating

File Quote Window Help

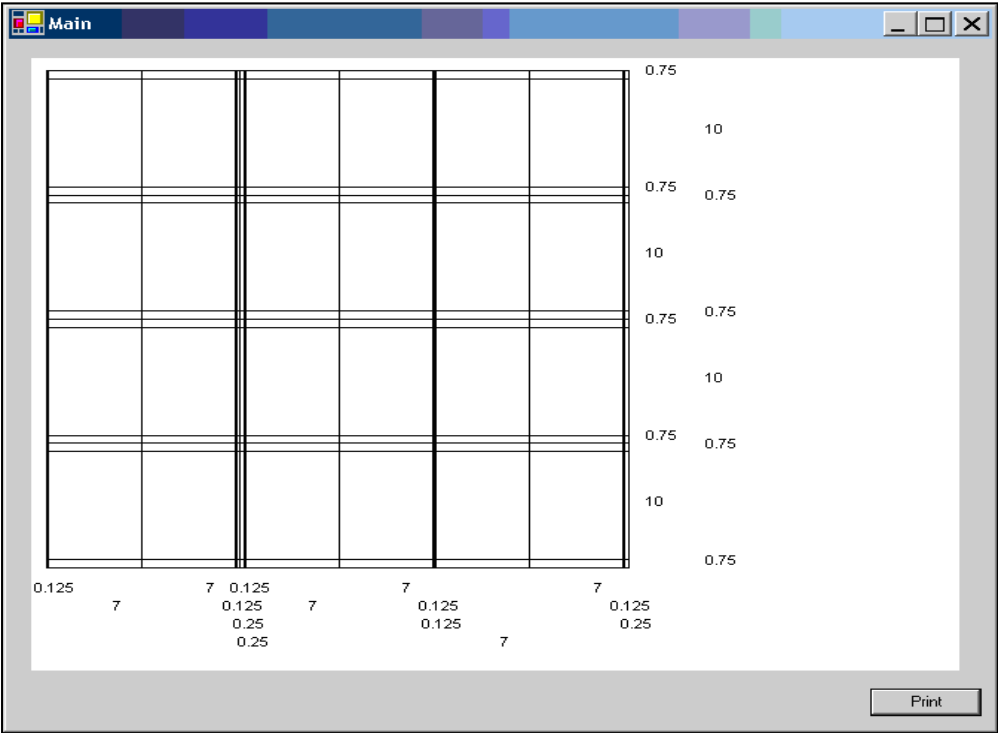
Quote No. 30967.9 [Components] Quote No. 30977 [QuotePricing]

Quote No. 30977 Title 205732 - Plains Village Archaeology (PARALLEL) Cust Code 601601 Customer University of Utah Press

Select a quantity: ☒ 650 ☐ 1000 ☐ 1500 ☐ 2000

SubSection	Cost	Time
Text	2000.16	2017
Imposition	Cost	Time
6 - 48pg Sigs 1 Up Tims	1618.62	1940
Side	Cost	Time
Front	1434.03	1901
Work Type	Cost	Time
Pre-Press	466.83	1822
Plate Making	120.73	21
Plate	63.86	18
Job Make Ready	42.57	12
Running	97.79	28
Ink	0.00	
Washup	0.00	0
Paper	642.25	

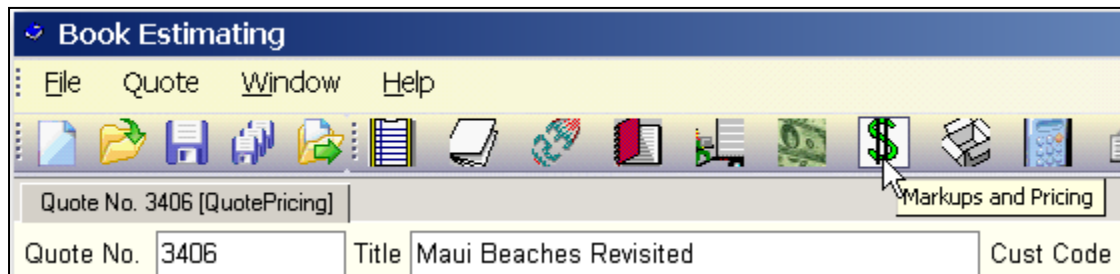
Group By: None Work Type: All Review/Query Display Layout



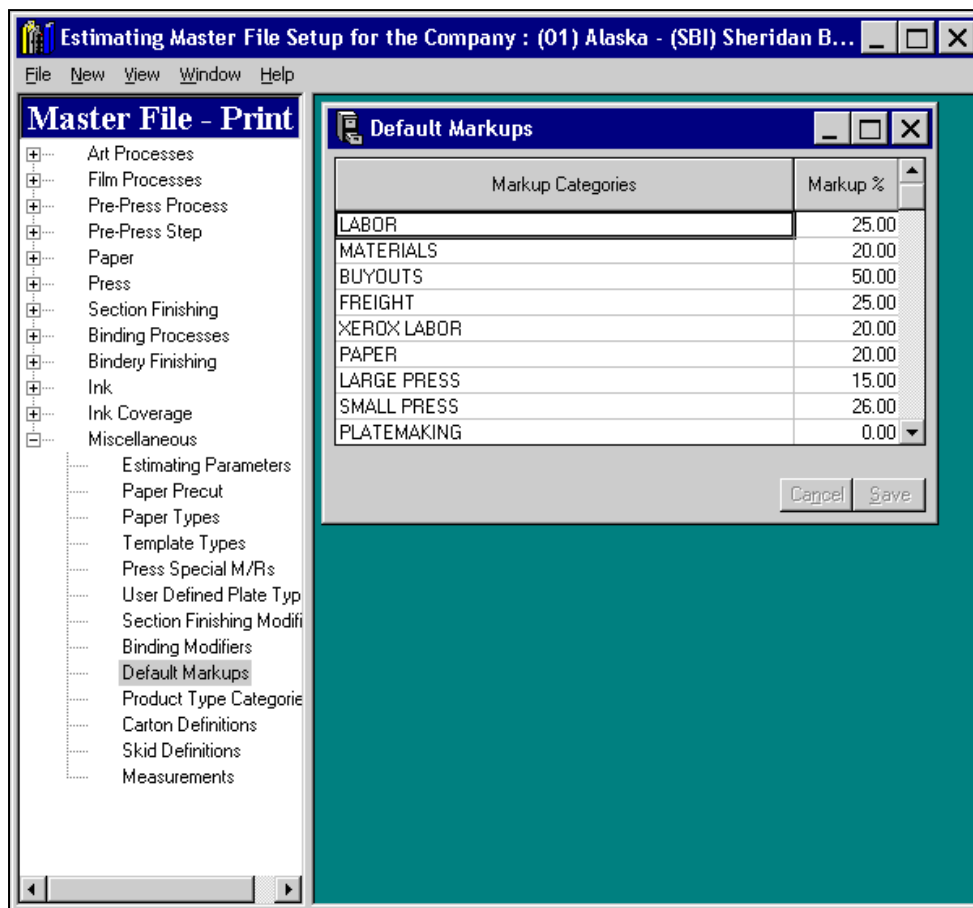
All Options shows all presses and templates considered and comparative costs.

Pricing and Markups

Access the pricing area by selecting the Dollar Sign from the top tool bar.



Default Markups are created in Master Files Print for your company and Master Files Book for customer specific markups. These predetermined markups flow into the markup column here.



Customer Specific markups can be established in Master Files Book, and if so, the customer specific markups are used. If no customer specific markups are entered, your company defaults are used.

Markups can be changed on a quote by quote basis if desired in the Pricing and Markups screen.

When you make a change to the markup in the first quantity this defaults across all quantities. You may edit this default to give a different markup for each quantity.

Note the value added percentage and amount are shown, and with each markup change made in any area, the value added amount and percentage changes, to see immediate impact on value add of pricing decisions. Also note you cannot change the cost values in the pricing area.

Proposal Generator

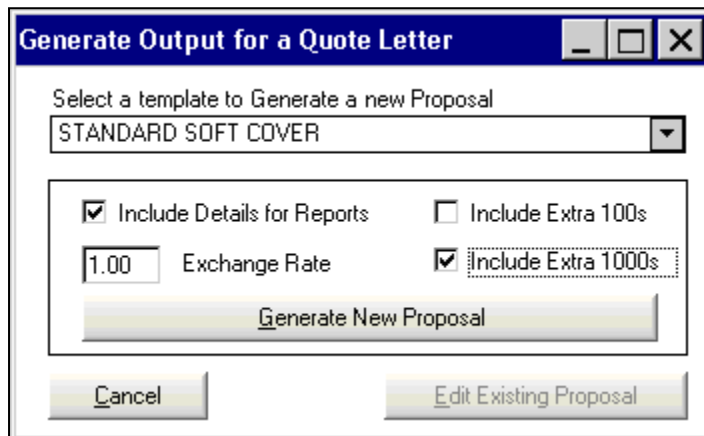
This is a data extraction tool for users to pull data into a crystal report or word document for their own style of quote letters. For complete information on the Proposal Generator including creating templates, see "Master Files Book QL.doc".

We have a breakout of costs for inclusion in Proposals. We accommodate exchange rates. These are set up in Master Files Quote letter and allow users to isolate costs in any way they wish, and create templates for re use. These quote letter templates are designed by you and available from the drop-down. See Master Files Book Quote Letter for instructions on setting up quote letter templates.

To access the Proposal Generator select the **Generate Proposal** icon, top far right in the toolbar.



Click the icon to open this screen. This is where you select the quote letter template and can input the exchange rate for international currency.



This is the first view from Proposal Generator showing the data that was extracted. You may make further price changes here if desired. Note the account Status displays in the upper left corner.

3-406[Maui Beaches Revisited]

Status

Net 100 days.

Address

Account Code

ALASKA

Name

Alaska Inc.

123 West Main

Comments

Suite 7

Waterdown

UT

84601

Country

USA

Edited	BindStyle	PageCount	QtyNo	EstQty	LineNo	Break	Descr1	Descr2	Qty	Cost	Markup	CostPlusMarkup	Price	SubTotal	Total
<input type="checkbox"/>	Perfect Bound	48	1	1000	1	<input type="checkbox"/>	Paper		2000	210.76	20	252.912	252.912	252.912	252.912
<input type="checkbox"/>	Perfect Bound	48	1	1000	3	<input type="checkbox"/>	Plates		32	262.24	9.694	267.662	267.662	540.574	540.574
<input type="checkbox"/>	Perfect Bound	48	1	1000	5	<input type="checkbox"/>	Press		8012	510.48	16.097	592.65	592.65	1133.224	1133.224
<input type="checkbox"/>	Perfect Bound	48	1	1000	6	<input type="checkbox"/>	Bind		8318	342.46	15.197	394.504	394.504	1527.728	1527.728
<input type="checkbox"/>	Perfect Bound	48	1	1000	7	<input type="checkbox"/>	Cover		6004	162.49	16.791	189.775	189.775	1717.503	1717.503
<input type="checkbox"/>	Perfect Bound	48	1	1000	999990	<input checked="" type="checkbox"/>	Miscellaneous		3000					1717.503	1717.503
<input type="checkbox"/>	Perfect Bound	48	2	2500	1	<input type="checkbox"/>	Paper		5000	438.14	20	525.768	525.768	525.768	525.768
<input type="checkbox"/>	Perfect Bound	48	2	2500	3	<input type="checkbox"/>	Plates		32	472.1	5.829	499.621	499.621	1025.369	1025.369
<input type="checkbox"/>	Perfect Bound	48	2	2500	5	<input type="checkbox"/>	Press		20012	782.47	16.228	909.448	909.448	1934.637	1934.637
<input type="checkbox"/>	Perfect Bound	48	2	2500	6	<input type="checkbox"/>	Bind		20794	593.13	15.291	683.625	683.625	2618.661	2618.661
<input type="checkbox"/>	Perfect Bound	48	2	2500	7	<input type="checkbox"/>	Cover		15004	243.16	16.295	262.783	262.783	2901.444	2901.444
<input type="checkbox"/>	Perfect Bound	48	2	2500	999990	<input checked="" type="checkbox"/>	Miscellaneous		7500					2901.444	2901.444
<input type="checkbox"/>	Perfect Bound	48	3	5000	1	<input type="checkbox"/>	Paper		10000	851.16	20	1021.392	1021.392	1021.392	1021.392
<input type="checkbox"/>	Perfect Bound	48	3	5000	3	<input type="checkbox"/>	Plates		32	200	20	240	240	1261.392	1261.392
<input type="checkbox"/>	Perfect Bound	48	3	5000	5	<input type="checkbox"/>	Press		40012	1080.83	16.507	1259.238	1259.238	2520.63	2520.63
<input type="checkbox"/>	Perfect Bound	48	3	5000	6	<input type="checkbox"/>	Bind		41269	955.43	15.353	1102.12	1102.12	3622.749	3622.749
<input type="checkbox"/>	Perfect Bound	48	3	5000	7	<input type="checkbox"/>	Cover		26254	790.28	15.495	912.732	912.732	4535.481	4535.481
<input type="checkbox"/>	Perfect Bound	48	3	5000	999990	<input checked="" type="checkbox"/>	Miscellaneous		15000					4535.481	4535.481
<input type="checkbox"/>	Perfect Bound	48	4	7500	1	<input type="checkbox"/>	Paper		15000	1228.03	20	1473.636	1473.636	1473.636	1473.636
<input type="checkbox"/>	Perfect Bound	48	4	7500	3	<input type="checkbox"/>	Plates		32	200	20	240	240	1713.636	1713.636
<input type="checkbox"/>	Perfect Bound	48	4	7500	5	<input type="checkbox"/>	Press		60012	1453.5	16.576	1694.427	1694.427	3408.063	3408.063
<input type="checkbox"/>	Perfect Bound	48	4	7500	6	<input type="checkbox"/>	Bind		61438	1325.53	15.379	1529.385	1529.385	4937.448	4937.448
<input type="checkbox"/>	Perfect Bound	48	4	7500	7	<input type="checkbox"/>	Cover		39379	885.75	15.489	1022.941	1022.941	5960.388	5960.388
<input type="checkbox"/>	Perfect Bound	48	4	7500	999990	<input checked="" type="checkbox"/>	Miscellaneous		22500					5960.388	5960.388

Click **Preview** to get the breakout to review.

Preview

File

View

Background

Document Map

Bind Style[Page Count] Details

Perfect Bound [48]

Status

Net 100 days.

Address

Acct. Code

ALASKA

Name

Alaska Inc.

123 West Main

Title

Maui Beaches Revisited

Suite 7

Estimator

Betty White

Waterdown

Comments

UT

84601

Country

USA

Currency

USA

Exch Rate

1

Created

8/19/2009 4:59:52 PM

3406.00

Bindstyle

Perfect Bound

Page Count

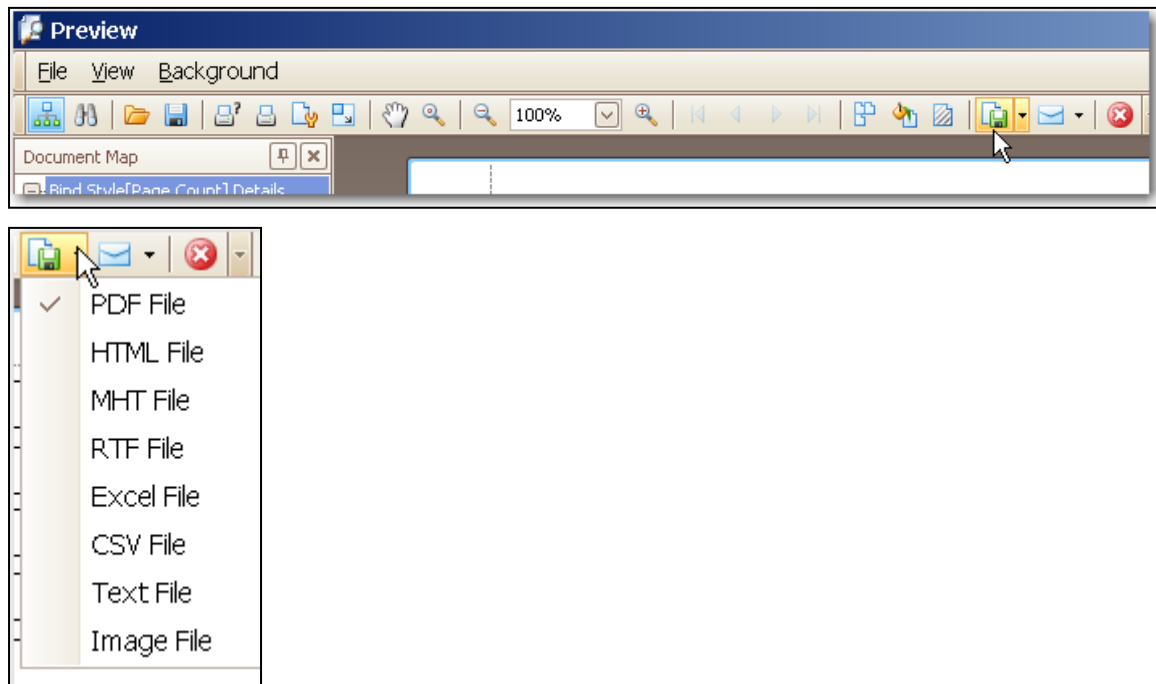
48

	1000	2500	5000	7500	10000	15000
Paper	252.91	525.77	1,021.39	1,473.64	1,925.34	2,820.50
Plates	287.66	499.62	240.00	240.00	240.00	240.00
Press	592.65	909.45	1,259.24	1,694.43	1,892.63	2,637.32
Bind	394.50	683.83	1,102.12	1,529.39	1,615.97	2,321.56
Cover	189.78	282.78	912.73	1,022.94	1,084.76	1,287.07
Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00
Total	1,717.50	2,901.45	4,535.48	5,960.39	6,758.69	9,306.45
Unit Price	1.718	1.161	0.907	0.795	0.676	0.620
Variance Amount	0.00	0.00	0.00	0.00	0.00	0.00
Quoted Price	1,717.50	2,901.44	4,535.48	5,960.39	6,758.69	9,306.45
Quoted Unit Price	1.718	1.161	0.907	0.795	0.676	0.620

Page 1 of 1

Zoom Factor: 100%

This data can be exported by selecting the **Export** icon, and these are your choices.



Notes about Proposal Generator output:

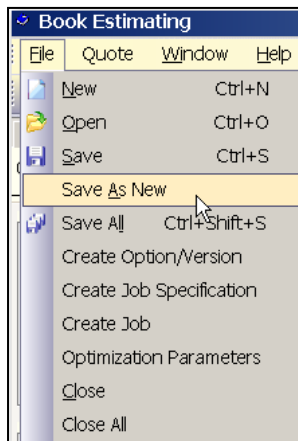
- Currently, Freight shows on the final view as "N/A".
- On split bound jobs, sharing common text, ALL the prepress displays on the FIRST bind style.

See Master Files Book Quote Letter Document for set up and more details.

Price List function in Proposal Generator: Allows further pricing and breakout options. This has not been fully developed.

Options/Versions and Copying Estimates

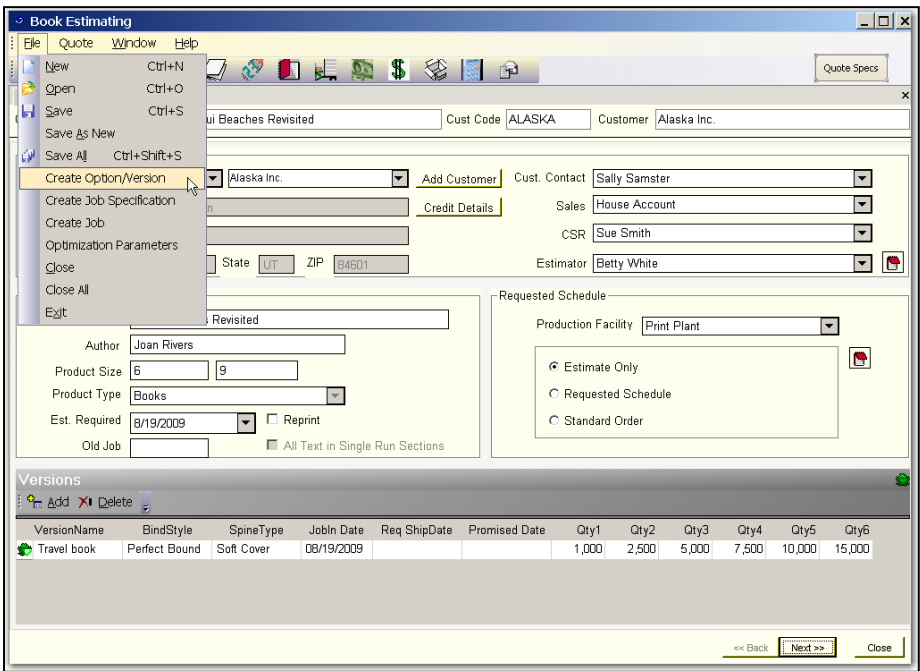
To access this area, select File. Then from the drop-down, click **Save As New** or **Create Option/Version**.



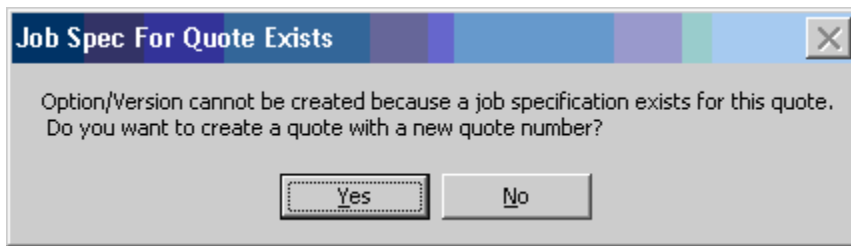
Save As New creates an exact copy of this estimate you have open and gives it a totally different estimate number. The copied quote will now be open and ready to edit.

You edit anything at all in this estimate except Bind Style, including Customer.

Create Option/Version



If this estimate has already been used to create a Job Spec, you receive this message. Your option here is to create a copy of this estimate with a new quote number.



You can only create option/versions if a job spec does not exist. The job spec is automatically given the estimate number with .9 suffix.

VersionName	BindStyle	SpineType	JobLn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
Travel book	Perfect Bound	Soft Cover	08/20/2009			1,000	2,500	5,000	7,500	10,000	15,000

We support up to 98 versions of each estimate.

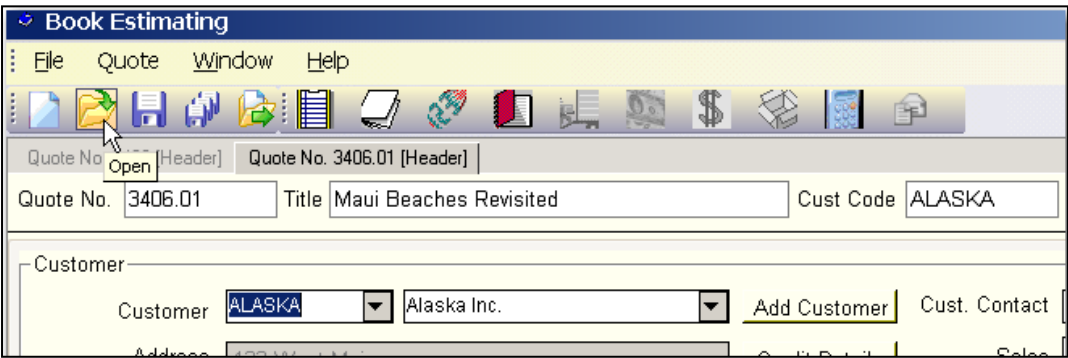
The first Option/version has the original quote number followed by .01. The second shows .02, etc.

The idea is to use these as versions of a single estimate as the customer is deciding which option to use.

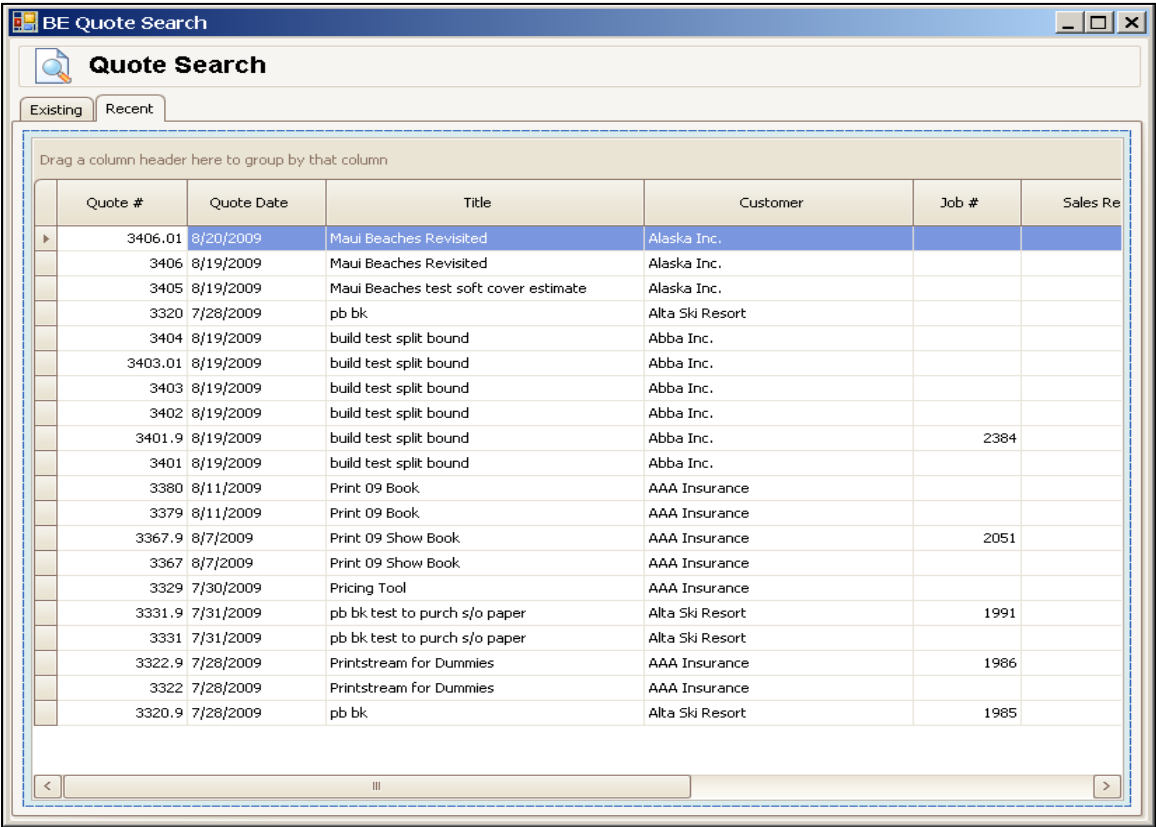
This is important to note as it impacts Win/loss reports. All "options" counts as ONE estimate in Win/ Loss reports, and only one of these can be turned into a job from this quote number.

Estimate Search: Locate existing estimates.

Select the file folder icon in the top tool bar to bring up the search engine.



The list that opens is the listing of estimates the user last worked on in Book Estimating under the **Recent** tab.



Double-click to select.

If you see a .9 suffix, this quote has been used to create a Job Specification, if a job has been created the Job number is listed.

If you see any other .01, .02. etc., up to .98, you are looking at numbered revisions of a main estimate.

Existing tab: Gives you access to all estimates created by any estimator.

BE Quote Search

Quote Search

Existing Recent

Search Type

- ☒ Quote No Range
- ☐ Job No Range
- ☐ Customer & Quote # Range
- ☐ Salesrep & Quote # Range
- ☐ Requested ShipDate

Search Criteria

Quote Number Range:

Customer:

SalesRep:

Quote Title Contains:

☐ And ☐ Or also contains

Action

Search Result

Quotes/Page: 50

Drag a column header here to group by that column

You can search by any of the Search Criteria listed on this screen, then select Find. If you want to see absolutely everything, you could key in 1+ in the **Quote Number Range** field.

BE Quote Search

Quote Search

Existing Recent

Search Type

- ☒ Quote No Range
- ☐ Job No Range
- ☐ Customer & Quote # Range
- ☐ Salesrep & Quote # Range
- ☐ Requested ShipDate

Search Criteria

Quote Number Range: 1+

Customer:

SalesRep:

Quote Title Contains:

☐ And ☐ Or also contains

Action

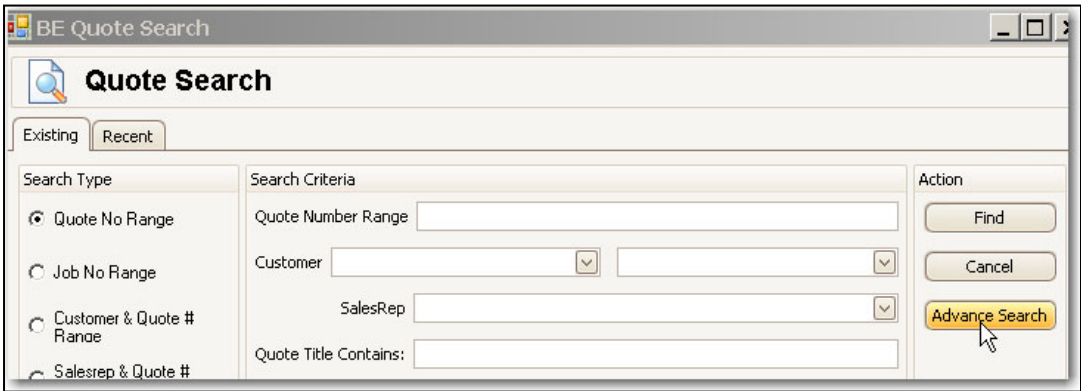
Search Result

Quotes/Page: 50

Drag a column header here to group by that column

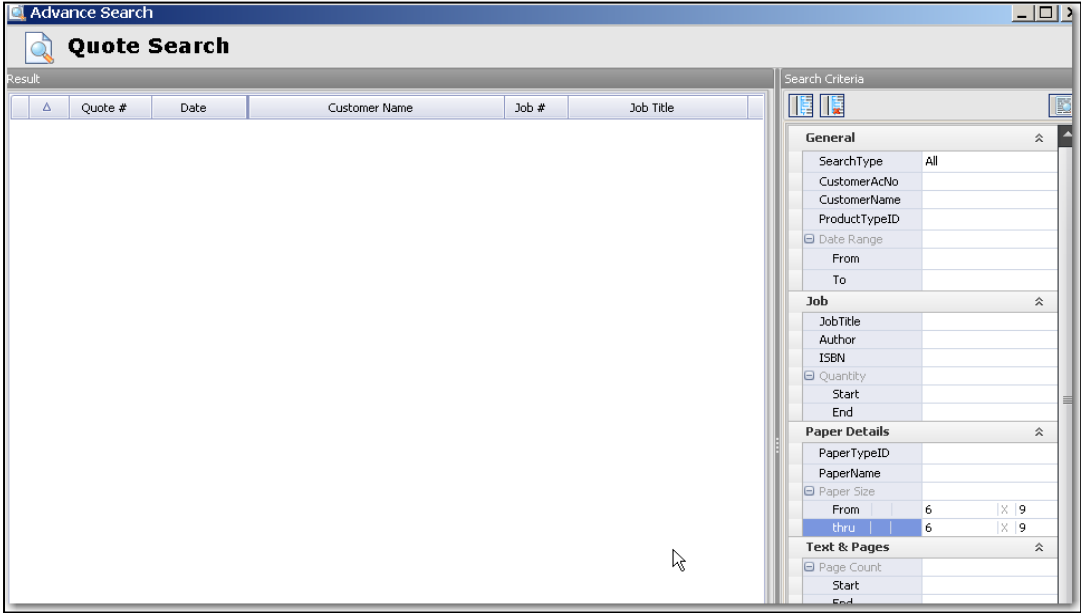
Qte_Hea...	QuoteNo	Title	Authors	CustName	AR_Cust...	QuoteDate	JobNumber	EstSales...	LastOpe...
3	1114.9	Hard Cover...		Abba Inc. ...	1	6/22/2005	674	1	2/27/2009
7	1118	Test 3 Piec...		Alaska Inc. ...	12	8/5/2005		1	3/3/2006
8	1119	Test HC SOP		Lighthouse ...	17	8/11/2005		5	3/3/2006
9	1120	Print 05 Ma...		Alaska Inc. ...	12	9/7/2005		1	6/4/2009
10	1120.9	Print 05 Ma...		Alaska Inc. ...	12	9/7/2005		1	9/7/2005
11	1121	Test PB Book		Abba Inc. ...	1	9/7/2005		1	1/19/2009
12	1121.9	Test PB Book		Abba Inc. ...	1	9/7/2005	876	1	9/7/2005

Advanced Search: By selecting this option we enable you to search all estimates in the system with expanded search criteria.



The image shows a window titled "BE Quote Search". Inside, there's a "Quote Search" section with two tabs: "Existing" and "Recent". Under "Existing", there are four radio buttons for "Search Type": "Quote No Range" (selected), "Job No Range", "Customer & Quote # Range", and "Salesrep & Quote #". To the right, under "Search Criteria", there are input fields for "Quote Number Range", "Customer" (with a dropdown), "SalesRep" (with a dropdown), and "Quote Title Contains:". On the far right, under "Action", there are three buttons: "Find", "Cancel", and "Advance Search" (highlighted with a mouse cursor).

This opens the advance search screen where you can search by trim sizes, paper description, job title, Author, ISBN, enabling you to locate this or similar estimates that can be easily copied and changed.



The image shows a window titled "Advance Search". It has a "Quote Search" section on the left with a "Result" table. The table has columns: "Quote #", "Date", "Customer Name", "Job #", and "Job Title". The table is currently empty. On the right, there's a "Search Criteria" section with several expandable/collapsible categories: "General", "Job", "Paper Details", and "Text & Pages". Each category has a list of search criteria with input fields. For example, under "General", there are fields for "SearchType" (set to "All"), "CustomerAcNo", "CustomerName", and "ProductTypeID". Under "Job", there are fields for "JobTitle", "Author", and "ISBN". Under "Paper Details", there are fields for "PaperTypeID", "PaperName", and "Paper Size" (with "From" and "thru" sub-fields, both set to "6 X 9"). Under "Text & Pages", there are fields for "Page Count", "Start", and "End".

Advance Search

Quote Search

Result

Quote #	Date	Customer Name	Job #	Job Title
---------	------	---------------	-------	-----------

Search Criteria

PaperTypeID
PaperName
Paper Size
From
thru

Text & Pages
Page Count
Start
End
Text Weight
Start
End

Personnels
SalesRep
CSR
Estimator

Inks
Cover Ink
Start
End
Text Ink
Start
End

Binding
Binding Style

Search Result Change Order Select

Enter your search criteria then the **Search** button at the lower right corner, and all estimates within these parameters display. Below the page size 6x9 was entered, so all estimates with this trim size are listed, you could also input a trim size range here.

Quote Search

Result

Quote #	Date	Customer Name	Job #	Job Title
1114.9	6/22/2005	Abba Inc.	874	Hard Cover Book
1118	8/5/2005	Alaska Inc.	0	Test 3 Piece Cover SOP
1119	8/11/2005	Lighthouse Management	0	Test HC SOP
1120	9/7/2005	Alaska Inc.	0	Print 05 Manual
1120.9	9/7/2005	Alaska Inc.	0	Print 05 Manual
1123	9/8/2005	Abba Inc.	0	Promotional Manual
1124	9/8/2005	Abba Inc.	0	Spring Tour Guide
1126	9/8/2005	Abba Inc.	0	Print 05 Show Guide
1130	9/8/2005	AAA Insurance	0	Insurance Guidelines
1131	9/9/2005	AAA Insurance	0	Print 05 User Guide
1132	9/9/2005	AAA Insurance	0	Print 05 Guide
1133	9/9/2005	AAA Insurance	0	Print 05 Guide
1132.9	9/9/2005	AAA Insurance	0	Print 05 Guide
1134	9/9/2005	AAA Insurance	0	Users Guide
1135	9/9/2005	AAA Insurance	0	User Group Manual
1136	9/9/2005	AAA Insurance	0	Print 05 Guide
1137	9/9/2005	AAA Insurance	0	Split Bound Book
1138	9/9/2005	AAA Insurance	0	Guide
1139	9/10/2005	AAA Insurance	0	Print 05 Guide
1140	9/10/2005	AAA Insurance	0	Print 05 Book
1141	9/10/2005	AAA Insurance	0	Print 05 Book
1144	9/11/2005	AAA Insurance	0	Print 05 Guide
1145	9/11/2005	AAA Insurance	0	Print 05 Manual
1146	9/12/2005	AAA Insurance	0	Print 05 Guide
1148	9/12/2005	AAA Insurance	0	Print 05 Book

Search Criteria

General
SearchType All
CustomerAcNo
CustomerName
ProductTypeID
Date Range
From
To

Job
JobTitle
Author
ISBN
Quantity
Start
End

Paper Details
PaperTypeID
PaperName
Paper Size
From 6 X 9
thru 6 X 9

Text & Pages
Page Count
Start
End
Text Weight
Start
End

Personnels
SalesRep
CSR
Estimator

Inks
Cover Ink

Search Result Change Order Select

For more detail select the “+” sign next to any to see more.

result

	Quote #	Date	Customer Name	Job #	Job Title
+	1114.9	6/22/2005	Abba Inc.	874	Hard Cover Book
> -	1118	8/5/2005	Alaska Inc.	0	Test 3 Piece Cover SOP

Versions

Section Details

Drag a column header here to group by that column

Version	Bind Style	Qty Index	Version Qty
> HC	HC 3 Piece BIS SOP	1	1000
HC	HC 3 Piece BIS SOP	2	2500
HC	HC 3 Piece BIS SOP	3	3000
HC	HC 3 Piece BIS SOP	4	5000
HC	HC 3 Piece BIS SOP	5	10000

	Quote #	Date	Customer Name	Job #	Job Title
+	1114.9	6/22/2005	Abba Inc.	874	Hard Cover Book
> -	1118	8/5/2005	Alaska Inc.	0	Test 3 Piece Cover SOP

Versions

Section Details

Drag a column header here to group by that column

QuoteHea...	Sub Section	Paper Name	Paper Type	Text Weight	Page Count	# of Colors
> 7	CC Front Pan...			0	2	0
	7 Text			0	160	1
	7 Dust Jacket			0	4	4
	7 CC Back Pane...			0	2	0
	7 CC Spine - SOP			0	2	0
	7 Brd Front&Ba...			0	4	0
	7 Endsheets			0	8	0

+

1119

8/11/2005

Lighthouse Management

0

Test HC SOP

To select, highlight the estimate and choose the **Select** button bottom right of this screen.

Advance Search

Quote Search

Result

	Quote #	Date	Customer Name	Job #	Job Title
	1114.9	6/22/2005	Abba Inc.	874	Hard Cover Book
>	1118	8/5/2005	Alaska Inc.	0	Test 3 Piece Cover SOP
	1119	8/11/2005	Lighthouse Management	0	Test HC SOP
	1120	9/7/2005	Alaska Inc.	0	Print 05 Manual
	1120.9	9/7/2005	Alaska Inc.	0	Print 05 Manual
	1123	9/8/2005	Abba Inc.	0	Promotional Manual
	1124	9/8/2005	Abba Inc.	0	Spring Tour Guide
	1126	9/8/2005	Abba Inc.	0	Print 05 Show Guide
	1130	9/8/2005	AAA Insurance	0	Insurance Guidelines
	1131	9/9/2005	AAA Insurance	0	Print 05 User Guide
	1132	9/9/2005	AAA Insurance	0	Print 05 Guide
	1133	9/9/2005	AAA Insurance	0	Print 05 Guide
	1132.9	9/9/2005	AAA Insurance	0	Print 05 Guide
	1134	9/9/2005	AAA Insurance	0	Users Guide
	1135	9/9/2005	AAA Insurance	0	User Group Manual
	1136	9/9/2005	AAA Insurance	0	Print 05 Guide
	1137	9/9/2005	AAA Insurance	0	Split Bound Book
	1138	9/9/2005	AAA Insurance	0	Guide
	1139	9/10/2005	AAA Insurance	0	Print 05 Guide
	1140	9/10/2005	AAA Insurance	0	Print 05 Book
	1141	9/10/2005	AAA Insurance	0	Print 05 Book
	1144	9/11/2005	AAA Insurance	0	Print 05 Guide
	1145	9/11/2005	AAA Insurance	0	Print 05 Manual
	1146	9/12/2005	AAA Insurance	0	Print 05 Guide
	1148	9/12/2005	AAA Insurance	0	Print 05 Book

Quote 2 of 314

Search Result Change Order Select

Once the estimate is located you can copy as a version/option, save as new, OR create a Job number if you were the winning bidder.

Create Job Numbers in Book Estimating

After the quote is accepted by the customer, you can create the job number in Book Estimating, and all the input flows seamlessly into Print Order Entry, with no duplication of input.

To create a job, locate the estimate, open it and select File>create job spec.

Book Estimating

File Quote Window Help

- New Ctrl+N
- Open Ctrl+O
- Save Ctrl+S
- Save As New
- Save All Ctrl+Shift+S
- Create Option/Version
- Create Job Specification
- Create Job
- Optimization Parameters
- Close
- Close All
- Exit

5.01 [Header]

ui Beaches Revisited

Alaska Inc.

State UT ZIP 84601

Revisited

Author Joan Rivers

Product Size 6 9

Product Type Books

Est. Required 8/20/2009 Reprint

Old Job All Text in Single Run Section

If the estimate was created as “Estimate Only” on the header screen, you receive a message that you need to change this setting to Standard order or Requested Schedule then recalculate the estimate, then Select Create Job Spec.

The screenshot shows the Estimate Header screen with the following fields:

- Job: ALASKA
- Customer: Alaska Inc.
- Cust. Contact: Sally Samster
- Sales: House Account
- CSR: Sue Smith
- Estimator: Betty White
- Requested Schedule:
 - Production Facility: Print Plant
 - Estimate Only (selected)
 - Requested Schedule
 - Standard Order

A message box titled "Book Estimating Validation" is displayed in the foreground, stating: "This quote was marked as 'estimate only'. Job Specification cannot be created." with an OK button.

Create Job Spec is designed to narrow down all the options to the one chosen for the job.

Select the chosen quantity and page count here.

Once you select the quantity and page count, the quoted price populates.

The screenshot shows the "Create Job Specification" dialog box with the following fields:

- Quantity: 1,000, 2,500, 5,000 (selected), 7,500, 10,000, 15,000
- Page Count: 48
- Quoted Price: 4,535.48
- ☐ All Text in Single Run Sections
- Create and Cancel buttons

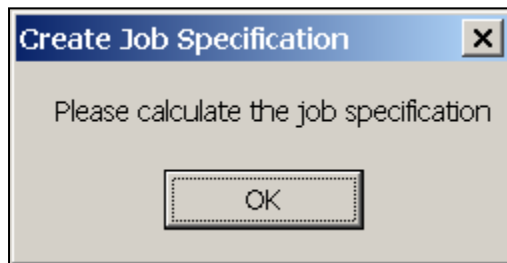
All Text in Single Run sections: Select this check box to show all press runs as separate line items in Print Order Entry and on the work order. If you have 10-32 page signatures, without selecting this option, this displays with details for ONE run, and the number of runs says “10”.

With this selected, there are 10 identical lines for the 10-32's.

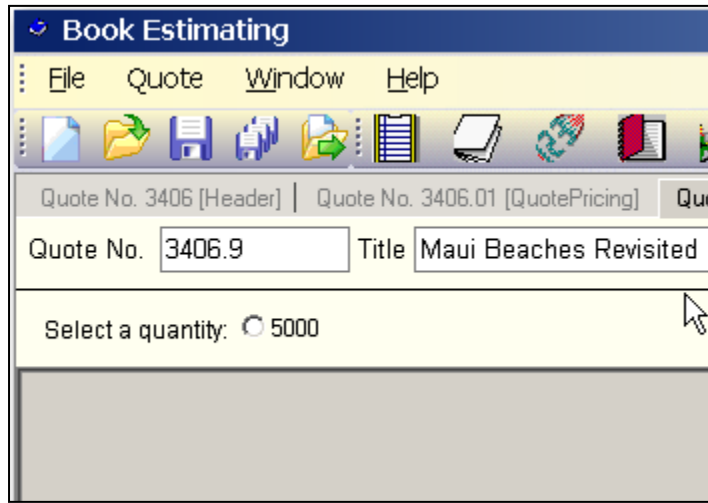
Note If you copied an estimate that had this selected, this box displays as selected. If you do not want to use this feature, clear this check box.

Note This is the ONLY time this field is active on the Header screen.

Click **Create**. This message opens.

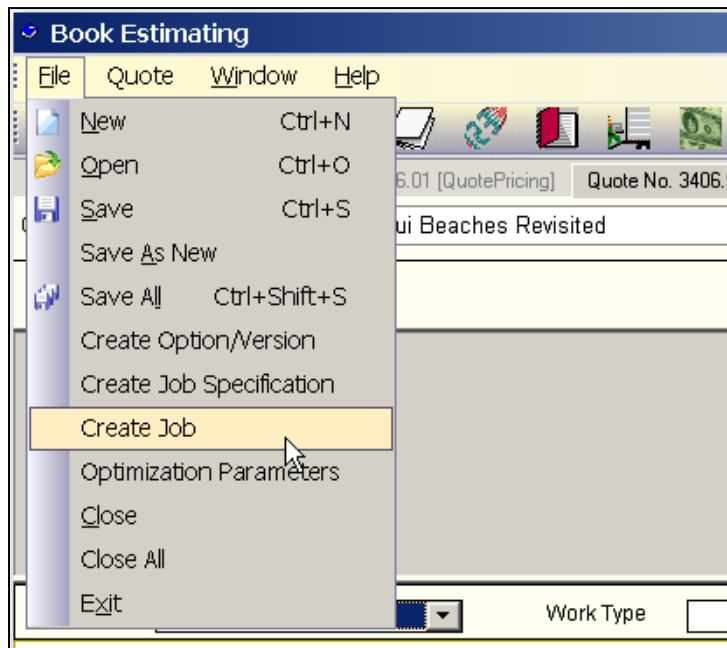


After this you have only one quantity and the Quote No field has a .9 suffix.

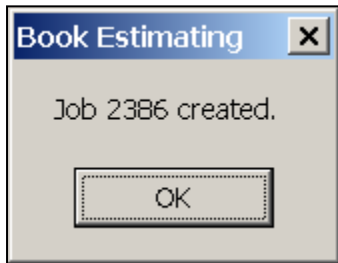


Click **OK** and calculate once more.

Then go to **File>Create Job**.



There is one final calculation as this information is flowing to the Print Order Entry module. When finished, you will see the job number.



This job is now available for job entry input in Print Order Entry module.

Replace Job Function

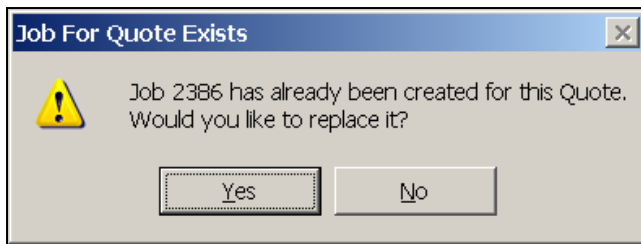
Small changes from estimated to actual specs are expected and handled directly in Print Order Entry as edits.

When major changes exist, the changes can be made in Book Estimating, and the estimate information can replace the estimate information used to originally create the job.

Estimating is notified of the changes, opens the .9 version of the estimate and makes the changes needed in Book Estimating.

Calculate, then select the Create Job function as before.

When the changes are made and the job spec is calculated, select Create Job again and receive this message.



When you choose YES here, the original job specifications are REPLACED by these new specifications. When this job is opened in Print Order Entry, all changes populate automatically, from this latest estimate.

Note Any edits made in Print Order entry, including NOTES or special instructions, paper substitutions, etc, are erased when you use this feature. The Print Order Entry Process is completed, and this job is made ready for Production in the Print Order Entry Module. See Print Order Entry with Book Estimating on the following pages.

Master Files Book Quote Letter

Overview

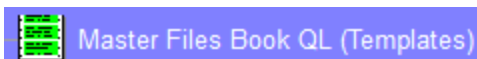
The Proposal Generator allows customers to determine where prices displays and which prices to show as separate lines in a format that can be exported for use in quote letters.

A variety of Quote Letter Templates may be needed to cover all price breakout options.

Examples: Including Freight or Excluding Freight, Prepress as a separate charge, Make Ready prices shown separately from Run prices. Other breakouts can be specific to a particular Bind Style.

Each option is created and saved as a separate Quote Letter Template in this program. They are then available as choices in Book Estimating.

There is no limit to the number of Quote Letter Template you set up and use and they are user defined. Existing Quote Letter Templates can be edited in this program as well.



Master Files Book QL (Templates)

Quote Letter Template screen

First step is to create Templates for your proposals.

Go to FILE, then NEW and you get this view.

Review of the Fields in this form.

QL Templates- Book Estimating

- The far left column lists templates that already exist in this database. This is blank before any are created.

Book Estimating – Quote Letter Format

- This is where each Proposal Template is defined.

- Template Names are entered.
- Lines for breakout or include in Total on Proposal Template entered.
- Links of Bind Styles, Sub Sections, Activity codes, or entire or partial cost centers are linked to those lines.

Bind Style Links and Section Links

- The first column to the right side.
- Displays all the available options set up in Master Files Book related to the quote structure including Bind Styles and Sections.

Cost Category links

- The far right column.
- Displays Cost categories and allows users to select a group of activities that are grouped by category.
- Example, prepress selected here pulls in all prepress processes.

Activity Code Links

- The middle column.
- Allows users to select processes at the individual activity code level.

This is a blank slate for you to fill in template name, and build your template line by line.

Create a New Template

Name

- Enter a Name for this template, easily recognizable by others who will select these Quote Letter Templates.

Add New Line

- Begin building the Template by selecting **Add New Line**. Type in a description for each line.

Break Cost and Include in Total

- Use Break cost if you want items linked to this line to show as a separate line on the proposal.
- Use Include in total if you want this line to be included in the total price on the proposal.
- If you select BREAK COST but do not select INCLUDE IN TOTAL, the price for this line NOT be included in the total price.

Links

- Next we link activity codes or categories to each line created above. With the line active in the Template Name area, we link by selecting the check box next to the activity or category we decide to link to that line.

Note You can sort all links by clicking the Description, Code, Process, or Type column headers.

Bind Style Links

The first option on the list is (Any). Selecting this means we want to include costs for any and all Bind Styles present on the Book Estimate.

In this example, we have selected ANY for the bind style link, and selected an entire Cost Category (Prepress setup, Running Material) in the far right column.

QL Book Estimating Templates

QL Templates :Book Estimating

- MR AND RUN NO PAPER
- NOTCH PAPER
- PREP SEPERATE TEMPLATE**
- STANDARD HARD COVER
- STANDARD SOFT COVER
- STANDARD SPLIT BOUND
- TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name: PREP SEPERATE TEMPLATE

Buttons: Add New Line, Display All, Save Template, Close

Description	Break Cost	Include in Total
all prepress		<input checked="" type="checkbox"/>

All Linkages group: 8 type: 20

Bind Style Links (1)		Activity Code Links (None)		Cost Category Links (3)	
Select	Description	Select	Description	Code	Process
<input checked="" type="checkbox"/>	(Any)		240 Heidelberg Make Ready	240100101	Pre-Press
<input type="checkbox"/>	Perfect Bound		240 Heidelberg Run	240100111	Setup
<input type="checkbox"/>	HC 1 Piece No BIS		240 Heidelberg Washup	240100121	Running
<input type="checkbox"/>	HC 1 Piece No BIS Sewn		250 Miller Make Ready	240130101	Material
<input type="checkbox"/>	HC 3 Piece No BIS SDP		250 Miller Run	240130111	Setup
<input type="checkbox"/>	HC 3 Piece BIS SDP		250 Miller Washup	240130121	Material
<input type="checkbox"/>	HC 3 Piece No BIS POS		540 Heidelberg Make Ready	240110101	Setup
<input type="checkbox"/>	HC 3 Piece BIS POS		540 Heidelberg Run	240110111	Waste
<input type="checkbox"/>	HC 1 Piece BIS Sewn		540 Heidelberg Washup	240110121	Helper
			840 Heidelberg Make Ready	240120101	Job MR
			840 Heidelberg Run	240120111	Setup
			840 Heidelberg Washup	240120121	Waste
			Aster Sewer Make Ready	260127101	Helper
			Aster Sewer Run	260127111	Adnl. Waste
			Bindery Buyout	260000051	Run
			Bindery Materials	260000001	Waste
			Bluelines	220120111	Helper
			Board Slitter Make Ready	260103101	Adnl. Waste
			Board Slitting	260103111	Setup
			Carton Material	260130001	Run
			Carton Packing	260130101	Waste
					Helper
					Adnl. Waste
					Setup
					Material
					Section Finishing
					Setup

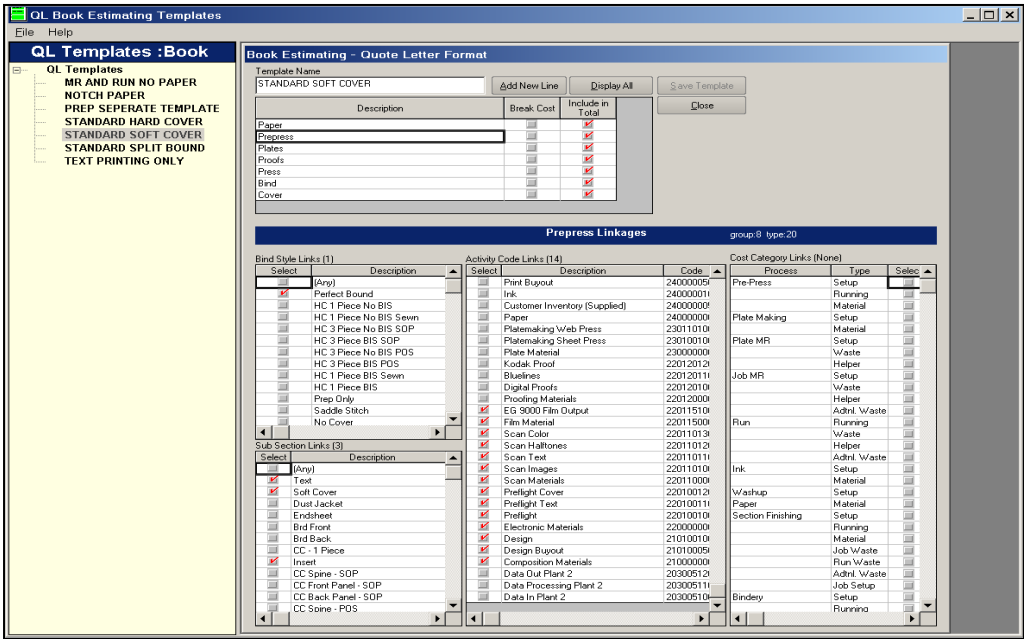
You will likely need templates that are specific to bind styles, for example the breakouts or price categories for a 3 piece case bound book may be different from what you use for a perfect bound book.

Sub Section Links

- Select (Any) as described above to capture any Sub Section types that may be found on the Book Estimate for this template or select which Sub Section Types to link.

Activity Code Links

- Here you can Select and Link Activity codes one by one to be included in the Quote Letter template you are building, shown below.



Cost Category Links

- Here you can Select and link all processes within a cost category.
- By using this column to select Prepress, Setup, or Running, or Material, we will capture all the associated Activity Codes for those processes in that Cost Center. Using this method, you do not need to select those activity codes individually, this is shown below



Paper

For the Paper line, highlight the Paper line under Description, then use check boxes to select the activity code for paper from the Activity Code links column, or Paper Material from the Cost Center Column.

As you highlight each Line Description, the selections that have been made displays. You may edit these choices and Save.

QL Book Estimating Templates

File Help

QL Templates:Book

QL Templates

MR AND RUN NO PAPER

NOTCH PAPER

PREP SEPERATE TEMPLATE

STANDARD HARD COVER

STANDARD SOFT COVER

STANDARD SPLIT BOUND

TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name

STANDARD SOFT COVER

Add New Line

Display All

Save Template

Close

Description	Break Cost	Include in Total
Paper		<input checked="" type="checkbox"/>
Prepress		<input checked="" type="checkbox"/>
Plates		<input checked="" type="checkbox"/>
Proofs		<input checked="" type="checkbox"/>
Press		<input checked="" type="checkbox"/>
Bind		<input checked="" type="checkbox"/>
Cover		<input checked="" type="checkbox"/>

Prepress Linkages

Bind Style Links (1)

Select	Description
<input checked="" type="checkbox"/>	(Any)
<input type="checkbox"/>	Perfect Bound
<input type="checkbox"/>	HC 1 Piece No BIS
<input type="checkbox"/>	HC 1 Piece No BIS Sewn
<input type="checkbox"/>	HC 3 Piece No BIS SOP
<input type="checkbox"/>	HC 3 Piece BIS SOP
<input type="checkbox"/>	HC 3 Piece No BIS PDS
<input type="checkbox"/>	HC 3 Piece BIS PDS
<input type="checkbox"/>	HC 1 Piece BIS Sewn
<input type="checkbox"/>	HC 1 Piece BIS

Sub Section Links (3)

Select	Description	R
<input checked="" type="checkbox"/>	(Any)	
<input type="checkbox"/>	Text	1
<input checked="" type="checkbox"/>	Soft Cover	2
<input type="checkbox"/>	Dust Jacket	3
<input type="checkbox"/>	Endsheet	4
<input type="checkbox"/>	Brd Front	5
<input type="checkbox"/>	Brd Back	6
<input type="checkbox"/>	CC - 1 Piece	7
<input checked="" type="checkbox"/>	Insert	8
<input type="checkbox"/>	CC Spine - SOP	9

Activity Code Links (14)

Select	Description	Code
<input type="checkbox"/>	Data In Plant 2	203005100
<input type="checkbox"/>	Data Processing Plant 2	203005110
<input type="checkbox"/>	Data Out Plant 2	203005120
<input type="checkbox"/>	Composition Materials	210000000
<input checked="" type="checkbox"/>	Design Buyout	210100050
<input checked="" type="checkbox"/>	Design	210100100
<input checked="" type="checkbox"/>	Electronic Materials	220000000
<input checked="" type="checkbox"/>	Preflight	220100100
<input checked="" type="checkbox"/>	Preflight Text	220100110
<input checked="" type="checkbox"/>	Preflight Cover	220100120
<input checked="" type="checkbox"/>	Scan Materials	220110000
<input checked="" type="checkbox"/>	Scan Images	220110100
<input checked="" type="checkbox"/>	Scan Text	220110110
<input checked="" type="checkbox"/>	Scan Halftones	220110120
<input checked="" type="checkbox"/>	Scan Color	220110130
<input checked="" type="checkbox"/>	Film Material	220115000
<input checked="" type="checkbox"/>	EG 9000 Film Output	220115100
<input checked="" type="checkbox"/>	Proofing Materials	220120000
<input checked="" type="checkbox"/>	Digital Proofs	220120100
<input checked="" type="checkbox"/>	Bluelines	220120110
<input checked="" type="checkbox"/>	Kodak Proof	220120120
<input checked="" type="checkbox"/>	Plate Material	230000000
<input checked="" type="checkbox"/>	Platemaking Sheet Press	230100100
<input checked="" type="checkbox"/>	Platemaking Web Press	230110100

Cost Category Links (None)

Process	Type	Select
Pre-Press	Setup	<input type="checkbox"/>
	Running	<input type="checkbox"/>
	Material	<input type="checkbox"/>
Plate Making	Setup	<input type="checkbox"/>
	Material	<input type="checkbox"/>
Plate MR	Setup	<input type="checkbox"/>
	Waste	<input type="checkbox"/>
Job MR	Setup	<input type="checkbox"/>
	Waste	<input type="checkbox"/>
	Helper	<input type="checkbox"/>
	Adnl. Waste	<input type="checkbox"/>
Run	Running	<input type="checkbox"/>
	Waste	<input type="checkbox"/>
	Helper	<input type="checkbox"/>
	Adnl. Waste	<input type="checkbox"/>
Ink	Setup	<input type="checkbox"/>
	Material	<input type="checkbox"/>
Washup	Setup	<input type="checkbox"/>
Paper	Material	<input type="checkbox"/>
Section Finishing	Setup	<input type="checkbox"/>
	Running	<input type="checkbox"/>
	Material	<input type="checkbox"/>
	Job Waste	<input type="checkbox"/>
	Pre-Press	<input type="checkbox"/>

Prepress

The next Line is Prepress, but to see this separate from Proofing, we will not select the entire Cost Category of Prepress but selects specific Activity Codes from the center column instead (titled Activity Code Links).

The only activity codes you link should be chargeable activity codes that you are estimating (no maintenance or breaks, for example).

QL Book Estimating Templates
File Help

QL Templates :Book

- QL Templates
- MR AND RUN NO PAPER
- NOTCH PAPER
- PREP SEPERATE TEMPLATE
- STANDARD HARD COVER
- STANDARD SOFT COVER
- STANDARD SPLIT BOUND
- TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name: STANDARD SOFT COVER Add New Line Display All Save Template Close

Description	Break Cost	Include in Total
Paper	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prepress	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Plates	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Proofs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Press	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bind	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cover	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Plates Linkages

Bind Style Links (1)		Activity Code Links (None)		Cost Category Links (2)		
Select	Description	Select	Description	Code	Process	Type
<input checked="" type="checkbox"/>	(Any)	<input type="checkbox"/>	Data In Plant 2	203005100	Pre-Press	Setup
<input checked="" type="checkbox"/>	Perfect Bound	<input type="checkbox"/>	Data Processing Plant 2	203005110		Running
<input type="checkbox"/>	HC 1 Piece No BIS	<input type="checkbox"/>	Data Out Plant 2	203005120		Material
<input type="checkbox"/>	HC 1 Piece No BIS Sewn	<input type="checkbox"/>	Composition Materials	210000000	Plate Making	Setup
<input type="checkbox"/>	HC 3 Piece No BIS SGP	<input type="checkbox"/>	Design Buyout	210100050		Material
<input type="checkbox"/>	HC 3 Piece BIS SGP	<input type="checkbox"/>	Design	210100100	Plate MR	Setup
<input type="checkbox"/>	HC 3 Piece No BIS POS	<input type="checkbox"/>	Electronic Materials	220000000		Waste
<input type="checkbox"/>	HC 3 Piece BIS POS	<input type="checkbox"/>	Preflight	220100100		Helper
<input type="checkbox"/>	HC 1 Piece BIS Sewn	<input type="checkbox"/>	Preflight Text	220100110	Job MR	Setup
<input type="checkbox"/>	HC 1 Piece BIS	<input type="checkbox"/>	Preflight Cover	220100120		Waste
		<input type="checkbox"/>	Scan Materials	220110000		Helper
		<input type="checkbox"/>	Scan Images	220110100		Adm'l Waste
		<input type="checkbox"/>	Scan Text	220110110	Run	Running
		<input type="checkbox"/>	Scan Halftones	220110120		Waste
		<input type="checkbox"/>	Scan Color	220110130		Helper
		<input type="checkbox"/>	Film Material	220115000		Adm'l Waste
		<input type="checkbox"/>	EG 9000 Film Output	220115100	Ink	Setup
		<input type="checkbox"/>	Proofing Materials	220120000		Material
		<input type="checkbox"/>	Digital Proofs	220120100	Washup	Setup
		<input type="checkbox"/>	Blueines	220120110	Paper	Material
		<input type="checkbox"/>	Kodak Proof	220120120	Section Finishing	Setup
		<input type="checkbox"/>	Plate Material	230000000		Running
		<input type="checkbox"/>	Platemaking Sheet Press	230100100		Material
		<input type="checkbox"/>	Platemaking Web Press	230110100		Job Waste

Sub Section Links (3)

Select	Description	R
<input checked="" type="checkbox"/>	(Any)	
<input checked="" type="checkbox"/>	Text	1
<input checked="" type="checkbox"/>	Soft Cover	2
<input type="checkbox"/>	Dust Jacket	3
<input type="checkbox"/>	Endsheet	4
<input type="checkbox"/>	Brd Front	5
<input type="checkbox"/>	Brd Back	6
<input type="checkbox"/>	CC - 1 Piece	7
<input checked="" type="checkbox"/>	Insert	8
<input checked="" type="checkbox"/>	CC Spine - SDP	9

Plates

Here we see the in this example, plate making is linked at the Cost Category level, not the Activity Code level. The option is yours if you wish to select all plate making links at the Activity code level instead.

QL Book Estimating Templates

File Help

QL Templates :Book

OL Templates

MR AND RUN NO PAPER

NOTCH PAPER

PREP SEPERATE TEMPLATE

STANDARD HARD COVER

STANDARD SOFT COVER

STANDARD SPLIT BOUND

TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name

STANDARD SOFT COVER

Add New Line

Display All

Save Template

Close

Description	Break Cost	Include in Total
Paper		<input checked="" type="checkbox"/>
Prepress		<input checked="" type="checkbox"/>
Plates		<input checked="" type="checkbox"/>
Proofs		<input checked="" type="checkbox"/>
Press		<input checked="" type="checkbox"/>
Bind		<input checked="" type="checkbox"/>
Cover		<input checked="" type="checkbox"/>

Proofs Linkages

Bind Style Links (1)			Activity Code Links (3)			Cost Category Links (None)		
Select	Description	Recs	Select	Description	Code	Process	Type	Select
<input checked="" type="checkbox"/>	(Any)		<input checked="" type="checkbox"/>	Preflight	220100100	Pre-Press	Setup	
<input checked="" type="checkbox"/>	Perfect Bound	1	<input checked="" type="checkbox"/>	Preflight Text	220100110		Running	
<input checked="" type="checkbox"/>	HC 1 Piece No BIS	2	<input checked="" type="checkbox"/>	Preflight Cover	220100120		Material	
<input checked="" type="checkbox"/>	HC 1 Piece No BIS Sewn	3	<input checked="" type="checkbox"/>	Scan Materials	220110000	Plate Making	Setup	
<input checked="" type="checkbox"/>	HC 3 Piece No BIS SOP	4	<input checked="" type="checkbox"/>	Scan Images	220110100		Material	
<input checked="" type="checkbox"/>	HC 3 Piece No BIS SOP	5	<input checked="" type="checkbox"/>	Scan Text	220110110	Plate MR	Setup	
<input checked="" type="checkbox"/>	HC 3 Piece No BIS POS	6	<input checked="" type="checkbox"/>	Scan Halftones	220110120		Waste	
<input checked="" type="checkbox"/>	HC 3 Piece BIS POS	7	<input checked="" type="checkbox"/>	Scan Color	220110130		Helper	
<input checked="" type="checkbox"/>	HC 1 Piece BIS Sewn	8	<input checked="" type="checkbox"/>	Film Material	220115000	Job MR	Setup	
<input checked="" type="checkbox"/>	HC 1 Piece BIS	9	<input checked="" type="checkbox"/>	EG 9000 Film Output	220115100		Waste	
<input checked="" type="checkbox"/>	Prep Only	11	<input checked="" type="checkbox"/>	Proofing Materials	220120000		Helper	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Digital Proofs	220120100		Adnl. Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Bluelines	220120110	Run	Running	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Kodak Proof	220120120		Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Plate Material	230000000		Helper	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Platemaking Sheet Press	230100100		Adnl. Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Platemaking Web Press	230110100	Ink	Setup	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Paper	240000000		Material	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Customer Inventory (Supplied)	240000005	Washup	Setup	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Ink	240000010	Paper	Material	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Print Buyout	240000050	Section Finishing	Setup	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Indigo Digital Click Material	240050000		Running	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Indigo Make Ready	240050100		Material	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Indigo Run	240050110		Job Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	240 Heidelberg Make Ready	240100100		Run Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	240 Heidelberg Run	240100110		Adnl. Waste	
<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	240 Heidelberg Washup	240100120		Job Setup	

Proofs

To see Proofs, highlight the Proofs line and select Proof activities from the Activities column.

There is not a Cost Category available for Proofs.

QL Book Estimating Templates

File Help

QL Templates :Book

- QL Templates
 - MR AND RUN NO PAPER
 - NOTCH PAPER
 - PREP SEPERATE TEMPLATE
 - STANDARD HARD COVER
 - STANDARD SOFT COVER**
 - STANDARD SPLIT BOUND
 - TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name: STANDARD SOFT COVER

Add New Line Display All Save Template Close

Description	Break Cost	Include in Total
Paper		<input checked="" type="checkbox"/>
Prepress		<input checked="" type="checkbox"/>
Plates		<input checked="" type="checkbox"/>
Proofs		<input checked="" type="checkbox"/>
Press		<input checked="" type="checkbox"/>
Bind		<input checked="" type="checkbox"/>
Cover		<input checked="" type="checkbox"/>

Press Linkages

Bind Style Links (1)			Activity Code Links (None)			Cost Category Links (14)		
Select	Description	Rate	Select	Description	Code	Process	Type	Select
<input checked="" type="checkbox"/>	(Any)			Preflight	220100100	Pre-Press	Setup	
	Perfect Bound	1		Preflight Text	220100110		Running	
	HC 1 Piece No BIS	2		Preflight Cover	220100120		Material	
	HC 1 Piece No BIS Sewn	3		Scan Materials	220110000	Plate Making	Setup	
	HC 3 Piece No BIS SOP	4		Scan Images	220110100		Material	
	HC 3 Piece BIS SOP	5		Scan Text	220110110	Plate MR	Setup	<input checked="" type="checkbox"/>
	HC 3 Piece No BIS POS	6		Scan Halftones	220110120		Waste	<input checked="" type="checkbox"/>
	HC 3 Piece BIS POS	7		Scan Color	220110130	Job MR	Helper	<input checked="" type="checkbox"/>
	HC 1 Piece BIS Sewn	8		Film Material	220115000		Setup	<input checked="" type="checkbox"/>
	HC 1 Piece BIS	9		EG 9000 Film Output	220115100		Waste	<input checked="" type="checkbox"/>
	Prep Only	11		Proofing Materials	220120000		Helper	<input checked="" type="checkbox"/>
				Digital Proofs	220120100	Run	Adnl. Waste	<input checked="" type="checkbox"/>
				Bluelines	220120110		Running	<input checked="" type="checkbox"/>
				Kodak Proof	220120120		Waste	<input checked="" type="checkbox"/>
				Plate Material	230000000		Helper	<input checked="" type="checkbox"/>
				Platemaking Sheet Press	230100100		Adnl. Waste	<input checked="" type="checkbox"/>
				Platemaking Web Press	230110100	Ink	Setup	<input checked="" type="checkbox"/>
				Paper	240000000		Material	<input checked="" type="checkbox"/>
				Customer Inventory (Supplied)	240000005	Washup	Setup	<input checked="" type="checkbox"/>
				Ink	240000010	Paper	Material	<input checked="" type="checkbox"/>
				Print Buyout	240000050	Section Finishing	Setup	
				Indigo Digital Click Material	240050000		Running	
				Indigo Make Ready	240050100		Material	
				Indigo Run	240050110		Job Waste	
				240 Heidelberg Make Ready	240100100		Run Waste	
				240 Heidelberg Run	240100110		Adnl. Waste	
				240 Heidelberg Washup	240100120		Job Setup	

Sub Section Links (2)

Select	Description	Rate
<input checked="" type="checkbox"/>	(Any)	
	Text	1
	Soft Cover	2
	Dust Jacket	3
	Endsheet	4
	Bind Front	5
	Bind Back	6
	CC - 1 Piece	7
	Insert	8
	CC Spine - SOP	9
	CC Front Panel - SOP	10

Press

Next select Press, note that the TEXT is selected under Sub Section Links, but not the cover, since the Cover is being shown as a separate line. These types of break outs are completely user defined.

In this case all Press Cost Categories are selected.

QL Book Estimating Templates

File Help

QL Templates :Book

QL Templates

MR AND RUN NO PAPER

NOTCH PAPER

PREP SEPERATE TEMPLATE

STANDARD HARD COVER

STANDARD SOFT COVER

STANDARD SPLIT BOUND

TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name
STANDARD SOFT COVER

Add New Line

Display All

Save Template

Close

Description	Break Cost	Include in Total
Paper		<input checked="" type="checkbox"/>
Prepress		<input checked="" type="checkbox"/>
Plates		<input checked="" type="checkbox"/>
Proofs		<input checked="" type="checkbox"/>
Press		<input checked="" type="checkbox"/>
Bind		<input checked="" type="checkbox"/>
Cover		<input checked="" type="checkbox"/>

Bind Linkages

Bind Style Links (1)

Select	Description	Rec
<input checked="" type="checkbox"/>	(Any)	
<input checked="" type="checkbox"/>	Perfect Bound	1
<input checked="" type="checkbox"/>	HC 1 Piece No BIS	2
<input checked="" type="checkbox"/>	HC 1 Piece No BIS Sewn	3
<input checked="" type="checkbox"/>	HC 3 Piece No BIS SOP	4
<input checked="" type="checkbox"/>	HC 3 Piece BIS SOP	5
<input checked="" type="checkbox"/>	HC 3 Piece No BIS POS	6
<input checked="" type="checkbox"/>	HC 3 Piece BIS POS	7
<input checked="" type="checkbox"/>	HC 1 Piece BIS Sewn	8
<input checked="" type="checkbox"/>	HC 1 Piece BIS	9
<input checked="" type="checkbox"/>	Prep Only	11
<input checked="" type="checkbox"/>	Saddle Stitch	

Sub Section Links (2)

Select	Description	Rec
<input checked="" type="checkbox"/>	(Any)	
<input checked="" type="checkbox"/>	Text	1
<input checked="" type="checkbox"/>	Soft Cover	2
<input checked="" type="checkbox"/>	Dust Jacket	3
<input checked="" type="checkbox"/>	Endsheet	4
<input checked="" type="checkbox"/>	Brd Front	5
<input checked="" type="checkbox"/>	Brd Back	6
<input checked="" type="checkbox"/>	CC - 1 Piece	7
<input checked="" type="checkbox"/>	Insert	8
<input checked="" type="checkbox"/>	CC Spine - SOP	9
<input checked="" type="checkbox"/>	CC Front Panel - SOP	10
<input checked="" type="checkbox"/>	CC Back Panel - SOP	11

Activity Code Links (None)

Select	Description	Code
<input checked="" type="checkbox"/>	Preflight	220100100
<input checked="" type="checkbox"/>	Preflight Text	220100110
<input checked="" type="checkbox"/>	Preflight Cover	220100120
<input checked="" type="checkbox"/>	Scan Materials	220110000
<input checked="" type="checkbox"/>	Scan Images	220110100
<input checked="" type="checkbox"/>	Scan Text	220110110
<input checked="" type="checkbox"/>	Scan Halftones	220110120
<input checked="" type="checkbox"/>	Scan Color	220110130
<input checked="" type="checkbox"/>	Film Material	220115000
<input checked="" type="checkbox"/>	ES 3000 Film Output	220115100
<input checked="" type="checkbox"/>	Proofing Materials	220120000
<input checked="" type="checkbox"/>	Digital Proofs	220120100
<input checked="" type="checkbox"/>	Blueines	220120110
<input checked="" type="checkbox"/>	Kodak Proof	220120120
<input checked="" type="checkbox"/>	Plate Material	230000000
<input checked="" type="checkbox"/>	Platemaking Sheet Press	230100100
<input checked="" type="checkbox"/>	Platemaking Web Press	230110100
<input checked="" type="checkbox"/>	Paper	240000000
<input checked="" type="checkbox"/>	Customer Inventory (Supplied)	240000005
<input checked="" type="checkbox"/>	Ink	240000010
<input checked="" type="checkbox"/>	Print Buyout	240000050
<input checked="" type="checkbox"/>	Indigo Digital Click Material	240050000
<input checked="" type="checkbox"/>	Indigo Make Ready	240050100
<input checked="" type="checkbox"/>	Indigo Run	240050110
<input checked="" type="checkbox"/>	240 Heidelberg Make Ready	240100100
<input checked="" type="checkbox"/>	240 Heidelberg Run	240100110
<input checked="" type="checkbox"/>	240 Heidelberg Washup	240100120
<input checked="" type="checkbox"/>	540 Heidelberg Make Ready	240110100

Cost Category Links (15)

Process	Type	Select
	Waste	<input checked="" type="checkbox"/>
	Helper	<input checked="" type="checkbox"/>
	Adnl. Waste	<input checked="" type="checkbox"/>
Run	Running	<input checked="" type="checkbox"/>
	Waste	<input checked="" type="checkbox"/>
	Helper	<input checked="" type="checkbox"/>
	Adnl. Waste	<input checked="" type="checkbox"/>
Ink	Setup	<input checked="" type="checkbox"/>
	Material	<input checked="" type="checkbox"/>
Washup	Setup	<input checked="" type="checkbox"/>
Paper	Material	<input checked="" type="checkbox"/>
Section Finishing	Setup	<input checked="" type="checkbox"/>
	Running	<input checked="" type="checkbox"/>
	Material	<input checked="" type="checkbox"/>
	Job Waste	<input checked="" type="checkbox"/>
	Run Waste	<input checked="" type="checkbox"/>
	Adnl. Waste	<input checked="" type="checkbox"/>
	Job Setup	<input checked="" type="checkbox"/>
Bindery	Setup	<input checked="" type="checkbox"/>
	Running	<input checked="" type="checkbox"/>
	Material	<input checked="" type="checkbox"/>
	Job Waste	<input checked="" type="checkbox"/>
	Run Waste	<input checked="" type="checkbox"/>
	Adnl. Waste	<input checked="" type="checkbox"/>
Shipping	Packing	<input checked="" type="checkbox"/>
	Material	<input checked="" type="checkbox"/>
	Freight	<input checked="" type="checkbox"/>

Bind

Next highlight the Bind and see that all bindery and Section finishing and Shipping Cost Categories are selected here. This is a good option when many activity codes are involved, this prevents you from having to select individually.

QL Book Estimating Templates

File Help

QL Templates :Book

- QL Templates
 - MR AND RUN NO PAPER
 - NOTCH PAPER
 - PREP SEPERATE TEMPLATE
 - STANDARD HARD COVER
 - STANDARD SOFT COVER
 - STANDARD SPLIT BOUND
 - TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name: STANDARD SOFT COVER [Add New Line] [Display All] [Save Template] [Close]

Description	Break Cost	Include in Total
Paper	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Prepress	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Plates	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Proofs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Press	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bind	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cover	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Cover Linkages

Bind Style Links (1)			Activity Code Links (None)			Cost Category Links (21)		
Select	Description		Select	Description	Code	Process	Type	Select
<input checked="" type="checkbox"/>	(Any)		<input type="checkbox"/>	Data In Plant 2	203005100	Plate Making	Setup	<input type="checkbox"/>
<input type="checkbox"/>	Perfect Bound	1	<input type="checkbox"/>	Data Processing Plant 2	203005110		Material	<input type="checkbox"/>
<input type="checkbox"/>	HC 1 Piece No BIS	2	<input type="checkbox"/>	Data Out Plant 2	203005120	Plate MR	Setup	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 1 Piece No BIS Sewn	3	<input type="checkbox"/>	Composition Materials	210000000		Waste	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 3 Piece No BIS SDP	4	<input type="checkbox"/>	Design Buyout	210100050	Job MR	Setup	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 3 Piece BIS SDP	5	<input type="checkbox"/>	Design	210100100		Waste	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 3 Piece No BIS POS	6	<input type="checkbox"/>	Electronic Materials	220000000		Helper	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 3 Piece BIS POS	7	<input type="checkbox"/>	Preflight	220100100	Run	Adnl. Waste	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 1 Piece BIS Sewn	8	<input type="checkbox"/>	Preflight Test	220100110		Running	<input checked="" type="checkbox"/>
<input type="checkbox"/>	HC 1 Piece BIS	9	<input type="checkbox"/>	Preflight Cover	220100120		Waste	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Prep Only	11	<input type="checkbox"/>	Scan Materials	220110000		Helper	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Saddle Stitch	1	<input type="checkbox"/>	Scan Images	220110100	Ink	Adnl. Waste	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Scan Text	220110110		Setup	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Scan Halftones	220110120	Washup	Material	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Scan Color	220110130	Paper	Material	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Film Material	220115000	Section Finishing	Setup	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	EG 9000 Film Output	220115100		Running	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Proofing Materials	220120000		Material	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Digital Proofs	220120100		Job Waste	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Bluelines	220120110		Run Waste	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Kodak Proof	220120120		Adnl. Waste	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Plate Material	230000000	Bindery	Job Setup	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	Platemaking Sheet Press	230100100		Running	<input type="checkbox"/>
			<input type="checkbox"/>	Platemaking Web Press	230110100		Material	<input type="checkbox"/>
			<input type="checkbox"/>	Paper	240000000		Job Waste	<input type="checkbox"/>
			<input type="checkbox"/>	Customer Inventory (Supplied)	240000005			
			<input type="checkbox"/>	Ink	240000010			
			<input type="checkbox"/>	Print Buyout	240000050			

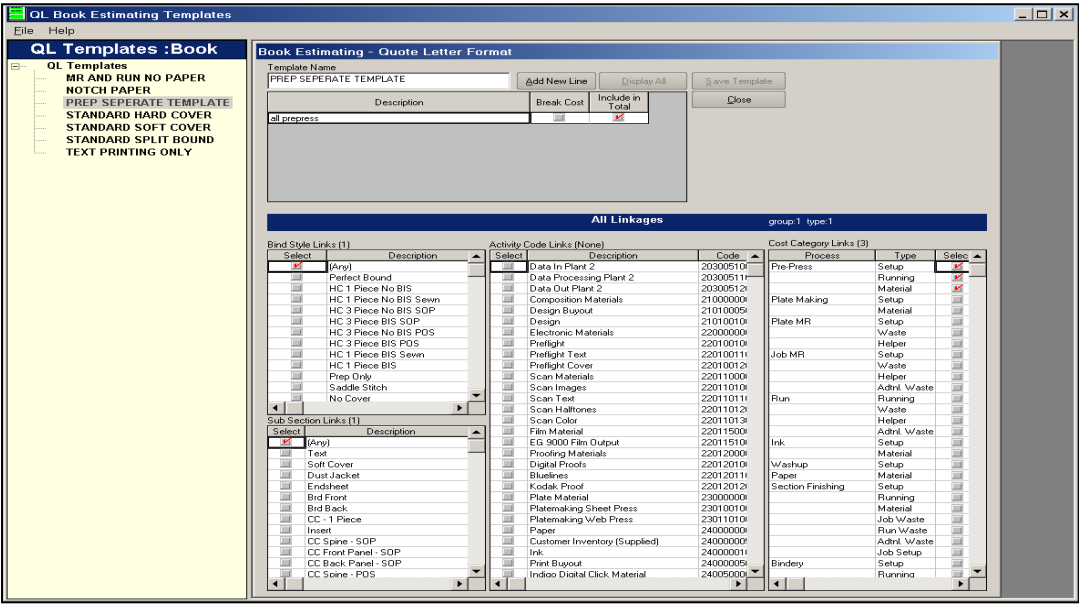
Sub Section Links (1)

Select	Description	Rec
<input checked="" type="checkbox"/>	(Any)	
<input type="checkbox"/>	Text	1
<input type="checkbox"/>	Soft Cover	2
<input type="checkbox"/>	Dust Jacket	3
<input type="checkbox"/>	Endsheet	4
<input type="checkbox"/>	Brd Front	5
<input type="checkbox"/>	Brd Back	6
<input type="checkbox"/>	CC - 1 Piece	7
<input type="checkbox"/>	Insert	8
<input type="checkbox"/>	CC Spine - SDP	9
<input type="checkbox"/>	CC Front Panel - SDP	10
<input type="checkbox"/>	CC Back Panel - SDP	11

Cover

The next line is for Cover, note they have included the cover as the sub section, and all Cost Categories associated with the Cover here.

Prepress only Template



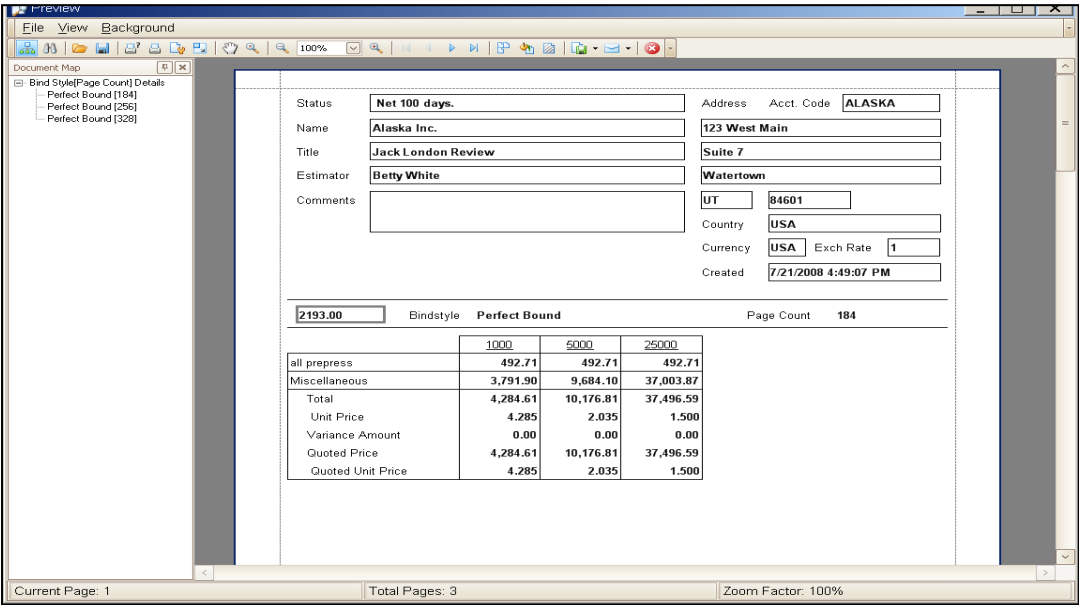
This shows the selection for the Prep Separate Template.

Save.

Always select Save Template if you wish to save.

Example Quote Letter Templates set up and Results.

This example Template shown above will only display the prepress as a separate line item on the proposal.



Since we did not select and link any other areas on this template all other prices show up under Miscellaneous.

Soft Cover Perfect Bound Template

Below is a Template set up for Standard Soft Cover (Perfect Bind) Bind style is shown.

Note The Bind Style link is shown as Perfect Bound, and the Sub Section Links shows Soft Cover, Text and Insert.

QL Book Estimating Templates

File Help

QL Templates :Book

QL Templates

- MR AND RUN NO PAPER
- NOTCH PAPER
- PREP SEPERATE TEMPLATE
- STANDARD HARD COVER
- STANDARD SOFT COVER**
- STANDARD SPLIT BOUND
- TEXT PRINTING ONLY

Book Estimating - Quote Letter Format

Template Name: STANDARD SOFT COVER

Add New Line Display All Save Template Close

Description	Break Cost	Include in Total
Paper		<input checked="" type="checkbox"/>
Prepress		<input checked="" type="checkbox"/>
Plates		<input checked="" type="checkbox"/>
Proofs		<input checked="" type="checkbox"/>
Press		<input checked="" type="checkbox"/>
Bind		<input checked="" type="checkbox"/>
Cover		<input checked="" type="checkbox"/>

All Linkages

Bind Style Links (1)			Activity Code Links (17)			Cost Category Links (32)		
Select	Description		Select	Description	Code	Process	Type	Select
<input checked="" type="checkbox"/>	(Any)		<input checked="" type="checkbox"/>	240 Heidelberg Make Ready	240100100	Pre-Press	Setup	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Perfect Bound	1	<input checked="" type="checkbox"/>	240 Heidelberg Run	240100110		Running	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 1 Piece No BIS	2	<input checked="" type="checkbox"/>	240 Heidelberg Washup	240100120		Material	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 1 Piece No BIS Sewn	3	<input checked="" type="checkbox"/>	250 Miller Make Ready	240130100	Plate Making	Setup	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 3 Piece No BIS SOP	4	<input checked="" type="checkbox"/>	250 Miller Run	240130110		Material	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 3 Piece BIS SOP	5	<input checked="" type="checkbox"/>	250 Miller Washup	240130120	Plate MR	Setup	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 3 Piece No BIS PDS	6	<input checked="" type="checkbox"/>	540 Heidelberg Make Ready	240110100		Waste	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 3 Piece BIS PDS	7	<input checked="" type="checkbox"/>	540 Heidelberg Run	240110110		Helper	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	HC 1 Piece BIS Sewn	8	<input checked="" type="checkbox"/>	540 Heidelberg Washup	240110120	Job MR	Setup	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	840 Heidelberg Make Ready	240120100		Waste	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	840 Heidelberg Run	240120110		Helper	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	840 Heidelberg Washup	240120120		Adnl. Waste	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Text	1	<input checked="" type="checkbox"/>	840 Heidelberg Make Ready	240127100	Run	Running	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Soft Cover	2	<input checked="" type="checkbox"/>	Aster Sewer Make Ready	260127110		Waste	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Dust Jacket	3	<input checked="" type="checkbox"/>	Aster Sewer Run	260127110		Helper	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Endsheet	4	<input checked="" type="checkbox"/>	Bindery Buyout	260000050		Adnl. Waste	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Brd Front	5	<input checked="" type="checkbox"/>	Bindery Materials	260000000	Ink	Setup	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Brd Back	6	<input checked="" type="checkbox"/>	Bluelines	220120110		Material	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	CC - 1 Piece	7	<input checked="" type="checkbox"/>	Board Slitter Make Ready	260103100	Washup	Setup	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Insert	8	<input checked="" type="checkbox"/>	Board Slitting	260103110	Paper	Material	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	Carton Material	260190000	Section Finishing	Setup	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	Carton Packing	260190100		Running	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	Casemaker Make Ready	260133100			<input checked="" type="checkbox"/>

Template Pricing Display

Here is an example of how this template displays the prices.

You can see that all estimated processes in this sample estimate were properly linked. IF they were not, we would see a price value in the **Miscellaneous** category.

FileViewBackground

Document Map

Bind Style[Page Count] Details

Perfect Bound [184]

Perfect Bound [256]

Perfect Bound [328]

Status

Net 100 days.

Address

Acct. Code

ALASKA

Name

Alaska Inc.

123 West Main

Title

Jack London Review

Suite 7

Estimator

Betty White

Watertown

Comments

UT

84601

Country

USA

Currency

USA

Exch Rate

1

Created

7/21/2008 4:49:07 PM

2193.00

Bindstyle

Perfect Bound

Page Count

184

	1000	5000	25000
Paper	719.28	3,325.76	16,033.48
Prepress	492.71	492.71	492.71
Plates	416.00	416.00	416.00
Press	938.77	1,326.31	3,217.80
Bind	939.12	3,231.67	13,364.47
Cover	778.73	1,384.36	3,972.13
Miscellaneous	0.00	0.00	0.00
Total	4,284.61	10,176.81	37,496.59
Unit Price	4.285	2.035	1.500
Variance Amount	0.00	0.00	0.00
Quoted Price	4,284.61	10,176.81	37,496.59
Quoted Unit Price	4.285	2.035	1.500

Current Page: 1

Total Pages: 3

Zoom Factor: 100%

Break Cost Option

To show a separate price for each line you have selected and have that line included in the total price, select both Break Cost and Include in Total check boxes.

Break Cost without selecting Include in Total:

In this example we set up to break out the make Ready and Run activities and did not choose to include these costs in the total.

The screenshot shows the 'QL Book Estimating Templates' application. The main window is titled 'Book Estimating - Quote Letter Format'. On the left, a tree view shows 'QL Templates' with sub-items: 'MR AND RUN NO PAPER', 'NOTCH PAPER', 'PREP SEPARATE TEMPLATE', 'STANDARD HARD COVER', 'STANDARD SOFT COVER', 'STANDARD SPLIT BOUND', and 'TEXT PRINTING ONLY'. The 'MR AND RUN NO PAPER' template is selected.

The central pane shows a table with columns: 'Description', 'Break Cost', and 'Include in Total'. The 'Make Ready' and 'Run' activities are listed, both with 'Break Cost' checked and 'Include in Total' unchecked.

Below this table is the 'Run Linkages' section, which contains three panes: 'Bind Style Links (1)', 'Activity Code Links (41)', and 'Cost Category Links (None)'. The 'Bind Style Links' pane shows a list of bind styles with checkboxes. The 'Activity Code Links' pane shows a list of activity codes with checkboxes. The 'Cost Category Links' pane shows a list of cost categories with checkboxes.

In this example on the left we selected Any Bind Styles and Any Sub Sections, then linked each Make Ready activity from the center column for the Make Ready, and all Run activities for the Running.

The result of using this pricing template is shown below. This is what displays when this template is launched from an estimate in the Book Estimating system.

The only linkage made was for make Ready and Run activities, all else displays under Miscellaneous.

Preview

File View Background

Document Map

- Bind Style[Page Count] Details
 - Perfect Bound [248]

Status:

Name:

Title:

Estimator:

Comments:

Address:

Acct. Code:

Suite:

City:

State: ZIP:

Country:

Currency: Exchange Rate:

Created:

3441.00 Bindstyle: Perfect Bound Page Count: 248

	5000
Make Ready	3,083.19
Run	2,523.63
Miscellaneous	4,923.48
Total	10,530.30
Unit Price	2.106
Variance Amount	-5,606.82
Quoted Price	4,923.48
Quoted Unit Price	0.985

Page 1 of 1 | Zoom Factor: 100%

You will see since we did not select the **Include in total** check box, the prices for the Make Ready and Run are NOT included in the quoted price. Use this feature with caution.

Using Proposal Generator from Book Estimating

Once the Quote Letter Template set up is completed, it is available for use in Book Estimating.

Select an estimate in Book Estimating, then access the Proposal Generator by selecting the icon at the far right

The screenshot shows the 'Book Estimating' software window with the 'Generate Proposal' dialog box open. The dialog box contains the following fields and options:

- Quote No.:** 3671 (Header)
- Title:** Notch paper test book
- Cust Code:** ABBA1
- Customer:** Abba Inc.
- Customer Section:**
 - Customer:** ABBA1 (dropdown), Abba Inc. (text), Add Customer (button)
 - Address:** Suite 100, 123 West Main
 - City:** (text), **State:** (text), **ZIP:** 84020-9544
 - Cust. Contact:** Betty Receivable (dropdown)
 - Sales:** House Account (dropdown)
 - CSR:** Sue Smith (dropdown)
 - Estimator:** jim (dropdown)
- Header Section:**
 - Title:** Notch paper test book
 - Author:** (text)
 - Product Size:** 6, 9
 - Product Type:** Books (dropdown)
 - Est. Required:** 10/20/2009 (dropdown), ☐ Reprint
 - Old Job:** (text), ☐ All Text in Single Run Sections
- Requested Schedule Section:**
 - Production Facility:** Print Plant (dropdown)
 - ☐ Estimate Only
 - ☐ Requested Schedule
 - ☒ Standard Order
- Versions Table:**

VersionName	BindStyle	SpineType	JobIn Date	Req ShipDate	Promised Date	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
notch paper bk	Perfect Bound	Soft Cover	10/20/2009			1,000	2,500				

At the bottom right of the dialog box are buttons: << Back, Next >>, and Close.

Selecting this opens this box:

The screenshot shows the 'Generate Output for a Quote Letter' dialog box. It contains the following elements:

- Title:** Generate Output for a Quote Letter
- Select a template to Generate a new Proposal:** (dropdown menu)
- ☐ Include Details for Reports
- ☐ Include Extra 100s
- ☐ Include Extra 1000s
- Exchange Rate:** 1.00
- Generate New Proposal** (button)
- Cancel** (button)
- Edit Existing Proposal** (button)

The templates that were created in MF Book QL display when the down arrow is selected:

Generate Output for a Quote Letter

Select a template to Generate a new Proposal

Name
MR AND RUN NO PAPER
NOTCH PAPER
PREP SEPERATE TEMPLATE
STANDARD HARD COVER
STANDARD SOFT COVER
STANDARD SPLIT BOUND
TEXT PRINTING ONLY

Generate Output for a Quote Letter

Select a template to Generate a new Proposal

STANDARD SOFT COVER

☐ Include Details for Reports ☐ Include Extra 100s

☐ Include Extra 1000s

Exchange Rate

Generate New Proposal

Cancel **Edit Existing Proposal**

Once one is selected, you can include additional 100's, additional 1000's, enter a different Exchange Rate, Or Include Details for Reports (rather than summary).

You may Generate a New Proposal or Edit Existing Proposal if one has been previously generated.

We accommodate different exchange rates besides the US dollar. If the Canadian exchange rate is 87% of the dollar, enter .87 here for Canadian customers.

The first screen you see:

3671[Notch paper test book]

Status: Net 25 days. Address: Suite 100, 123 West Main, County: USA, Account Code: ABBA1, 84020-9544

Name: Abba Inc.

Comments:

Edited	BindStyle	PageCount	QtyNo	EstQty	LineNo	Break	Descr1	Descr2	Qty	Cost	Markup	CostPlusMarkUp	Price	SubTotal	T
<input type="checkbox"/>	Perfect Bound	248	1	1000	1	<input type="checkbox"/>	Paper		6000	1522.84	20	1827.408	1827.408	1827.408	1827.408
<input type="checkbox"/>	Perfect Bound	248	1	1000	2	<input type="checkbox"/>	Prepress		1250	550.01	15.127	633.212	633.212	2460.62	2460.62
<input type="checkbox"/>	Perfect Bound	248	1	1000	3	<input type="checkbox"/>	Plates		44	465.04	14.074	530.49	530.49	2991.11	2991.11
<input type="checkbox"/>	Perfect Bound	248	1	1000	5	<input type="checkbox"/>	Press		28018	1214.24	15.774	1405.774	1405.774	4396.884	4396.884
<input type="checkbox"/>	Perfect Bound	248	1	1000	6	<input type="checkbox"/>	Bind		14078	860.67	15.401	993.221	993.221	5390.104	5390.104
<input type="checkbox"/>	Perfect Bound	248	1	1000	7	<input type="checkbox"/>	Cover		8004	321.76	17.112	376.821	376.821	5766.925	5766.925
<input type="checkbox"/>	Perfect Bound	248	1	1000	999990	<input checked="" type="checkbox"/>	Miscellaneous		250					5766.925	5766.925
<input type="checkbox"/>	Perfect Bound	248	2	2500	1	<input type="checkbox"/>	Paper		10000	3154.45	20	3785.34	3785.34	3785.34	3785.34
<input type="checkbox"/>	Perfect Bound	248	2	2500	2	<input type="checkbox"/>	Prepress		1250	550.01	15.127	633.212	633.212	4418.552	4418.552
<input type="checkbox"/>	Perfect Bound	248	2	2500	3	<input type="checkbox"/>	Plates		44	677	9.981	744.57	744.57	5163.122	5163.122
<input type="checkbox"/>	Perfect Bound	248	2	2500	5	<input type="checkbox"/>	Press		60018	1825.18	15.931	2115.956	2115.956	7279.078	7279.078
<input type="checkbox"/>	Perfect Bound	248	2	2500	6	<input type="checkbox"/>	Bind		36286	1825.66	15.466	2108.059	2108.059	9387.137	9387.137
<input type="checkbox"/>	Perfect Bound	248	2	2500	7	<input type="checkbox"/>	Cover		20004	553.68	17.313	649.537	649.537	10036.674	10036.674
<input type="checkbox"/>	Perfect Bound	248	2	2500	999990	<input checked="" type="checkbox"/>	Miscellaneous		250					10036.674	10036.674
<input type="checkbox"/>	Perfect Bound	320	1	1000	1	<input type="checkbox"/>	Paper		2000	1924.71	20	2309.652	2309.652	2309.652	2309.652
<input type="checkbox"/>	Perfect Bound	320	1	1000	2	<input type="checkbox"/>	Prepress		1610	660.01	15.045	759.312	759.312	3068.964	3068.964
<input type="checkbox"/>	Perfect Bound	320	1	1000	3	<input type="checkbox"/>	Plates		48	545.04	14.944	626.49	626.49	3695.454	3695.454
<input type="checkbox"/>	Perfect Bound	320	1	1000	5	<input type="checkbox"/>	Press		8020	1396.06	15.748	1615.909	1615.909	5311.363	5311.363
<input type="checkbox"/>	Perfect Bound	320	1	1000	6	<input type="checkbox"/>	Bind		16353	982.52	15.481	1134.623	1134.623	6445.986	6445.986
<input type="checkbox"/>	Perfect Bound	320	1	1000	7	<input type="checkbox"/>	Cover		8004	323.55	17.117	378.934	378.934	6824.919	6824.919
<input type="checkbox"/>	Perfect Bound	320	1	1000	999990	<input checked="" type="checkbox"/>	Miscellaneous		322					6824.919	6824.919
<input type="checkbox"/>	Perfect Bound	320	2	2500	1	<input type="checkbox"/>	Paper		5000	4081.08	20	4897.296	4897.296	4897.296	4897.296
<input type="checkbox"/>	Perfect Bound	320	2	2500	2	<input type="checkbox"/>	Prepress		1610	660.01	15.045	759.312	759.312	5656.608	5656.608
<input type="checkbox"/>	Perfect Bound	320	2	2500	3	<input type="checkbox"/>	Plates		48	757	11.04	840.57	840.57	6497.178	6497.178
<input type="checkbox"/>	Perfect Bound	320	2	2500	5	<input type="checkbox"/>	Press		20020	2118	15.989	2456.234	2456.234	8953.412	8953.412
<input type="checkbox"/>	Perfect Bound	320	2	2500	6	<input type="checkbox"/>	Bind		40487	2106.18	15.559	2433.882	2433.882	11387.294	11387.294
<input type="checkbox"/>	Perfect Bound	320	2	2500	7	<input type="checkbox"/>	Cover		20004	556.24	17.326	652.612	652.612	12039.906	12039.906
<input type="checkbox"/>	Perfect Bound	320	2	2500	999990	<input checked="" type="checkbox"/>	Miscellaneous		322					12039.906	12039.906

Cancel Save Changes Preview Design Report Price List

You may change PRICES in this screen but not COSTS. If you have changed a price, you will see the cost, the markup, the cost plus Markup, and the price have changed, and there is a pencil icon by the **Edited** check box.

3671[Notch paper test book]

Status: Net 25 days. Address: Suite 100, 123 West Main, County: USA, Account Code: ABBA1, 84020-9544

Name: Abba Inc.

Comments:

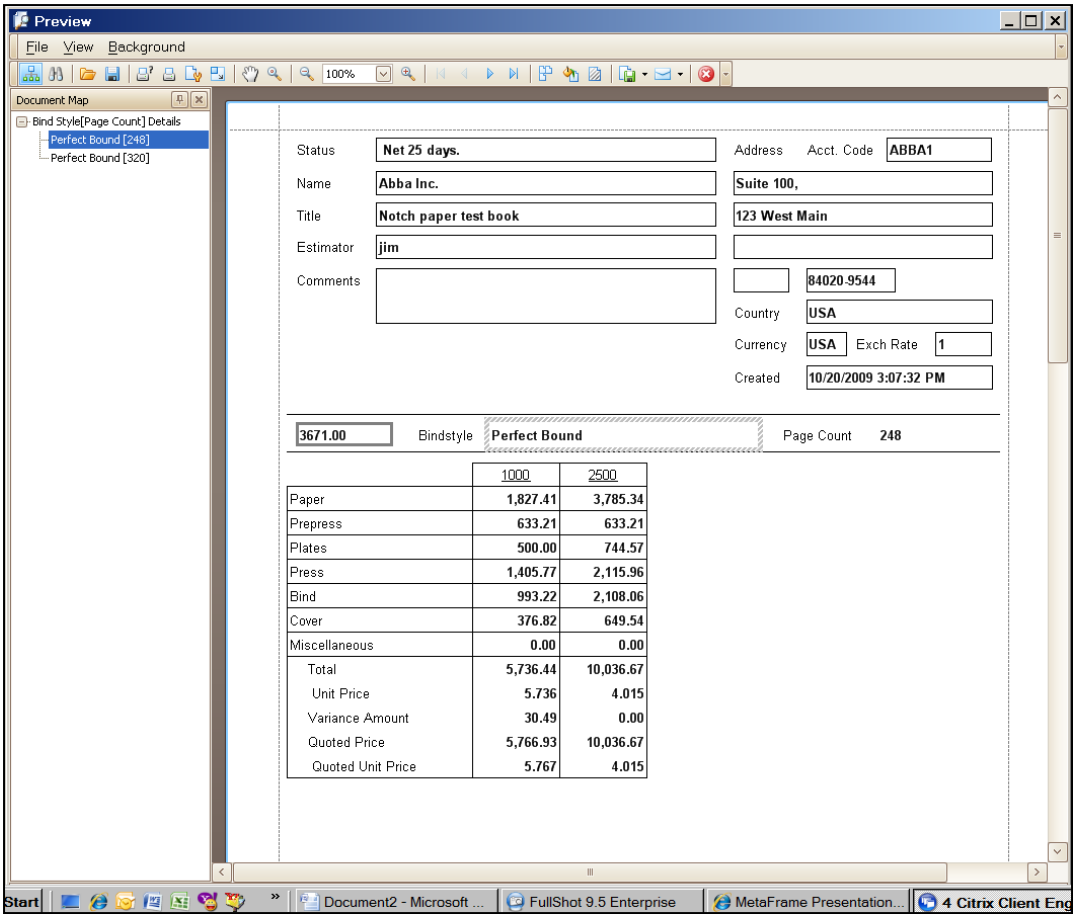
Edited	BindStyle	PageCount	QtyNo	EstQty	LineNo	Break	Descr1	Descr2	Qty	Cost	Markup	CostPlusMarkUp	Price	SubTotal	T
<input type="checkbox"/>	Perfect Bound	248	1	1000	1	<input type="checkbox"/>	Paper		6000	1522.84	20	1827.408	1827.408	1827.408	1827.408
<input type="checkbox"/>	Perfect Bound	248	1	1000	2	<input type="checkbox"/>	Prepress		1250	550.01	15.127	633.212	633.212	2460.62	2460.62
<input checked="" type="checkbox"/>	Perfect Bound	248	1	1000	3	<input type="checkbox"/>	Plates		44	465.04	14.074	530.49	500	2991.11	2991.11
<input type="checkbox"/>	Perfect Bound	248	1	1000	5	<input type="checkbox"/>	Press		28018	1214.24	15.774	1405.774	1405.774	4396.884	4396.884
<input type="checkbox"/>	Perfect Bound	248	1	1000	6	<input type="checkbox"/>	Bind		14078	860.67	15.401	993.221	993.221	5390.104	5390.104
<input type="checkbox"/>	Perfect Bound	248	1	1000	7	<input type="checkbox"/>	Cover		8004	321.76	17.112	376.821	376.821	5766.925	5766.925
<input type="checkbox"/>	Perfect Bound	248	1	1000	999990	<input checked="" type="checkbox"/>	Miscellaneous		250					5766.925	5766.925
<input type="checkbox"/>	Perfect Bound	248	2	2500	1	<input type="checkbox"/>	Paper		10000	3154.45	20	3785.34	3785.34	3785.34	3785.34
<input type="checkbox"/>	Perfect Bound	248	2	2500	2	<input type="checkbox"/>	Prepress		1250	550.01	15.127	633.212	633.212	4418.552	4418.552
<input type="checkbox"/>	Perfect Bound	248	2	2500	3	<input type="checkbox"/>	Plates		44	677	9.981	744.57	744.57	5163.122	5163.122
<input type="checkbox"/>	Perfect Bound	248	2	2500	5	<input type="checkbox"/>	Press		60018	1825.18	15.931	2115.956	2115.956	7279.078	7279.078
<input type="checkbox"/>	Perfect Bound	248	2	2500	6	<input type="checkbox"/>	Bind		36286	1825.66	15.466	2108.059	2108.059	9387.137	9387.137
<input type="checkbox"/>	Perfect Bound	248	2	2500	7	<input type="checkbox"/>	Cover		20004	553.68	17.313	649.537	649.537	10036.674	10036.674
<input type="checkbox"/>	Perfect Bound	248	2	2500	999990	<input checked="" type="checkbox"/>	Miscellaneous		250					10036.674	10036.674
<input type="checkbox"/>	Perfect Bound	320	1	1000	1	<input type="checkbox"/>	Paper		2000	1924.71	20	2309.652	2309.652	2309.652	2309.652
<input type="checkbox"/>	Perfect Bound	320	1	1000	2	<input type="checkbox"/>	Prepress		1610	660.01	15.045	759.312	759.312	3068.964	3068.964
<input type="checkbox"/>	Perfect Bound	320	1	1000	3	<input type="checkbox"/>	Plates		48	545.04	14.944	626.49	626.49	3695.454	3695.454
<input type="checkbox"/>	Perfect Bound	320	1	1000	5	<input type="checkbox"/>	Press		8020	1396.06	15.748	1615.909	1615.909	5311.363	5311.363
<input type="checkbox"/>	Perfect Bound	320	1	1000	6	<input type="checkbox"/>	Bind		16353	982.52	15.481	1134.623	1134.623	6445.986	6445.986
<input type="checkbox"/>	Perfect Bound	320	1	1000	7	<input type="checkbox"/>	Cover		8004	323.55	17.117	378.934	378.934	6824.919	6824.919
<input type="checkbox"/>	Perfect Bound	320	1	1000	999990	<input checked="" type="checkbox"/>	Miscellaneous		322					6824.919	6824.919
<input type="checkbox"/>	Perfect Bound	320	2	2500	1	<input type="checkbox"/>	Paper		5000	4081.08	20	4897.296	4897.296	4897.296	4897.296
<input type="checkbox"/>	Perfect Bound	320	2	2500	2	<input type="checkbox"/>	Prepress		1610	660.01	15.045	759.312	759.312	5656.608	5656.608
<input type="checkbox"/>	Perfect Bound	320	2	2500	3	<input type="checkbox"/>	Plates		48	757	11.04	840.57	840.57	6497.178	6497.178
<input type="checkbox"/>	Perfect Bound	320	2	2500	5	<input type="checkbox"/>	Press		20020	2118	15.989	2456.234	2456.234	8953.412	8953.412
<input type="checkbox"/>	Perfect Bound	320	2	2500	6	<input type="checkbox"/>	Bind		40487	2106.18	15.559	2433.882	2433.882	11387.294	11387.294
<input type="checkbox"/>	Perfect Bound	320	2	2500	7	<input type="checkbox"/>	Cover		20004	556.24	17.326	652.612	652.612	12039.906	12039.906
<input type="checkbox"/>	Perfect Bound	320	2	2500	999990	<input checked="" type="checkbox"/>	Miscellaneous		322					12039.906	12039.906

Cancel Save Changes Preview Design Report Price List

Note Price changes made here will not show you the changes in Value Add or Contribution.

IF you want to see how the pricing changes impact Value Add or contribution percentage, make pricing changes in the Pricing and Markups screen in Book Estimating instead of here to view this information. And note that pricing changes made in the pricing and markups area of the estimate will not pull into this area, they will need to be keyed in here as well

If you see costs with the Description of Miscellaneous, this means there are costs coming in that are NOT linked. From here, you can select **Preview** for a different view that displays the breakouts more clearly for this quote letter template.

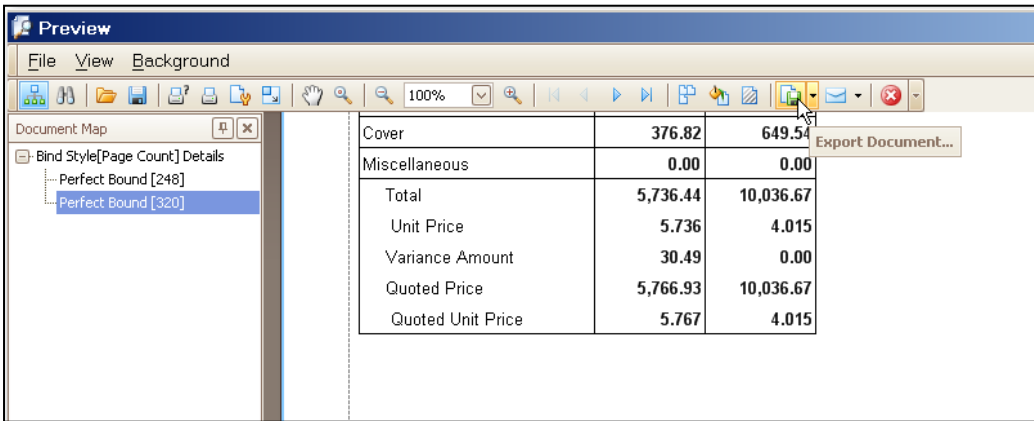


This will only show the Marked up Sell Price with any pricing changes that were keyed into the Proposal for this quote in the Proposal area.

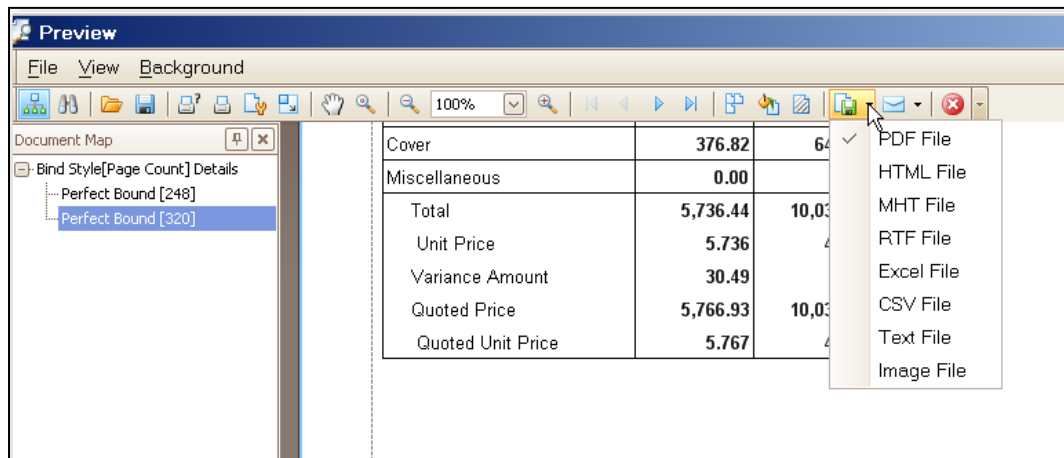
Note The additional 1000's should display as ZERO for prepress only.

To export, select the **Export** icon.

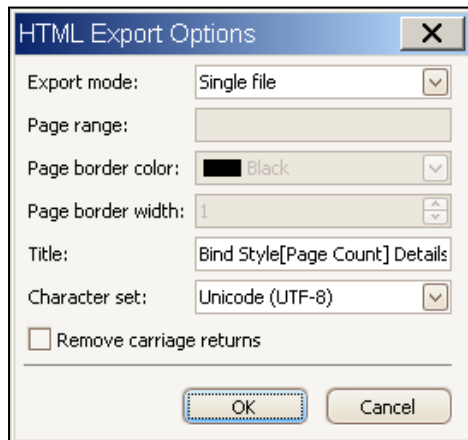
Select the **Export** icon 3rd from right.



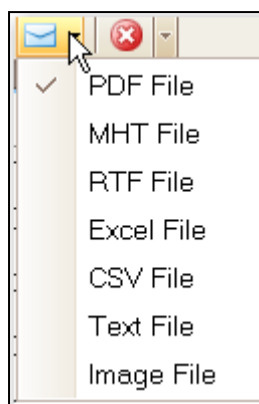
And select the format.



The instructions that follow are specific to the format selected.

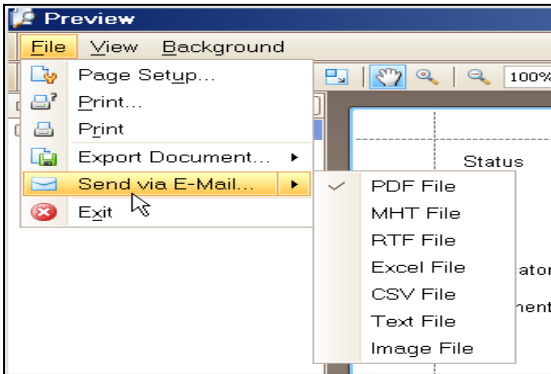


Here are options of format you can use to email.



These are the same export options. You may also activate this area by using File>Export Document.

Or File>Send via Email.



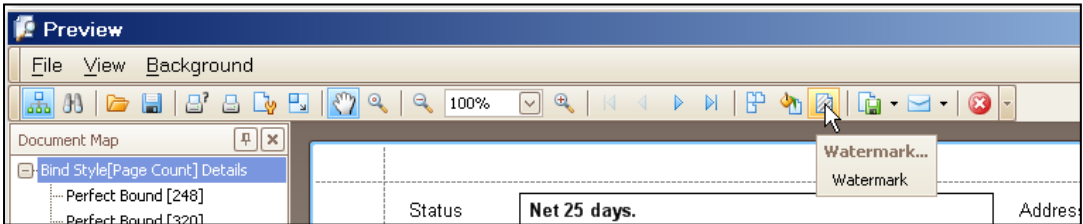
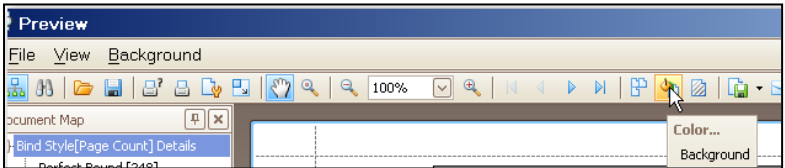
Split Bind Estimates on Proposal Generator.

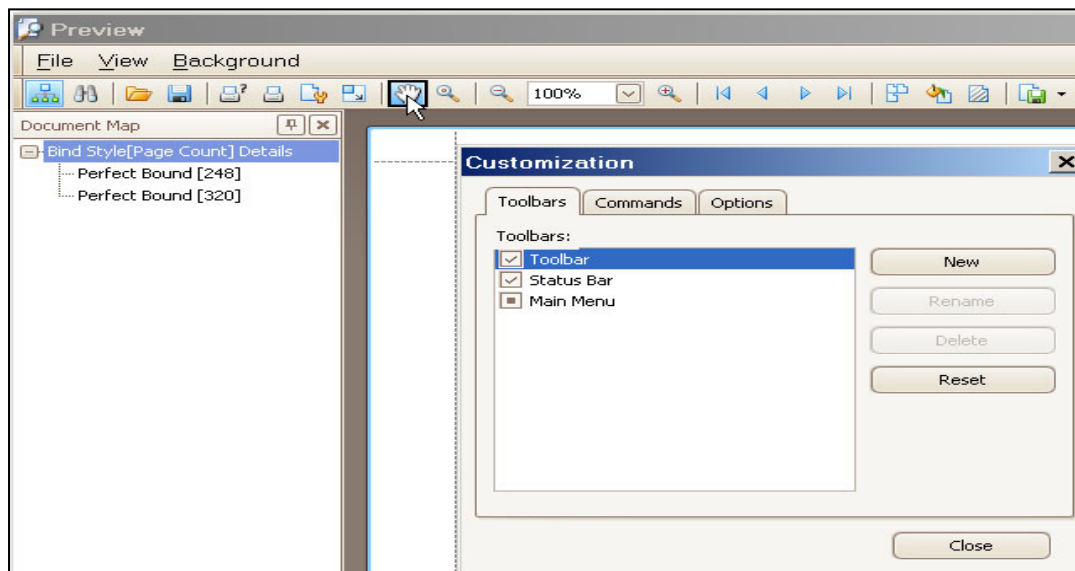
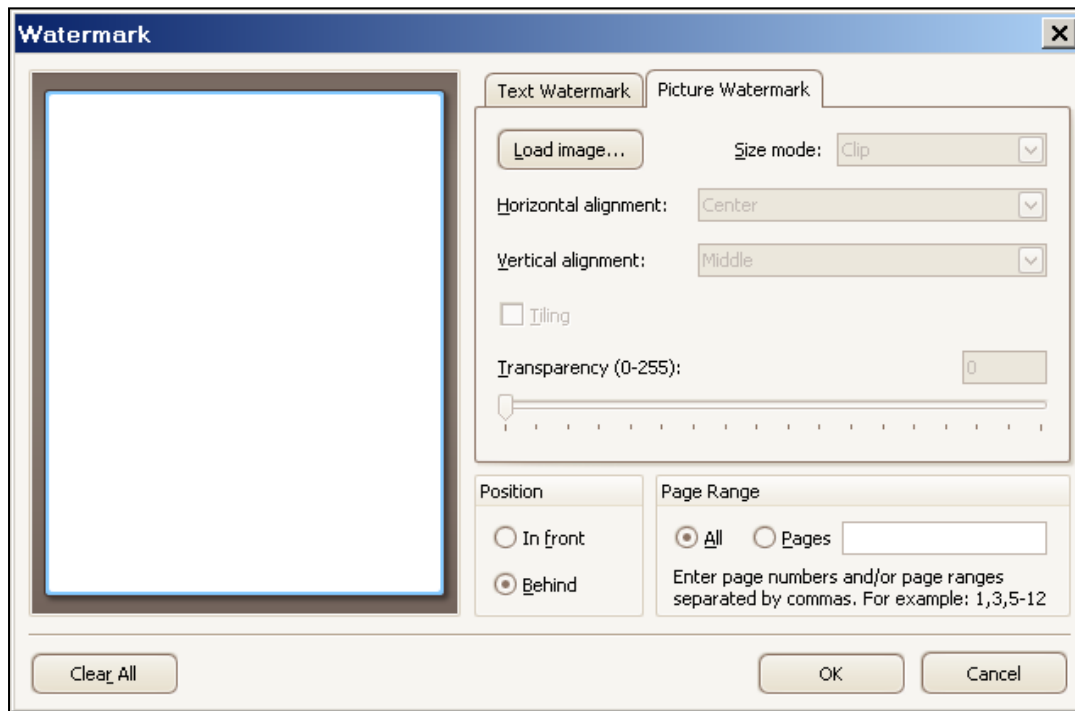
Currently, ALL PREPRESS are applied to the first bind style listed in Book Estimating. This is due to shared text used for Split Bind estimates.

For printing text, all text paper and printing displays on the first Bind Style only, as text is common to both.

For these reasons, you will not get an accurate estimate for each bind style using this tool.

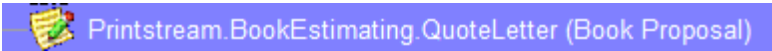
Icons across the top of Preview screen: hover over any one of these and a description displays.





Book Estimating Quote Letter

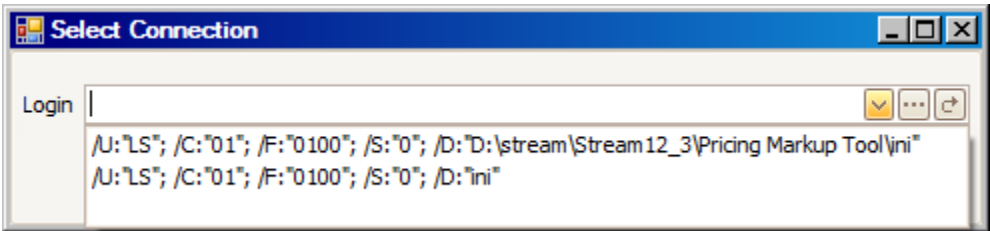
Overview



Book Estimating Quote Letter Generation will show you how to create and generate different quote letter formats which can be used with Book Estimating.

This program is currently being run as a standalone program. The program is called **Pricing Markup Tool**. Please work with your support person to get this program with its associated files setup on your system.

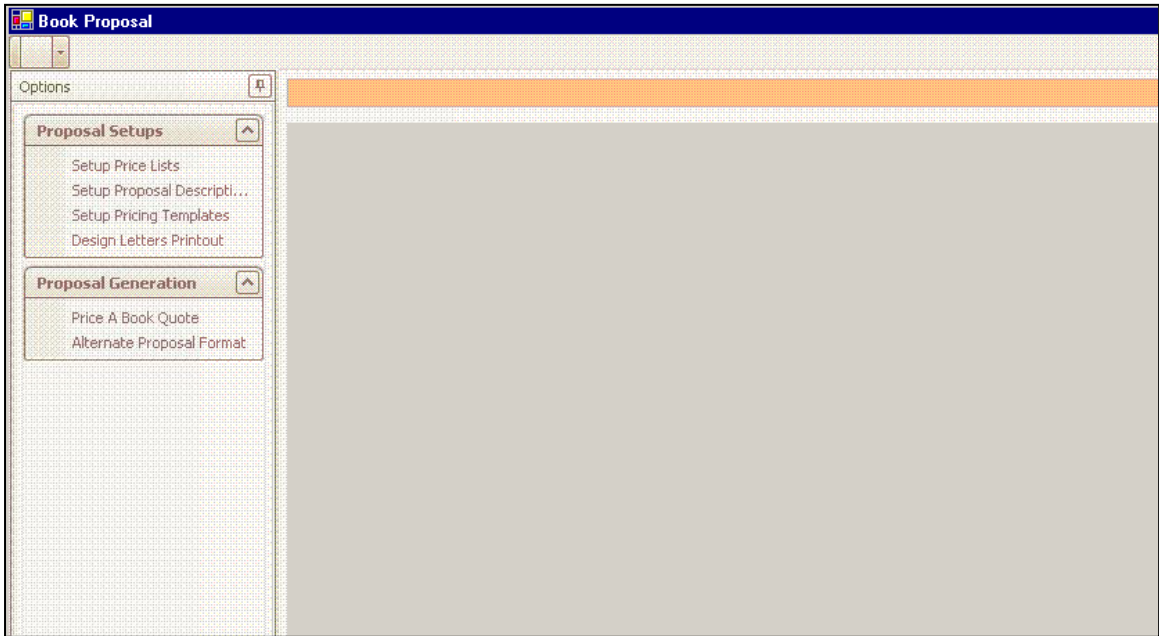
When you launch the program, it prompts you for a login path. Click the arrow and select the path that is pointing to your database. Then click **Login**.

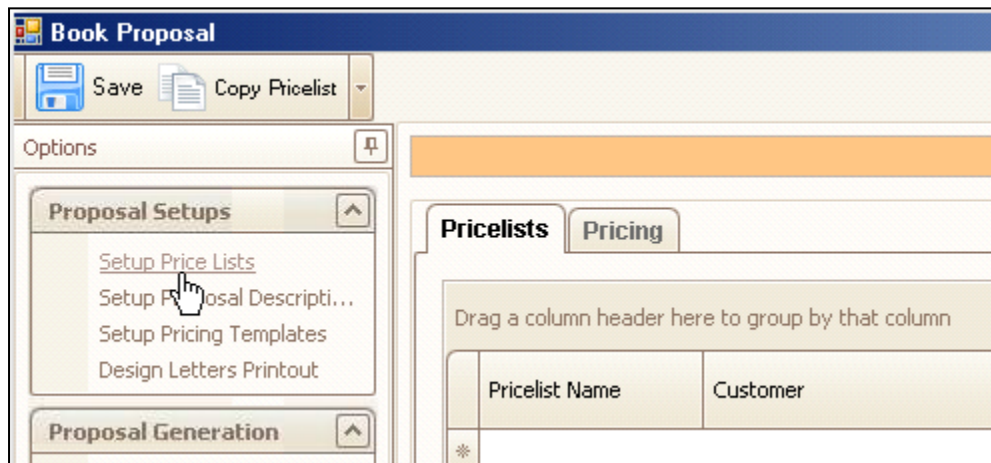


Proposal Setups

Set up Price Lists

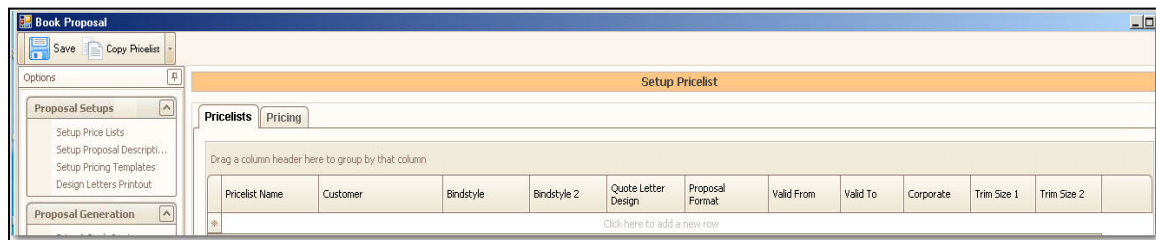
The first step in setting up the Price Lists is to select the Setup Price List option from the tree.





Pricelists tab

On the blank line at the top, start by entering information for this particular price list.



Price List Name- enter the name of this.

Customer-select a Customer from the drop-down choices.

Bind Style- select a bind style from the drop-down choices. These are set up in Master Files Book under Bind Style Definition.

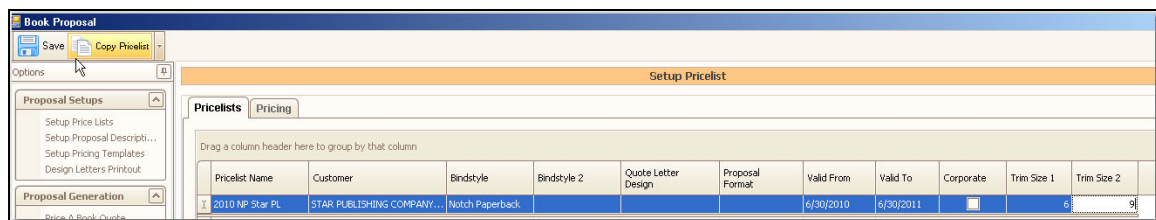
- Bind style for a price list covering one bind style only.
- Bind style and Bind Style 2 both require bind style entries for a split bound price list where both bind styles are used in a single estimate.

Valid From – enter the date this Price List is valid From (Start date).

Valid to – Enter the date this price list is valid TO.

Corporate check box- not currently functional.

Enter Trim Size 1 and trim size 2 as page size of the book. Note sizes need to be entered as decimals not fractions when they are not a whole number.



Click **Save** when finished.

Pricing tab

Enter the pricing that is specific for this Price List.
Select the price list you are working on from the drop-down choices.
Pricing lines that pull in directly from the marked up cost in Book Estimating are

- Paper
- Buyouts
- Cartons and Pallets (unless you have entered a different pricing rate for cartons and pallets here then the pricing you have entered is used).

For these items to pull in from the Book Estimate at the marked up rate, no pricing input is needed on the Price list.

Note You will need to enter pricing for all other processes to have them pull into price list, and the process must exist in the Book estimate for pricing entered here to pull into the Price List.

Processes tab

Processes tab displays these Process Types set up in Master File Print:

- **Binding- binding processes**– all processes using pockets will bin in this category.
- **Prep Process**-These prepress processes are either included in a Prepress Workflow or designed to be added as additional prep processes on the estimate.
- **Prep Workflow**- includes one or more prep processes set up in Master Files Book.
- **Section Finishing** – finishing processes that impact one or more sections of a Book Estimate but do not impact all sections are displayed here.

The screenshot shows the 'Book Proposal' application window. The 'Setup Pricelist' dialog is open, with the 'Pricing' tab selected. The 'Pricelist' dropdown is set to '2010 NP Star PL'. The 'Customer' field contains 'STAR PUBLISHING COMPANY'. The 'Bindstyle' is 'Notch Paperback' and the 'Trim Size' is '6 x 9'. The 'Processes' tab is active, displaying a list of process types on the left: 'Process Type: Binding', 'Process Type: Prep Process', 'Process Type: Prep Workflow', and 'Process Type: Section Finish'. On the right, there are input fields for 'Process' (set to 'Apply Disk Pack'), 'Measure', 'First Makeready', and 'Makeready'. To the right of these fields are checkboxes for pricing methods: 'Price Per Page', 'Price by Form Qty', 'Price By Total Pages', 'Price By Process Qty', and 'Use book qty instead of process qty'. At the bottom right, there is a table with columns 'Qty Break', 'Rate', and 'Material Rate', and a button to 'Click here to add a new row'.

Clicking + displays all available processes.

Book Proposal

Options: Save, Copy Pricelist

Setup Pricelist

Pricelists **Pricing**

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Processes **Print** **Per Book Charges** **Paper** **Buyouts**

Process Type: ↑

Process Name

Process Type: Binding

Apply Disk Pack

Apply Stickers

Bindery Buyout

Carton Pack

Drop-in Blocks in Binder

Gathering

Hand Cancel

Individual Shrinkwrap

Marrying

Nip Glue Trim

Notch Case Binding

Process: Apply Disk Pack

Measure:

First Makenready:

Makenready:

Run

Price Per Page

Price by Form Qty

Price By Total Pages

Price By Process Qty

Use book qty instead of process qty

Qty Break	Rate	Material Rate
Click here to add a new row		

To apply process pricing, select the process, right-click the process and choose Apply Process Prices.
(You can also delete process pricing using this same method.)

Pricelists **Pricing**

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Processes **Print** **Per Book Charges** **Paper**

Process Type: ↑

Process Name

Process Type: Binding

Apply Disk Pack

Apply Stickers

Bindery Buyout

Carton Pack

Process: Apply Disk Pack

Measure:

First Makenready:

Makenready:

Run

Price Per Page

Price by Form Qty

Price By Total Pages

Price By Process Qty

Use book qty instead of process qty

Qty Break	Rate	Material Rate
Click here to add a new row		

Context Menu:

- Add Process Prices
- Delete Process Prices

This activates the pricing area.

Enter Measures (will this be per 1000, per each (1). This indicates the measure that is used for this price line.

You have the ability to add a First Makeready charge.

And a following Makeready charge under Makeready, this could be for additional pockets in binding processes.

Price By Column- this tells us how to apply the measure. SELECT ONE ONLY in this area per process.

Price per page – takes the page count of the book as the multiplier. Used in prep processes.

Price by Form quantity – takes this process price times the number of signatures or forms. Used for binding process that use number of pockets.

Price by Total Pages – this multiplier would take the total number of pages times the number of books. If you had some tip in to occur on each page this could be useful.

Price by Process Qty- this uses the total number of cartons, for example, not the number of books. The process quantity is used as the modifier not the Book quantity.

Use book qty instead of process qty- this takes the book quantity as the multiplier. Example if you charge cartons based on the number of books, not the number of cartons, you would use this selection.

Qty Break area- allows specific input to apply quantity breaks for different pricing values within a pricing line.

The input on this area can be different based on the selection made above.

Price per Page displays like this. Rate is the labor rate, material is the Material rate used, and these can vary by quantity break.

Book Proposal

Options: Save, Copy Pricelist

Proposal Setups

- Setup Price Lists
- Setup Proposal Descripti...
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal Format

Setup Pricelist

Pricelists | **Pricing**

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Corporate: ☐

Processes | **Print** | **Per Book Charges** | **Paper** | **Buyouts**

Process Type:

Process Name:

☐ Process Type: Binding

☐ Process Type: Prep Process

- Digital Lasers
- Preflight & Process New File
- Process Igen Component
- Process Reprint File
- Soft Proofs
- Soft Proofs - 1200 or more pgs
- Soft Proofs - 800 to 1199 pgs
- Soft Proofs - up to 799 pgs
- Process Type: Prep Workflow
- Process Type: Section Finish

Process: Digital Lasers

Measure: 1

First Makeready: \$1.000

Makeready: \$0.000

☒ Price Per Page

☐ Price by Form Qty

☐ Price By Total Pages

☐ Price By Process Qty

☐ Use book qty instead of process qty

Qty Break	Rate	Material Rate
200	\$2.500	\$0.750
400	\$2.000	\$0.750
600	\$1.750	\$0.650
99999999	\$1.500	\$0.500

The quantity break referred to here is the number of pages. You can enter different rates for different page counts. The quantity entered is applied to all page counts UP TO the page count quantity listed. This applies 2.50 + .75 to each page using digital lasers, plus a 1.00 MR, on this pricing line instead of what was estimated in Book Estimating.

Price by Form Qty- for binding processes, the display asks for the form Qty, Qty Break, and Rate.

The first Makeready is the job Makeready.

The Makeready is multiplied by each form.

Book Proposal

Options: Save, Copy Pricelist

Proposal Setups

- Setup Price Lists
- Setup Proposal Descripti...
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal Format

Setup Pricelist

Pricing

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Processes

Process Type: ↑

Process Name:

- Drop-in Blocks in Binder
- Gathering
- Hand Cancel
- Individual Shrinkwrap
- Marrying
- Nip Glue Trim
- Notch Case Binding
- Notch Case-in
- Notch Case-in and Jacket
- Pallets/Slids
- Paperback Binding
- PS Saddle Stitch
- Sewing
- Sewn Case-in

Process: Paperback Binding

Measure: 1000

First Makeready: \$100.000

Makeready: \$10.000

Price Per Page: ☐

Price by Form Qty: ☒

Price By Total Pages: ☐

Price By Process Qty: ☐

Use book qty instead of process qty: ☐

Form Qty	Qty Break	Rate
8	99999999	\$50.000
16	10000	\$53.000
16	99999999	\$51.000
24	10000	\$54.000
24	99999999	\$53.000
36	10000	\$55.000
36	99999999	\$54.000
99999999	99999999	\$55.500

You have the ability to enter multiple qty breaks within a single form quantity or one quantity break per each form quantity using this setting.

Price by Total pages allows you to set different prices for Different page counts at different quantity breaks.

In this case if you were applying a disk pack to each page in the book, you could assign a page count and quantity break pricing for each page count.

Book Proposal

Options: Save, Copy Pricelist

Proposal Setups

- Setup Price Lists
- Setup Proposal Descripti...
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal Format

Setup Pricelist

Pricing

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Processes

Process Type: ↑

Process Name:

- Process Type: Binding
- Apply Disk Pack
- Apply Stickers
- Bindery Buyout
- Carton Pack
- Drop-in Blocks in Binder
- Gathering
- Hand Cancel
- Individual Shrinkwrap
- Marrying
- Nip Glue Trim
- Notch Case Binding
- Notch Case-in
- Notch Case-in and Jacket

Process: Apply Disk Pack

Measure: 1000

First Makeready: \$0.000

Makeready: \$0.000

Price Per Page: ☐

Price by Form Qty: ☐

Price By Total Pages: ☒

Price By Process Qty: ☐

Use book qty instead of process qty: ☐

Page Count	Qty Break	Rate	Material Rate
100	1000	\$1.000	\$0.500
100	5000	\$1.000	\$0.450
100	99999999	\$0.750	\$0.250
200	1000	\$0.800	\$0.500
200	5000	\$0.750	\$0.450
200	99999999	\$0.700	\$0.250
99999999	99999999	\$0.500	\$0.250

Price by Process Qty- this uses the process Qty in Book Estimating. In this example for laminating, we will use the actual quantity to laminate, including overs needed for following processes as estimated in Book Estimating, and shows the quantity based on the number of press sheets going through this process.

Book Proposal

Options: Save Copy Pricelist

Proposal Setup

- Setup Price Lists
- Setup Proposal Descripti...
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal Format

Setup Pricelist

Pricing

Pricelist: 2010 PB price list Star

Customer: STAR PUBLISHING COMPANY

Bindstyle: Perfect Paperback

Trim Size: 6 x 9

Corporate: ☐

Processes

Process Type: ☐ Process

Process Name: Laminating - Gloss

Measure: 1000

First Makeready: \$25.000

Makeready: \$0.000

Price Per Page: ☐

Price by Form Qty: ☐

Price By Total Pages: ☐

Price By Process Qty: ☒

Use book qty instead of process qty: ☐

Qty Break	Rate	Material Rate
1000	\$15.000	\$10.000
5000	\$14.000	\$9.500
10000	\$12.000	\$9.000
9999999	\$11.000	\$7.500

Use book qty instead of process qty- If you use price per book or per 1000 books for any process this is the selection you would choose.

Book Proposal

Options: Save Copy Pricelist

Proposal Setup

- Setup Price Lists
- Setup Proposal Descripti...
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal Format

Setup Pricelist

Pricing

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9

Corporate: ☐

Processes

Process Type: ☐ Process

Process Name: Carton Pack

Measure: 1000

First Makeready: \$10.000

Makeready: \$0.000

Price Per Page: ☐

Price by Form Qty: ☐

Price By Total Pages: ☐

Price By Process Qty: ☒

Use book qty instead of process qty: ☒

Qty Break	Rate	Material Rate
1000	\$10.000	\$2.000
5000	\$8.000	\$1.500
10000	\$7.500	\$1.250
9999999	\$6.500	\$100.000

This setting does not consider the number of cartons used in the estimate, it strictly uses the estimated quantity of books as the basis for pricing. Example, estimate has 1000 books and uses 10 cartons. With this setting I takes these rates times the 1000 books.

Print tab

Here you enter prices for printing for each signature configuration you produce.

This shows a 16 page set up.

The screenshot shows the 'Book Proposal' software interface. The 'Setup Pricelist' window is open, displaying various pricing options. The 'Pricing' tab is selected, showing a table for 'Price Header' and 'Run Charges'.

Pages	Colors Front	Colors Back	First Setup	Setup -Addtl.	Measure	Charge Per Page	Plate Charge
16	1	1	\$75.00	\$10.00	1,000		\$10,000

QtyBreak	Rate
10,000	\$22,000
25,000	\$20,000
50,000	\$18,000
99,999,999	\$15,000

This takes a 75.00 job make ready, and if there are following forms on this estimate apply a 10.00 mr for each following form shown in Setup Addtl.

The measure 1000 uses the run rates per 1000, and applies 10.00 for each plate used. The number of make readies, subsequent make readies, and plates are pulled from the Book Estimate, the rates to price these are set up here.

Run Charges uses 24.00/ 1000 up to 1000 qty.

22.00/1000 up to 10000, up to infinity (99999999) quantity which uses 15.00/1000.

This is required for all the page count configurations you run.

Book Proposal

Options: Save, Copy Pricelist

Proposal Setups: Setup Price Lists, Setup Proposal Descripti..., Setup Pricing Templates, Design Letters Printout

Proposal Generation: Price A Book Quote, Alternate Proposal Format

Setup Pricelist

Pricelists: Pricing

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9 Corporate

Processes: Print, Per Book Charges, Paper, Buyouts

Section Type

Drag a column header here to group by that column

Section Name	Type
Text	Text
Paperback Cover	Cover
Endsheets	Endsheet
Case Cover	Cover
Dust Jacket	Jacket
Outside Supplied Component	CustomerSu...
3 Piece Case	Cover
Board Front & Back	Cover
Board Front & Back w/spine	Cover
Insert	Insert
Binding	Insert

Price Header

Pages	Colors Front	Colors Back	First Setup	Setup -Addit.	Measure	Charge Per Page	Plate Charge
16	1	1	\$75.00	\$10.00	1,000		\$10.000
24	1	1	\$78.00	\$11.00	1,000		\$10.000
32	1	1	\$80.00	\$10.00	1,000		\$10.000
48	1	1	\$82.00	\$10.00	1,000		\$10.000
64	1	1	\$85.00	\$10.00	1,000		\$10.000

Run Charges

QtyBreak	Rate
1,000	\$34,000
10,000	\$32,000
25,000	\$30,000
50,000	\$29,000
99,999,999	\$28,500

The above was entered with the Text type highlighted.

Note If you find no printing results when you price a book quote check this screen to make sure the configuration in the estimate exists with pricing here. If you run 8 page signatures and only 8 pg signatures are used in a Book Estimate, with this set up you would see no printing price results.

To pull in pricing for Cover print prices we highlight the Section Name: Paperback cover.

And Type: Cover, then enter pricing for the cover.

Book Proposal

Options: Save, Copy Pricelist

Proposal Setups: Setup Price Lists, Setup Proposal Descripti..., Setup Pricing Templates, Design Letters Printout

Proposal Generation: Price A Book Quote, Alternate Proposal Format

Setup Pricelist

Pricelists: Pricing

Pricelist: 2010 NP Star PL

Customer: STAR PUBLISHING COMPANY

Bindstyle: Notch Paperback

Trim Size: 6 x 9 Corporate

Processes: Print, Per Book Charges, Paper, Buyouts

Section Type

Drag a column header here to group by that column

Section Name	Type
Text	Text
Paperback Cover	Cover
Endsheets	Endsheet
Case Cover	Cover
Dust Jacket	Jacket
Outside Supplied Component	Customer...
3 Piece Case	Cover
Board Front & Back	Cover
Board Front & Back w/s...	Cover
Insert	Insert
Binding	Insert

Price Header

Pages	Colors Front	Colors Back	First Setup	Setup -Addit.	Measure	Charge Per Page	Plate Charge
4	4	0	\$50.00	\$0.00	1,000		\$5.000

Run Charges

QtyBreak	Rate
1,000	\$2,000
4,000	\$1,000
99,999,999	

If you have 4c 2 side covers you would add a pricing line for Colors Front 4, Colors Back 4. This set up shows 4 colors front only.

This step is repeated for each section type that has printing pulled in to the price lists.

Per Book Charges tab

Charges entered here are not present at all in the estimate. Key in any description you like, measure 1 or 1000, can also charge per page.

In the Price Header Area, add a **Description**, **Setup Charge**, **Measure**, **Charge per Page** check box, and select **Bindstyle** from the drop-down choice.

The screenshot shows the 'Book Proposal' application window. On the left is a sidebar with 'Options' and 'Proposal Setups' (Setup Price Lists, Setup Proposal Descripti..., Setup Pricing Templates, Design Letters Printout) and 'Proposal Generation' (Price A Book Quote, Alternate Proposal Format). The main area is titled 'Setup Pricelist' and has tabs for 'Pricelists' and 'Pricing'. The 'Pricing' tab is active, showing fields for 'Pricelist' (2010 NP Star PL), 'Customer' (STAR PUBLISHING COMPANY), 'Bindstyle' (Notch Paperback), and 'Trim Size' (6 x 9). Below these are tabs for 'Processes', 'Print', 'Per Book Charges', 'Paper', and 'Buyouts'. The 'Per Book Charges' tab is selected, displaying a 'Price Header' table with columns: Description, Setup Charge, Measure, Charge Per Page, and Bindstyle. A single row is present: 'Per Book QA Inspect', '\$5,000', '1', a checked checkbox, and 'Notch Paperback'. Below the 'Price Header' is a 'Run Charges' section with a table that has columns 'Qty Break' and 'Rate'. A single row is present: '99,999,999' and '\$0.250'.

In the run charges area enter quantity breaks and rates you wish to charge for this Per book Charge.

Select the enter key here and have a blank space at the top of the row for this to save correctly.

Click **Save**.

Paper and Buyouts tabs

Paper and **Buyouts** tabs are used for linking processes for Quote Letter output.

Options in Setup Price Lists

Copy Price list- from the **Pricing** tab area you can select a price list from the drop-down choices, and choose Copy Pricelist.

The next screen allows you to copy this price list to a new customer, and give it a new name. Click **Save**.

And this price list is available from the Drop-down price lists and available to edit under Setup Price Lists as shown above.

Copy or Delete Price Lists

From the **Pricelists** tab, highlight a price list, right-click and select the **Copy** option.

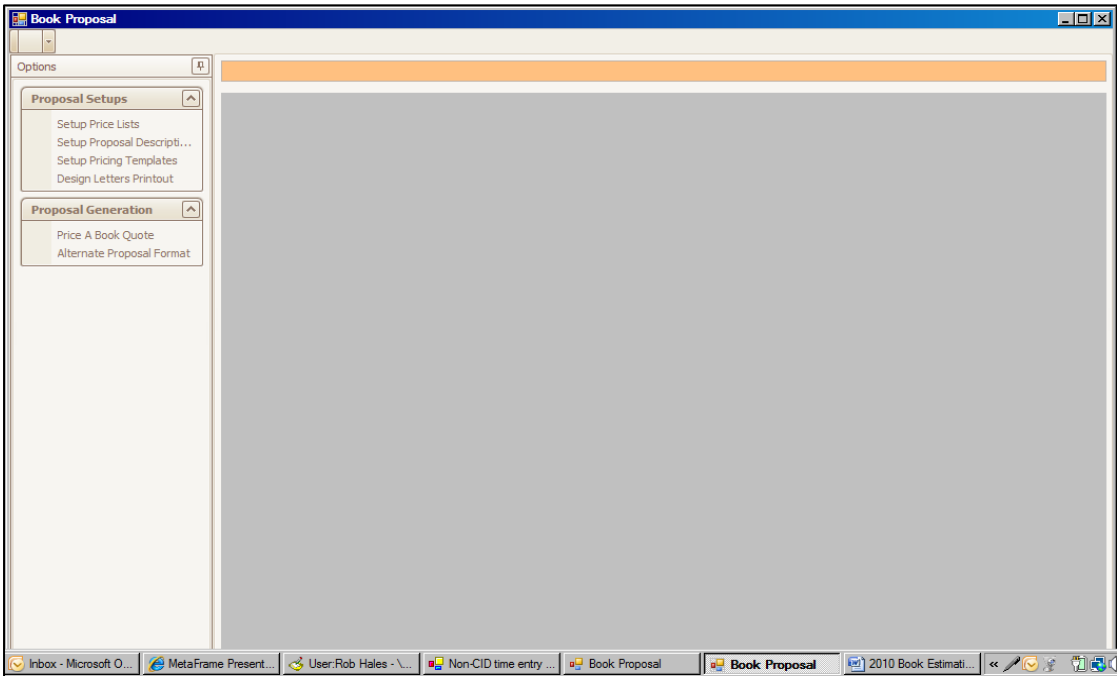
Price List Name	Customer	Bindstyle	Trim Size	Created Date	Last Modified
2010 PB price list Star	STAR PUBLISHING COMPANY...	Perfect Paperback		6/28/2010	6/28/2010

This opens the same screens shown above on copy price list function, rename the copied price list, etc.

You also have the option to delete a price list here.

Setup Proposal Descriptions

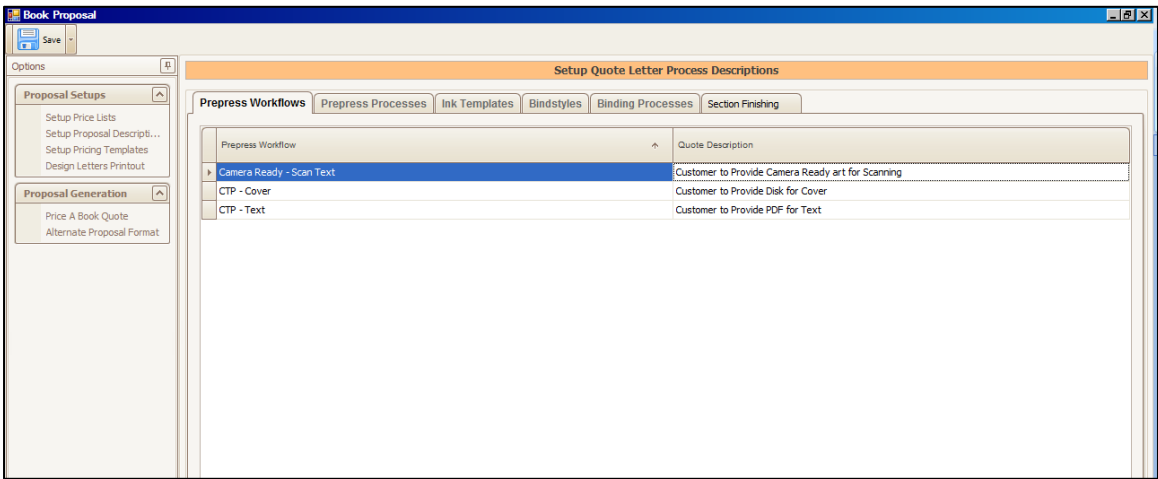
The first step in setting up the Price List Formats is to select **Setup Proposal Descriptions** from the **Proposal Setups** area.



Prepress Workflows

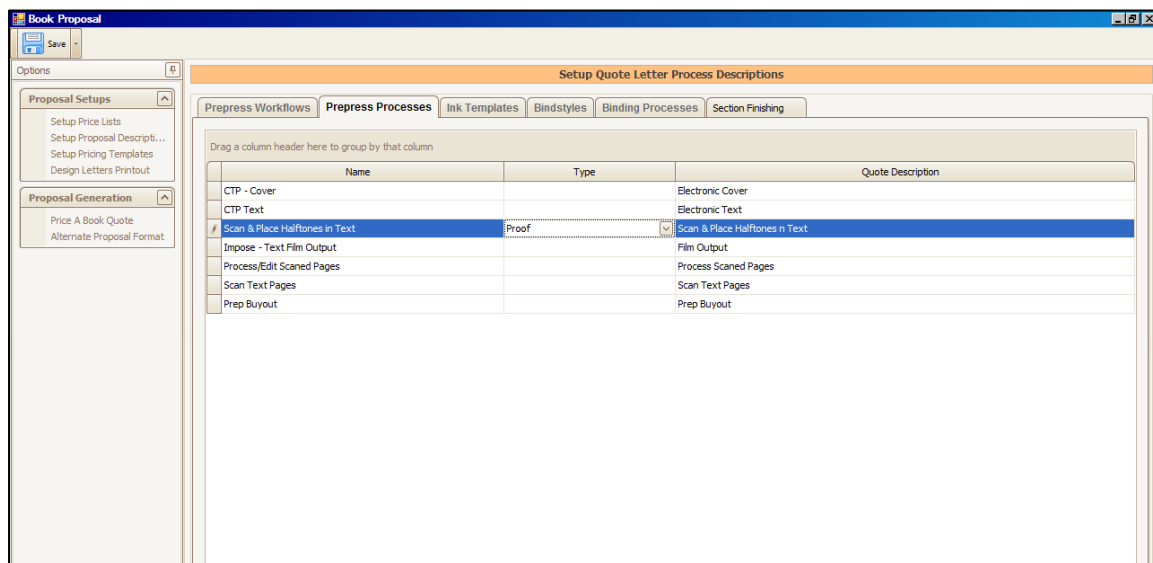
Shown are various tabs that represent different areas in book estimating.

The first tab is called **Prepress Workflows**. When selected, on the left is a listing of all the Prepress Workflows that were setup in Master Files Book and are selected for the prepress on each component in Book Estimating. On the right is a column for inputting the quote letter description you want to appear when the workflow on the left is selected for a component in Book Estimating.



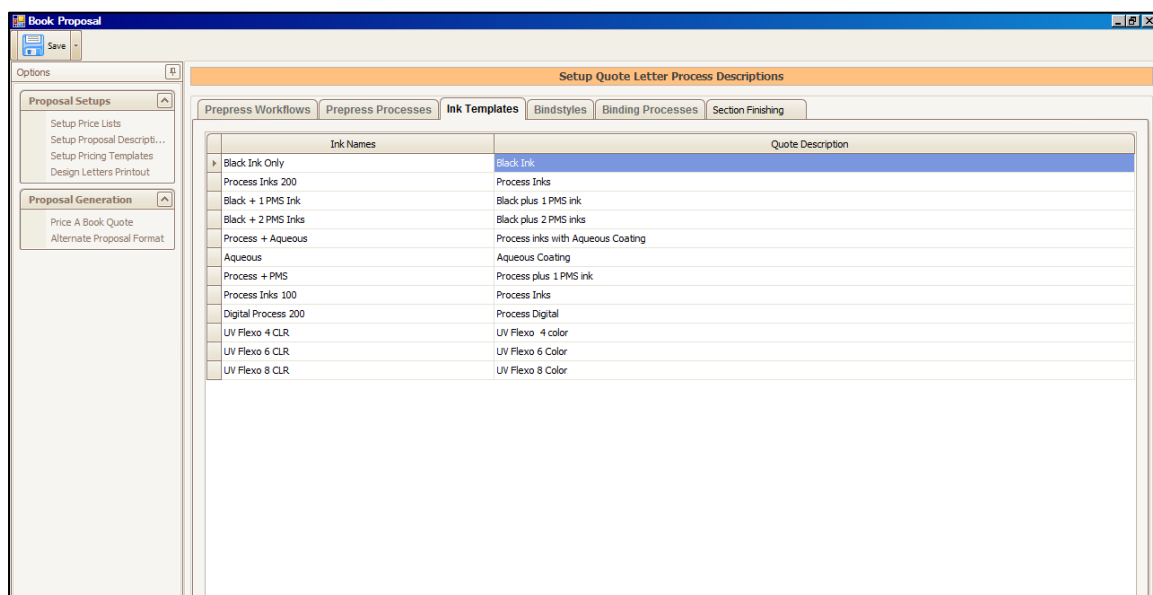
Prepress Processes

Within the **Prepress Processes** tab is a listing of all the Prepress processes setup in Master Files Print. These processes are either included in a Prepress Workflow or designed to be added as additional prepress processes on the estimate. Clicking the **Type** column produces a pop up screen that allows you to link any Proofing, Halftones, or Screen processes on the left to a Proofing, Halftone, or Screen type. These types are used to specifically identify these types of processes for breaking out information on the quote letter format. On the right, enter the quote letter description you want to appear on the quote letter when these processes are selected on an estimate.



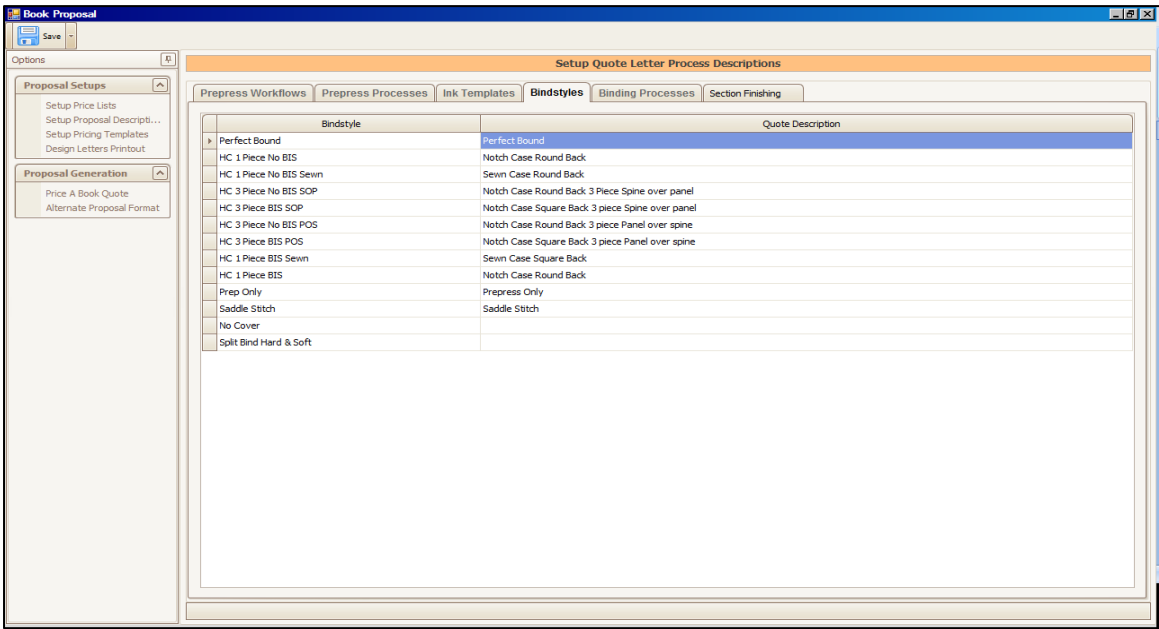
Ink Templates

Within the **Ink Templates** tab is a listing of the ink templates created in Master File Book and available for selection in Book Estimating. On the right, enter the quote letter description you want to be used when each ink template is used in Book Estimating.



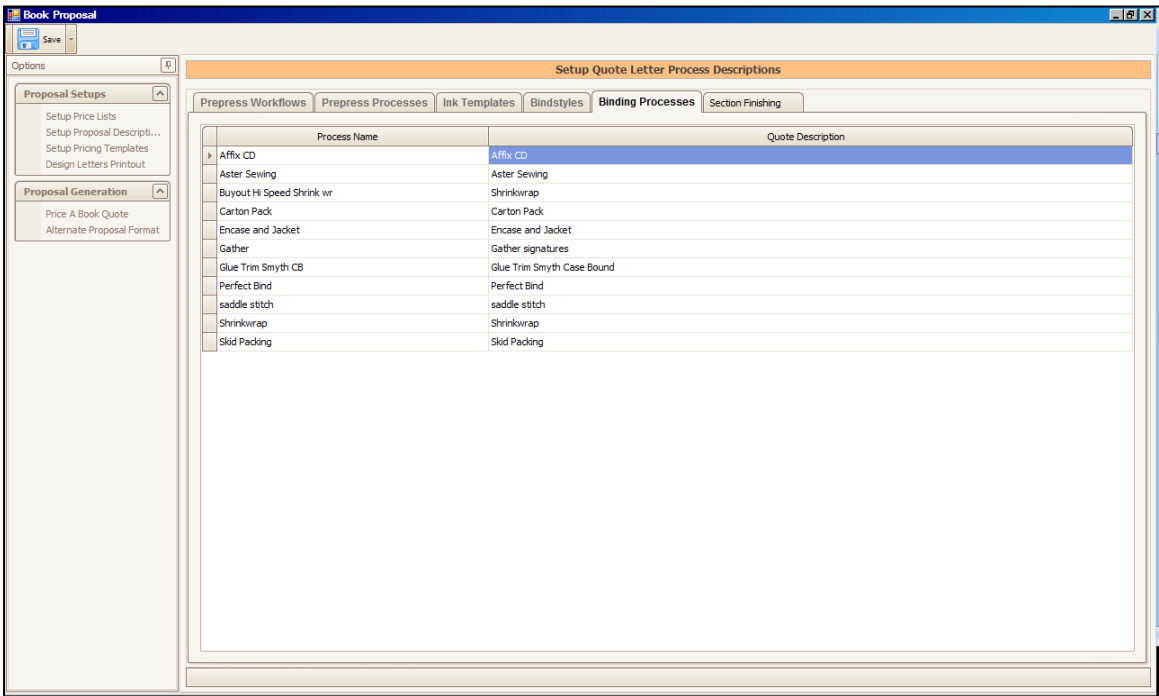
Bindstyles

Within the **Bindstyles** tab is a listing of all the Bindstyles setup in Master Files Book and selected in Book Estimating. On the right, enter the quote letter description to be used for each Bindstyle selected on the estimate.



Binding Processes

Within the **Binding Processes** tab is a listing of all the Binding Processes setup in Master Files Print and selected in Book Estimating. On the right, enter the quote letter description for that binding process when it is used on the estimate.



Section Finishing

Within the **Section Finishing** tab is a listing of all the section finishing processes setup in Master File Print. On the right, enter the quote letter description you want to appear when the process is selected on an estimate.

Process	Quote Letter Description
Fold Signatures	Fold Signatures
Trim - No Bleed	Trim
Trim - With Bleed	Trim
Film Laminate	Film Laminate
Foil Stamp	Foil Stamp
Casemaking	Case Making
Reinforce Endsheets	Reinforce Endsheets
Die Cut - Buyout	Die Cut
Outside Print - Buyout	Print
Foil Die - Buyout	Foil Die

Setup Pricing Templates

This is the area where you can setup different templates to display the pricing breakdowns on your quote letters. These templates are selected when you price a book quote and are pulled into the actual proposal generation.

Format Name	Linked To Pricelist	Pricelist
Click here to add a new row		
Notch Case 9"	<input checked="" type="checkbox"/>	Hard Cover
Perfect Bound	<input checked="" type="checkbox"/>	Perfect Bound
Hamilton Sample	<input checked="" type="checkbox"/>	Perfect Bound
Perfect Bound Cost	<input type="checkbox"/>	
Split Bound QL	<input checked="" type="checkbox"/>	Split Bound

Format List Tab

Format Name

To add a new template, click the **Format Name** field and enter the Quote Letter Template name.

Linked To Price List

If the quote letter is going to be linked to an existing price list that has been setup, select the **Linked To Pricelist** check box. If you are going to be using Cost Plus from estimating with this format, do not select this check box.

Pricelist

If you selected the **Linked To Pricelist** check box, click here to get a pop-up listing of all the price lists. Click the price list you want to link to this quote letter template. If using Cost Plus, do not select a Price list for this template.

Click **Save** to save your quote letter formats.

Format Tab

Format Lines Tab

Line Name

This is the screen where the pricing breakdown lines for the quote letter are created. Click a blank row and enter a description for each pricing line.

Sort Order

Enter the number to determine the line order sort number for the pricing template. This is the order the lines display on the quote letter under the pricing area.

If the Price Format selected is linked to a price list, the **Is Linked to Pricelist** check box is selected. If the Price Format is based on Cost Plus from estimating, this check box is cleared.

Click **Save** to save the format lines.

Pricelist Links Tab

Type	Process	Sub Process	Cost Line
Flat Charges	Budgeted Corrections	Makeready	Prepress
Flat Charges	Budgeted Corrections	Run	Prepress
Text	48pgs 1 / 1	Makeready	Text
Text	48pgs 1 / 1	Run	Text
Text	48pgs 1 / 1	Plates	Plates
Flat Charges	Notch Case Fixed	Makeready	Bindery - Hard
Flat Charges	Notch Case Fixed	Run	Bindery - Hard
Flat Charges	Headbands	Makeready	Bindery - Hard
Flat Charges	Headbands	Run	Bindery - Hard
Prepress Workflow	CTP - Text	Makeready	Prepress
Prepress Workflow	CTP - Text	Run	Prepress
Binding	Perfect Bind	Makeready	Bindery - Soft
Binding	Perfect Bind	Run	Bindery - Soft

Price Format

Select the Quote Letter Pricing Template created within the **Format List** tab.

Pricelist

If the pricing template was linked to a price list, the price list automatically displays and the **Is Linked to Pricelist** check box is selected. If the Pricing template was designed for Cost Plus to work with the estimating, you will not see a price list selected here.

If the pricing template is linked to a price list, a listing of all processes with pricing setup are displayed in the price list attached to this pricing template.

Pricing processes are displayed in the **Type**, **Process**, and **Sub Process** columns.

- Data in each column is sorted by clicking the column header.
- Drag-and-drop columns to move them.
- Add or remove columns by right-clicking one of the column headers and selecting **Column Chooser**. This displays a listing of columns not currently displayed on the screen.
 - To add one of the columns listed, drag it to the column area.
 - To remove an existing column, drag-and-drop it in the **Column Chooser** box. It is removed from your screen and is displayed in the **Column Chooser** box.
- To group by any column, drag- and-drop the column header on the space above the columns.

Each of the price list items listed must be linked to one of the format lines created in the previous step. The lines can be individually linked or linked in groups.

- To individually link a line, click the cost line space for that line to open a pop-up of all the format lines. Click the appropriate line to link the price list item to. Each Price List line is broken out by Sub Process with both a make ready and run process. If the format you are linking to has areas where make ready is broken out separately from run pricing, this allows you to link these correctly. If make ready is not broken out from run, link both to the same line description.
- To link multiple lines at the same time, group by column and use the filter option, which is accessed by right-clicking the column header to filter the processes displayed on the screen. Once you have all the processes listed that you want to link to a particular line, click the **Line Name** drop-down for a listing of all format lines. Select a line and click **Apply** to link all the lines displayed on your screen to that format line. For this reason, be very careful that you only have lines displayed that you want linked to the line selected. If you make a mistake, you can still click individual lines and change the linkage for those lines.

Activity Links Tab

If the Pricing template is not linked to a price list (the **Is Linked to Pricelist** check box is cleared), a listing of all activity codes in the system are displayed. Under this method, all of the activity codes need to be linked to a format line. The format options for sorting, grouping, adding, and removing columns, as well as filtering, are the same as mentioned for linking the price list items.

The screenshot shows the 'Book Proposal' window with the 'Setup Cost Breakout Templates' tab selected. The 'Format List' and 'Format' tabs are visible at the top. The 'Price Format' is set to 'Perfect Bound Cost'. The 'Is Linked to Pricelist' checkbox is unchecked. The 'Format Lines' and 'Activity Links' tabs are visible below. The 'Line Name' dropdown is empty. The main table displays a list of activity codes and their associated format lines.

Activity Code	Activity Name	Cost Center Code	Cost Center	Activity Type	Cost Type	Chargeable	Production Department	Section Name	Format Line
10011	Labor Activi...	100	Labor WIP ...	Art	Labor	Yes	Labor WIP ...	Cover-boar...	
10022	Labor Activi...	100	Labor WIP ...	Art	Labor	Yes	Labor WIP ...	Cover-boar...	
11000	Startup Bal...	110	Suel cost c...	Finish	Labor	Yes	suel ...	Cover-boar...	
12000	New Activit...	110	Suel cost c...	Finish	Material	Yes	suel ...	Cover-boar...	
30000	DP MATERI...	300	DP ADMIN	Art	Material	Yes	DATA PRO...	Cover-boar...	
30001	New Insert...	830	INSERTER ...	Finish	Labor	Yes	MAILING ...	Cover-boar...	
30010	DP SET UP	300	DP ADMIN	Art	Labor	Yes	DATA PRO...	Cover-boar...	
31005	PURCHASE ...	310	LIST PURC...	Art	Sub-Contract	Yes	DATA PRO...	Cover-boar...	
31010	DP Buyout ...	300	DP ADMIN	Art	Sub-Contract	Yes	DATA PRO...	Cover-boar...	
31020	DATA ENTR...	310	LIST PURC...	Art	Sub-Contract	Yes	DATA PRO...	Cover-boar...	
32005	DATA ENTR...	320	DATA ENTR...	Art	Sub-Contract	Yes	DATA PRO...	Cover-boar...	
32011	DATA ENTR...	320	DATA ENTR...	Art	Labor	Yes	DATA PRO...	Cover-boar...	
34005	PROGRAM...	340	PROGRAM...	Art	Sub-Contract	Yes	DATA PRO...	Cover-boar...	
34006	DIGITIZE S...	340	PROGRAM...	Art	Labor	Yes	DATA PRO...	Cover-boar...	

Design Letters Printout

This area allows you to create custom quote letter formats for displaying the quote header information as well as the specifications for the quote. This area does not control the pricing breakdowns. Those were defined under the Setup Pricing Templates area.

Letter Format Name	Date Created	Last Edited	Created By	Last Edit By	Notes	Company Code
Format 1	5/27/2010	6/25/2010	LS			01
Format 2	5/27/2010	6/25/2010	LS			01

Letter Format Name

To create a new format

1. Enter the **Letter Format Name**.
2. Enter the **Date Created**, the date the letter was **Last Edited**, and who the letter was **Created By**.

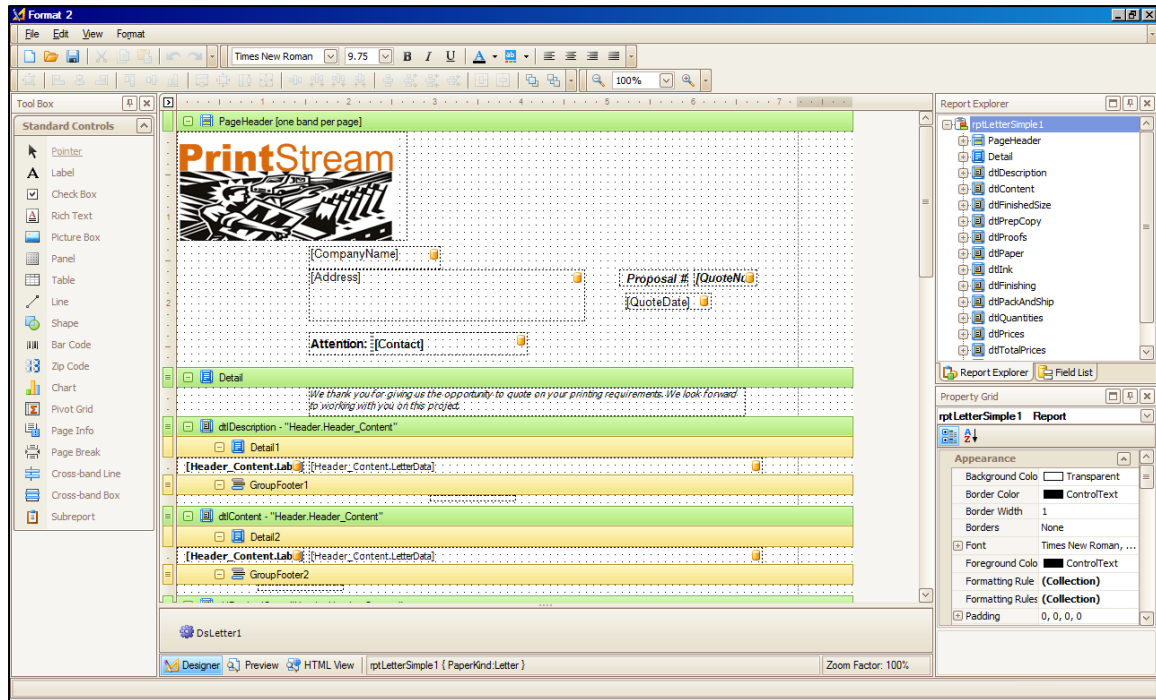
The **Company Code** is populated when the new format is saved.

Your system comes with a built-in default format. When these different formats are created, they are initially populated by the default format, which can be customized.

To open the formatting tool

1. Click the format you want to work on.
2. Click the **Edit Letter Design** icon at the top of the screen.

Edit Letter Design



This program uses the report writer for dot net, which is “Dev Express”.

You can get more information on the many features and uses of Dev Express by clicking the link below.

<http://www.devexpress.com/Products/NET/Reporting/user-designer.xml>

Proposal Generation

Price a Book Quote

To create Quote Letters

1. Click **Price A Book Quote** from the **Proposal Generation** area on the left.
2. Enter the **Quote #** or select from the quote listing.
3. Ensure there is a **Price Output Template** and **Price List** assigned to the quote letter.

If the **Price Output Template** is Cost Plus based, then no Price List is selected. Ensure the **Calculate Using Cost Plus** check box is selected. You can manually assign one by clicking the drop-down and selecting from the listing. Make sure the template selected matches the details setup up on the quote such as the correct customer, bind style, and trim size.

4. Click **Calc Prices** to calculate prices.

Book Proposal

Options: Calc Prices, Save, Print Report, Cancel

Calculate Quotation Pricing

Select a Quote

☐ Calculate Using Cost Plus

Quote # 3555 Title Split Bound QL Test

Customer Code STREAM Customer Name Streamline Solutions

Price Output Template Split Bound QL

Price List Split Bound Pricelet Customer Streamline Solutions

Pricing Summary Results By Qty Debug

Page Count 480

Page Count	Process	Line #	Setup Line #	Section	Sub Section	Pages	# of Forms	Measure	Qty	Rate	Sell	Setup
480	Indigo	Soft Cover	Soft Cover	Soft Cover	Soft Cover	4	1	1000	2,500	\$109.220		\$273.05
480	Springhill 10PT C15 Cover^...	Soft Cover	Soft Cover	Soft Cover	Soft Cover	4	1	1000	319	\$199.185		\$63.54
480	Film Laminate 02	Soft Cover	Soft Cover	Soft Cover	Soft Cover	0	0	1000	2,500	\$30.000		\$75.00
480	Timson 38	Text	Text	Text	Text	48	10	1000	2,500	\$21.000		\$525.00
480	Timson 38 Plates	Plates	Text	Text	Text	48	10	1	2	\$55.000		\$1,100.00
480	Book Makers 60# Opq Web...	Text	Text	Text	Text	48	1	100	5,365	\$89.992		\$4,828.09
480	Pearl Linen Cover^^0200	Hard Cover	Hard Cover	HC 1-Piece ...	CC - 1 Piece	4	1	1	101	\$1.800		\$181.80
480	Casemaking 02	Hard Cover	Hard Cover	HC 1-Piece ...	CC - 1 Piece	0	0	1000	250	\$25.000		\$6.25
480	Foil Stamp 02	Hard Cover	Hard Cover	HC 1-Piece ...	CC - 1 Piece	0	0	1000	250	\$15.000		\$3.75
480	Eska Board .088^^0200	Hard Cover	Hard Cover	HC 1-Piece ...	Brd Front&...	4	1	1000	49	\$900.000		\$44.10
480	Glatfelter Endleaf 80# Shee...	Hard Cover	Endsheet	Endsheet	Endsheet	8	1	1000	71	\$90.141		\$6.40
480	Sterling Gloss 80# Sheet^^...	Dust Jacket	Dust Jacket	Dust Jacket	Dust Jacket	4	1	1000	384	\$150.000		\$57.60
480	Film Laminate 02	Dust Jacket	Soft Cover	Dust Jacket	Dust Jacket	0	0	1000	250	\$30.000		\$7.50

5. In this screen, review pricing, make pricing edits, and add or remove pricing rows.
6. Once the pricing is correct or if no changes were made, click **Save** to save the current pricing.

Alternate Proposal Format

- Click **Alternate Proposal Format** from the **Proposal Generation** area on the left.

The screenshot shows the 'Book Proposal' application window. On the left is a sidebar with 'Options' (Load, Print), 'Proposal Setup' (Setup Price Lists, Setup Proposal Descriptions, Setup Pricing Templates, Design Letters Printout), and 'Proposal Generation' (Price A Book Quote, Alternate Proposal Format). The main area is titled 'Alternate Proposal' and contains the following fields:

- Quote #**: 3555 (with a 'Split Bound Q: Text' button)
- Page Count**: 480 (with a 'Letter Format' button and 'Format 2' selected)
- Header**:
 - Quote Date**: 6/28/2010 12:00:00 AM
 - Company Name**: Streamline Solutions
 - Address**: 100 Smith Ranch Road, Suite 124, San Rafael, CA 94903
 - Telephone**: 415 462 7268, **Fax**: 415 499 7677
 - Email**: (empty)
 - Contact**: Sam Fortune, **Salesrep**: Chris Kinkady
- Table**:

Label	LetterData
Description	Notch Case
Content	Perfect Bound
FinishedSize	6 x 9
Copy	Soft Cover - Customer to Provide Disk for Cover
	Text - Customer to Provide PDF for Text
	Dust Jacket - Customer to Provide Disk for Cover
Ink Colors	Dust Jacket - Printed 5 & colors one side
	Endsheet - Printed 5 & colors one side
	Soft Cover - Printed 4 & colors one side
	Text - Printed 1color throughout
Paper Stocks	Brd Front&Back W/O S- 999Eaka Board .088
	CC - 1 Piece - Pearl Linen Cover ~~~0200
	Dust Jacket - Sterling Gloss 80# Sheet ~~~0200
	Endsheet - Glatfelter Endleaf 80# Sheet ~~~~0200

- Select the **Quote #** by either entering the quote number or selecting from the quote listing.
- Click **Page Count** to see a drop-down listing of page counts that were entered on the quote selected.
- Click the page count you want to generate the quote letter for.
- Click **Letter Format** to see a listing of quote letter formats created under **Design Letters Printout**. Select the format you want to use for this quote letter.
- After selecting the **Letter Format**, the quote header and quote specifications display on the screen. Any of this information can be edited. The edited information appears on the quote letter when it is generated.
- Generate the quote letter by clicking the **Print** icon at the top of the screen.
The quote letter displays.



Note If, after viewing the quote letter, you need to make changes to specifications or pricing, close the quote letter to return to the main proposal screen where you can make edits to the specifications. If you need to make edits to pricing, click **Price A Book Quote**, select the quote number, make edits, and click **Save** before generating another proposal.

Calculate Prices

An estimate must exist and have been successfully calculated in Book Estimating to be available for the Price List. The processes that have pricing entered on the Process lines must exist in the selected Book Estimate to display.

Select Price a Book quote, then select or key in the Estimate number from Book Estimating. Next select the Pricelist from the drop-down choices and click the green checkmark for **Calc Prices** to see the results of the pricelist pricing lines display.

The screenshot shows the 'Book Proposal' window. At the top, there is a toolbar with icons for 'Calc Prices' (a green checkmark), 'Save' (a floppy disk), 'Print Report' (a printer), and 'Cancel' (a red X). Below the toolbar is a sidebar with 'Options' and two expandable sections: 'Proposal Setups' and 'Proposal Generation'. The 'Select a Quote' section is active, showing a 'Quote #' of 174, a 'Customer Code' of 00000737, a 'Price Output Template' dropdown, and a 'Price List' dropdown set to '2010 NP Star PL'. At the bottom of this section are four tabs: 'Pricing', 'Summary', 'Results By Qty', and 'Debug'.

All the processes that either pull in directly from the marked up Book Estimate, or that have a pricing line entered in the Set Up Price list area.

The screenshot shows the 'Book Proposal' window with the 'Calculate Quotation Pricing' results displayed. The 'Pricing' tab is selected. The table below shows the pricing details for various processes.

Page #	Process	Line #	Setup Line #	Section	Sub Section	Pages	# of Forms	Measure	Qty	Rate	Sell	Setup	Total	Variance	Quoted Price
320	TGen 3			Paperback...	Paperback...	4	1	1000	4	\$2,000	\$0.01	\$50.00	\$50.01	0.00 %	\$50.01
320	TGen 3 Plates			Paperback...	Paperback...	4	1	1	4	\$5,000	\$20.00	\$0.00	\$20.00	0.00 %	\$20.00
320	10 pt CIS			Paperback...	Paperback...	4	1	1000	604	\$83.212	\$50.26	\$0.00	\$50.26	0.00 %	\$50.26
320	Tinson for Estimating			Text	Text Sig	64	5	1000	1,000	\$34,000	\$170.00	\$125.00	\$295.00	0.00 %	\$295.00
320	Tinson for Estimating Pl...			Text	Text Sig	64	5	1	2	\$10,000	\$100.00	\$0.00	\$100.00	0.00 %	\$100.00
320	50# Husky Offset Smooth			Text	Text Sig	64	1	100	1,633	\$71,300	\$1,164.33	\$0.00	\$1,164.33	0.00 %	\$1,164.33
320	Carton Pack					0	0	1000	1,000	\$12,000	\$12.00	\$10.00	\$22.00	0.00 %	\$22.00
320	Pallets/Skids					0	0	1	1	\$3,750	\$3.75	\$0.00	\$3.75	0.00 %	\$3.75
320	Per Book QA Inspect					0	1	1,000	1,000	\$0.00	\$0.00	\$5.00	\$5.00	0.00 %	\$5.00
												\$1,520.35	\$1,710.35	\$0.00	\$1,710.35

In this case the Paper and Pallets are the areas that pull in directly from the book estimate.

The text paper from BE shows $1012.46 + 15\%$ markup which = \$1164.33. The price list displays this exactly. For cover paper BE displays $38.66 + 30\%$ markup which = 50.258. The price list displays 50.26.

Book Estimating

Quote No. 174 [QuotePricing] Title PB book for price list test Cust Code 00000737 Customer STAR PUBLISHING COMPANY

Select a quantity: 1000 10000

Page Count	Section Level Costs	Section Level Time	Job Level Costs	Job Level Time	Freight Costs	Total Costs	Total Time
320	2117.85	217	536.24	96	0.00	2654.09	313

Group By: None Work Type: Paper Review/Query Display Layout All Options

Drag a column header here to group by that column.

SubSection	Imposition	Side	Cost Category	Cost	Quantity	Measure	MarkUp	Sheets	Material Rate	Weight	Descr	Wast
Paperback Cover	1 - 4pg Sigs 2 Up	Front	Material	38.66	1000	Sheets	30	604	64	66	10 pt CIS	
Text Sig	5 - 64pg Sigs 1 U	Front	Material	1012.46	1000	Lbs	15	7190	62	1633	50# Husky Offset	
				1051.12								

<< Back Next >> Close

EDITS to Price List calculations

You can Delete or Add any pricing row in the grid.

To add a pricing row, right-click the grid and select **Add a New row**.

Calculate Quotation Pricing

Select a Quote

☐ Calculate Using Cost Plus

Quote # 174 Title PB book for price list test

Customer Code 00000737 Customer Name STAR PUBLISHING COMPANY

Price Output Template Price List 2010 NP Star PL Pricelist Customer STAR PUBLISHING COMPANY

Pricing Summary Results By Qty Debug

Page Count 320

Page	Process	Line #	Setup Line #	Section	Sub Section	Pages	# of Forms	Measure	Qty	Rate	Se
Page Count: 320											
320	Igen 3			Paperback ...	Paperback ...	4	1	1000	4	\$2.000	
320	Igen 3 Plates			Paperback ...	Paperback ...	4	1	1	4	\$5.000	
320	10 pt CIS			Paperback ...	Paperback ...	4	1	1000	604	\$83.212	
320	Timson for Estimating			Text	Text Sig	64	5	1000	1,000	\$34.000	
320	Timson for Estimating PL...			Text	Text Sig	64	5	1	2	\$10.000	
320	Per Book QA Inspect			Text	Text Sig	64	1	100	1,633	\$71.300	
						0	0	1000	1,000	\$12.000	
						0	0	1	1	\$3.750	
						0	1	1	1,000	\$0.000	

Right-click context menu options: Add a New Row, Delete a Pricing Line

This allows you to key in any name for this row, and any amount. Required fields are Measure and qty, and Rate. To see the results click off the cell.

Select a Quote

☐ Calculate Using Cost Plus

Quote # 174 Title PB book for price list test

Customer Code 00000737 Customer Name STAR PUBLISHING COMPANY

Price Output Template

Price List 2010 NP Star PL Pricelist Customer STAR PUBLISHING COMPANY

Pricing Summary Results By Qty Debug

Page Count ^

Details										1000						
Page	Process	Line #	Setup Line #	Section	Sub Section	Pages	# of Forms	Measure	Qty	Rate	Sell	Setup	Total	Variance	Variance	Quoted Price
Page Count: 320																
320	Igen 3			Paperback ...	Paperback ...	4	1	1000	4	\$2.000	\$0.01	\$50.00	\$50.01	0.00 %	\$0.00	\$50.01
320	Igen 3 Plates			Paperback ...	Paperback ...	4	1	1	4	\$5.000	\$20.00	\$0.00	\$20.00	0.00 %	\$0.00	\$20.00
320	10 pt C15			Paperback ...	Paperback ...	4	1	1000	604	\$83.212	\$50.26	\$0.00	\$50.26	0.00 %	\$0.00	\$50.26
320	Timson for Estimating			Text	Text Sig	64	5	1000	1,000	\$34.000	\$170.00	\$125.00	\$295.00	0.00 %	\$0.00	\$295.00
320	Timson for Estimating Pl...			Text	Text Sig	64	5	1	2	\$10.000	\$100.00	\$0.00	\$100.00	0.00 %	\$0.00	\$100.00
320	50# Husky Offset Smooth			Text	Text Sig	64	1	100	1,633	\$71.300	\$1,164.33	\$0.00	\$1,164.33	0.00 %	\$0.00	\$1,164.33
320	Carton Pack					0	0	1000	1,000	\$12.000	\$12.00	\$10.00	\$22.00	0.00 %	\$0.00	\$22.00
320	Pallets/Slids					0	0	1	1	\$3.750	\$3.75	\$0.00	\$3.75	0.00 %	\$0.00	\$3.75
320	Per Book QA Inspect					0	1	1	1,000	\$0.000	\$0.00	\$5.00	\$5.00	0.00 %	\$0.00	\$5.00
320	Any New Row					0	0	1	1	\$100.000	\$100.00	\$0.00	\$100.00	0.00 %	\$0.00	\$100.00
										\$1,620.35	\$190.00	\$1,810.35	\$0.00	\$0.00	\$1,810.35	

This has changed the total quoted price by 100.00.

Other Edits to Calculated Prices

You can also click any cell (except in the Total column, this totals), and key in any value you like.

This includes Qty, Rate, Sell, Setup, Variance % and Variance amount, add a set up.

Book Proposal

Calc Prices Save Print Report Cancel

Options

Proposal Setup

Setup Price Lists

Setup Proposal Descripti...

Setup Pricing Templates

Design Letters Printout

Proposal Generation

Price A Book Quote

Alternate Proposal Format

Select a Quote

☐ Calculate Using Cost Plus

Quote # 174 Title PB book for price list test

Customer Code 00000737 Customer Name STAR PUBLISHING COMPANY

Price Output Template

Price List 2010 NP Star PL Pricelist Customer STAR PUBLISHING COMPANY

Pricing Summary Results By Qty Debug

Page Count ^

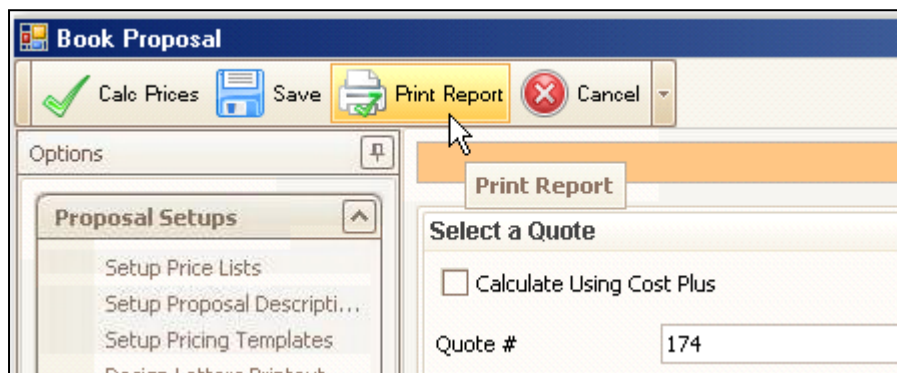
Details										1000						
Page	Process	Line #	Setup Line #	Section	Sub Section	Pages	# of Forms	Measure	Qty	Rate	Sell	Setup	Total	Variance	Variance	Quoted Price
Page Count: 320																
320	Igen 3			Paperback ...	Paperback ...	4	1	1000	4	\$2.000	\$0.01	\$50.00	\$50.01	0.00 %	\$0.00	\$50.01
320	Igen 3 Plates			Paperback ...	Paperback ...	4	1	1	4	\$5.000	\$20.00	\$0.00	\$20.00	0.00 %	\$0.00	\$20.00
320	10 pt C15			Paperback ...	Paperback ...	4	1	1000	604	\$83.212	\$50.26	\$0.00	\$50.26	0.00 %	\$0.00	\$50.26
320	Timson for Estimating			Text	Text Sig	64	5	1000	1,000	\$34.000	\$170.00	\$125.00	\$295.00	0.00 %	\$0.00	\$295.00
320	Timson for Estimating Pl...			Text	Text Sig	64	5	1	2	\$10.000	\$100.00	\$0.00	\$100.00	0.00 %	\$0.00	\$100.00
320	50# Husky Offset Smooth			Text	Text Sig	64	1	100	1,633	\$73.494	\$1,200.00	\$0.00	\$1,200.00	0.00 %	\$0.00	\$1,200.00
320	Carton Pack					0	0	1000	1,000	\$12.000	\$12.00	\$10.00	\$22.00	0.00 %	\$0.00	\$22.00
320	Pallets/Slids					0	0	1	1	\$6.000	\$6.00	\$0.00	\$6.00	0.00 %	\$0.00	\$6.00
320	Per Book QA Inspect					0	1	1	1,000	\$0.000	\$0.00	\$5.00	\$5.00	0.00 %	\$0.00	\$5.00
320	Any New Row					0	0	1	1	\$100.000	\$100.00	\$0.00	\$100.00	0.00 %	\$0.00	\$100.00
										\$1,658.27	\$240.00	\$1,898.27	\$120.00	\$0.00	\$2,018.27	

You can manipulate any prices in this way.

When you have the desired price for this quote, remember to select the **Save** icon.

When you next pull up this quote in Price a Book Quote, these edits will save UNLESS YOU SELECT THE RECALC ICON. In that case, the default pricing set in the price list is populated.

Print Report



If you have existing Excel pricelists and want to do further manipulation or comparison you can select the Print Report icon and this is the view. All the pricing edits display here as entered on the Price List.

Preview

File View Background

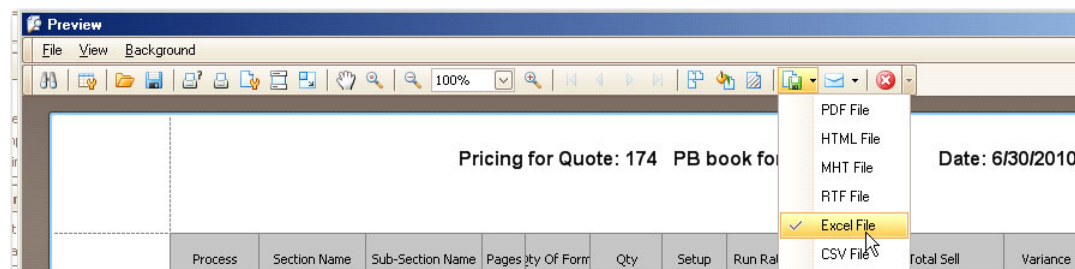
100%

Pricing for Quote: 174 PB book for price list test Date: 6/30/2010 12:16:37 PM 1 of 1

Process	Section Name	Sub-Section Name	Pages	Qty Of Form	Qty	Setup	Run Rate	Sell	Total Sell	Variance	Quoted Price
Page Count: 320											
Qty Number: 1											
IGen	Paperback Cover	Paperback Cover	4	1	4	50	\$2,000	\$0.01	\$50.01	0	\$50.01
IGen	Paperback Cover	Paperback Cover	4	1	4	0	\$5,000	\$20.00	\$20.00	0	\$20.00
10 pt	Paperback Cover	Paperback Cover	4	1	604	50	\$83.212	\$50.26	\$100.26	0	\$100.26
Timso	Text	Text Sig	64	5	1,000	125	\$34,000	\$170.00	\$295.00	0	\$295.00
Timso	Text	Text Sig	64	5	2	0	\$10,000	\$100.00	\$100.00	0	\$100.00
50# H	Text	Text Sig	64	1	1,633	0	\$73,484	\$1,200.00	\$1,200.00	120	\$1,320.00
Carto			0	0	1,000	10	\$12,000	\$12.00	\$22.00	0	\$22.00
Pallets			0	0	1	0	\$6,000	\$6.00	\$6.00	0	\$6.00
Per Bo			0	1	1,000	5	\$0.000	\$0.00	\$5.00	0	\$5.00
Any N			0	0	1	0	\$100,000	\$100.00	\$100.00	0	\$100.00
									\$1,898.27		\$2,018.27
Qty Number: 2											
IGen	Paperback Cover	Paperback Cover	4	1	4	50	\$0.000	\$0.00	\$50.00	0	\$50.00
IGen	Paperback Cover	Paperback Cover	4	1	4	0	\$5,000	\$20.00	\$20.00	0	\$20.00
10 pt	Paperback Cover	Paperback Cover	4	1	5,450	0	\$83.200	\$453.44	\$453.44	0	\$453.44
Timso	Text	Text Sig	64	5	10,000	125	\$32,000	\$1,600.00	\$1,725.00	0	\$1,725.00
Timso	Text	Text Sig	64	5	2	0	\$10,000	\$100.00	\$100.00	0	\$100.00
50# H	Text	Text Sig	64	1	12,306	0	\$71,300	\$8,774.18	\$8,774.18	0	\$8,774.18
Carto			0	0	10,000	10	\$12,000	\$120.00	\$130.00	0	\$130.00
Pallets			0	0	6	0	\$3,750	\$22.50	\$22.50	0	\$22.50
Per Bo			0	1	10,000	5	\$0.000	\$0.00	\$5.00	0	\$5.00
									\$11,280.12		\$11,280.12
									\$13,178.39		\$13,298.39

new cid overs n... Microsoft Excel... User-Cherry Terr... CID: 22409 Ent... Book Proposal... Preview - \\Re... Preview - \\... FullShot 9.5 Ent... MetaFrame Pres...

From here, you can select the Export icon and export this to Excel to do more review, sub totals, etc., to match your existing price lists done in Excel.



Microsoft Excel - Document

File Edit View Insert Format Tools Data Window Help

Tahoma 8 B I U

Pricing for Quote: 174 PB book for price list test Date: 6/30/2010 12:16:37 PM 1 of 1

Process	Section Name	Sub-Section Name	Pages	Qty Of Forms	Qty	Setup	Run Rate	Sell	Total Sell	Variance	Quoted Price
Page Count: 320											
Qty Number: 1											
10 Gen	Paperback Cover	Paperback Cover	4	1	4	50	\$2.00	\$0.01	\$50.01	0	\$50.01
10 Gen	Paperback Cover	Paperback Cover	4	1	4	0	\$5.00	\$20.00	\$20.00	0	\$20.00
10 pk	Paperback Cover	Paperback Cover	4	1	604	50	\$83.21	\$50.26	\$100.26	0	\$100.26
10 Gen	Text	Text Sig	64	5	1,000	125	\$34.00	\$170.00	\$295.00	0	\$295.00
10 Gen	Text	Text Sig	64	5	2	0	\$10.00	\$100.00	\$100.00	0	\$100.00
10 Gen	Text	Text Sig	64	1	1,633	0	\$73.48	#####	\$1,200.00	120	\$1,320.00
10 Gen	Text	Text Sig	0	0	1,000	10	\$12.00	\$12.00	\$22.00	0	\$22.00
10 Gen	Text	Text Sig	0	0	1	0	\$6.00	\$6.00	\$6.00	0	\$6.00
10 Gen	Text	Text Sig	0	1	1,000	5	\$0.00	\$0.00	\$5.00	0	\$5.00
10 Gen	Text	Text Sig	0	0	1	0	\$100.00	\$100.00	\$100.00	0	\$100.00
									\$1,898.27		\$2,018.27
Qty Number: 2											
10 Gen	Paperback Cover	Paperback Cover	4	1	4	50	\$0.00	\$0.00	\$50.00	0	\$50.00
10 Gen	Paperback Cover	Paperback Cover	4	1	4	0	\$5.00	\$20.00	\$20.00	0	\$20.00
10 pk	Paperback Cover	Paperback Cover	4	1	5,450	0	\$83.20	\$453.44	\$453.44	0	\$453.44
10 Gen	Text	Text Sig	64	5	10,000	125	\$32.00	#####	\$1,725.00	0	\$1,725.00
10 Gen	Text	Text Sig	64	5	2	0	\$10.00	\$100.00	\$100.00	0	\$100.00

Ready NUM

To tie into the Quote Letter document, if you have Price Output Templates set up and available, you would select Alternate Proposal format here, and a Quote letter is launched and printed from here.

Book Proposal

Options Load Print

Proposal Settings

- Setup Price Lists
- Setup Proposal Descriptions
- Setup Pricing Templates
- Design Letters Printout

Proposal Generation

- Price A Book Quote
- Alternate Proposal **Book**

Alternate Proposal

Quote #

Page Count

Header

Quote Date

Company Name

Address

Telephone

Fac

Email

Contact

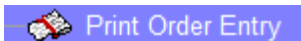
Salesrep

Label

LetterData

Print Order Entry with Book Estimating

Overview



If you are not using Book Estimating as an estimating system, refer to the document Print Order Entry Commercial Version.doc.

Print Order Entry is the Order Entry program used with Book Estimating to prepare the order for the plant. Scheduling records are created here, Work Orders/Tickets are prepared, Additional information is added. Actual inventory can be reserved and request for Purchase Orders created for Scheduled Purchasing.

Selections made in the Book estimate pull into the job and can be completely revised and overridden in Print Order Entry without impacting the sell price to the customer, if desired.

A complete audit trail of all changes complete with change order reports, internal and external, are created. Shipping information can be added, and there is a Proof Tracking feature outlined at the end of this document.

There are two ways jobs are created in Print Order Entry:

- Job numbers are created in Book Estimating. When the job is opened in Print Order Entry, all the specs for the job as quoted auto populate. In Print Order Entry these specs are reviewed and changed to match the actual job specs.
- Jobs are created directly from Print Order Entry -- no Book Estimate was prepared. In this case an estimate is prepared first in Print Order Entry, which can be used to quote to the customer or to create a cost estimate for an estimate-to-actual analysis in job cost reporting when price lists are used for that purpose.

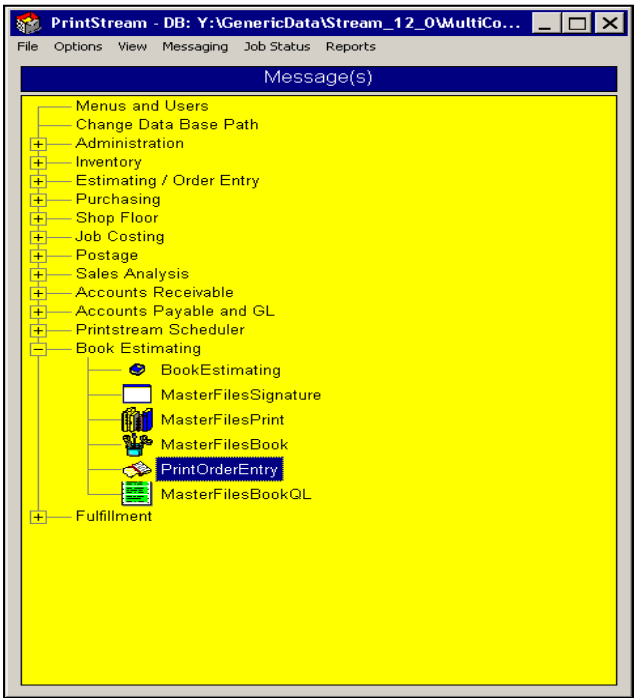
When incoming jobs are vastly different from the Book Estimate, users may make the changes in Book Estimating and replace the entire job or make the changes directly in Print Order Entry. There is more automation available if this is done in Book Estimating.

This document shows how the job looks from a Book Estimate, and details how to edit, replace or create each area when Book Estimate was not previously created.

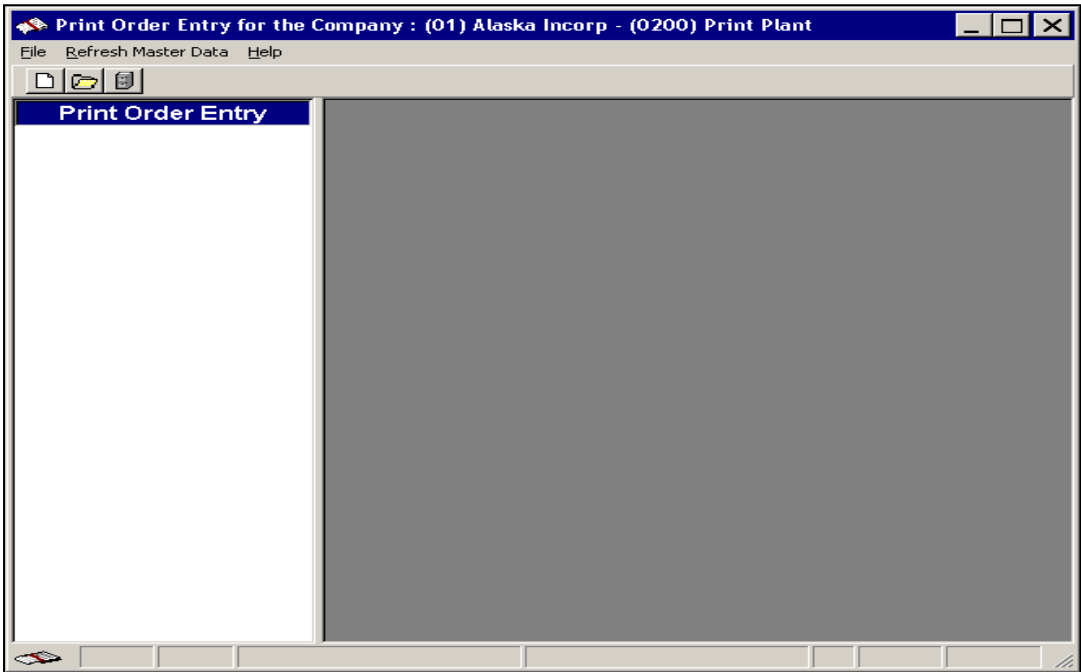
Entering a Job Generated from Book Estimating

Open Print Order Entry

To Open Print Order Entry from the tree, double-click the icon or name.



This screen opens:



Open Existing Job in Print Order Entry

Use this to access a job number or estimate number that created a job number from Book Estimating, or any existing job in Print Order Entry, by typing in the quote number or job number, or quote or job number ranges.

If the job or quote number is unknown, there are numerous search options.

Click the open folder icon, and this screen opens. To search all existing quotes or jobs, select **Existing** tab. To find all existing jobs, leave the rest of the search options blank. Click **Find**.

To search by:

- **Quote Number Range**, enter the exact quote number here if known, or for a range enter a quote number and the + sign for all quotes higher than the number you entered.
- Use **Job description contains And/Or also contains** to further refine the search.
- **Job Number Range**, as described above, except use the job number instead of the quote number. Enter other information to refine the search.
- **First Mail Date Range** (for mail jobs only).

Customer AND Job OR Quote Number range brings up input screen.

Select the icon to the right of the Customer Number and you can search all customers.

Search for the Customer

Find Customer By

Ac No:

Name:

☐ Active ☐ Not Active ☒ Both

Salesrep:

CSR:

Account Credit Status: A ☒ B ☐ C ☐ D ☐ N ☐ P ☐ X ☐

Search

Cancel

Contact Name:

City:

State:

Zip:

Phone:

Store:

Franchise:

	Cred Status	Active	Customer Ac No	Customer Name	Salesrep Name	CSR Name	Contact Name	Address1	Address2	Address3	ZIP
--	-------------	--------	----------------	---------------	---------------	----------	--------------	----------	----------	----------	-----

Search for the Customer

Find Customer By

Ac No:

Name:

☐ Active ☐ Not Active ☒ Both

Salesrep:

CSR:

Account Credit Status: A ☒ B ☐ C ☐ D ☐ N ☐ P ☐ X ☐

Search

Cancel

Contact Name:

City:

State:

Zip:

Phone:

Store:

Franchise:

	Cred Status	Active	Customer Ac No	Customer Name	Salesrep Name	CSR Name	Contact Name	Address1	Address2	Address3	ZIP
1	A	Active	ABBA1	Abba Inc.	House Accot	Sue Smith	Betty Receiv	Suite 100,	123 West Ma		84020
2	A	Active	BABA1	Babba Inc.	House Accot	Sue Smith	Betsy Receiv	Suite 300	456 West Ma	Waterton,UT	84020
3	A	Active	ALASKA	Alaska Inc.	House Accot	Sue Smith	Sally Samster	123 West Ma	Suite 7	Waterton,UT	84601
4	A	Active	SmartMai	SmartMail of	Rob Hales			kjkjkj		Austin,TX	45621
5	A	Active	SLOC	Salt lake oly	sandra	Sue Smith		666 East Ma		Waterton,UT	45345
6	A	Active	656	coke	sandra	Sue Smith	Tim Conway	45 west main		waterton,UT	55434
7	A	Active	CINKAID	Cinkaid Office	sandra						
8	A	Active	CinCin	Cinnamon	sandra			66 west main		waterton,UT	35234
9	A	Active	COKA	Coka Colo	House Accot						
10	A	Active	CZARINA	Patsy Czar	sandra						
11	A	Active	COCO	COCO the be	House Accot						
12	A	Active	CICI	CICI the fox	sandra						
13	A	Active	100	The Perfect S	Mark Knophli	Sue Smith		656 Main Str		Draper,UT	84020
14	A	Active	BaiGift01	Bailey's Gift S	House Accot						
15	A	Active	PARKCITY	Park City	bill			130895o Ma		Park City ,UT	84188
16	A	Active	KatMan01	Kat-Man-Du	bill			6544 Viper D		Los Angeles, CA	94312

Double-click the customer to select.

Open existing quote

Existing Recent

Find by

Quote Number Range... ☐

Job Number Range... ☐

First Mail Date Range... ☐

Customer AND Job OR Quote Number Range.. ☒

Sales Rep. AND Quote Date OR Quote Number... ☐

ISBN number ☐

Customer #:

Customer:

Address:

AND

Job Number Range:

Quote Num. Range:

AND

Job desc. contains:

also contains:

No Filtering By Company/Plant ☐

Find

Stop


Quote Num.	Job Nu...	Customer	Title	Version	Quantity	Quote Date	In
------------	-----------	----------	-------	---------	----------	------------	----

Now double-click the quote number to select. This opens the job in Print Order Entry.

Open existing quote

Existing | Recent

Find by

Quote Number Range... ☐ Customer #: ALASKA  Find

Job Number Range... ☐ Customer: Alaska Inc. 30

First Mail Date Range... ☐ Address: 123 West Main Suite 7 Stop

Customer AND Job OR Quote Number Range... ☒ AND Job Number Range: AND Job desc. contains: also contains:

Sales Rep. AND Quote Date OR Quote Number... ☐ OR Quote Num. Range: 1000+ No Filtering By Company/Plant

ISBN number ☐

Quote Num.	Job Nu...	Customer	Title	Version	Quantity	Quote Date
1218.99	945	Alaska Inc.	CID 12863 test	test	10,000	3/2/2006
1284.99	961	Alaska Inc.	test pb	test pb	100,000	4/7/2006
1296.99	971	Alaska Inc.	Test Film Lamination	SC	5,000	6/9/2006
1377.99	1011	Alaska Inc.	test perfect bind book	perfect	1,000	3/19/2007
1379	1012	Alaska Inc.	Copy of test perfect bin...	perfect	5,000	3/19/2007
1389.99	1016	Alaska Inc.	Jack London Review	perfect	5,000	4/13/2007
1414.99	1033	Alaska Inc.	Michelle sample job	perfec...	10,000	6/14/2007
1420	1035	Alaska Inc.	Copy of Michelle sampl...		10,000	7/23/2007

Sales Rep AND Quote Date OR Quote Number may be used to locate a quote or job based on the sales rep that was set up in the job. Use the drop-down arrow next to the Sales Rep field and locate the sales rep for this job. Select the quote or job from the list of quotes/jobs for that sales rep.

Open existing quote

Existing | Recent

Find by

Quote Number Range... ☐ Sales Rep.: Chris Kinkaidy Find

Job Number Range... ☐ AND Quote Date Range: 18 Stop

First Mail Date Range... ☐ OR Quote Num. Range:

Customer AND Job OR Quote Number Range... ☐ AND Job desc. contains: also contains:

Sales Rep. AND Quote Date OR Quote Number... ☒ AND Job desc. contains: also contains:

ISBN number ☐

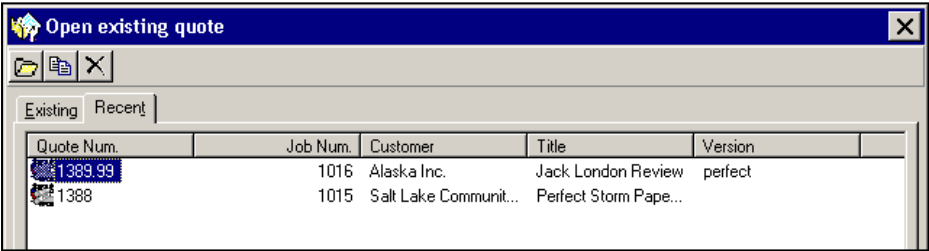
No Filtering By Company/Plant

Quote Num.	Job Nu...	Customer	Title	Version	Quantity	Quote Date
1548.99	1104	Black Angus Doggi...	Superman Returns1 pc ...	csae	3,500	4/8/2008
1547.99	1103	Black Angus Doggi...	Hawaii Whale Watch is...	csae	2,500	4/8/2008
1545.99	1105	Black Angus Doggi...	Building Bridges case b...	case	7,500	4/8/2008
1190	926	Flamingo Press	Copy of Copy of Copy o...	HC	1,500	10/21/2005
1184	921	Flamingo Press	Copy of Copy of Copy o...	HC	1,500	10/17/2005
1183	920	Flamingo Press	Copy of Copy of 3 piece...	HC	1,500	10/17/2005
1182	919	Flamingo Press	Copy of Copy of Copy o...	HC	1,500	10/17/2005
1181	918	Flamingo Press	Copy of Copy of Copy o...	HC	1,500	10/17/2005

ISBN Number brings up this screen, but a search by ISBN number is currently not functional. You can enter the ISBN into the Job Description in Book Estimating, and locate it with the **Job Desc Contains** option.

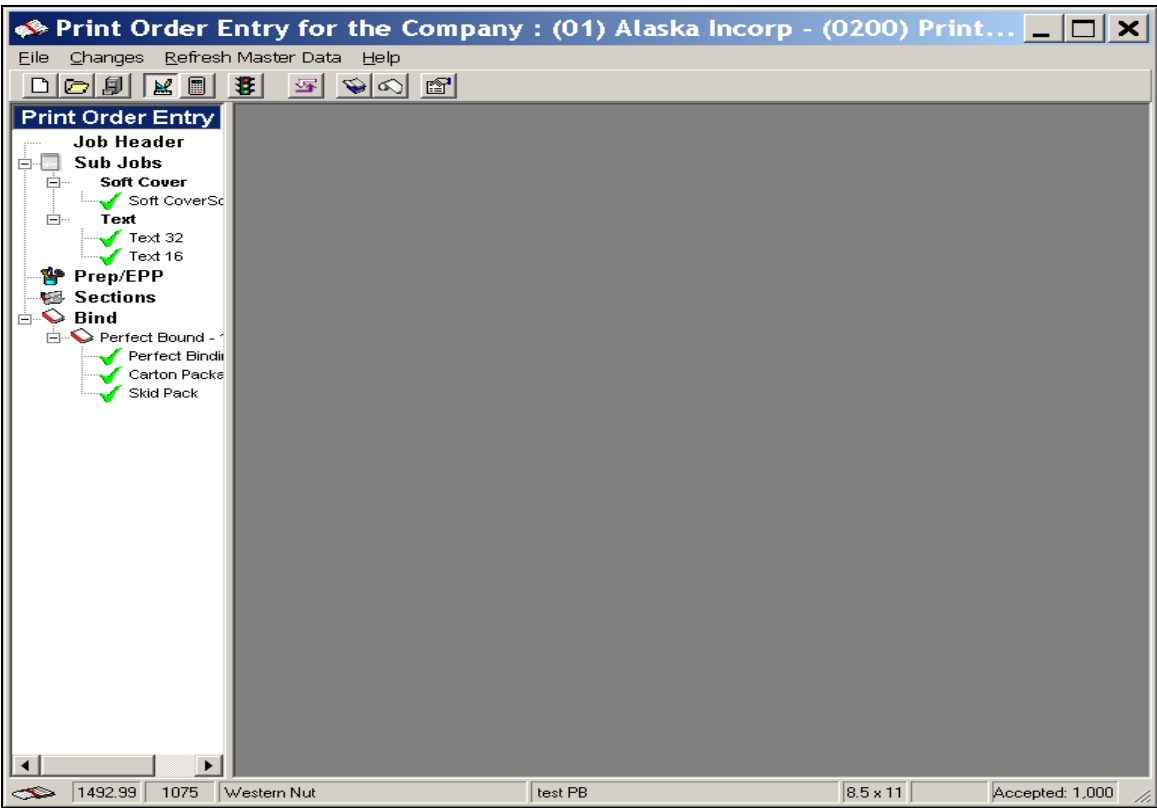
The **Recent** tab brings up Recent estimates/jobs you have opened from your user login only. Any job created in Book Estimating has .99 as the last 2 digits of the quote number.

To select, highlight the quote or job and double-click, or highlight and select the **Open** icon (yellow file folder at far left at top). Either action opens this job in Print Order Entry.



Edit Mode

Once you have opened the estimate/job that you created in Book Estimating, or the job that already exists in Print Order Entry, this is how the screen opens.



Layout of this screen

The tree down the left side of this screen shows the structure of the job opened, with all the sub jobs and sections, and Binding and Binding Finishing processes associated with this bind style.

Icons in the Toolbar in Edit Mode



If you hover over each with the cursor, the description of each icon displays.

From left to right:

- Blank Sheet icon -- start a new job
- Open Folder icon -- open existing quote or job
- File Cabinet icon -- close existing job
- Pencil and right angle icon -- edit mode
- Calculator icon -- calculate action, or review mode
- Stoplight -- Job Status accesses Job Status Program
- Two arrows icon -- recalculate by bind styles quantities
- Press icon -- show templates, this is an alternate way to select templates
- Paper Roll icon -- add subsequent web section (for multi web presses only)
- Hand and Worksheet icon -- customer supplied section

All info entered or created in Book Estimating auto populates the job in Print Order Entry. In Print Order Entry, we add, edit or remove data to prepare the job for production's use.

At this stage all specs can be reviewed against the original estimate. When changes are required, they can be made here, and an audit trail of all changes and costs incurred is kept on the Change Order Report. There is an internal and customer version of the Change Order Report.

Note If extensive changes have occurred between the estimate and the Order Entry stage, users can make the changes in Book Estimating, and REPLACE this job with the revised specs. Changes can be made with more automation in Book Estimating, so if no planning has occurred (notes, buyouts entered, etc.), this practice is recommended. ***All edits to the estimate/job from Print Order Entry are lost when the updated job is replaced in Book Estimating.*** See more on this in Book Estimating Users Guide.

Job Header Screen

All information entered in Book Estimating populates and can be edited here, except customer, and quantity. Quantity can be edited from the versions screen.

Customer that was selected in Book Estimating populates here.

Customer information automatically populates from Master Files Customer. You may copy this job to a different customer, but cannot edit the customer at this point.

Contact -- this field can be edited by users with a high enough security level. If you cannot access this field, this customer only has one contact set up in Master Files Customer.

If you can edit this field, there is more than one contact with unique addresses assigned to this account.

To change the contact:

Select the ellipsis to the right to view the list of contacts for this customer. This screen opens.

	Contact	Email	Address
1	John L. Smith	rob@printstre	1234 West Coast Highway TERRA LINDA, CA 94903
2	Grace Noble		2845 West 45th Street FAIRFAX, CA 94930
3	Jim West		1234 West Coast Highway San Francisco, CA 94020

Highlight your selection and click **Save**. The corresponding address populates with the contact name.

Phone/Fax – the contact phone and fax number are displayed here as entered in Master Files Customer. If you edited the customer contact, the correct phone number displays. You can manually enter these, but they are only displayed on this estimate/job.

Business Management

Sales Rep - *populates from Book Estimating* assigned in Master Files Customer. You may edit by using the drop-down arrow to assign a different Sales Rep. (This must be a valid, active sales rep in the system). Table for sales rep is set up in Master File Customer.

CSR - *populates from Book Estimating* edit by using the arrow to select a valid, active CSR from the table created in Master File Customer.

Estimator - name of person who created this estimate in Book Estimating populates here. This field can be edited by selecting from the drop-down list.

Notepad icon beside Estimator: Estimator notes displays if any were entered on the estimate (optional entry). These notes print on the Quote Breakdown and Work Ticket.

Planner – this entry is optional. You can click here to select a planner from the drop-down list. The planner shows in various screens in Job Status.

Notepad icon beside Planner: Click here to add notes for the scheduler.

These notes are viewable in MR Scheduler after the estimate has been updated to a job and is ready to schedule.

Note Planners and Estimators are set up in Customer Master File in the same screen where Sales Reps and CSRs are created.

Prod. Type – *This populates from Book Estimating and can be edited here.*

Click the arrow to see a drop-down listing of Product Types. These types are user-defined and were setup in Master Files Print. They are used for sales reporting. You should select the category which best fits the estimate/job you are entering.

Title – enter the title for the estimate or job here. *This is a required field. This populates from Book Estimating and can be edited here.*

Author – The author entered in Book Estimating displays here.

Description – *This populates from Book Estimating and can be edited here.* This information prints on the Work Ticket, and Invoice.

Other Parameters

Unit of Measure. Number field for display. Mainly used in Fulfillment.

Description: The description of the Unit of Measure (Ex: bundles, packs, etc.).

Page Count: *This populates from Book Estimating.* Edits that show here occur within the sections.

Default Section Size: *This populates from Book Estimating and can be edited here.*

Re-Contact Date: Two weeks from the present date will populate here. This can be overridden. Used for sales as a follow-up and reporting tool for follow-up of estimates.

FSC related quote: Identifies this job as Forest Stewardship Council related. There is no validation just identification.

Signature Based Estimate: *this populates from Book Estimating and is **not** editable if a Book Estimate was used.* This is selected to use signatures that were created in Master Files Signature, Book system, not the traditional print templates. **Always select this option. Book Estimating logic is disabled if you do not use Signature Based Estimate.**

Requoting options: Please disregard. This area is still in development.

Job In Process in POE after BE: Indicates this originated with a BE estimate and changes will occur only in Print Order Entry without going back through Book Estimating

Requested Re-quoting from BE WITH replacing job back in POE: Requests changes made to the specs be re-estimated in Book Estimating and the job replaced in Print Order Entry.

Requested Re-quoting from BE without replacing job back in POE: Changes are documented on a log indicating a re-estimate is needed. This function keeps the estimate on file in sync with changes made to the job in production for future re-estimating purposes.

Wizard – Please do not select this option, as it will not work correctly for you.

Cancel – select this option if you want to cancel the edits you have made to this estimate/job.

Save – found in the header screen, this takes you to the menu tree (after versions are entered).

Versions tab follows immediately.

Define Product Versions

The versions defined in the header screen of Book Estimating populate and can be edited here.

This screen is used to define the Product Versions and Bind Styles that apply to this estimate/job and is a required field. On the Header screen, select the **Versions** tab and this Define Product Versions screen opens:

Version Description	Bind Style	Spine Type	ISBN	Quantity	Due Date	Promised Ship Date	Scheduled Completion	Actual Ship Date
English	HC 3 Piece BIS SOP	Case Bound - Round		5,000	01/30/2010			
French	HC 3 Piece BIS SOP	Case Bound - Round		10,000	01/30/2010			

Word 'Overs' in Version's Description distinct the difference between Order Qty and Manufactured Qty

Final Req. Ship Date: 2/10/2010

Cancel Save

Version Description – enter a description for the product. This description displays on the Work Ticket and in shipping.

Bind Style – select a bind style by clicking the arrow to see a drop-down listing of bind styles. Bind Styles are created in Master Files Book. For more information on creating new Bind Styles, please see documentation for Master Files Book.

Spine Type – select the spine type from the drop-down choices. This is a limited choice and based on the bind style selected above. The linkage and spine types are created in Master Files Book. This field is used to determine the calculation formula used in determining the spine width on books.

ISBN - This field is optional. You can enter the ISBN of the product. This prints on the shipping documents.

Due Date - Enter the date here the customer had indicated the job is due. A due date must be entered for each version.

Promised Ship Date - For use with Book Estimating. If a requested ship date was entered, it displays here, as well as in MR Scheduler on a Requested Scheduled area once this job has been calculated in Print Order Entry. You are not able to make an entry here.

Scheduled Completion - Once the job is scheduled, you are able to view the scheduled completion date here. It is set by the scheduler.

Actual Ship Date - This displays the date the job was final shipped in PrintStream.

Qty - Enter the quantity for each version entered.

Final Req. Ship Date – Represents the final ship date for the job.

Clicking **Job Header** in the tree on the left side of the screen displays this header information at any time.

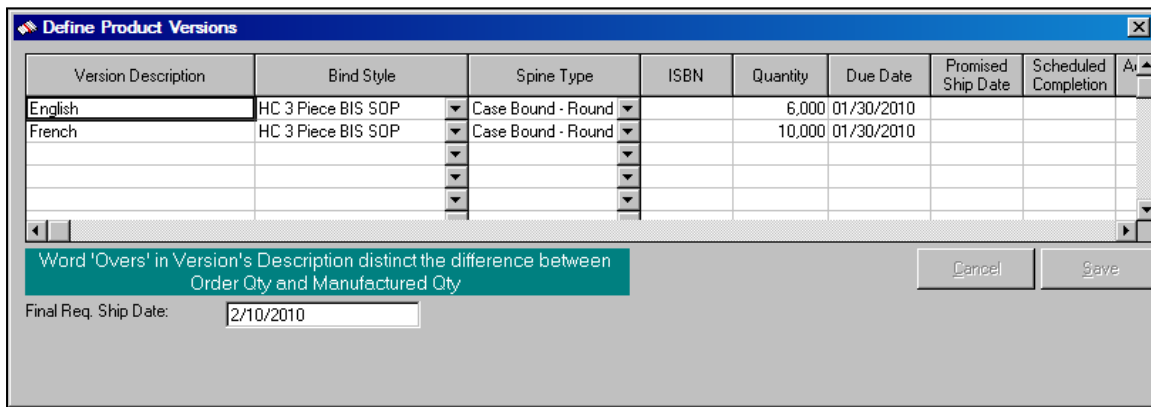
Cancel/Save – click either button to cancel or save the information entered. This returns you to the header screen.

Adding Versions

You can enter additional versions here with the same (or different) bind styles with different due dates (sales samples for example) and different quantities.

Adding a Version with the Same Bind Style

Click the **Version Description** field and type the **Description**, **Bind Style**, **Spine Type**, **Quantity**, and **Due Date** for this version. Then **Save**.



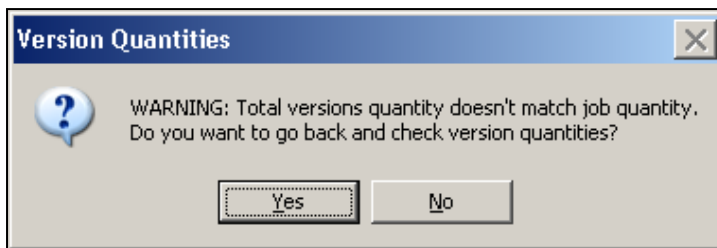
Version Description	Bind Style	Spine Type	ISBN	Quantity	Due Date	Promised Ship Date	Scheduled Completion	Av
English	HC 3 Piece BIS SOP	Case Bound - Round		6,000	01/30/2010			
French	HC 3 Piece BIS SOP	Case Bound - Round		10,000	01/30/2010			

Word 'Overs' in Version's Description distinct the difference between Order Qty and Manufactured Qty

Final Req. Ship Date: 2/10/2010

Cancel Save

This warning flag alerts the user that a change has been made in the version quantity which will impact the job. Clicking **Yes** allows you to go back and check version quantities. Clicking **No** changes the quantity to match the total of all the versions.

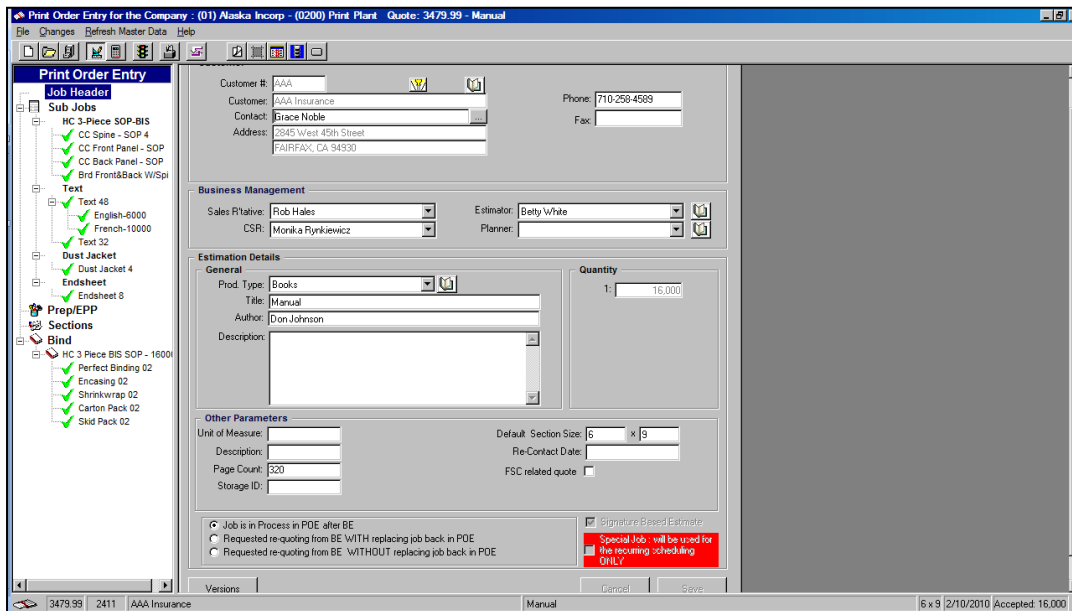


Version Quantities

WARNING: Total versions quantity doesn't match job quantity.
Do you want to go back and check version quantities?

Yes No

In this case, you will see that the job total displays and calculates as **16000**.



Print Order Entry for the Company - (01) Alaska Incorp - (0200) Print Plant - Quote: 3479.99 - Manual

Customer: AAA Insurance
Contact: Grace Noble
Address: 2845 West 45th Street
FAIRFAX, CA 94930

Phone: 710-259-4589
Fax:

Business Management
Sales Representative: Rob Hales
CSR: Monika Pyrkiewicz
Estimator: Betty White
Planner:

Estimation Details
Prod. Type: Books
Title: Manual
Author: Don Johnson
Description:

Quantity
1: 16,000

Other Parameters
Unit of Measure:
Description:
Page Count: 320
Storage ID:
Default Section Size: 6 x 9
Re-Contact Date:
FSC related quote:

Job is in Process in PDE after BE
Requested re-quoting from BE WITH replacing job back in PDE
Requested re-quoting from BE WITHOUT replacing job back in PDE

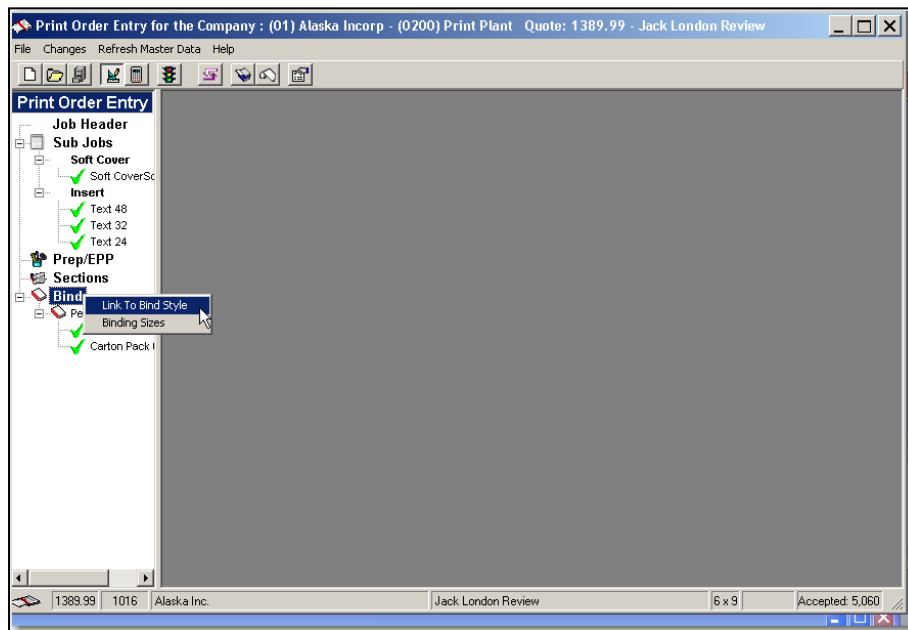
Signature Based Estimate
Special Job - will be used for the recurring scheduling ONLY

3479.99 2411 AAA Insurance Manual 6 x 9 2/10/2010 Accepted 16,000

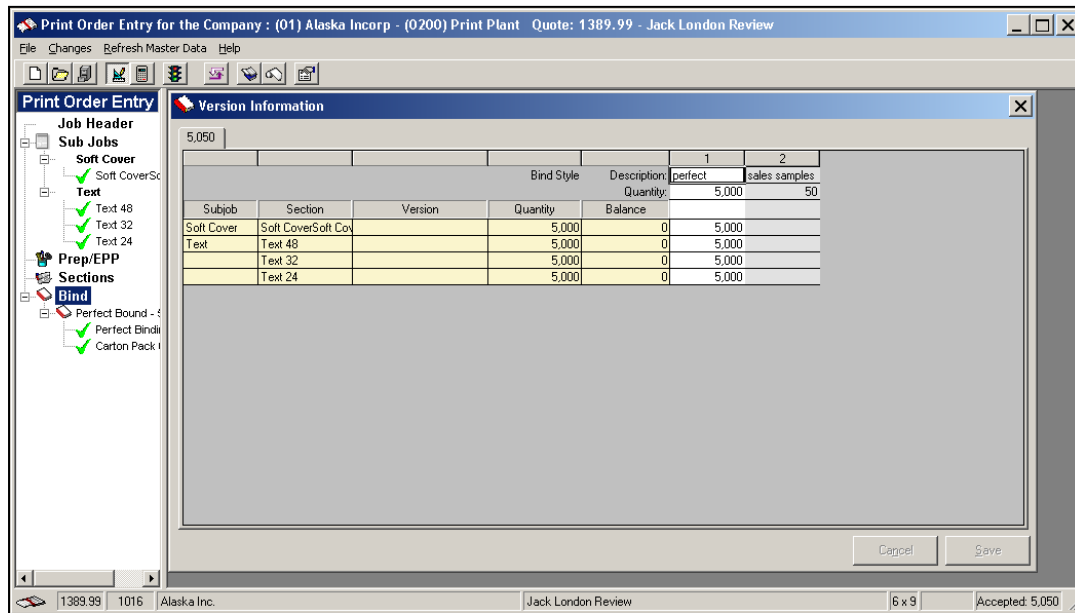
Once you have defined additional versions (beyond what Book Estimating populated) you will need to link the versions you created to the appropriate bind style. This is true even if all versions have the identical bind style.

Link To Bind Style

Right-click the Bindery portion of the tree, and select **Link To Bind Style**.

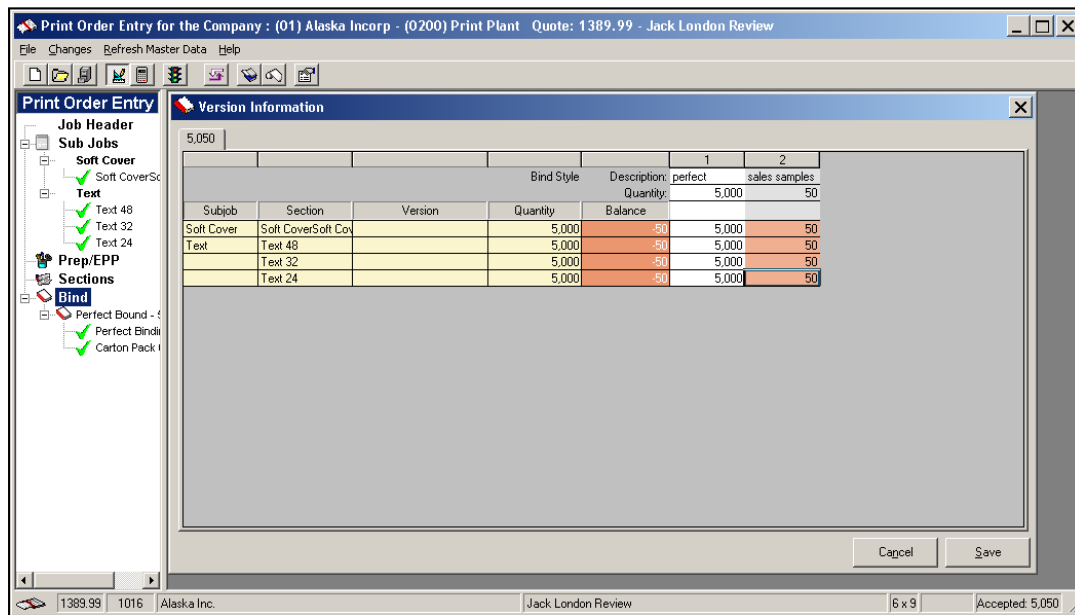


This opens the following screen:



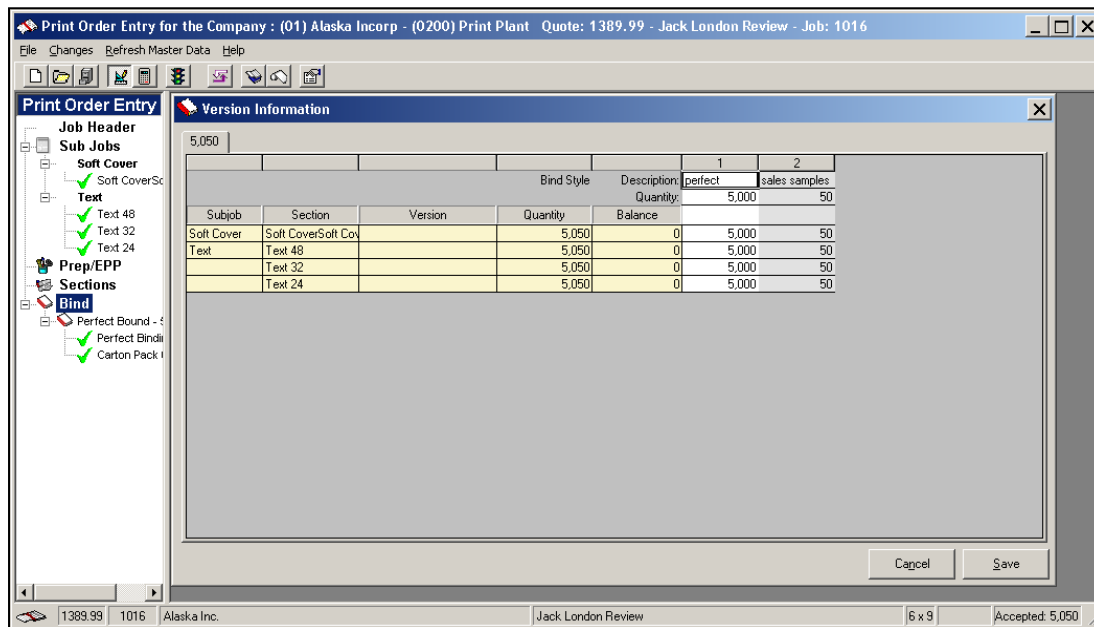
The added version shows up at the far left, but has no sub jobs or sections associated to it.

Next you click under the column to add the quantity of each section that comprises this version as shown. This is how it looks:



An example where you would not select all sections would be overs on covers for promotional purposes. In that instance, you would only select Covers for that version.

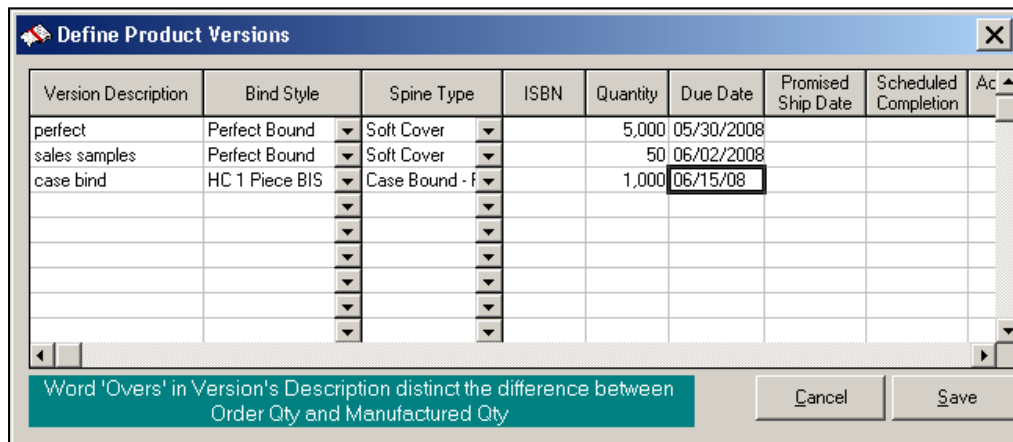
Clicking the **Save** button on this screen still shows quantity in the **Balance** column, but if you select **Bind** from the tree and right-click again, then select the **Link To Bind Styles** option, you will see that all quantities have synchronized.



Versions with Different Bind Styles

If the Book Estimate was created with different bind styles, this automatically populates here – one version for each bind style estimated. If not, you may enter a second bind style.

When adding a different bind style, define them here in the Define Product Versions screen:



Define Product Versions

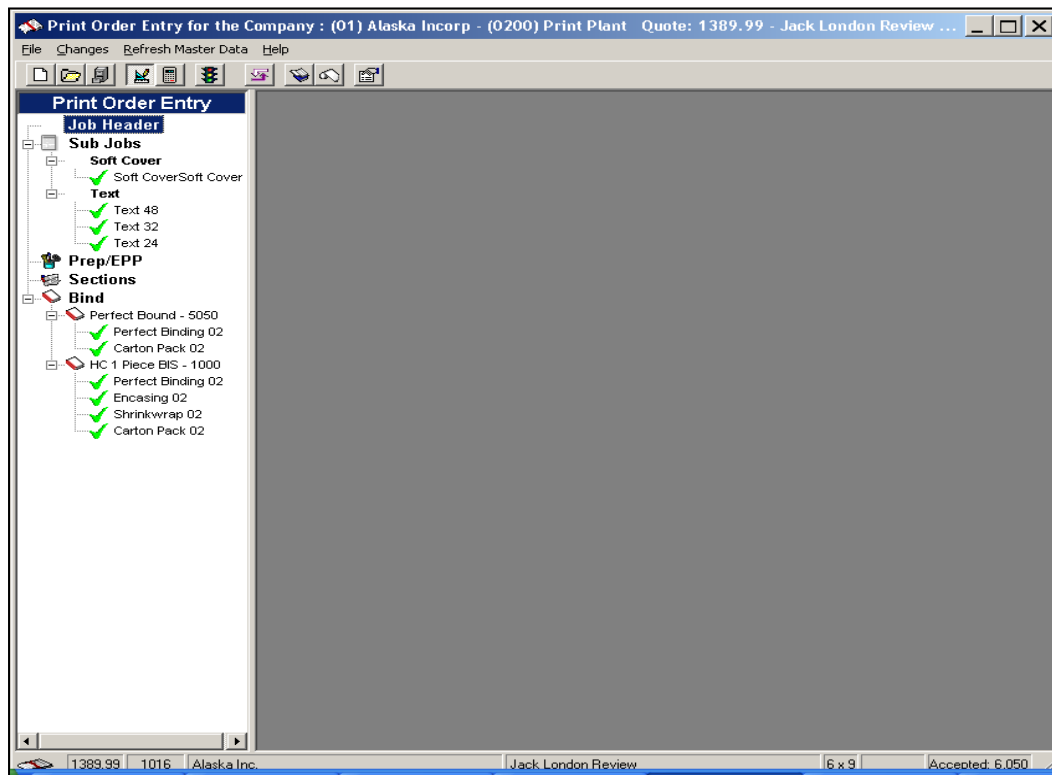
Version Description	Bind Style	Spine Type	ISBN	Quantity	Due Date	Promised Ship Date	Scheduled Completion	Ac
perfect	Perfect Bound	Soft Cover		5,000	05/30/2008			
sales samples	Perfect Bound	Soft Cover		50	06/02/2008			
case bind	HC 1 Piece BIS	Case Bound - f		1,000	06/15/08			

Word 'Overs' in Version's Description distinct the difference between Order Qty and Manufactured Qty

Cancel Save

You must then add any sub jobs and sections to the job in Print Order entry. Simply defining the version here will not trigger the calculations for paper required, etc., (e.g., if you simply add a bind style called 'case bind,' you still must define sub jobs and select paper for the binder boards, cover cloth, etc. in order to actually produce this product).

Here is how the tree looks after adding and saving this bind style. The additional binding processes have pulled in, but no sub job for the cover cloth or binder boards is present. This has to be added by adding a sub job for these items.



Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London Review ...

File Changes Refresh Master Data Help

Print Order Entry

- Job Header**
- Sub Jobs**
 - Soft Cover**
 - Soft CoverSoft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP**
- Sections**
 - Bind**
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - HC 1 Piece BIS - 1000
 - Perfect Binding 02
 - Encasing 02
 - Shrinkwrap 02
 - Carton Pack 02

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 6,050

If the quote you opened in Print Order Entry was estimated as a split bound estimate (one estimate with common text and two different bind styles), this screen would have created each bind style as a version in this screen.

You do not have the option to add a second bind style in Book Estimating and replace the job in this case.

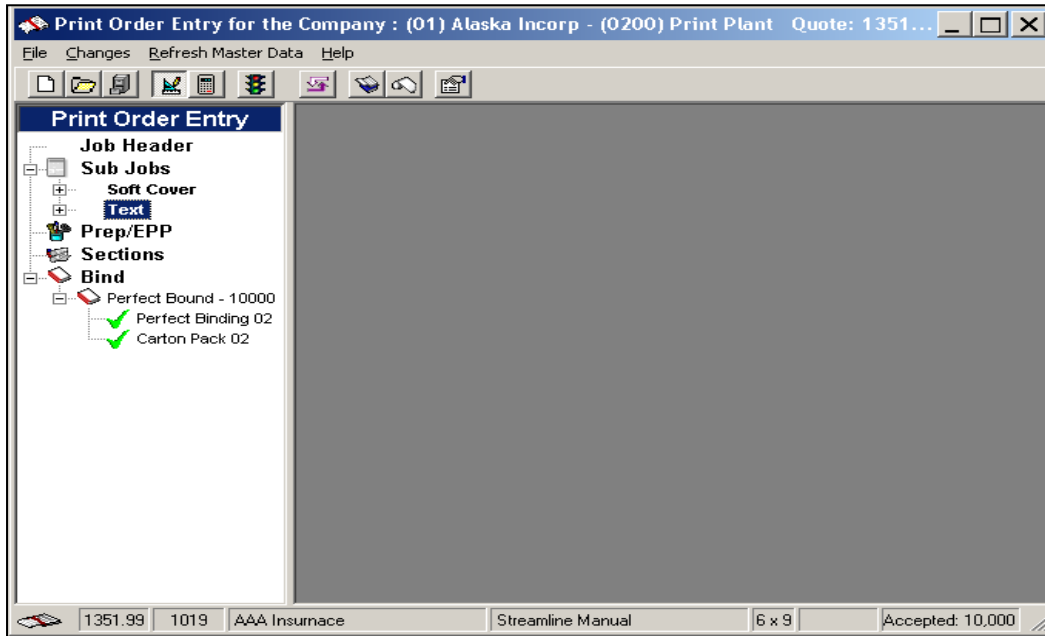
Sub Jobs

These populate from Book Estimating and can be edited here, or more sub jobs can be added.

Sub jobs are user-defined categories that are used to group printed sections. For example a TEXT sub job could contain a group of text runs, (i.e., 16 page, 32 page, 8 page and 4 page signatures). We call these individual runs **Sections**.

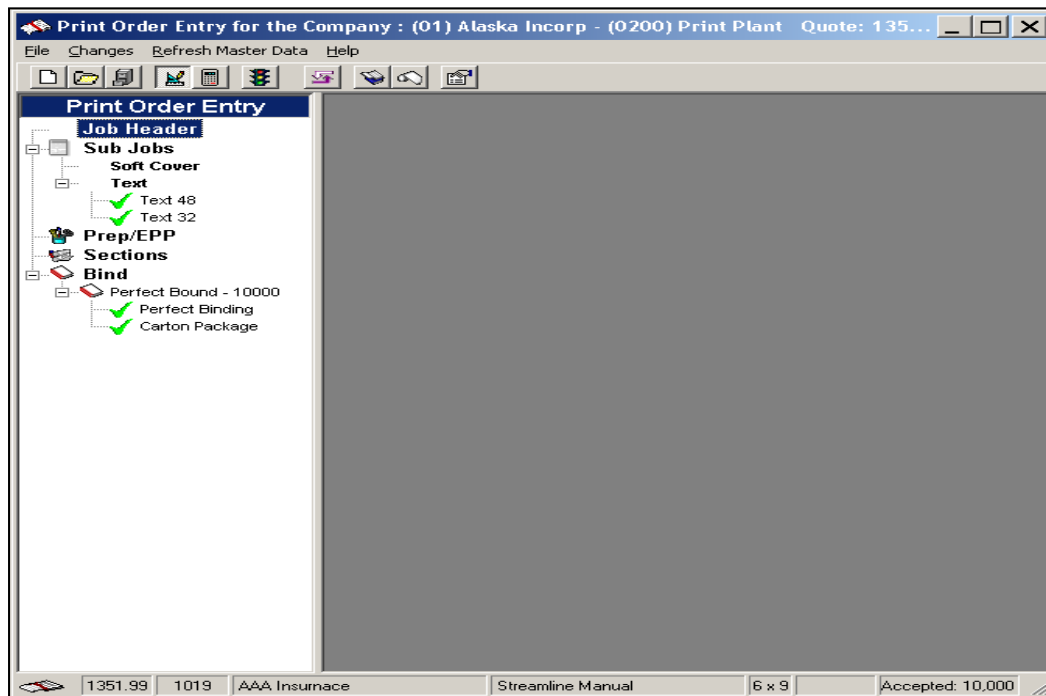
Grouping sections by sub jobs allows you to print the work ticket by sub job which includes all sections that are linked to it.

To review, click the + sign to the left of the **Sub Job** and all sub jobs display.



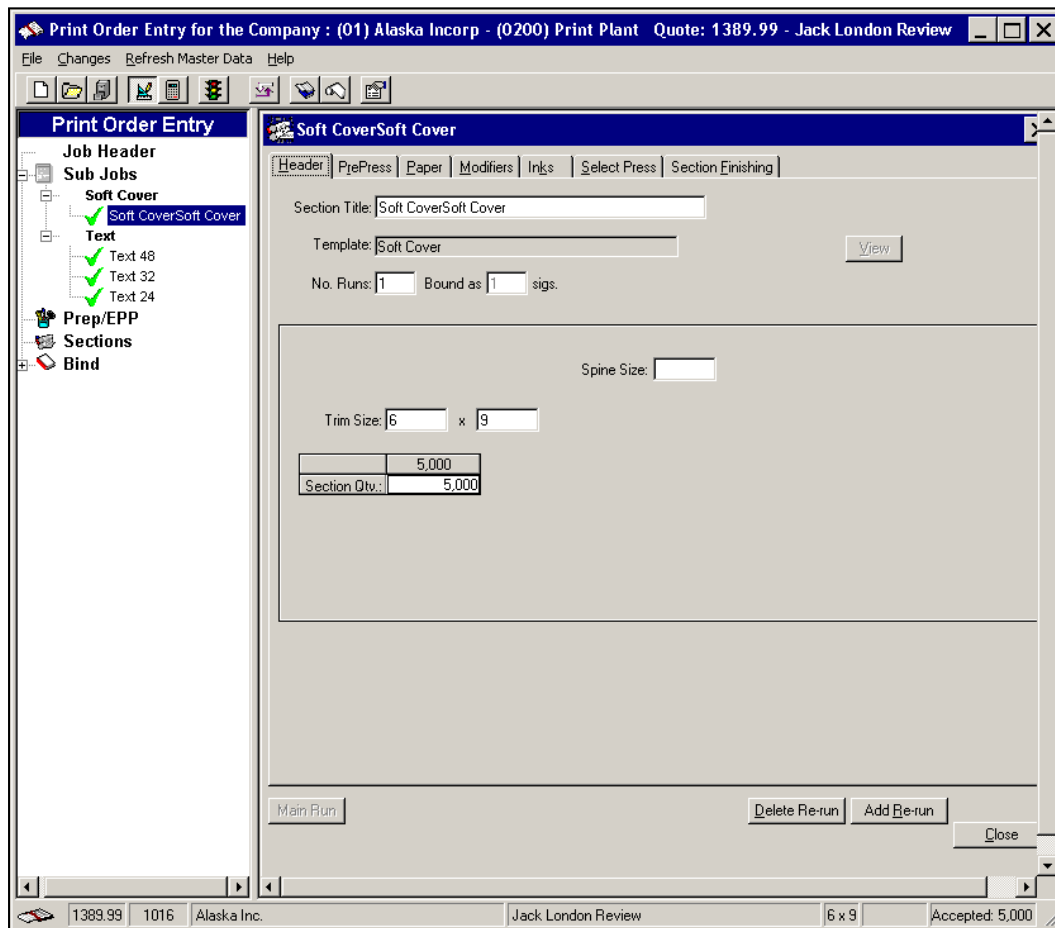
Sections: *these populate from Book Estimating and can be edited here.*

To see the individual sections within a sub job, select the + sign to the left of the specific sub job and each section displays.



To view details for each component click directly on the component and the details are available from the tabs on this screen.

COVER – the header screen only has an area that shows the **Spine Size**. If you prefer, you may manually calculate and enter the spine size, rather than use what the system calculates.



Section Header Screen

Note To select a different template, users must delete this section and add a new one.

In the **Find Press** field, you can use this template, but change nearly all aspects of the running details, press sheet size, number up, paper size, press, etc.

Section Title - defaults from *Book Estimating*; edit here if desired. This displays on the work ticket.

Template - populates from *Book Estimating* the Template (signature) used for this section. See note above. This **cannot be edited**; the section must be deleted and a new one added to select a different template, but numerous edits to how this template runs can be made on the **Select Press** tab.

The screenshot shows the 'Print Order Entry' application window. A sidebar on the left contains a tree view with items like 'Job Header', 'Sub Jobs', 'Soft Cover', 'Text', 'Prep/EPP', 'Sections', and 'Bind'. The 'Text' item is selected, and a 'Text 48' dialog box is open. The dialog has tabs for 'Header', 'PrePress', 'Paper', 'Modifiers', 'Info', 'Select Press', and 'Section Finishing'. The 'Header' tab is active, showing fields for 'Section Title' (Text 48), 'Template' (Timson 8 1/2 x 11 - 48 pg No Lip W/Mil), 'No. Runs' (5), 'Bound as' (1 sigs), 'Trim Size' (8 x 10), and 'Section Qty' (10,000). There is a 'View' button next to the template field. At the bottom of the dialog are buttons for 'Main Print', 'Delete Run', 'Add Run', and 'Close'. The status bar at the bottom of the application window displays '3444.99 2398 AAA Insurance' and 'Print 09 Book 8 x 10 9/25/2009 Accepted 10,000'.

No Runs - number of runs for this template. *This pulls in from the Book Estimating and can be edited here.*

Example: Job was estimated as 64 pages. This would display as 2 runs of the 32-page signature. The job comes in and is actually 128 pages. Here you would enter 4 runs. This would ripple up and change the page count on the JOB HEADER screen, and calculate the correct amount of press time, paper, bindery, etc.

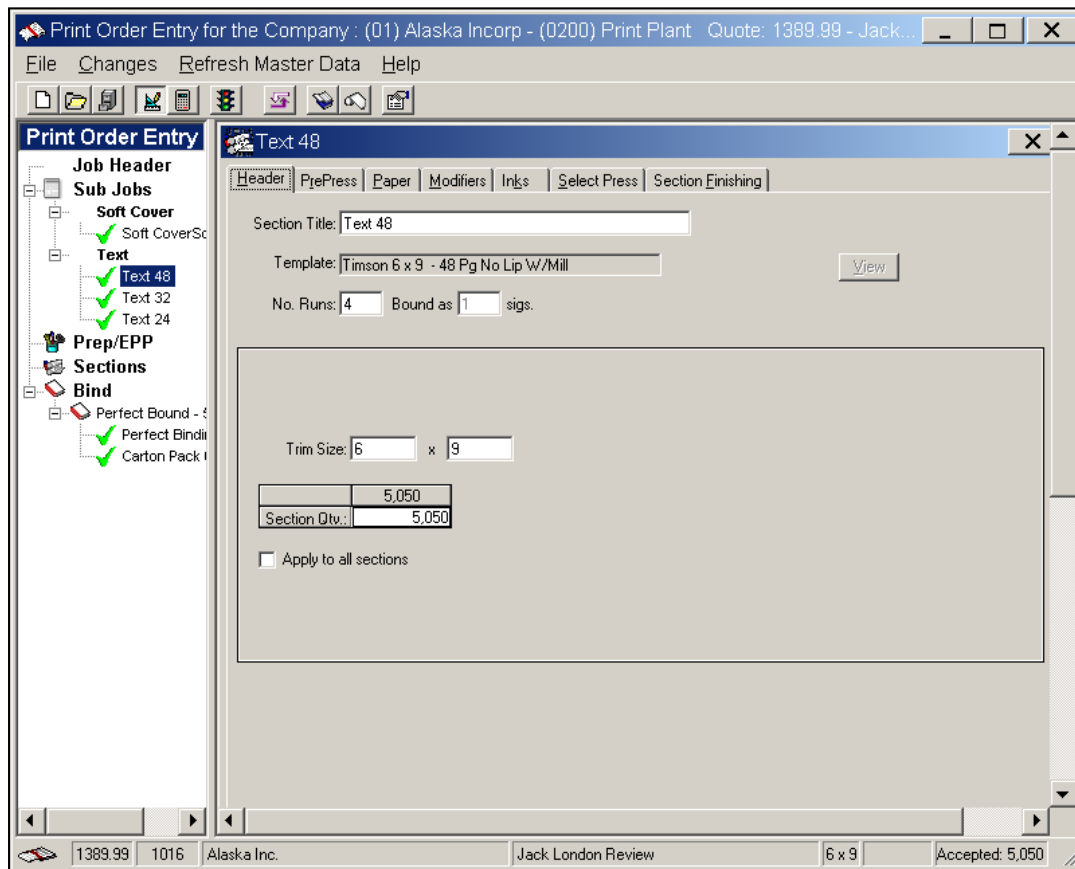
Bound as -1 signature, indicates if each Run is bound as a single signature. This pulls in from Book Estimating. If each run is to be bound as 2 signatures, enter 2. This doubles the number of signatures on binding equipment, using pockets, and changes the page count on the job header screen (example: a 32-page printed section that is cut and folded as two (2) 16-page sections).

Trim Size - trim size of each section populates from Book Estimating and can be edited here by entering a different size.

Section Qty - defaults to the version quantity. If you want to change the quantity to over-run a section or under-run a section, you can change the quantity here. This does not affect the overall estimate/order quantity. This could be used if customer wants unbound overs on covers only as an example.

Note The overs entered as a second version show up in the gray box, right below the trim size, and not in the section quantity. This indicates the additional version was not linked to the bind style.

After making the link as described, the section quantities selected for each version will match the job quantity (see below).



Apply to all sections - for this to work correctly, this must be set up correctly on the very FIRST section. Use this feature when you have multiple sections within a sub job (different text configurations within a text sub job) and you want this selection to be applied to them all. This functionality repeats on a number of tabs in Print Order Entry.

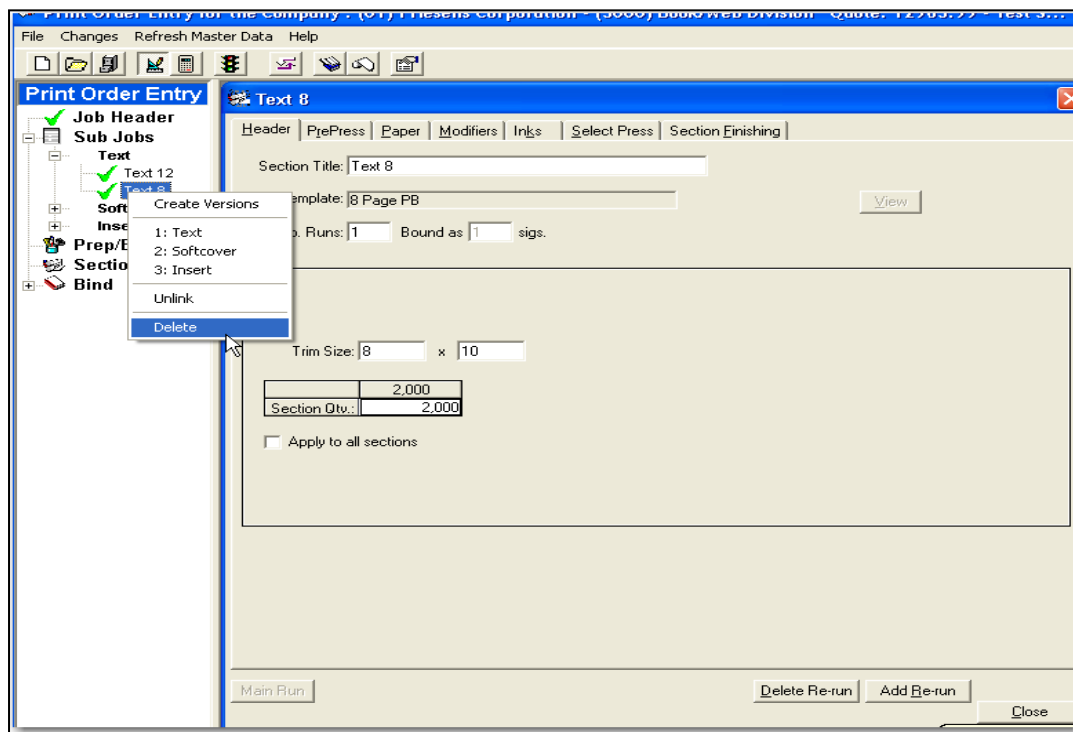
Main Run - when this is grayed out, you are working in the **Main Run** area.

Add Re-Run - select this tab if you want to add an additional press run for this Section on another press. See 'Reruns' section of this document for more information.

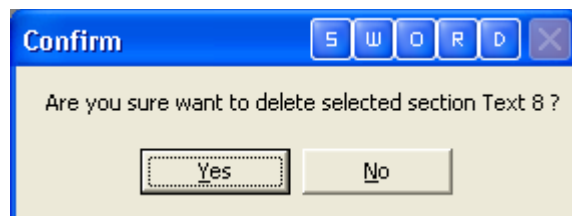
Delete Rerun - if you added a rerun and decide you don't want it, use this to delete the rerun. See 'Reruns' section of this document for more information.

Removing Sections - when the page count has changed between Book Estimating and Print Order Entry, or if you need to replace the template because the edits you can perform are not sufficient, you can either have the job re-estimated and replaced in Book Estimating, or you can remove the section, and replace it with a different section.

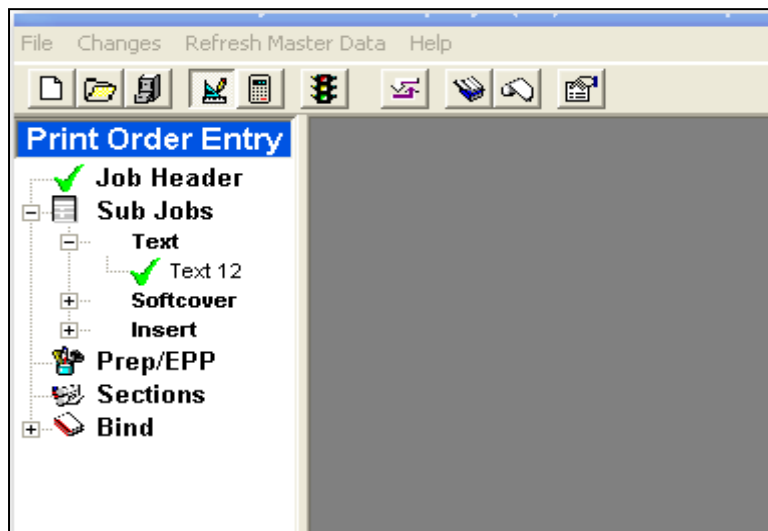
To Remove: highlight the section you wish to replace, and right-click. This opens this screen:



When you select Delete, this message is received:



When you click **Yes**, the change is made. Note there is only one section for 12 pages listed now. No 8-page section.



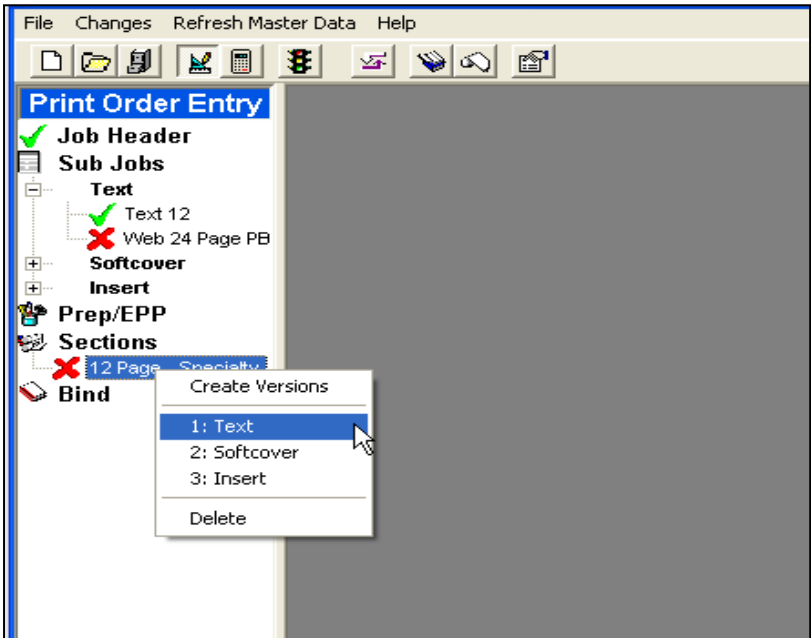
Changing Templates

To select a different Template (section), highlight the sub job on the tree that is associated with the template and choose the Sections branch on the tree. This brings up all available templates, which were set up in Master Files Signature.

Templates		
Options		
Art Signatures POESignatures Binding Bind Finishing		
Signature Name	Size Range	Combinations
Printed Endsheets - Specialty	1 x 1 - 15 x 18	2-2 pg endsheets
Printed HC	1 x 1 - 15 x 18	
Softcover - Concealed Specialty	1 x 1 - 20 x 20	
Softcover - Foil Stamp 1 up	1 x 1 - 15 x 18	
Softcover - Regular	1 x 1 - 20 x 20	
Softcover - Saddle	1 x 1 - 30 x 30	
Softcover - Saddle (Large Sizes)	13 1/2 x 12 - 30 x 30	
Softcover - Specialty	1 x 1 - 20 x 20	
Unbound 2 Page Reply Card	1 x 1 - 15 x 18	
Unbound 6 Page Reply Card	1 x 1 - 15 x 18	3-2 page signatures
Web 16 Page PB	1 x 1 - 9 x 9 1/4	
Web 16 Page SEW	1 x 1 - 9 x 9 1/4	
Web 24 Page PB	1 x 1 - 6 1/4 x 9 1/4	
Web 24 Page SEW	1 x 1 - 6 1/4 x 9 1/4	
Web 32 Page PB	1 x 1 - 9 x 9 1/4	
Web 32 Page SEW	1 x 1 - 9 x 9 1/4	

To select, double-click the desired signature and enter data on all the following pages.

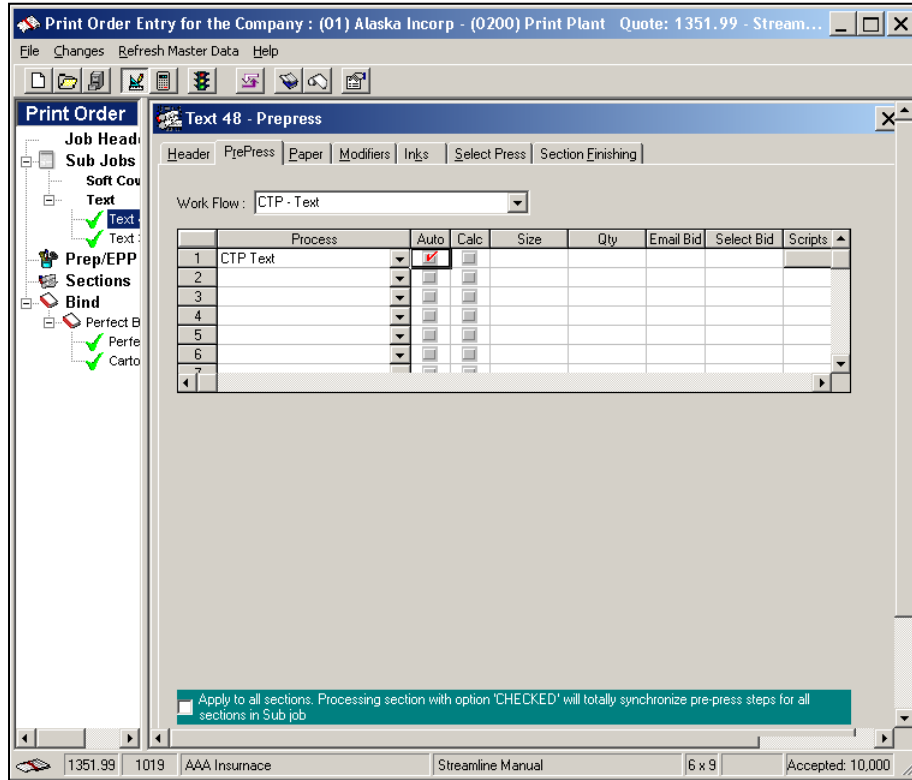
Alternatively, you can enter the section with all the following information without linking it to a sub job until you have finished the input, the new section displays under the **Sections** branch. Next, to associate the section to a sub job, highlight the section, right-click and select the appropriate sub job.



Section Tabs

PrePress Tab

The prepress Workflows nominated in Book Estimating populate and can be edited here.



The Prepress Workflow selected in Book Estimating displays, along with the associated Prepress Steps. The workflows contain Prepress Steps, which contain one or more PrePress Processes.

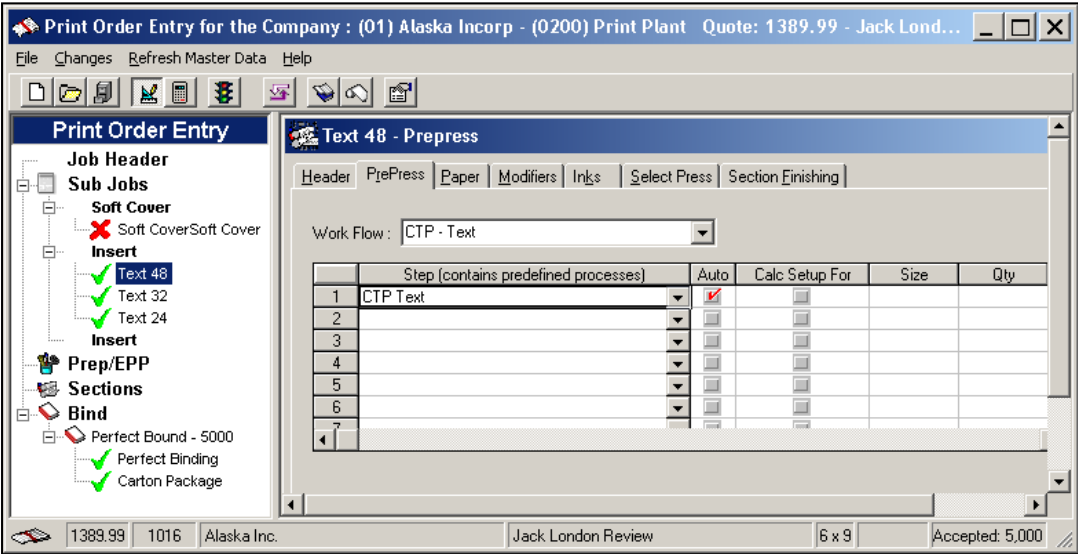
The actual Prepress Processes only display after the job is calculated. The activity codes are at the process level, and these are the processes that display in Scheduling and Shop Floor.

You can add or delete any prepress processes here, whether they were included in the Prepress Workflow setup. You can also select a different workflow, delete and calculate with no prep, and make any edits here.

Highlight the drop-down and select the additional process, then select Auto, or Calc.

Auto - means the User Defined Formula for the prepress processes were used in Book Estimating and have been pulled in here. No size entries are required.

Calc. - select if you wish to calculate the set up to this process. When the same prepress steps occur across multiple sections, this enables users to specify where and how many times this set up is applied. If you expand this window it reads as **Calculate Setup For**.

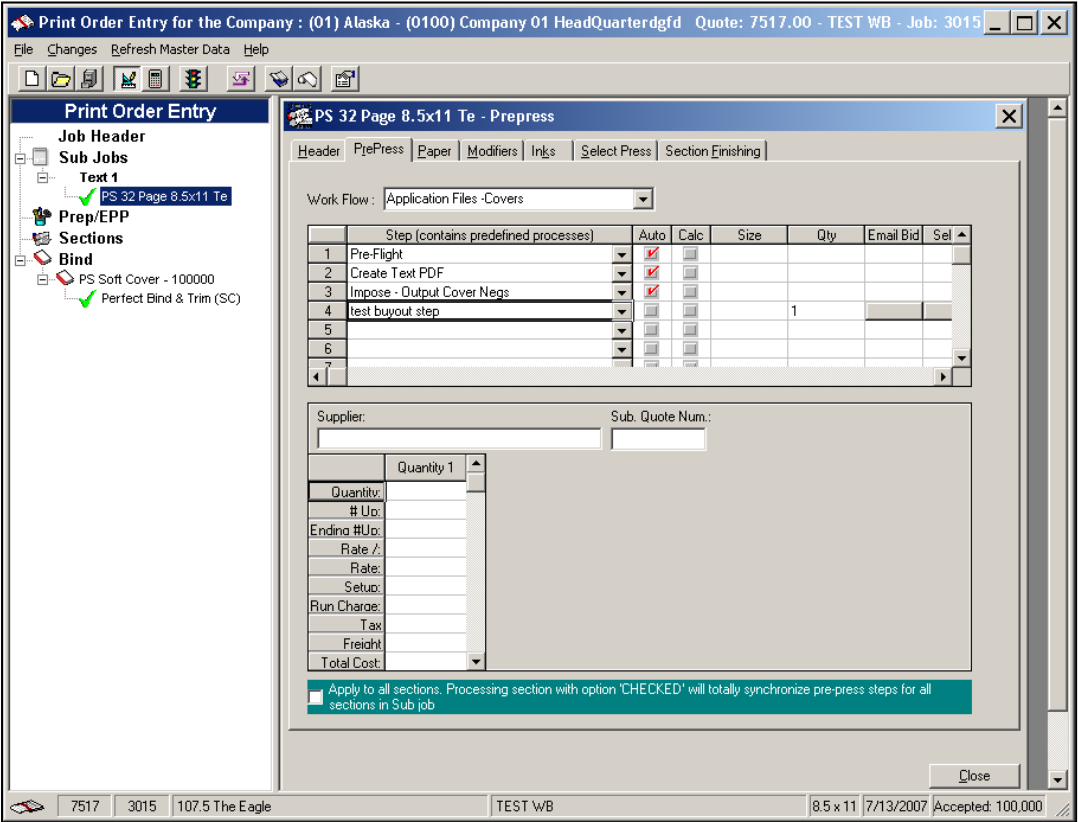


Apply to all sections - check box synchronizes prepress steps for all sections in this sub job and redundant entry is not required. You need not do this if the prep from Book Estimating is not changed.

Buyout - Prepress

Buyout Process for each area (Prepress, Section Finishing, and Bindery) must be set up in Master Files Print and linked in Master Files Book to be available here.

If this Buyout was entered in Estimating when the job was created, all this auto populates, including the estimated vendor and prices.



To shop for other bids, you can email vendors and ask for bids from this screen. See document "PrintStream Email user Guide.doc" for instructions on this feature.

If you have a price list from the vendor or already have the price, enter all fields on this screen. After you have selected Prepress Buyout as a process, enter a quantity for the buyout.

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - ...

File Changes Refresh Master Data Help

Print Order Entry

Job Header

Sub Jobs

Soft Cover

Text

Text 48

Text 32

Text 24

Prep/EPP

Sections

Bind

Perfect Bound - 5050

Perfect Binding 02

Carton Pack 02

Encasing 02

Soft CoverSoft Cover - Prepress

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Work Flow : CTP - Cover

	Auto	Calc	Size	Qty	Email Bid	Select Bid	Scripts
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
2	<input type="checkbox"/>	<input type="checkbox"/>	0 x 0	1			
3	<input type="checkbox"/>	<input type="checkbox"/>					
4	<input type="checkbox"/>	<input type="checkbox"/>					
5	<input type="checkbox"/>	<input type="checkbox"/>					
6	<input type="checkbox"/>	<input type="checkbox"/>					

Supplier: Sub. Quote Num.:

5,050

Quantity: 1

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

Next, click the **Email Bid** button and select the vendor or vendors (this is needed to add the vendor prices, whether you are using the email for bid function).

Email For Buyout Bids For 'Prep Buyout'

	Vendor	Account Num	Contact	1
1	Gina's Company	GINACO	Gina	<input checked="" type="checkbox"/>

Vendor Account Num.: Vendor Name:

Email Close Save Add Vendor

Save and close this screen. Then click the **Select Bid** button.

Buyout Bids For 'Prep Buyout'

Vendor Details		1	
Name	Gina's Company	Setup	10.00
		Minimum	25.00
Reference		Lot Price	75.0000
		Tax	0.00
		Freight	0.00
Contact		Total	75.00
Turntime	0	Accepted	<input checked="" type="checkbox"/>
Notes			

☐ - Total ☒ - Best Price

If you had more than one vendor, you could enter more than one Bid and select the bid you want. The **Accepted** check box is the one that is used.

Save and Close. The following screen opens:

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London Review - ...

File Changes Refresh Master Data Help

Print Order Entry

- Job Header
- Sub Jobs
 - Soft Cover
 - Soft CoverSoft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
 - Prep/EPP
 - Sections
 - Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - Encasing 02

Soft CoverSoft Cover - Prepress

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Work Flow : CTP - Cover

	Auto	Calc	Size	Qty	Email Bid	Select Bid	Scripts
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0 x 0	1			
2	<input type="checkbox"/>	<input type="checkbox"/>					
3	<input type="checkbox"/>	<input type="checkbox"/>					
4	<input type="checkbox"/>	<input type="checkbox"/>					
5	<input type="checkbox"/>	<input type="checkbox"/>					
6	<input type="checkbox"/>	<input type="checkbox"/>					

Supplier: Gina's Company Sub. Quote Num.:

Quantity: 5,050

Up: 1

Rate /: 0

Rate: \$75.00

Setup: \$10.00

Run Charge: \$75.00

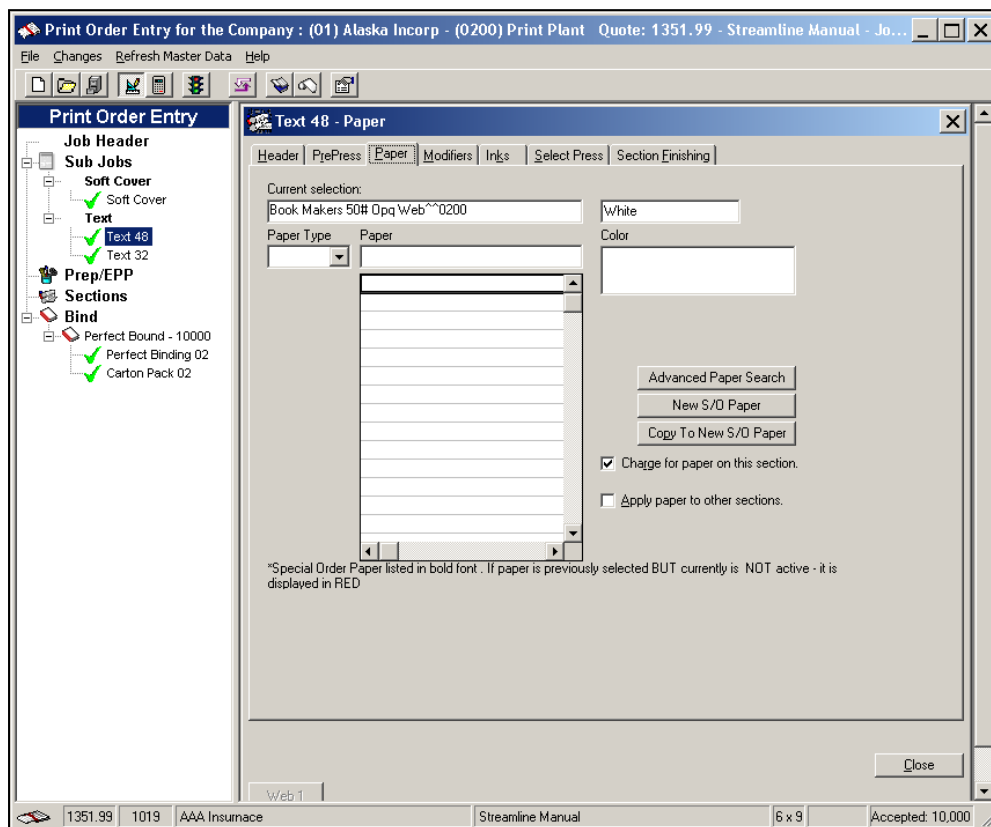
Tax: \$0.00

Freight: \$0.00

Total Cost: \$85.00

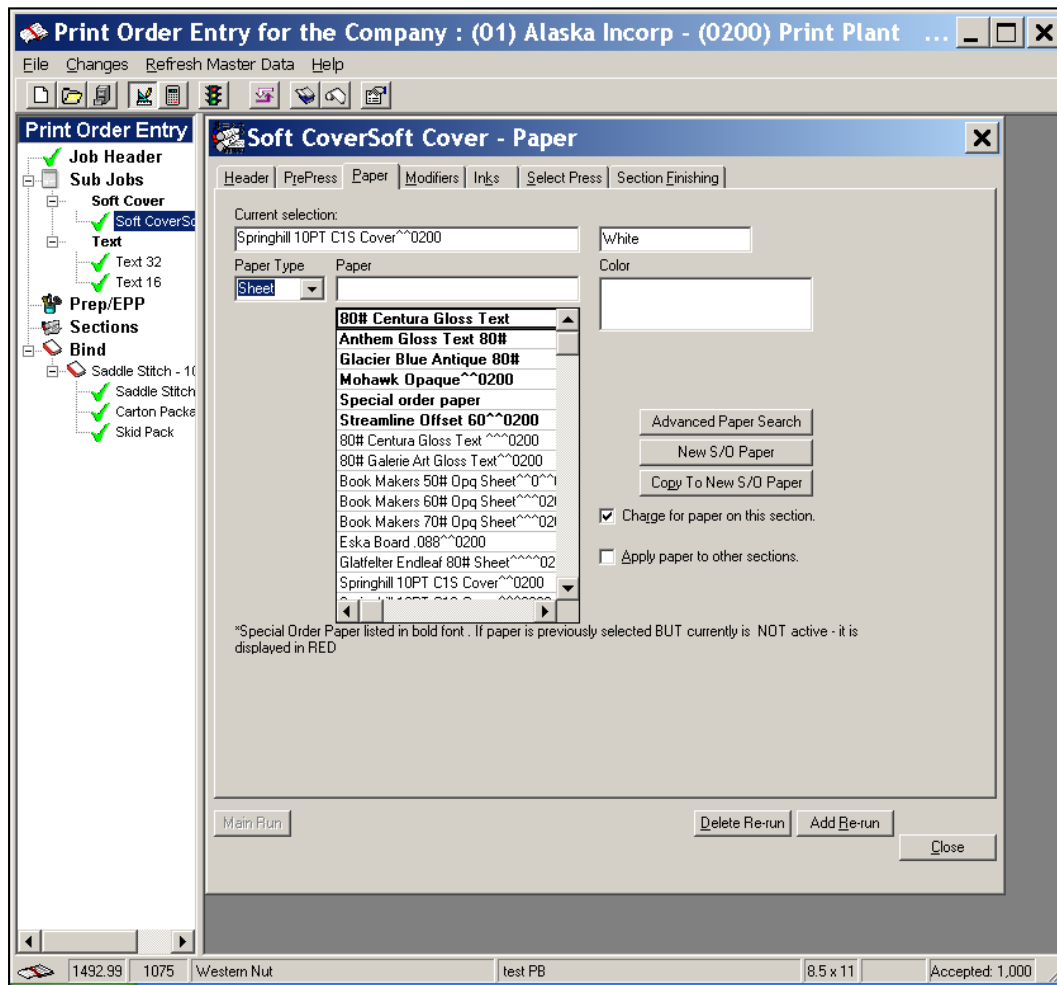
1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

Paper Tab



Current Selection – *the paper used in Book Estimating populates here.* When you enter this screen, you will see that paper listed in the current selection area.

The following pages describe how to change this selection for estimating/costing purposes. You can change the paper that is actually used in the Paper Reservation screen and bypass this if you are not re-quoting the paper change to the customer. Actual inventory paper to be used can be assigned in the Paper Reservation screen after the job is calculated. This option only displays in Review mode. (See more under 'Paper Reservations' section.)



To change this selection:

You can double-click one of the papers listed here to select.

You can begin typing a paper name that exists in Master Files Print Paper in the blank field **Paper** above the paper names. Note this field is case sensitive. If paper types are entered as uppercase and lowercase, then you must search using the same case-sensitive requirements. Note that Special Order Paper (not floor stock that has been entered in Master Files Print) is in BOLD. You can choose the **Advanced Search** button to access advanced search options.

Search Papers - you can change this paper on this section by clicking the arrow next to **Paper Type** to see a listing of paper types. After you select a paper type, you will see a listing of all papers that fall under that type.

To select from this list, double-click your selection, and it becomes the "current selection". Note that Special Order (not considered floor stock) papers displays in BOLD.

Advanced Paper Search - allows additional search options, including all available sizes.

Floor Stock – **Yes** displays paper you order for inventory. **No** displays non-floor stock papers.

Type - Filters by paper type, these selections are hard coded.

Paper Search

Floor Stock: Yes

Type: Sheet

Category: Web, Sheet, Continuous, Materials, Flexo

Sub Category:

☐ Show Inactive

Basis Type:

Basis Weight:

PPI:

Caliper:

Name	Description	Sizes	Colors	Fl

Category - filters by paper category set up in Master Files print. These are industry standard paper categories or may be user defined.

Paper Search

Floor Stock: Yes

Type: Sheet

Category:

Sub Category: A-Offset/Bond, B-Coated Text, C-Uncoated Cove, D-Coated Cover, E-Board, F-Index, G-NCR, H-Envelopes

☐ Show Inactive

Basis Type:

Basis Weight:

PPI:

Caliper:

Name	Description	Sizes	Colors	Fl

Sub Category – this is an optional field to further refine your search. Sub categories are user defined. Example could be Category Offset Bond, Sub Category White. These are set up in Master Files Print .

Basis Type – Hard coded paper types used here for filtering only.

Paper Search

Floor Stock: Yes

Type: Sheet

Category:

Sub Category:

☐ Show Inactive

Basis Type: H-Card

Basis Weight:

PPI:

Caliper:

Name	Description	Sizes	Colors	Fl

Basis Weight – industry standard weights that = the weight of 500 sheets in the basis (basic) size within a basic type. In this area used for filtering only.

PPI – Pages Per Inch.

Caliper - paper thickness expressed in 1000th of an inch.

Name Like - enter any name of paper similar to the one for which you are searching.

Descr Like - enter any description of paper similar to the one for which you are searching.

Vendor - number or name searches all papers linked to this vendor in Master Files Print, Paper.

Show Inactive box - includes inactive papers in the search.

Paper Search - when you have the filters you want, click the **Search** button, and all papers within the selected criteria display.

This searches all papers entered marked as **Floor Stock** in Master Files Print.

Paper Search

Floor Stock Yes
Type Sheet
Category
Sub Category

Basis Type
Basis Weight
PPI
Caliper

Name Like
Descr Like
Vendor

☐ Show Inactive

	Name	Description	Sizes	Colors	Floor Stock	Category	Subcategory	Type	Perfect
1	80# Centura Gloss Text ^^^0200	80# Centura	23 x 35	White	Yes	B-Coated Te		Sheet	Yes
2	Book Makers 50# Opq Sheet^^^020	Book Makers	23 x 35	White	Yes	A-Offset/Bor		Sheet	Yes
3	Book Makers 60# Opq Sheet^^^0200	Book Makers	25 x 38	White	Yes	A-Offset/Bor		Sheet	Yes
4	Book Makers 70# Opq Sheet^^^0200	Book Makers	29 x 42	White	Yes	A-Offset/Bor		Sheet	Yes
5	Eska Board .088^^^0200	Eska Board	35 x 45	Natural	Yes	E-Board		Sheet	No
6	Glatfelter Endleaf 80# Sheet^^^020		50 x 38	White	Yes	B-Coated Te		Sheet	Yes
7	Springhill 10PT C1S Cover^^^0200	Springhill 10F	25 x 38	White	Yes	D-Coated Co		Sheet	No
8	Springhill 12PT C1S Cover^^^0200	Springhill 12F	19 x 25	White	Yes	D-Coated Co		Sheet	Yes
9	Sterling Gloss 80# Sheet^^^0200		20 1/2 x 2	White	Yes	B-Coated Te		Sheet	Yes

_loaded 9 records. Click 'Continue' to load next.

In the **Sizes** column, select the arrow to see all available sizes and select the one you want to use.

Paper Search

Floor Stock: Yes
 Type: Sheet
 Category:
 Sub Category:

Basis Type:
 Basis Weight:
 PPI:
 Caliper:

Name Like:
 Descr Like:
 Vendor:

☐ Show Inactive

Inventory Clear All Select Stop

	Name	Description	Sizes	Colors	Floor Stock	Category	Subcategory	Type	Perfec
1	80# Centura Gloss Text ^^^0200	80# Centura	23 x 35	White	Yes	B-Coated Te		Sheet	Yes
2	Book Makers 50# Opq Sheet^^0^020	Book Makers	25 x 38	White	Yes	A-Offset/Bor		Sheet	Yes
3	Book Makers 60# Opq Sheet^^0200	Book Makers	25 x 38	White	Yes	A-Offset/Bor		Sheet	Yes
4	Book Makers 70# Opq Sheet^^0200	Book Makers	25 x 38	White	Yes	A-Offset/Bor		Sheet	Yes
5	Eska Board .086^^0200	Eska Board	15 5/16 x 8	Natural	Yes	E-Board		Sheet	No
6	Glatfelter Endleaf 80# Sheet^^^020		25 x 38	White	Yes	B-Coated Te		Sheet	Yes
7	Springhill 10PT C1S Cover^^0200	Springhill 10F	19 x 25	White	Yes	D-Coated Co		Sheet	No
8	Springhill 12PT C1S Cover^^0200	Springhill 12F	20 x 26	White	Yes	D-Coated Co		Sheet	Yes
9	Sterling Gloss 80# Sheet^^0200		20 1/2 x 2	White	Yes	B-Coated Te		Sheet	Yes

Loaded 9 records. Click 'Continue' to load next.

300 Continue Search Close

Select - click to highlight your choice and click **Select** button or double-click.

Paper Search

Floor Stock: Yes
 Type: Sheet
 Category:
 Sub Category:

Basis Type:
 Basis Weight:
 PPI:
 Caliper:

Name Like:
 Descr Like:
 Vendor:

☐ Show Inactive

Inventory Clear All Select Stop

	Name	Description	Sizes	Colors	Floor Stock	Category	Subcategory	Type	Perfec
--	------	-------------	-------	--------	-------------	----------	-------------	------	--------

300 Continue Search Close

Paper Search, Inventory Papers

Inventory button - when you select this button an Inventory Search is launched. New search criteria are available. The inventory search displays inventory items entered in Master Files Inventory and shows quantity on hand and quantity on order, and displays item numbers.

Special Order Paper

If a special order paper has been estimated in Book Estimating it populates here, you may edit if desired.

If you have selected a Special Order Paper (purchased specifically for this job) that already exists, you will then get this warning reminding you to enter price changes for this item in the Select Press area (under **Press** tab) during Calculation of the quote.

New Special Order Paper- If you find no appropriate paper listed, select this option to create a New Special Order paper, and this screen opens.

Special Order Paper (New Paper)

Paper:

Description:

Parameters

Category: <input type="text"/>	Ink Factor: <input type="text"/>
Subcategory: <input type="text"/>	Press Speed: <input type="text"/> %
Type: <input type="text"/>	Case Making Speed: <input type="text"/> %
Perfect: <input type="text"/>	Sheets Per Lift: <input type="text"/>
Charge By: <input type="text"/>	Core Waste: <input type="text"/> %
Min Buy Qty: <input type="text"/>	Pages Per Inch: <input type="text"/>
In Packs Of: <input type="text"/>	Caliper: <input type="text"/>
	Use Caliper: <input type="checkbox"/>

Weights

Basis Type: Basis Weight:

Pounds: OR Per: Sq. "

Job Cost Links

Supplier:

Activity Code:

Cancel Save

Special Order Paper (New Paper)

Paper: Special Sundance Gloss

Description:

Parameters

Category: B-Coated Text	Ink Factor: 0.70
Subcategory: <input type="text"/>	Press Speed: 100.00 %
Type: Sheet	Case Making Speed: 0.00 %
Perfect: Yes	Sheets Per Lift: 500
Charge By: Sheets	Sheeting Waste: 0.00 %
Min Buy Qty: 0	Pages Per Inch: 446
In Packs Of: 0	Caliper: 0.0045
	Use Caliper: <input type="checkbox"/>

Weights

Basis Type: A-Book Basis Weight: 80.00

Pounds: 0.0000 OR Per: 0 Sq. "

Job Cost Links

Supplier: Draper Paper

Activity Code: 240000000 | M Paper | 01 | 0200

Cancel Save

Category – select a category from the drop-down menu entered in **Paper Types**.

Sub Category – optional, allows further filtering of papers i.e., category could be **Offset/Bond**. Sub category could be **white**.

Type - filters by paper type, these selections are hard coded.

Perfect – select **Yes** to print using a perfecting press pass with this paper or **No** to not print in this manner.

Charge By - select the charge method from drop-down menu (e.g., sheetfed, select **Sheet**, Web papers, select **Weight**).

***Min. Buy Qty.** – optional, if minimum purchase qty. exists enter the qty. (E.g., envelopes = 500).

***Packs of** – optional, number of sheets in a whole carton or pack.

Basis Type & Weight – enter basis type (industry standard 'hard coded' drop-down menu) and enter industry standard basis weight.

***Pounds / per.** – optional, enter pounds per xxx sq. inches (usually only for Carbon stocks).

***Supplier** – the default Vendor from which this paper is typically purchased.

Activity Code – The material activity code that you have set up for paper.

Ink Factor – ink absorption factor (e.g., 1.0 for uncoated, .7 for coated, etc.).

Press Speed - e.g., 95%, overrides the “standard” paper type speed in the Press - Master File.

***Case Making Speed** – optional, affects case making speed (if paper is bookbinding cloth).

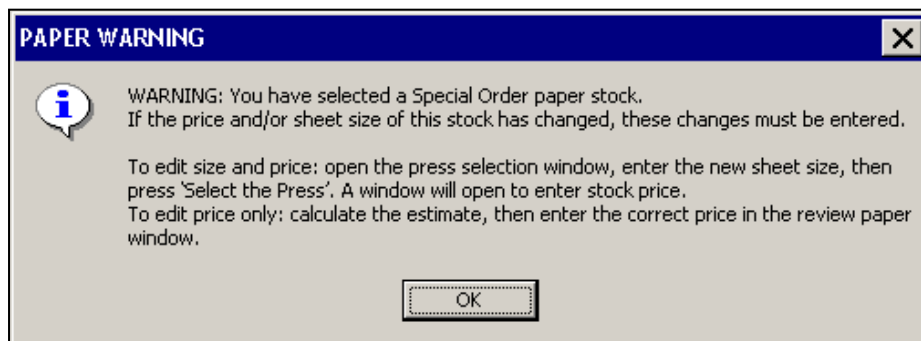
Sheets/Lift – number of sheets that are lifted into the cutter for each cutting load (e.g., Text = 500 sheets)

***Sheeting Waste** – optional, waste% if you are sheeting off a web or continuous press.

Pages Per Inch – pages-per-inch measurement used thickness calculations.

Caliper – another measurement, thousandths of an inch, for thickness calculations. Using **Caliper** tells the system to base calculations on caliper not PPI.

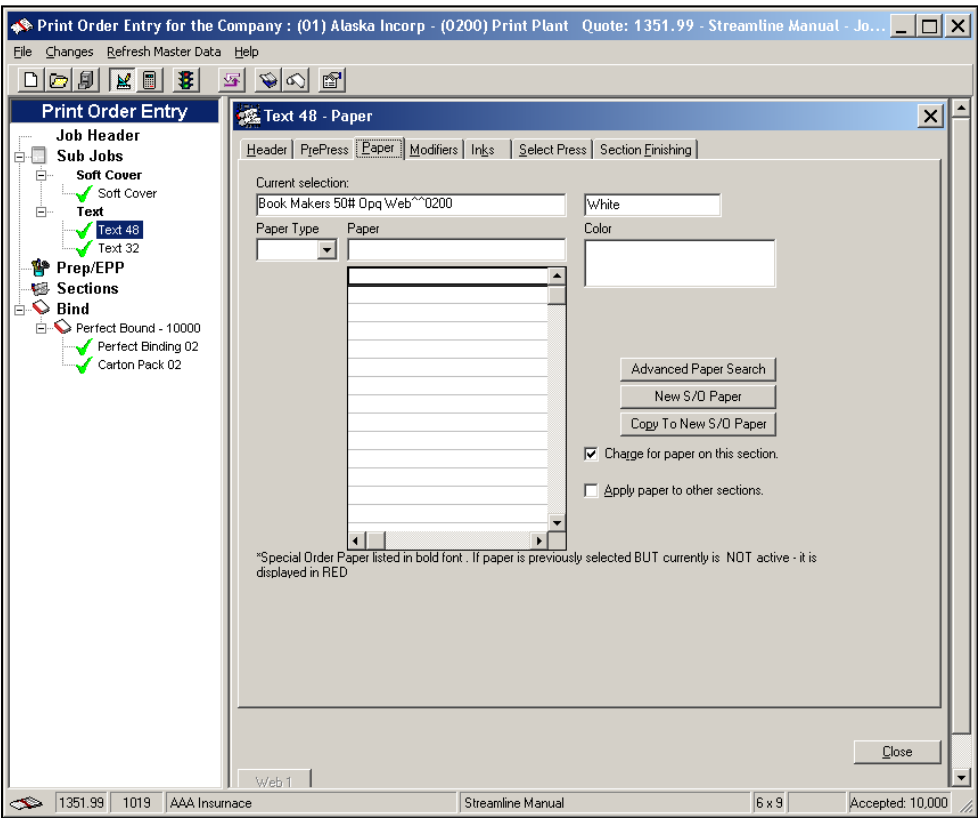
Save when finished. You receive this warning about pricing:



You will see this message, and when you click **Select Press**, you are prompted to enter the cost of the special order paper.

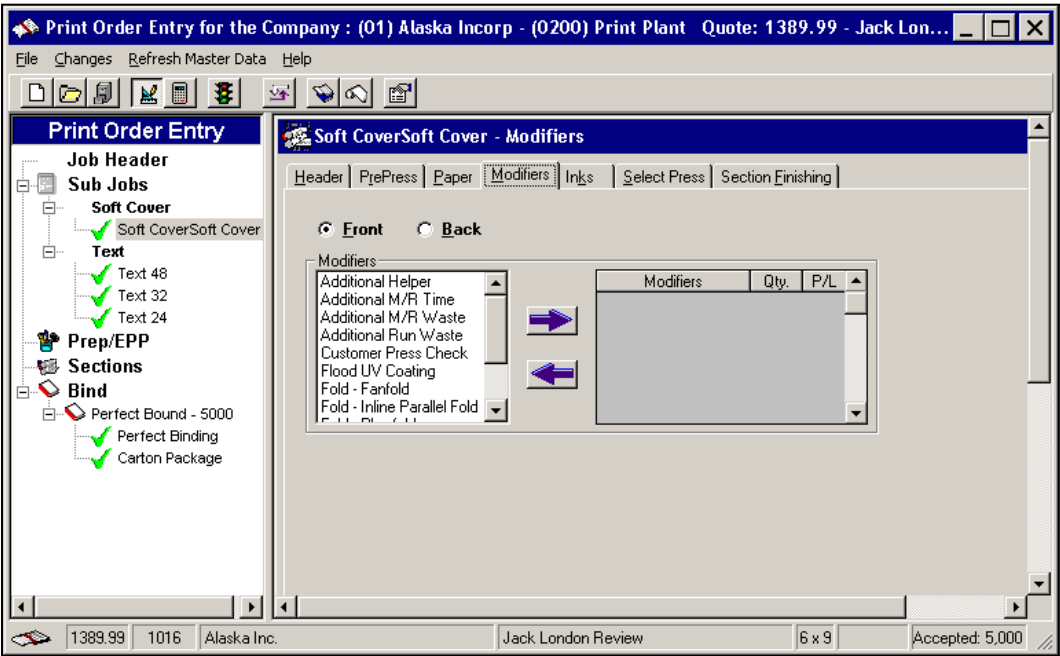
Apply Paper to other sections – in order for this to work correctly, this check box has to be selected on the first section added before the other sections have been added to the sub jobs. If selected, it defaults each additional section chosen to the same paper that was selected on this section for the same sub job. This is useful when you have multiple text runs on the same paper within a book. It means you only need to select this paper **ONCE**.

Charge for paper on this section – this option is selected by default. If cleared, it will not pull any paper pricing for this section into the estimate/order. This is most commonly used when the customer is providing the paper that was selected.



Modifiers Tab

Any modifiers applied in Book Estimating automatically populate here. You may add or edit modifiers here.



Modifiers are user-defined operations performed on the press that impact the press make-ready and running times. Waste and Additional Helper are other examples of modifier. The modifiers are set up in the press area of Master Files Print and display here for selection.

To **add a modifier**, click to highlight it and then click the arrow pointing to the right. The quantity for each modifier defaults to one (1) but can be overridden for the desired quantity.

To **remove a modifier**, click the modifier description on the right half of the screen, then click the arrow pointing to the left. Modifiers can be applied to both the front and back of the press sheet.

Modifiers are used in press selection. If you add a modifier, and the press you are expecting to use does not have any values assigned for this modifier, that press is not selected.

Inks Tab

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London Review ...

File Changes Refresh Master Data Help

Print Order Entry

Job Header

Sub Jobs

- Soft Cover
 - Soft Cover/Soft Cov
- Insert
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP
- Sections
- Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02

Text 48 - Inks

Header PrePress Paper Modifiers Inks Select Press Section Finishing

No. Pages: 48

Select From Ink List

- Aqu. Spot
- Aqueous
- Blk
- Cyan
- Dull Varn
- Gloss Varn
- Magenta
- Metalic
- PMS-1
- PMS-2
- PMS-3
- PMS-4

OR Select From Ink Templates

Black Ink Only

Front **Back** Colors: 1/1

Coverage: Light Coverage 200 % Cov.: 25.00%

No. Colors: 1 Plate Type: Metal Extra Plates: 0

Selected Colors:		Actual Colors:	
Ink Color	% Coverage	Actual Ink Color	% Coverage
Blk	0.00%	Blk	0.00%

Sheeted off this press ☐

Bleeds ☐

Work and turn ☐

Dutch cut ☐ Num. First M/Rs: 1

Main Run Delete Re-run Add Re-run Close

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

The inks, coverage, and plate types populate from *Book Estimating*. You can edit any of these in this screen. These were set up in Master File Print, Ink Coverage and Master Files Book Ink Templates.

Coverage – the coverage selected is displayed here. To select a different coverage, click the arrow and select a different ink coverage.

% Cov. – displayed is the percentage for the ink coverage description that was selected. It is linked to the description selected and cannot be changed here.

No. Colors – displays the total number of colors for the front or back of press sheet.

Plate Type – the plate type defaults if it was setup in the template selected. To select the plate type or choose a different plate type, click the arrow and select the desired type.

Extra Plates – if there are version or plate changes on this section, you can enter the number of plates to change on both the front and back of the press sheet for this section. Note if there are multiple runs of this section, the extra plates are multiplied by the number of runs to determine the total number of extra plates needed.

Selected Colors – the ink colors selected for this section are displayed here. To add additional colors to this list, click the desired ink color under the ink listing on the left side of the screen and then either double-click to select or click the arrow pointing to the right. You will see the ink added to the active ink colors for the section. To remove inks, click the ink color to remove and then click the arrow pointing to the left. The ink color is deleted from the active list.

Actual Colors – this is used for orders only. If you are entering an estimate, nothing is required here. For orders, you can key in the actual ink color. This prints on the Work Ticket in the **Inks** area for each section.

% Coverage Selected Colors – this field is used as a manual override to the percentage coverage for this ink. By default, the system takes the total ink coverage and divides by the number of inks on each side of the sheet to calculate the coverage by ink. Example, if the coverage is 25% and there are 2 colors, then each color calculates at 12.5% coverage. If you wanted one ink to calculate at 15% and the other to calculate at 10%, you would manually enter the percentage for each ink, and costs would be based on those coverages.

% Actual Ink Coverage – optional, if you enter percentages in these fields, the system calculates the number of pounds of each ink needed for the job. This is used for order entry only.

Work & Turn – this is not functional in Signature-based Book Estimating. All templates are set up in Master Files Signature.

Dutch Cut – this is not functional with Signature-based Book Estimating. Templates are set up in Master Files Signature.

Num. First M/R's – displays the number of initial press make-readies for this section. If you zero out this number, the system will not calculate an initial press make ready. It will only calculate plate make-readies for the press.

Bleeds - select if this piece bleeds, meaning ink extends beyond the trim.

Sheeted off this press – displays that this run is sheeted off the press.

Add Rerun - See more on this after the 'Select Press Tab' section.

Select Press Tab

This populates from *Book Estimating* and can be edited here. The press estimated in Book Estimating for this section displays. You can edit from this screen the number up, number out, paper size, and roll widths. If you do overrides in any of these areas, be sure to use the paper size lock to hold your changes.

The screenshot shows the 'Text 48 - Select a Press' dialog box. The 'Front' radio button is selected. The 'Press Type' is set to 'Web'. The 'Section Qty.' is 5,050. The 'Press' is 'Timson 38'. The 'Perfect' checkbox is checked. The 'Trim Size' is '6 x 9'. The 'Number Up' is 1. The 'Press Size' is '37.5 x 38'. The 'Number Out' is 1. The 'Paper Size' is '37.5'. The 'Roll Width' is '37.5'. The 'Paper Size Lock' is checked. The 'Find Press' button is visible. The 'Main Run' button is also visible. The 'Delete Re-run' and 'Add Re-run' buttons are at the bottom right. The 'Close' button is at the bottom right.

Front or **Back** radio buttons indicate which side you are viewing, if this is a work-and-turn form or web press run, the **Back** button is not active.

Press Type - to edit the estimated press type, make a different selection from the drop-down menu. Note that your paper choice must be compatible with this press type.

Section Quantity - the job quantity defaults here but can be overridden. IF you override here, the additional quantity is run on the press, but will not flow into the bindery operations.

Press - you can manually override the press by clicking the arrow and selecting another press from the listing. The presses available to select are driven by the Press Type.

Note if you manually override the press, you should not click **Find Press** as this tells the engine to go out and find a new press, not necessarily using the one you selected.

After selecting the press, close this screen, and when you do a full calculation (click the calculate icon (4th from right at the top of the toolbar), the press you selected is used if it physically can be used. If not, you will see a 'no signature combination found' error box.

Perfect - if this check box is selected, then the template is set to perfect. You can change the section from perfect to sheet wise by clearing check the box and clicking **Find Press** again.

Trim Size - the trim size as entered in estimating defaults here and can be overridden.

Number up - the number of finished pieces up on the press sheet displays here, as calculated in Book Estimating. User may edit by entering a different number here.

Press Size - the press sheet size as calculated in Book Estimating. User may edit by entering a different press sheet size here.

Number Out - this is the number of Press sheets that are calculated to be cut out of a parent sheet.

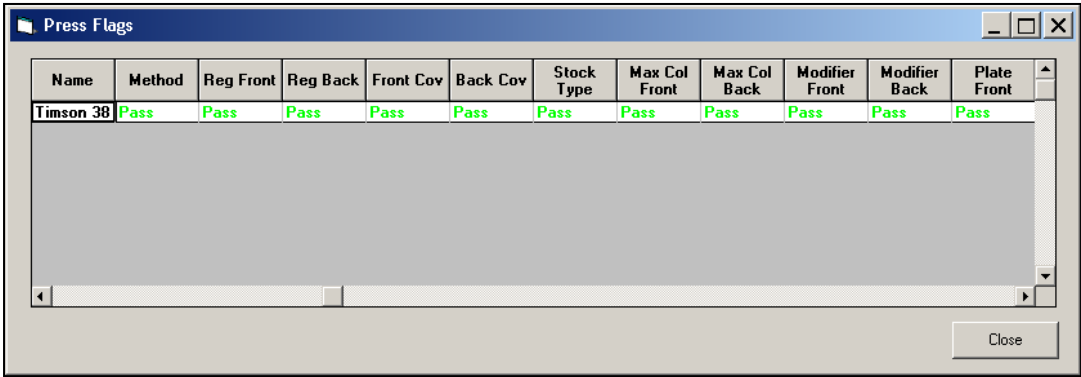
Number Up - is the number of finished pieces on a single press sheet.

Paper Size - this is the Parent Paper size. Users may edit by selecting a different paper size FROM THE DROP-DOWN selections only.

Paper Size Lock – select this and the paper size you entered will not change during recalculation.

Find Press - if you are happy with the estimated choice, or have overridden this choice with a press you want the system to use, DO NOT click the **Find Press** button. *If you click **Find Press** here, the program will disregard all information regarding related sections for common book block considerations, and SHOP for a different press for THIS SECTION ONLY.* Use this with care. It will also disregard any overrides you have entered for press selection, It literally tells the system to GO OUT AND FIND A PRESS, and the results may not match the Book Estimating selection.

PF – if the system does not find a press, you can click this button to see a pass/fail (or Press Flags) chart for each press. This helps you to troubleshoot the problem. Note that this option is not available if you do not use the **Find Press** button.



Name	Method	Reg Front	Reg Back	Front Cov	Back Cov	Stock Type	Max Col Front	Max Col Back	Modifier Front	Modifier Back	Plate Front
Timson 38	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass

Reruns

If additional runs have been specified in Book Estimating the reruns will pull in automatically, you may edit here.

Functionality: A Rerun is defined as an additional pass through the press. You do not need to use this unless you want to dictate how many passes and how many colors are used for each run. The engine automatically calculates simple number of runs for the number of inks you enter.

Example: If you have 8 colors, and a 4 color press, it calculates 2 passes to accommodate the 8 colors, using both runs on the same press.

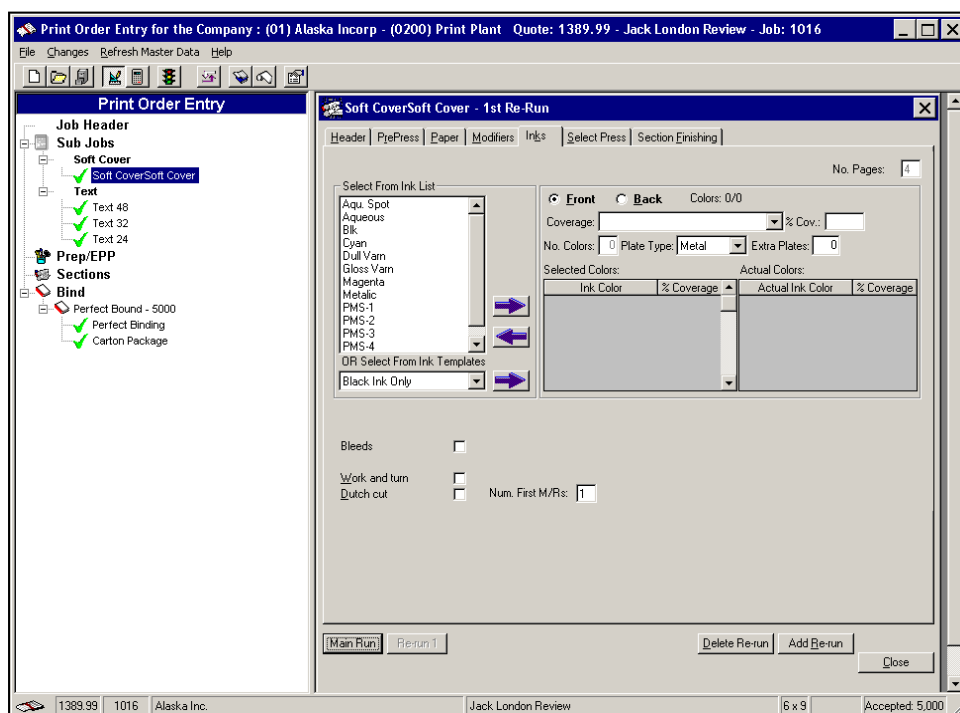
The **Add Rerun** function allows specific control over which press, which pass, and which inks are used for each rerun, including the ability to run a sheet that has been cut down from the original run size.

This is useful when a dry trap varnish is desired, or a metallic as a separate run, OR when a larger press sheet has been trimmed down and gets different imprints after lamination.

By design you do not change or add paper in this area, you are dealing with the paper already printed or passed in the original (MAIN).

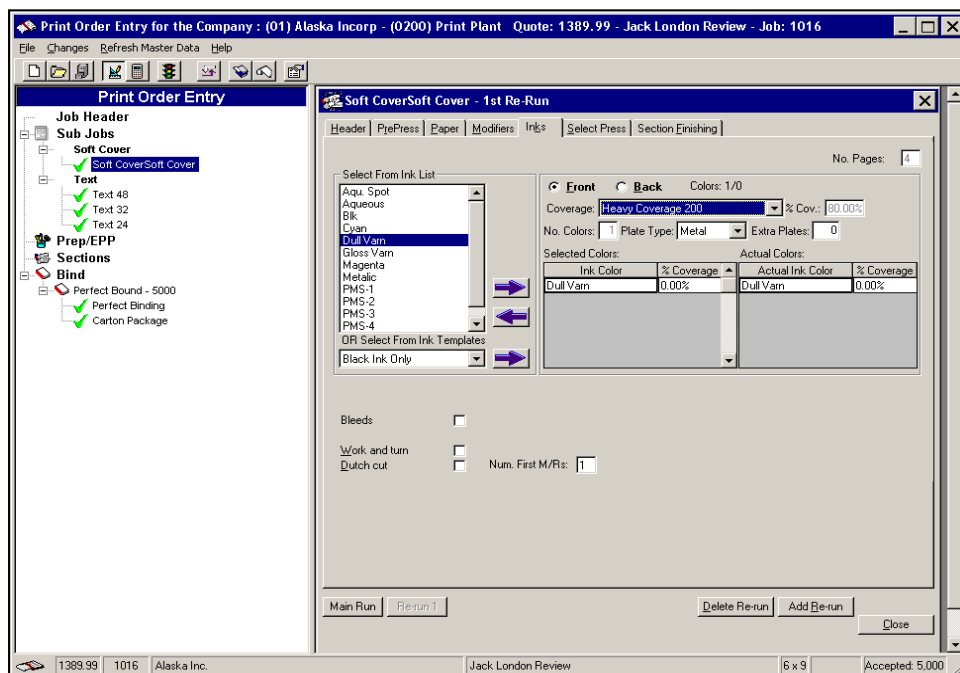
Adding Reruns

To add a rerun, select the **Add Rerun** button, which takes the user to the Inks screen.

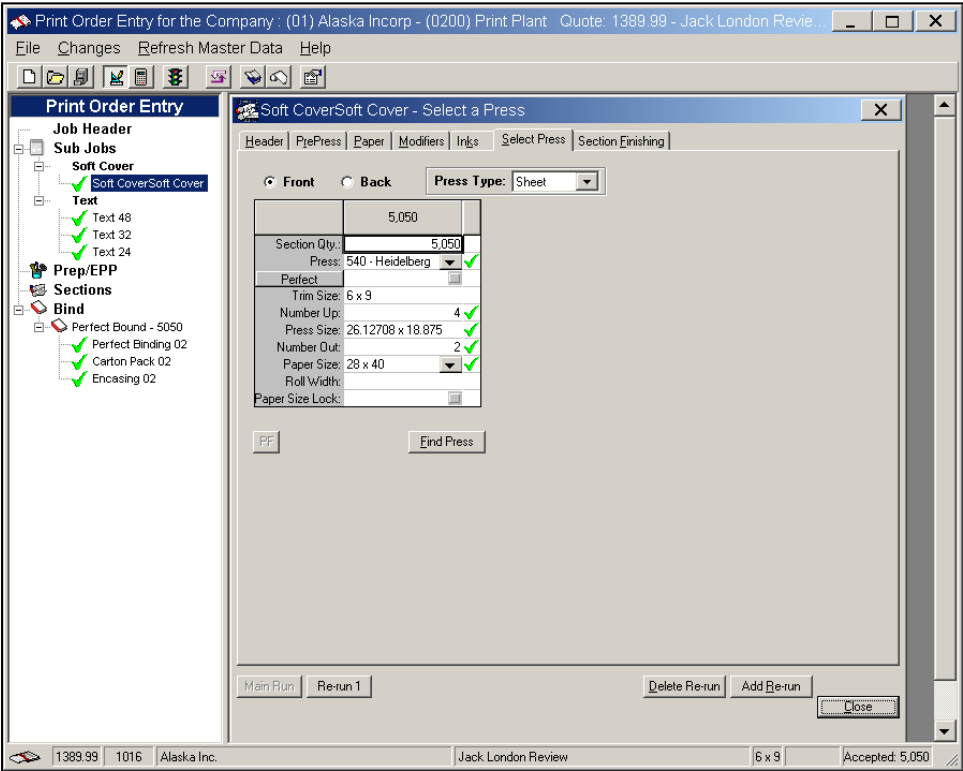


Here you can select any inks you want on this pass of the cover, assign plate type and coverage.

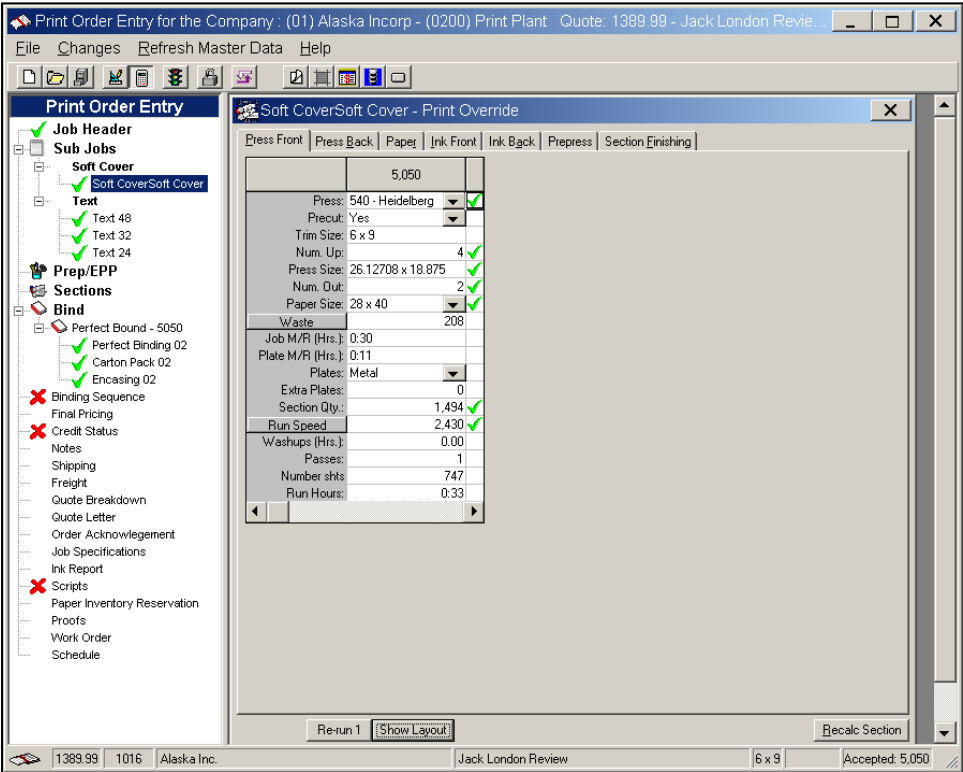
This shows the gloss varnish has been selected as a separate pass through the press, instead of being applied in line with the ink.



Selecting the **Press** tab defaults to the press used in the Main run.



This shows you can change for the varnish to be applied to any press you choose that can accommodate the size and template.

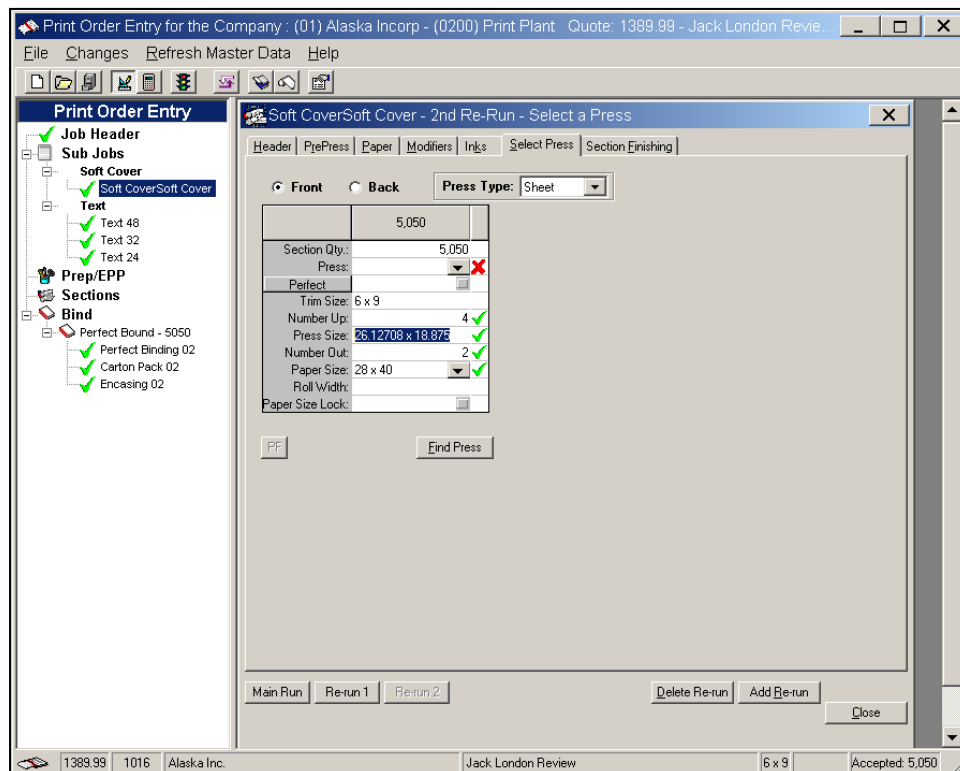


If you then want to do another pass through the press, you can **Add Rerun** again. Up to 6 reruns can be accommodated. Select **Add Rerun** again for each additional rerun needed.

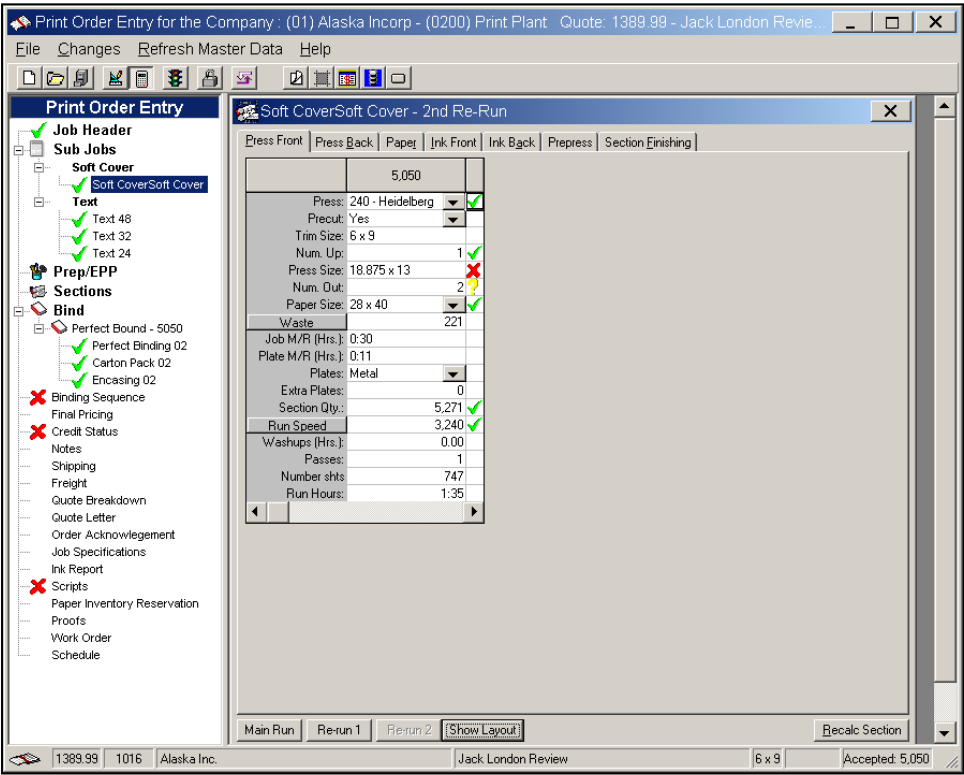
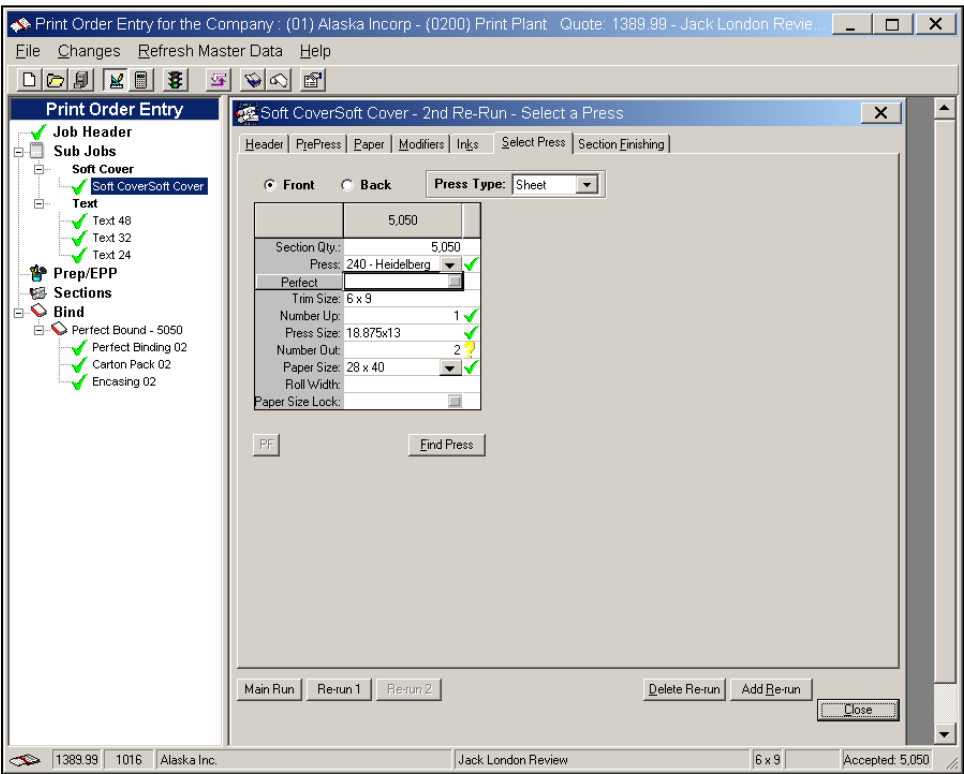
To cut to a smaller press size and rerun through the press

1. Select **Add a Rerun**.
2. Go to the Inks screen as describe.
3. At the **Select Press** tab, you can edit the press size and number up.

Note The default press is the press used in the Main Run screen and displays no press if this is what is used.



This next screen shows a different press was forced, with different number up and press size:



This did calculate as running the smaller sheet size on the 240, but is showing you this press was not set up in Master Files Print to take this small of a sheet.

The buttons on the left show you which rerun you are working with, as the current selection is the only one grayed out.

- To delete rerun, click the **Delete Rerun** button.

Section Finishing Tab

Section Finishing processes estimated in Book Estimating displays here and can be edited or deleted.

Section Finishing Definition: a finishing process that occurs on a single section, like folding text, or laminating a cover.

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London ...

File Changes Refresh Master Data Help

Print Order Entry

Job Header

Sub Jobs

Soft CoverSoft Cover

Text

Text 48

Text 32

Text 24

Prep/EPP

Sections

Bind

Perfect Bound - 5050

Perfect Binding 02

Carton Pack 02

Soft CoverSoft Cover - Section Finishing

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Selected Section Finishing Processes:

Film Laminate 02

Trim-No Bleed 02

Scripts Delete

Scripts	Component	Quantity
Film Laminate 02	Component Finishing	5,050
Run Quantity:		5,050
Number Up:		4

Available SF Processes:

Description

Board Slitting 02

Casemaking 02

Cloth Slitting 02

Diecut Buvoat 02

Additional M/R Time

Additional M/R Waste

Additional Run/Waste %

Fold and Glue Inline

Folder Helper

Perf and Fold

Speed Reduction %

Modifiers

Quantity

☐ Suppress Non Valued Modifiers for the Section Finishing Process

Main Run Delete Re-run Add Re-run Close

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

Selected Section Finishing Processes – these populate from *Book Estimating*, you can add or delete section finishing processes here. When you highlight the process, you will see the run quantity and number up for that process. Both the run quantity and number up can be overridden for each quantity on the estimate/order.

Delete – to delete a Section Finishing process, click the process to highlight it, and then click delete.

Scripts - if scripts were attached to Section Finishing processes in Master Files Print, they are here to be answered. If they are mandatory scripts, answers are required.

Available SF Processes – this displays a listing of all Section Finishing Processes. You can search for a process by typing in part of the process name or scrolling through the listing to locate the process. To select the process, double-click it.

Run Quantity - the job quantity defaults here. You may edit if the entire run does not get this section finishing process.

Number Up - the default number up for the section finishing process in Master Files Print defaults here. Users may edit.

Modifiers - highlight and right arrow to select, left arrow to deselect. These work the same way as press modifiers to impact run speeds, waste, and set up times. Modifiers are set up in Master Files Print.

Quantity - tells how many modifiers to apply.

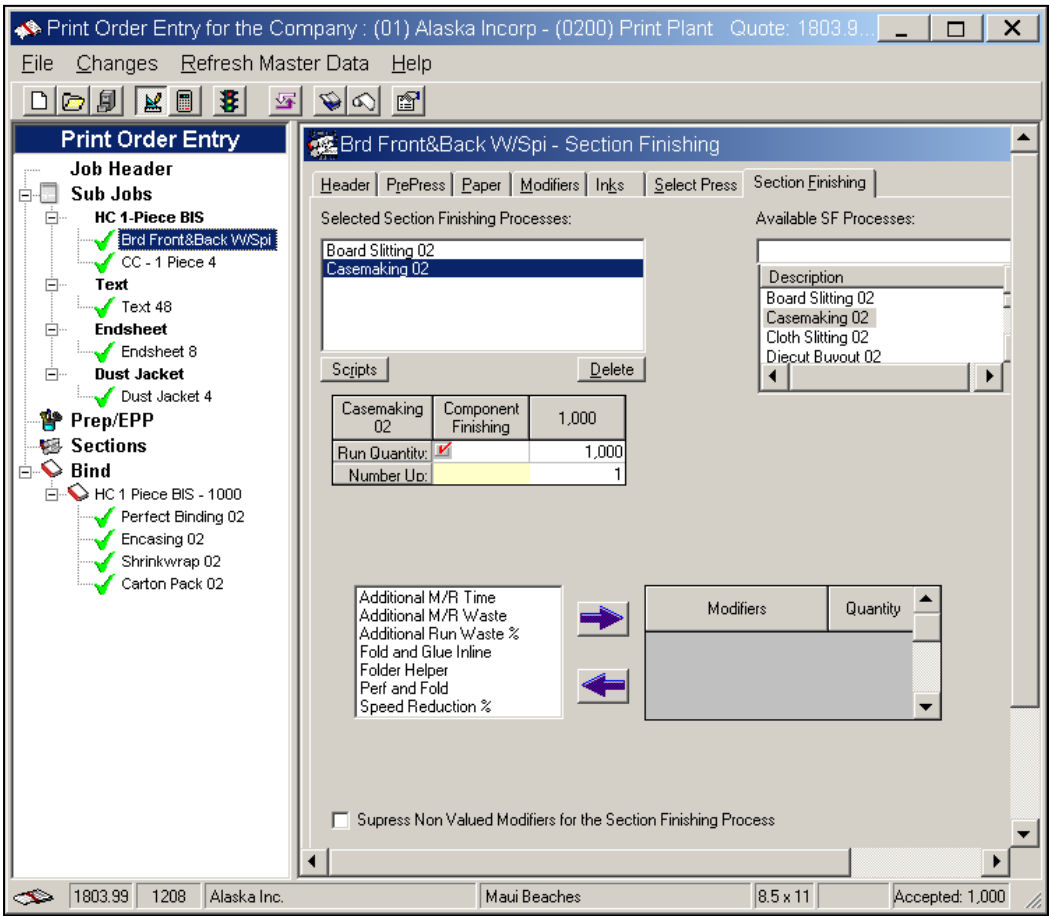
Adding Section Finishing processes to Reruns:

Select which rerun that needs Section Finishing processes added. Then select the section finishing process for that rerun as described for Main run. Example would be, trim a press sheet from 8 up to 4 up, then send through a smaller press for an imprint.

Component Finishing

Definition: A finishing process that occurs on more than a single section, but not on all sections. Example, cover cloth and binder boards that create a case, then go through the foil stamping process. Time charged to the foil stamper needs only be applied once, but the waste associated with that stamping run would be associated with both the Cover Cloth and Binder Board sections. See more on this in the Book Estimating User Guide.

To use a component finishing process, you add the process as a section finishing process to all the sections affected and select the Component finishing box.



This shows the input for cover cloth and binder boards to both receive waste allocations for the casemaking set up and run, but time only applies to the first section.

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1803.9...

File Changes Refresh Master Data Help

Print Order Entry

Job Header

Sub Jobs

- HC 1-Piece BIS
 - ✓ Brd Front&Back W/Spi
 - ✓ CC - 1 Piece 4
- Text
 - ✓ Text 48
- Endsheet
 - ✓ Endsheets 8
- Dust Jacket
 - ✓ Dust Jacket 4

Prep/EPP

Sections

Bind

- HC 1 Piece BIS - 1000
 - ✓ Perfect Binding 02
 - ✓ Encasing 02
 - ✓ Shrinkwrap 02
 - ✓ Carton Pack 02

CC - 1 Piece 4

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Selected Section Finishing Processes:

Casemaking 02

Available SF Processes:

Description

Board Slitting 02

Casemaking 02

Cloth Slitting 02

Diecut Buyout 02

Scripts Delete

Casemaking 02	Component Finishing	1,000
Run Quantity:	✓	1,000
Number Up:		1

Additional M/R Time
Additional M/R Waste
Additional Run Waste %
Fold and Glue Inline
Folder Helper
Perf and Fold
Speed Reduction %

Modifiers Quantity

☐ Suppress Non Valued Modifiers for the Section Finishing Process

1803.99 1208 Alaska Inc. Maui Beaches 8.5 x 11 Accepted: 1,000

Customer Supplied Sections

If a customer supplied section was included in Book Estimating, it auto populates here. You may edit if desired.

Set up is required for Customer Supplied sections in Master Files Book.

Definition: Sections that the customer furnishes that can be bound into the book, or added to the finished book. These cannot have prepress or printing processes, but can have bindery processes. Examples: customer furnished inserts to be trimmed, folded, and bound into a book, or customer furnished CD sleeves. Even if no processes occur with these sections, we need to add them to include the bulk and weight for carton selection and freight calculations.

To add a customer furnished section, select the **Customer Furnished** icon, far right in the tool bar across the top, while in edit mode. This screen opens:

Header Tab

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack ...

File Changes Refresh Master Data Help

Print Order Entry

- Job Header
- Sub Jobs
 - Soft Cover
 - Soft CoverSoft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP
- Sections
 - Section 5
- Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - Encasing 02

Supplied Section Details

Header Section Finishing

Section Title: Section 5 Section Type: S - Supplied

Subsection Type: Subsection Type Trim Size: 6 x 9

☐ Include in PC

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack ...

File Changes Refresh Master Data Help

Print Order Entry

- Job Header
- Sub Jobs
 - Soft Cover
 - Soft CoverSoft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP
- Sections
 - Section 5
- Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - Encasing 02

Supplied Section Details

Header Section Finishing

Section Title: CF Book Club insert Section Type: S - Supplied

Subsection Type: Subsection Type Trim Size: 6 x 9

ES - End Sheet
IN - Insert
MB - Mechanical Cover Back
MC - Mechanical Cover Common
MF - Mechanical Cover Front
NP - Supplied Non-Printed
SC - Soft Cover
TX - Text

Section Title- enter the name of this customer supplied section. This prints on the Work Order and should help the plant to identify.

SubSection Type- select the sub section type for Customer supplied items you created in Master Files Book.

Section Type - defaults to Supplied.

Trim Size - defaults to trim size of the finished book.

Include in PC- whether this is included in the page count or not, this changes the number of total pages in the book as displayed on work order, invoice and quote letter if selected. **This will NOT automatically add pockets in binding processes.**

No of Pages - total number of pages. For a CD sleeve, enter 2 (front and back each comprise one page, so one sheet counts as 2 pages).

Sheet Size - furnished size. In this example the press sheet size. If any section finishing is to occur, i.e., cutting out cards from a parent sheet, you will always enter the press sheet size here.

Bound as - for a folded piece, like an insert, enter the number of binding runs this item have. Example, if it is a 16-page insert that will cut in half and fold as two 8-pg inserts, enter two (2).

Basis Type- select from the drop-down menu.

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack ...

File Changes Refresh Master Data Help

Print Order Entry

- Job Header
- Sub Jobs
 - Soft Cover
 - Soft Cover/Soft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP
- Sections
 - Section 5
- Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - Encasing 02

Supplied Section Details

Header Section Finishing

Section Title: CF Book Club insert Section Type: S - Supplied

Subsection Type: SC - Soft Cover Trim Size: 6 x 9

☒ Include in PC

Number of Pages: 8

Sheet Size: 19 x 25

Bound as: 1 sigs.

Number Up: 2

Basis Type: A-Book

Basis Weight: A-Book

PPI: B-Writing

Item #: C-Wrap

Inventory Code: D-Cover

Inv. Description: E-P.Bristol

Date on Hand: F-Index

Section Qty: 5,050

Save

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

The screenshot shows the 'Print Order Entry' application window. The title bar reads 'Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack...'. The interface is divided into two main panes. The left pane, titled 'Print Order Entry', contains a tree view with the following structure: 'Job Header' (checked), 'Sub Jobs' (checked), 'Soft Cover' (checked), 'Text' (checked), 'Prep/EPP' (checked), 'Sections' (checked), and 'Bind' (checked). The right pane, titled 'Supplied Section Details', contains the following fields: 'Section Title' (CF Book Club insert), 'Section Type' (S - Supplied), 'Subsection Type' (SC - Soft Cover), 'Trim Size' (6 x 9), 'Include in PC' (checked), 'Number of Pages' (8), 'Sheet Size' (19 x 25), 'Bound as' (1 sigs), 'Number Up' (2), 'Basis Type' (A-Book), 'Basis Weight' (80), 'PPI' (0045), 'Item #' (with 'List...' and 'New...' buttons), 'Inventory Code', 'Inv. Description', 'Date on Hand', and 'Section Qty' (5,050). The 'Basis Weight' field is highlighted.

Basis Weight- the basis weight of the paper used for this piece.

PPI-Pages Per inch, 1 sheet equals 2 pages.

Item # - if this has an inventory item number, enter it here. To see the list of customer items entered in your inventory system, click the **List** button. If you see this item, you can select it and it populates here. If it does not exist and you wish to add it, click the **New** button, and you are taken to an area to enter as a new inventory item.

Inv Code and Inv Description - populates when an inventory item is assigned or selected.

Date on hand - this is when this item is expected and is useful for scheduling and receiving. You do not HAVE to enter an inventory item for customer furnished material, but to track, issue, and receive in the system, the information must be entered.

Section Quantity - defaults to the job quantity. You can enter a different quantity here when less than the job quantity receives this customer supplied item.

Section Finishing Tab

Add any section finishing processes by selecting them from available processes on the right.

Note These need to be entered in the order they occur in production for allocations to be correct.

Print Order Entry

File Changes Refresh Master Data Help

Print Order Entry

- Job Header
- Sub Jobs
 - Soft Cover
 - Soft CoverSoft Cover
 - Text
 - Text 48
 - Text 32
 - Text 24
- Prep/EPP
- Sections
 - Section 5
- Bind
 - Perfect Bound - 5050
 - Perfect Binding 02
 - Carton Pack 02
 - Encasing 02

Supplied Section Details

Header Section Finishing

Selected Section Finishing Processes:

- Trim-No Bleed 02
- MBO Fold 02

Scripts Delete

	5,050
Run Quantity:	5,050
Start # Up:	1
End # Up:	1

Additional M/R Time
Additional M/R Waste
Additional Run Waste %
Fold and Glue Inline
Folder Helper
Perf and Fold
Speed Reduction %

Modifiers Quantity

Available SF Processes:

- MBO Fold 02
- Outside Print - Buyout 02
- PreTrim 02

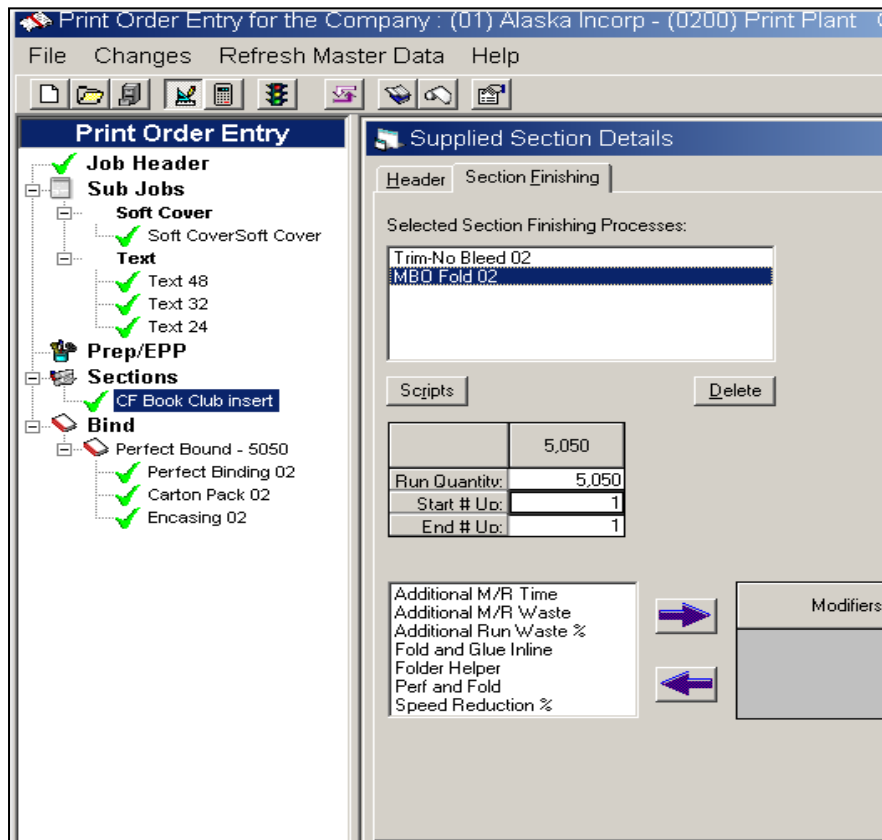
Save

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

Run Quantity - pulls in what you entered on the previous page, or defaults to the job quantity.

Start # up- and End # up - can be edited. These pull in the default settings based on the setup for each process in Master Files Print.

Once you **Save** the changes, the section title reflects the name you gave it.

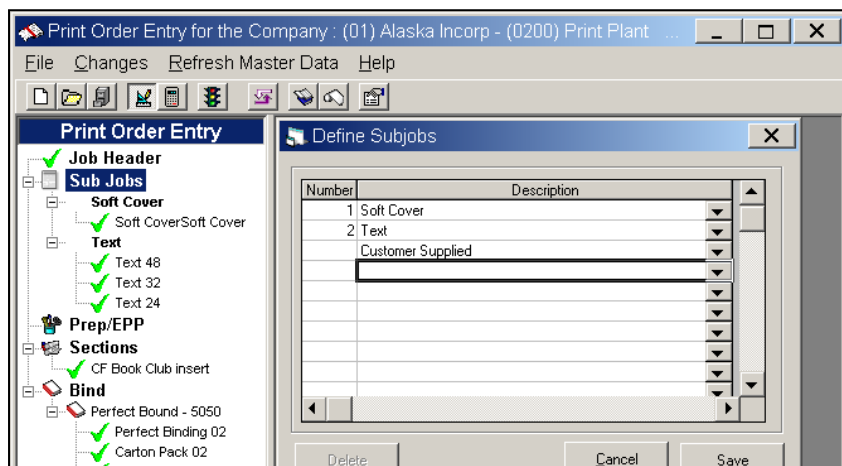


You still need to associate this new section to a sub job. If it is treated like a text section, a bound insert, you may opt to add it to the Text Sub or Insert sub job.

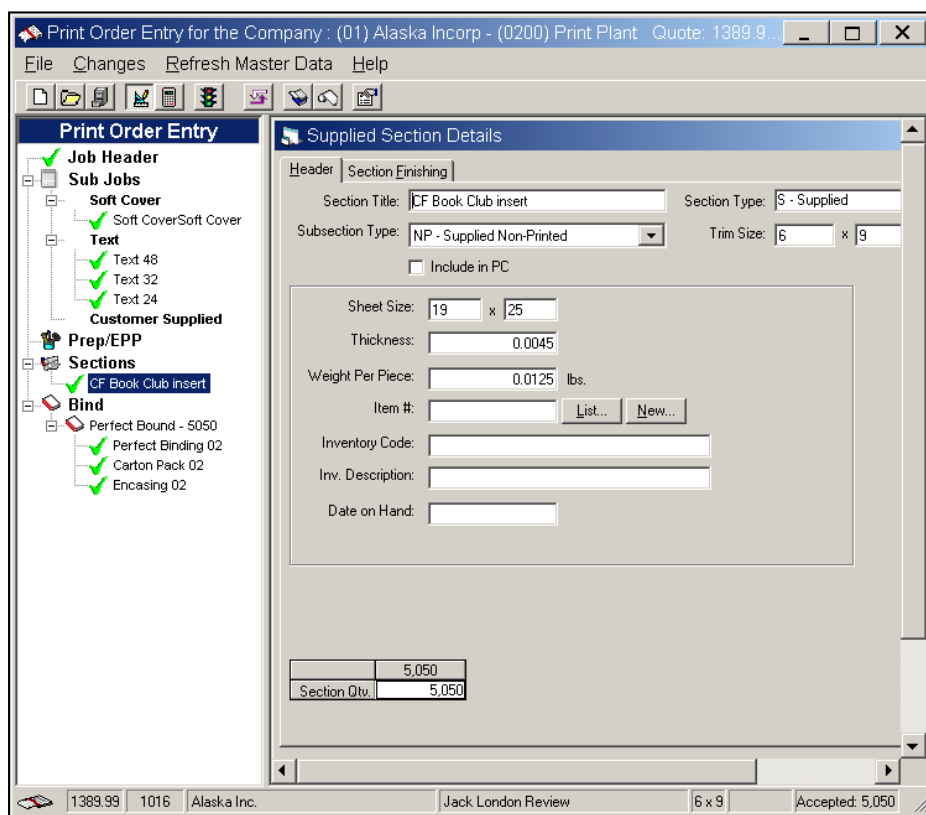
If it is a CD or other items not treated like text, you can create a separate sub job for customer supplied, and link the customer supplied item to the customer supplied sub job.

To create a new customer supplied sub job, select SUB JOBS from the menu on the left, then select your customer supplied sub job from the drop-down choices. This will have been set up in Master Files Book. Save when finished.

Sub Jobs - Adding

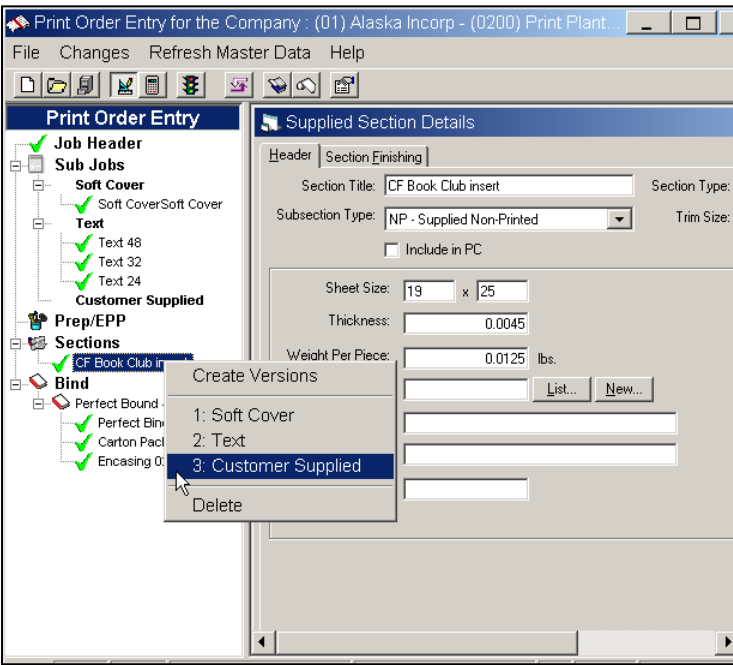


You will see the customer supplied sub job and the customer supplied section on the menu, and see they are not connected.

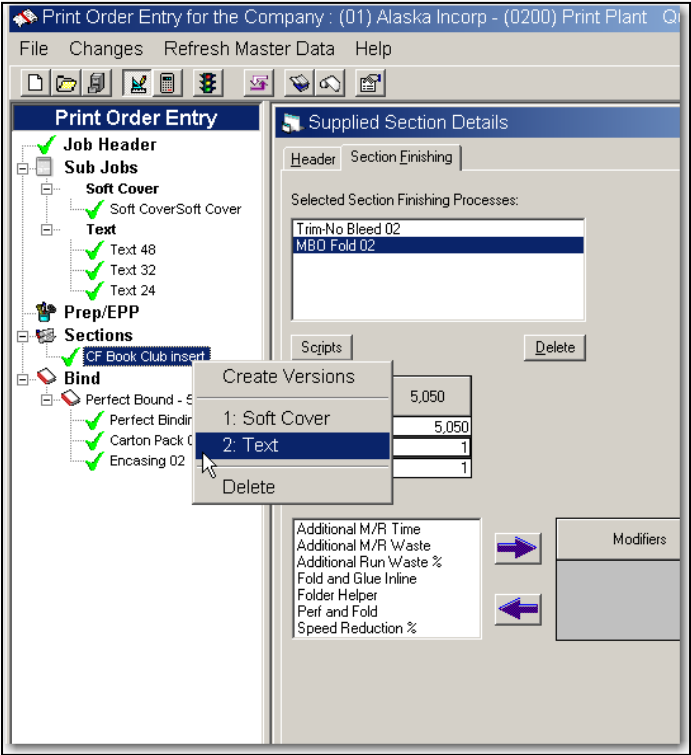


To link, highlight the section, right-click and select the sub job you wish to link to.

Note If you ADD a sub job, you will need to link it to a bind style for the job to calculate correctly.

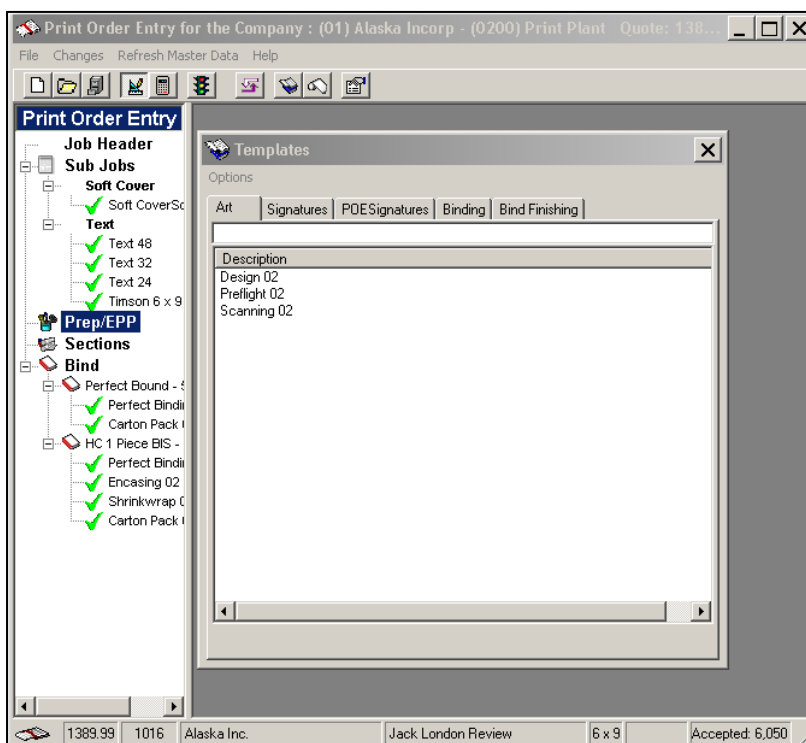


To link to the text section you do not add the sub job but link to the existing text section the same way.



Prep/EPP

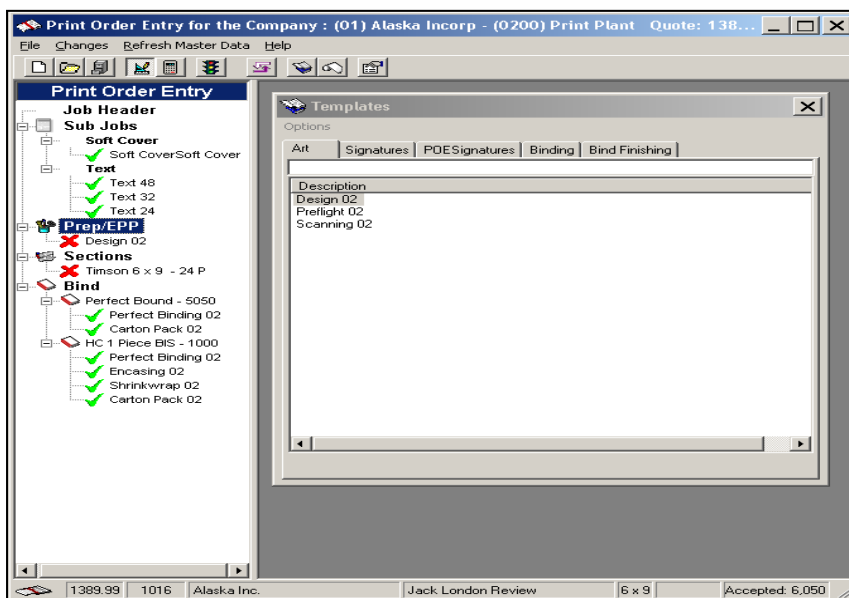
This populates automatically if used in Book Estimating, and can be added or edited here.



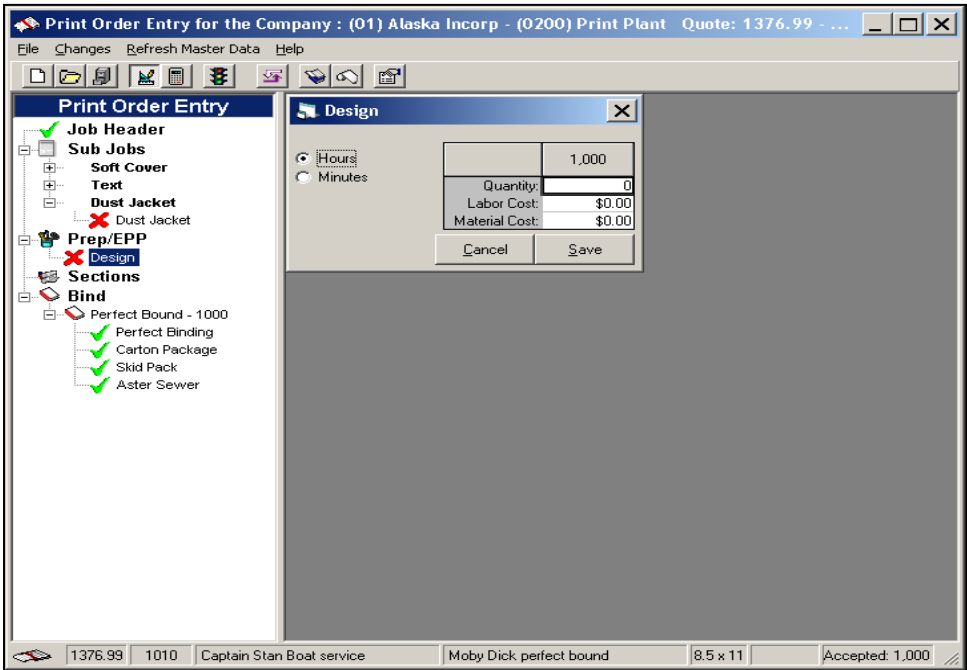
This area shows selected artwork processes for the estimate/job and can be used for processes you wish to schedule at the JOB level, not the SECTION level.

Examples are Planning and Preflight, or art creation such as Design. These processes are listed in the Template Box under **Art**.

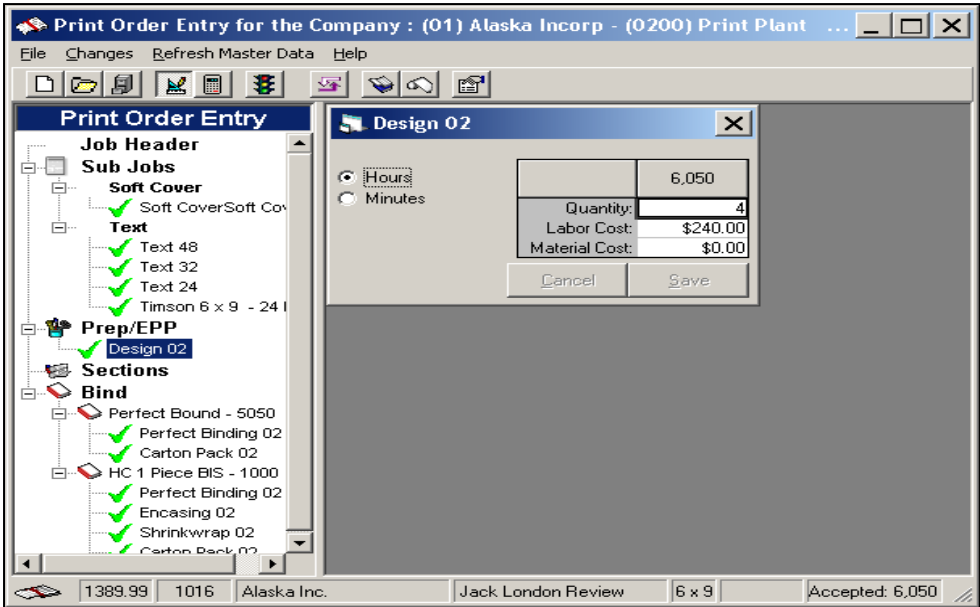
To select a process, highlight **Prep/EPP** in the tree then double-click the art processes that you want to add.



Double-clicking the process brings up this box for additional input:



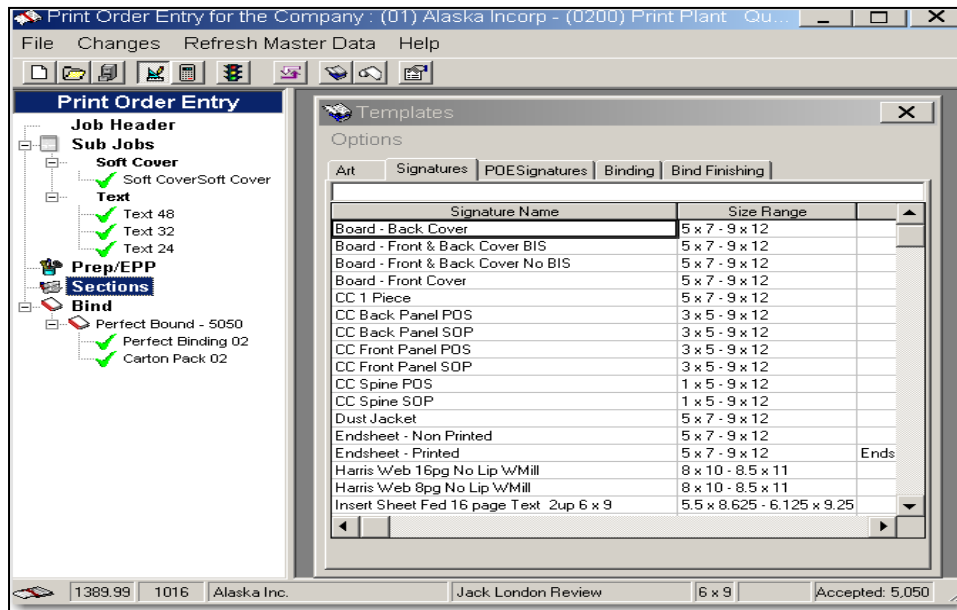
If the process displays with a red X, it means that additional information is required. Click the process in the tree, and you will see the art dialog box displayed. Enter in the pertinent information and click **Save**.



The red X changes to a green check.

Sections (from the menu)

These are not needed unless additions not included in the Book Estimate are added in Print Order Entry.



Art Tab

Displays the same processes as outlined Prep/EPP section of this document.

Signatures Tab

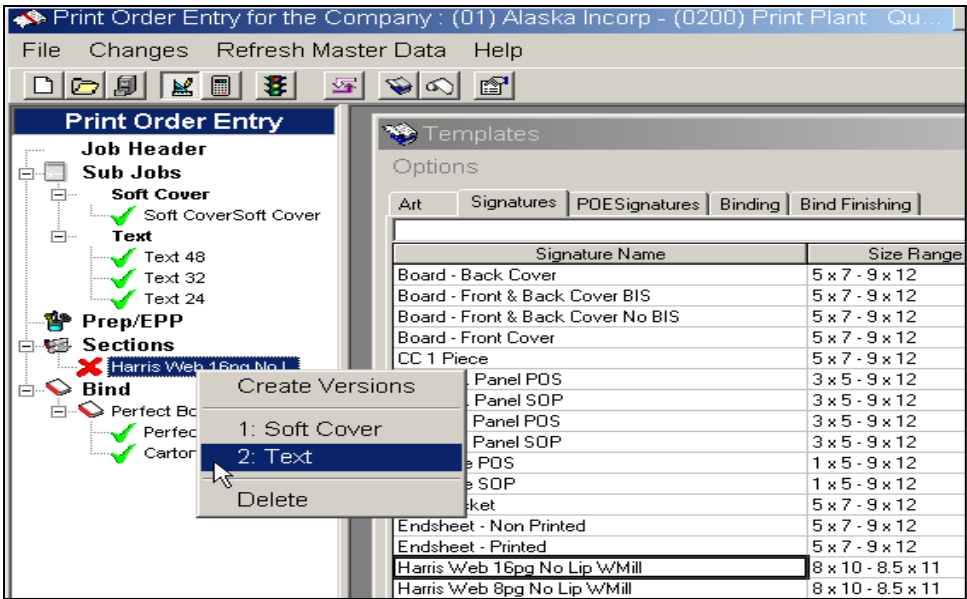
Displays all active Templates created in Master Files Signature not marked as POE only.

POE Signatures Tab

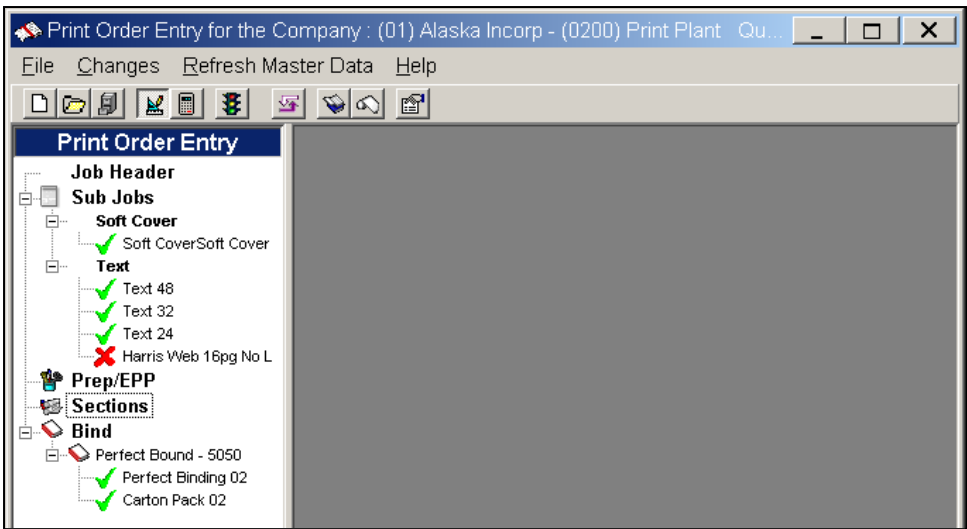
Displays all active template/signatures created in Master Files Signature marked as **POE only**. This allows non-standard templates to be used in production but not generally estimated.

When selecting section templates for a sub job, if the sub job is not highlighted, then the section template displays in this area. The section can be linked to a sub job by clicking to highlight the section description and right-clicking. Click the sub job name to which you want to link the section. Sections can also be deleted by clicking to highlight the section description, right-clicking and selecting **Delete**.

Note All section templates must be linked to a sub job. If there are any unlinked sections, you will receive an error message during calculation telling you that there are sections which are not linked to sub jobs.



To link the section to a sub job, right-click the section and highlight the sub job from the drop-down choices. Then this section displays listed under that sub job.



If the new section does **not** belong with any of your sub jobs, you will need to create a new sub job for the new section (see 'Adding Sub Jobs').

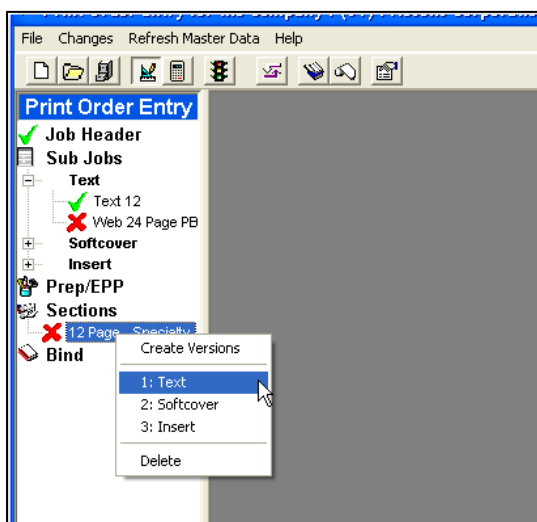
To select a different Template (section) than the one estimated, highlight the sub job on the tree to which this template belongs, and choose the Sections branch on the tree. This brings up all available templates, which were set up in Master Files Signature.

Options		
Art	Signatures	POESignatures
Binding	Bind Finishing	
Signature Name	Size Range	Combinations
Printed Endsheets - Specialty	1 x 1 - 15 x 18	2-2 pg endsheets
Printed HC	1 x 1 - 15 x 18	
Softcover - Concealed Specialty	1 x 1 - 20 x 20	
Softcover - Foil Stamp 1 up	1 x 1 - 15 x 18	
Softcover - Regular	1 x 1 - 20 x 20	
Softcover - Saddle	1 x 1 - 30 x 30	
Softcover - Saddle (Large Sizes)	13 1/2 x 12 - 30 x 30	
Softcover - Specialty	1 x 1 - 20 x 20	
Unbound 2 Page Reply Card	1 x 1 - 15 x 18	
Unbound 6 Page Reply Card	1 x 1 - 15 x 18	3-2 page signatures
Web 16 Page PB	1 x 1 - 9 x 9 1/4	
Web 16 Page SEW	1 x 1 - 9 x 9 1/4	
Web 24 Page PB	1 x 1 - 6 1/4 x 9 1/4	
Web 24 Page SEW	1 x 1 - 6 1/4 x 9 1/4	
Web 32 Page PB	1 x 1 - 9 x 9 1/4	
Web 32 Page SEW	1 x 1 - 9 x 9 1/4	

To select, double-click and then enter data on all the following screens (paper, prepress, etc).

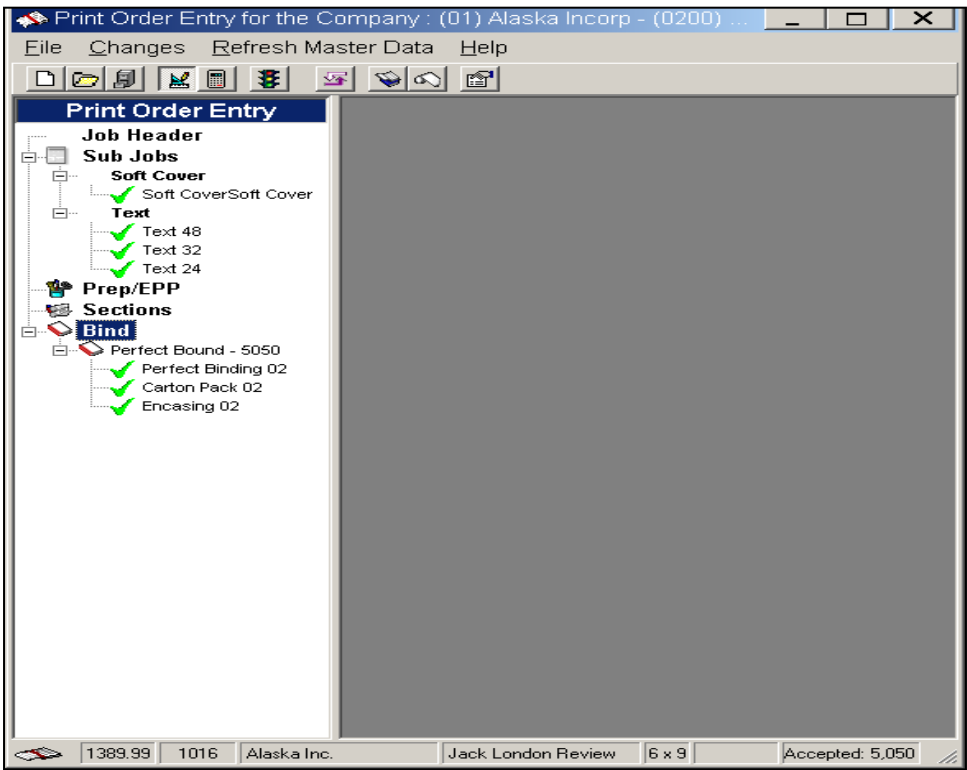
Once you have entered the new section/template under the sub job, you can delete the section you wanted to replace.

Alternatively, you can enter the section with all the following information without linking it to a sub job until you have finished the input, then the new section displays under the **Sections** branch. To associate the section to a sub job, highlight the section, right-click and select the appropriate sub job.



Binding Tab

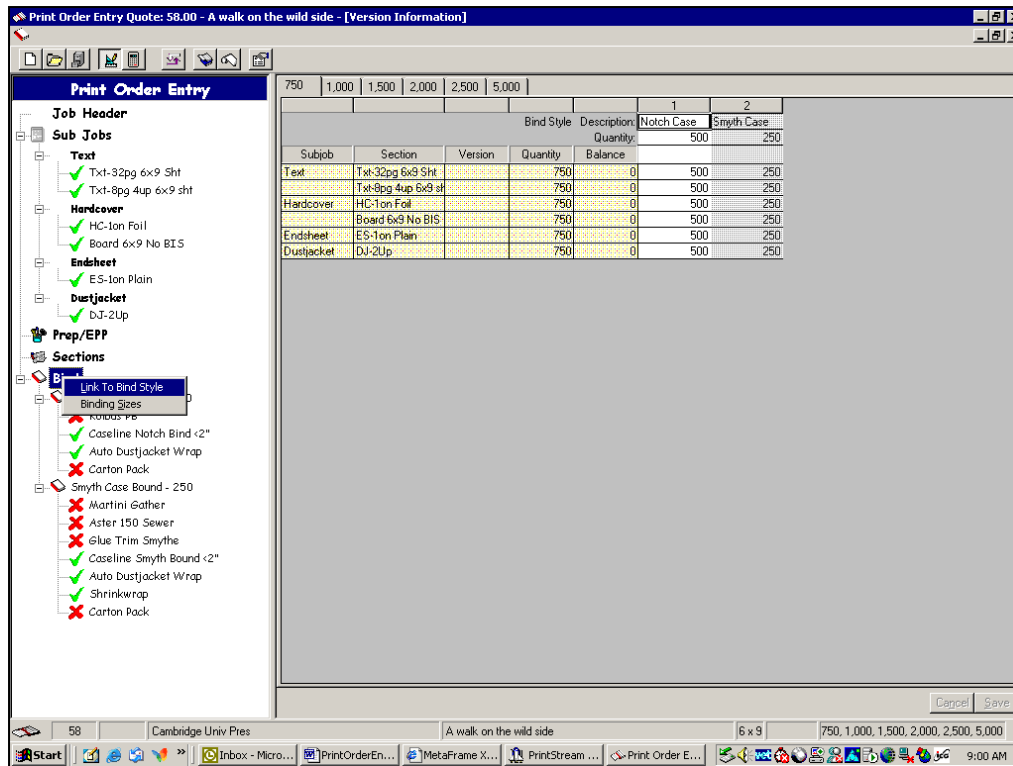
The binding processes from Book Estimating auto populates. You may delete or edit here.



Right-click the **Bind** tab to access the link to bind style and binding sizes areas.

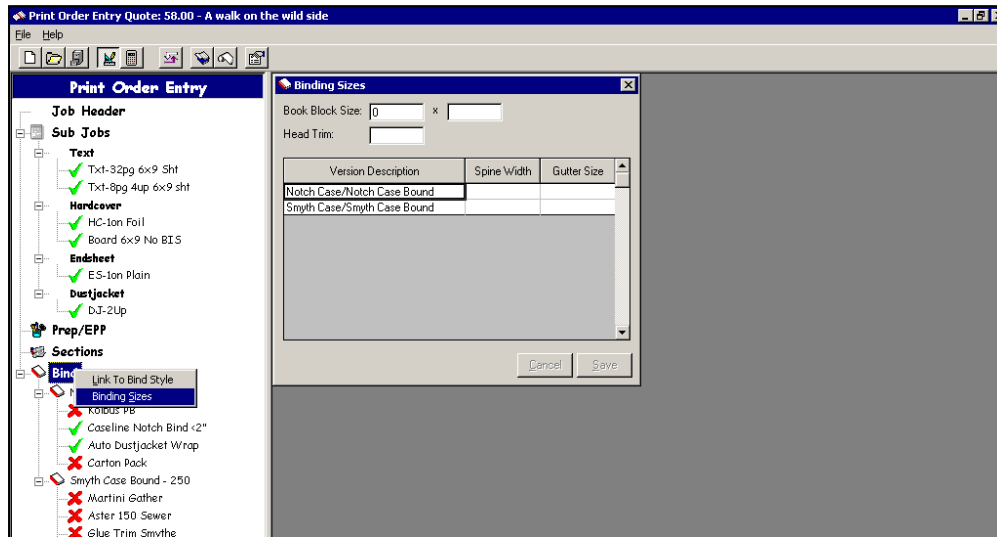
Bind

Link to Bind Style



To access this screen, click **Bind** in the tree to highlight it, then right-click and select **Link To Bind Style**. If the estimate/order has only one bind style, it is not necessary to come into this screen since all sections are automatically linked to that bind style. If more than one bind-style is specified, you will see a column for each bind style. By default, the split-bind quantities display in both columns. If the section listed does not go to both bind styles, click the column and row for that section and enter "0". After making your changes, click **Save**, and the program automatically adjusts the quantity on each section according to the quantities displayed in this screen.

Binding Sizes

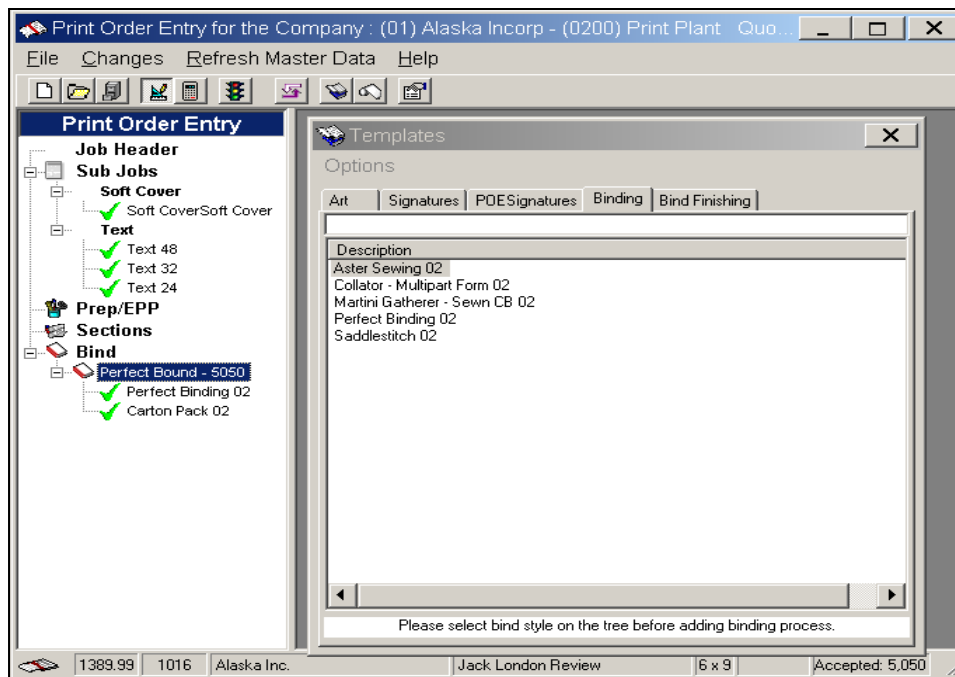


To access this screen, click **Bind** to highlight it then right-click and select **Binding Sizes**. This screen is used for order entry purposes only. All of the information entered in this screen prints on the Work Ticket in the Bind Sizes area.

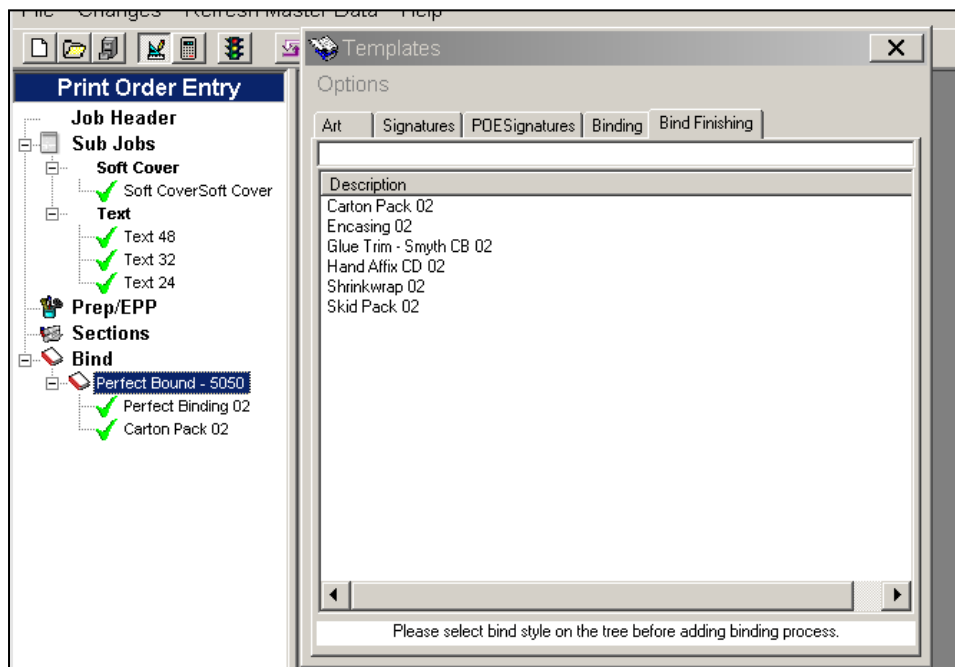
Note If more than one bind style is specified, you can enter the spine width and gutter size for each bind style separately.

Re-Sort Binding Processes – this screen allows you to change the bindery process sequence.

Binding Tab - used to add binding processes. Double-click the process you wish to add.



Binding processes refer to processes that use pockets and have to do with putting the book together. You need only do this if this sub job needs additional Binding processes for the job.



Binding Finishing Tab

These processes auto populate from Book Estimating. You may add processes from here.

Binding processes apply to the Finished Product, not any specific section (example carton or skid packing). You could opt to have some finishing processes occur on some, but not all, of the finished product. To select, highlight the bind style to which this additional process is applied and double-click. The process displays on the tree. Open from the tree to add information.

Carton Packing - special logic exists in Book Estimating and Print Order Entry for carton and skid packing.

When you select carton packing, this screen opens:

The screenshot shows the 'Print Order Entry' application window. The title bar reads 'Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389 99 - Jack London Review - Job: 1016'. The main menu includes 'File', 'Changes', 'Refresh Master Data', and 'Help'. On the left, a tree view shows the project structure: 'Job Header', 'Sub Jobs', 'Soft Cover' (with 'Soft CoverSoft Cover' checked), 'Text' (with 'Text 48', 'Text 32', and 'Text 24' checked), 'Prep/EPP', 'Sections', 'Bind' (with 'Perfect Bound - 5050' checked), and 'Carton Pack 02' (highlighted). The 'Carton Pack 02' dialog box is open, showing the following fields and options:

- Qty. To Pack:** 5,050
- Packing Parameters:**
 - Max Carton Width: 12.75, Min Carton Width: 8.625, Max Skid Width: 52, ☒ Single Wall
 - Max Carton Length: 19, Min Carton Length: 8, Max Skid Length: 0, ☐ Double Wall
 - Max Carton Depth: 10.125, Min Carton Depth: 5.75, Max Skid Depth: 54, ☒ 200lb Burst Strength
 - Max Packed Weight: 45, Stacks Across Width: 0, Max Packed Skid Weight: 3000, ☐ 275lb Burst Strength
 - Min Fill Height: 0, Stacks Across Length: 0, Inhouse Breakdown: 9999999, ☐ Custom Printed
 - Additional Bulk Height: 0, Books Per Carton: 0, Custom Breakdown: 500, Force Carton: [dropdown]
 - Additional Book Weight: 0
- Buttons: 'Update Standards with Current', 'Cancel', 'Save'

The status bar at the bottom shows '1389 99 1016 Alaska Inc.', 'Jack London Review', '6 x 9', and 'Accepted: 5,050'.

What displays here is the carton packing profile for your plant; or if a customer specific packing profile exists, this is what is used in carton selection.

Best-fit logic is in place for cartons and skids based on formulas that are bind-style specific and set up in Master Files Book.

Update Standards with Current - if you believe a change in the packing profile may have occurred, select this option and the current profile is considered.

Burst Strength – from drop-down, 200lb or 275 lb. These are RSC standards.

Breakdown Quantity to use Custom Cartons – enter the quantity break for ordering custom cartons. If the number of Standard or In-house cartons on an estimate exceeds this quantity, it automatically calculates a custom carton based on the bind style and trim size of the book.

Note Custom cartons are always calculated regardless of the break point when there are no Standard or In-house cartons that fit the carton size calculated by the formula on the bind style.

Custom Printed - click **Yes** or **No**. **Yes** should be selected if default cartons are custom printed.

Breakdown Quantity to use In-house Cartons – if your facility has the ability to manufacture cartons, use this field to enter the quantity break for manufacturing In-house Cartons. If the number of Standard Cartons on an estimate exceeds this quantity, it will automatically look for an In-house Carton to fit the book. If no In-house Cartons are found that will fit the bind style and trim size of the book, it reverts to custom cartons. If your facility does not manufacture In-house Cartons, set this value to 999999.

The following minimum and maximum values define the parameters into which cartons and skids must fall to be considered in the estimating process:

Maximum Carton Height – Maximum allowable height in inches for cartons.

Maximum Carton Length – Maximum allowable length in inches for cartons.

Maximum Carton Weight – Maximum allowable weight in pounds for cartons.

Maximum Carton Width – Maximum allowable width, in inches for cartons.

Maximum Skid Height – Maximum allowable height, in inches for skids.

Maximum Skid Weight – Maximum allowable weight, in pounds for skids.

Maximum Skid Length – Maximum allowable length, in inches for skids.

Maximum Skid Width – Maximum allowable width, in inches for skids.

Minimum Carton Height – Minimum allowable height in inches for cartons.

Minimum Carton Length – Minimum allowable length in inches for cartons.

Minimum Carton Width – Minimum allowable width in inches for cartons.

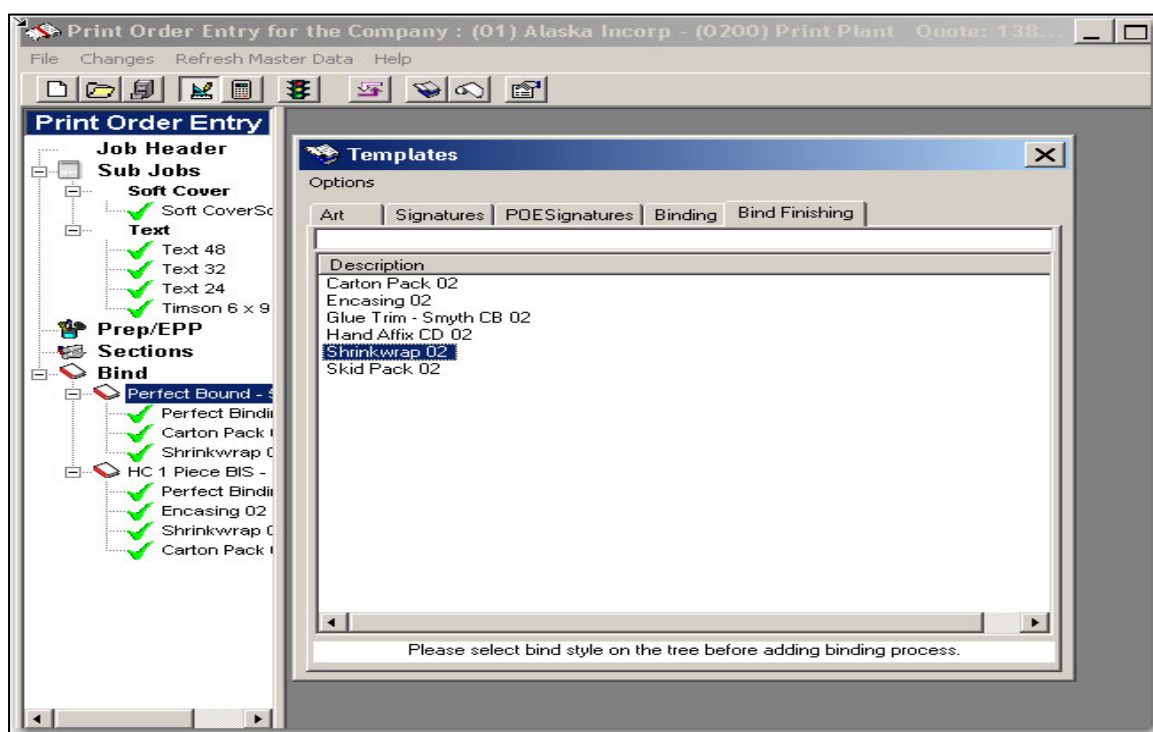
Minimum Fill Height – Minimum amount of filler material in inches, pre carton.

Single Wall (Yes or No) – select Single or Double wall for your default cartons.

Force Carton- this allows you to override the best fit logic and dictate what carton to use. The system does so if it is physically possible.

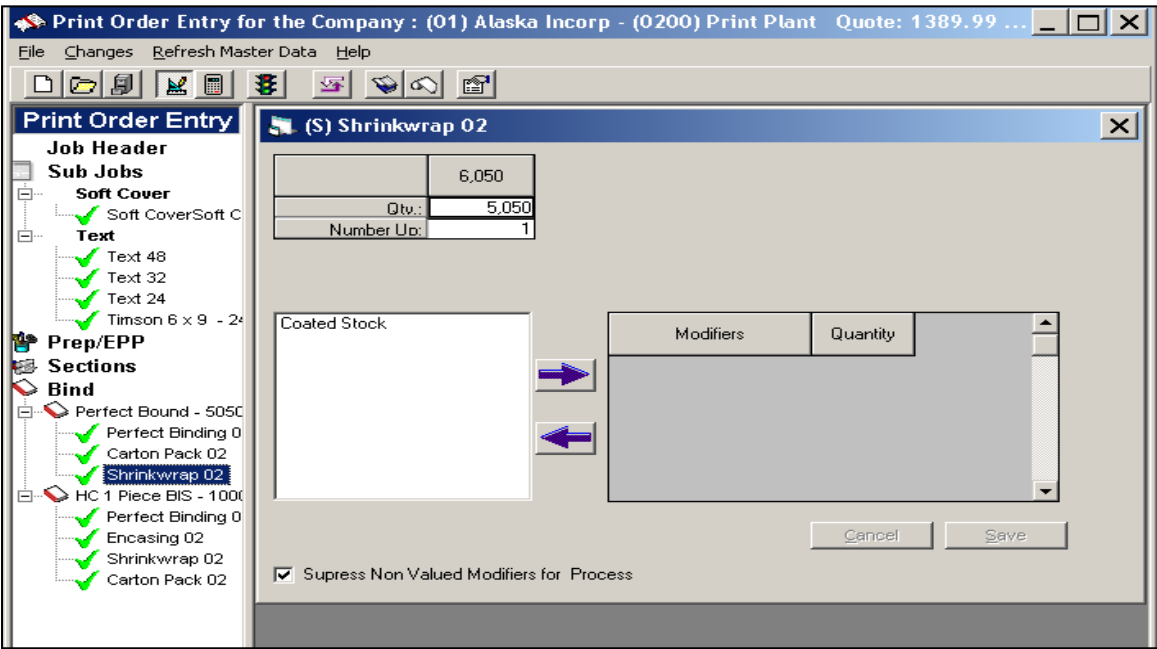
Skid Packing has similar parameters, and you have the same option of forcing a specific skid. For more detailed information, see the Book Estimating User Guide or Book Carton Setup.doc.

To add other binding finishing processes, like Shrinkwrapping, highlight the Bind Style. Click the process to highlight it, then double-click the process you wish to select.



After you select the process to add, click the process you selected. You may edit the quantity here, as the entire job quantity may not need this process.

You also can add modifiers to the Binding Finishing process. This impacts calculation if you have set up a value for this modifier to work on this process in Master Files Print, Make-readies tab.



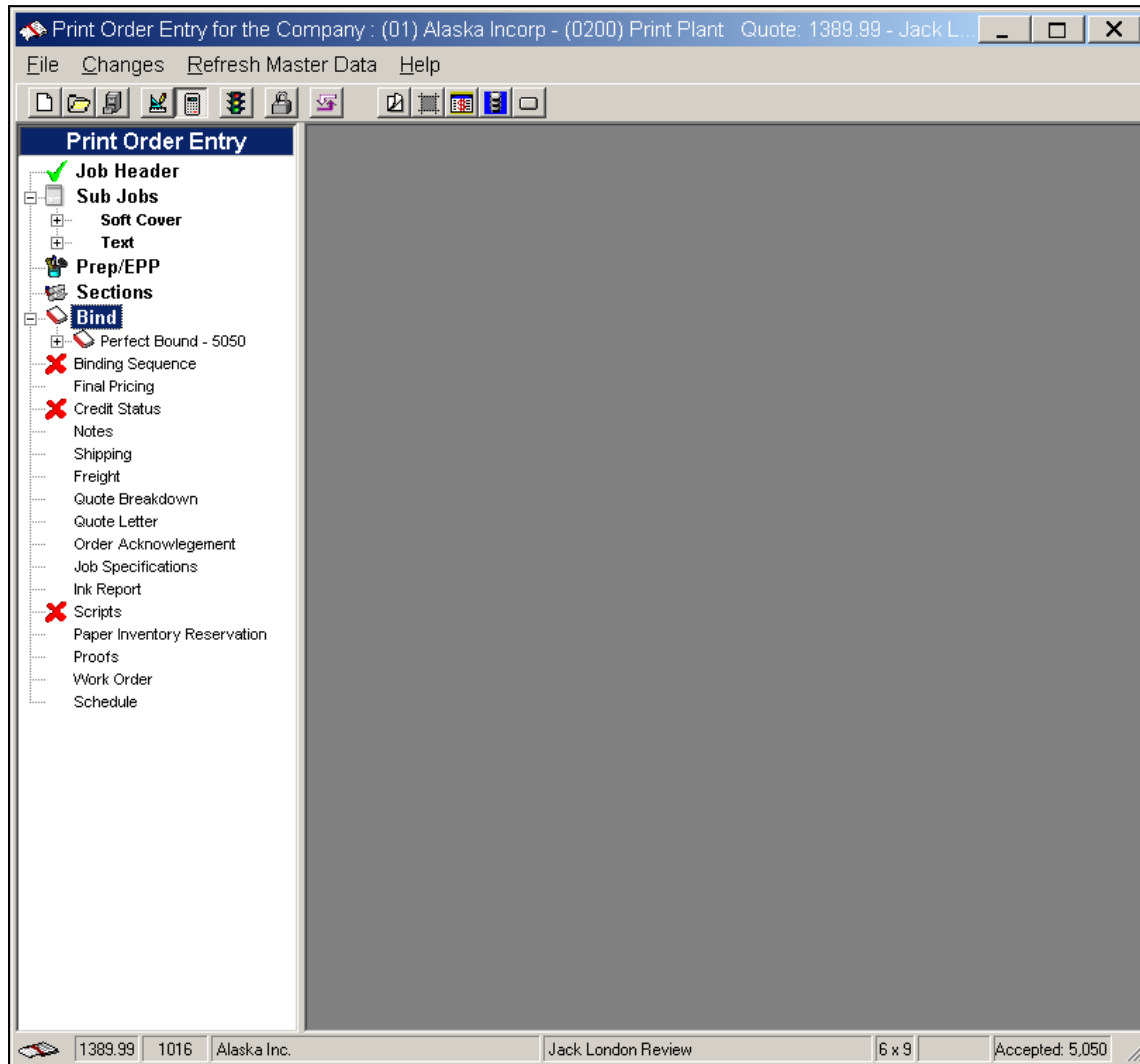
Once all edits are made, you are ready to Update this job (calculator icon 5th from the left).

Calculate and Review Mode

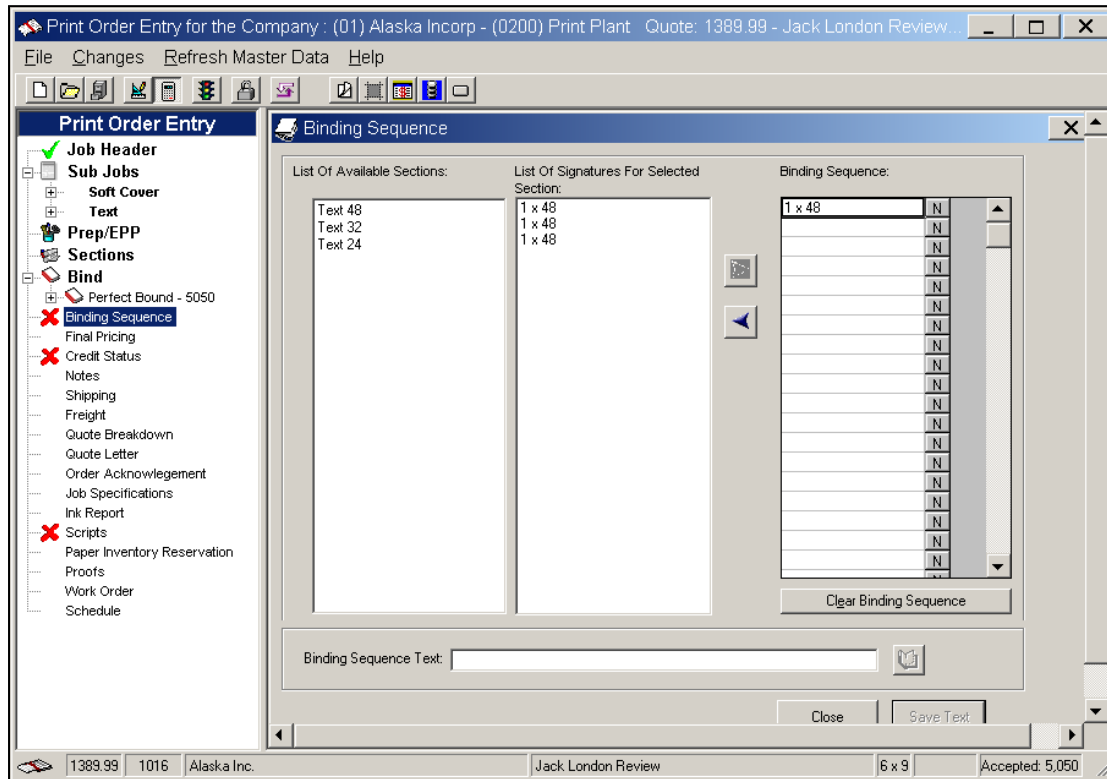
Once you have made all additions and edits, you are ready to Calculate/Update the job.

Select the Update icon, looks like a calculator, 5th from the right on the toolbar.

Once the job calculates successfully, you will see the additional items on the menu bar.



Binding Sequence



This screen is used to select the binding sequence.

List of Available Sections – shows all text sections. As you click the section, you will see all signatures in that section. To select sequence, click the first signature and hold the mouse button down to highlight each signature included in the sequence. When you have highlighted all of the signatures for the first selection, press on the arrow pointing to the Binding Sequence screen. You will see the description for the first segment displayed there. Continue linking all sections until all are displayed in the Binding Sequence area. If all signatures have been linked correctly, when you click each section under 'List of Available Sections,' you will see that no signatures display in the center screen.

There is a button with "N" next to each binding sequence. Clicking this button allows you to add additional notes for that binding sequence that prints on the Work Ticket in the Binding Sequence area.

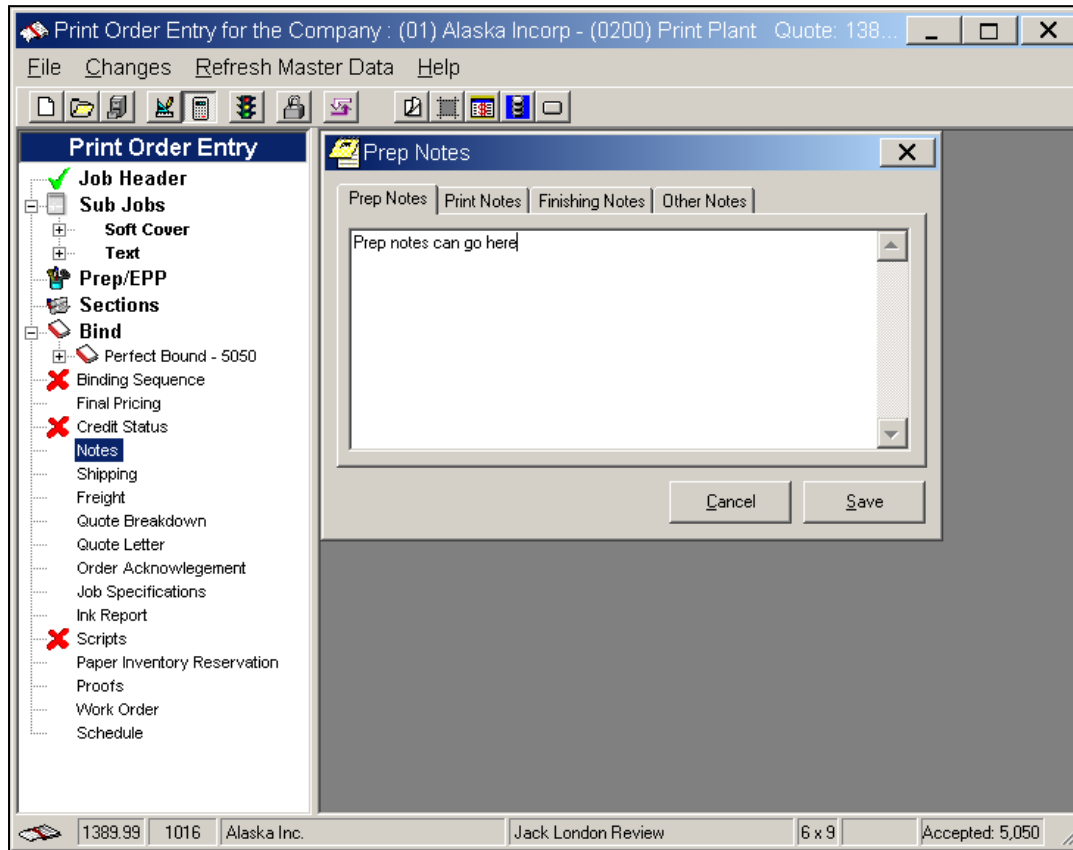
Clear Binding Sequence – clicking this button allows you to remove the binding sequence and re-add it.

Binding Sequence Text – this is an override for selecting the binding sequence above. If you enter a sequence in this field it prints in the Binding Sequence on the Work Ticket.

Once the binding sequence has been setup, when you close this screen, the Red X next to Binding Sequence should turn to green.

Note If you convert this to an order and the sequence has not been entered, you will get a warning message indicating that the sequence has not been set and asking if you want to proceed.

Notes




Notes can be added in the following areas: Prepress, Print, Finishing, and Other or General notes. All of this information prints on the Work Ticket in the appropriate areas.

Note Documents can be copied and pasted into these screens from other applications like Word or Excel.

Shipping


Shipment can optionally be set up in Print Order Entry. Select **Shipping** from the menu and this screen opens:


Job Shipments
[-] [] [X]

File Shipping Methods Find Shipment Set Shipping Status

Job Shipping Information

Enter Job#:



Customer:

Job Description:
Job Qty:

Shipments Status:
☐ Flag as Final Shipped
Shipment Hold:

Shipments Summary

	Delivery#	Shipment ID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost	Batch #

(Double Click on a Shipment to open the edit window)

Add Shipment

To add shipping information, select the **Add Shipment** option and this screen displays. In this example, the red box around the Customer Shipping notes informs us there are notes regarding shipping attached to this customer.

Editing Shipment											X
Packing Slip#:		Shipment ID:		Date:	7/8/2008	Time:	3:50:00 PM	<input type="checkbox"/> Ready To Ship			
Cust. Acc#:		ALASKA		Customer:		Alaska Inc.					
Job#:		1016		Job Desc.:		Jack London Review					
Contact:		Sally Samster		Select Address		Responsible:		LS		Acct#:	
Phone:		801555 0133		House Address		Ship Method:				<input checked="" type="checkbox"/> Hold Acct# when selecting a new address	
<input type="checkbox"/> Hold Contact when selecting a new address						Tracking#:				Weight:	
Contact:		Sally Samster				Ship Cost:				No. of Packages:	
Phone:		801555 0133				Ship Type:		Ship To		No. of Skids:	
Company:		Alaska Inc.				Stage:				Customer PO:	
Address:		123 West Main				Billing Type:				<input type="button" value="Customer's Time Stamped Notes"/> <input type="button" value="Reference Fields"/> <input type="button" value="Packages Detail"/>	
City:		Watertown		State:		UT					
County:				Zip:		84601					
Country:		USA									
Shipment Items											
	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Jack London Review				5050		5050				...

In this case there is more than one version, so you select from the drop-down choices.

Editing Shipment

Packing Slip#: Shipment ID: Date: 7/8/2008 Time: 3:50:00 PM ☐ Ready To Ship

Cust. Acct#: ALASKA Customer: Alaska Inc.


Job#: 1016 Job Desc.: Jack London Review

Contact: Sally Samster Responsible: LS Acct#:

Phone: 801555 0133 Ship Method:

☐ Hold Contact when selecting a new address

Tracking#: Weight:

Contact: Sally Samster  Ship Cost: No. of Packages:

Phone: 801555 0133 Ship Type: Ship To No. of Skids:

Company: Alaska Inc. Stage: Customer PO:

Address: 123 West Main Billing Type:

Suite 7

City: Watertown State: UT

Country: Zip: 84601

Country: USA

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Jack London Review	perfect sales samples			5050	5050					

(Double click on a shipment item# to edit the packages)

Once you select the version, the bind style populates.

Editing Shipment

Packing Slip#: Shipment ID: Date: 7/8/2008 Time: 3:50:00 PM ☐ Ready To Ship

Cust. Acct#: ALASKA Customer: Alaska Inc.


Job#: 1016 Job Desc.: Jack London Review

Contact: Sally Samster Responsible: LS Acct#:

Phone: 801555 0133 Ship Method:

☐ Hold Contact when selecting a new address

Tracking#: Weight:

Contact: Sally Samster  Ship Cost: No. of Packages:

Phone: 801555 0133 Ship Type: Ship To No. of Skids:

Company: Alaska Inc. Stage: Customer PO:

Address: 123 West Main Billing Type:

Suite 7

City: Watertown State: UT

Country: Zip: 84601

Country: USA

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Jack London Review perfect		Perfect Bound		5050	5050					

(Double click on a shipment item# to edit the packages)

The actual job shipment is most likely to occur from the warehouse not Print Order Entry. You can enter all the information you have and save for each shipment, then the warehouse can enter actual quantity shipped, no of skids, etc. to complete and ship the job physically and in the system.

Editing Shipment

Packing Slip#: Shipment ID: Date: 7/8/2008 Time: 3:50:00 PM ☐ Ready To Ship

Cust. Acct#: ALASKA Customer: Alaska Inc.

Job#: 1016 Job Desc.: Jack London Review

Contact: Sally Samster Responsible: LS Acct#:

Phone: 801555 0133 Ship Method: ABF Freight Systems ☒ Hold Acct# when selecting a new address

☐ Hold Contact when selecting a new address

Contact: Sally Samster Weight:

Phone: 801555 0133 Ship Cost: No. of Packages:

Company: Alaska Inc. Ship Type: Ship To No. of Skids:

Address: 123 West Main Customer PO:

Suite 7

City: Watertown State: UT Stage: Balance

County: Zip: 84601 Billing Type: Collect

Country: USA

Shipment Items

	Description	Version	Bind Style	ISBN	Estimated Qty	Actual Qty	Back Order	Item Type	Tax	Job Qty	Print Labels
1	Jack London Review perfect		Perfect Bound		5050	5050					

(Double click on a shipment item# to edit the packages)

To **add a new shipment**, select the **Add Shipment** button or to **edit** a previous shipment, double-click. Select a **Stage** (e.g., 1st Shipment, 2nd Shipment, Final Shipment) from the drop-down menu. Enter the **Est. Qty.** and **Actual Qty.** (if this is a partial shipment, the Backorder field calculates the remaining qty.) Enter any optional fields (Change or Edit Address, Ship Method, Tracking #, Acct. #, Ship Cost, Responsible, etc.) Select the **Ship** button and enter **Yes** or **No** to the question, "Have all items now been shipped for this job?"

Option to print **packing slip** in the Edit Shipment screen > select the **Printer** icon (upper right).

Additional (optional fields):

Ship Method & Billing Type - prints on packing slip.

ISBN - unique code alpha & numeric prints on packing slip

Stage - stage of shipment: Advance, Balance, Drop Ship, Waiting, etc.

Item Type - Report 711 (cat. & codes) > MF-Reports to setup (drop-down menu) prints on packing slip.

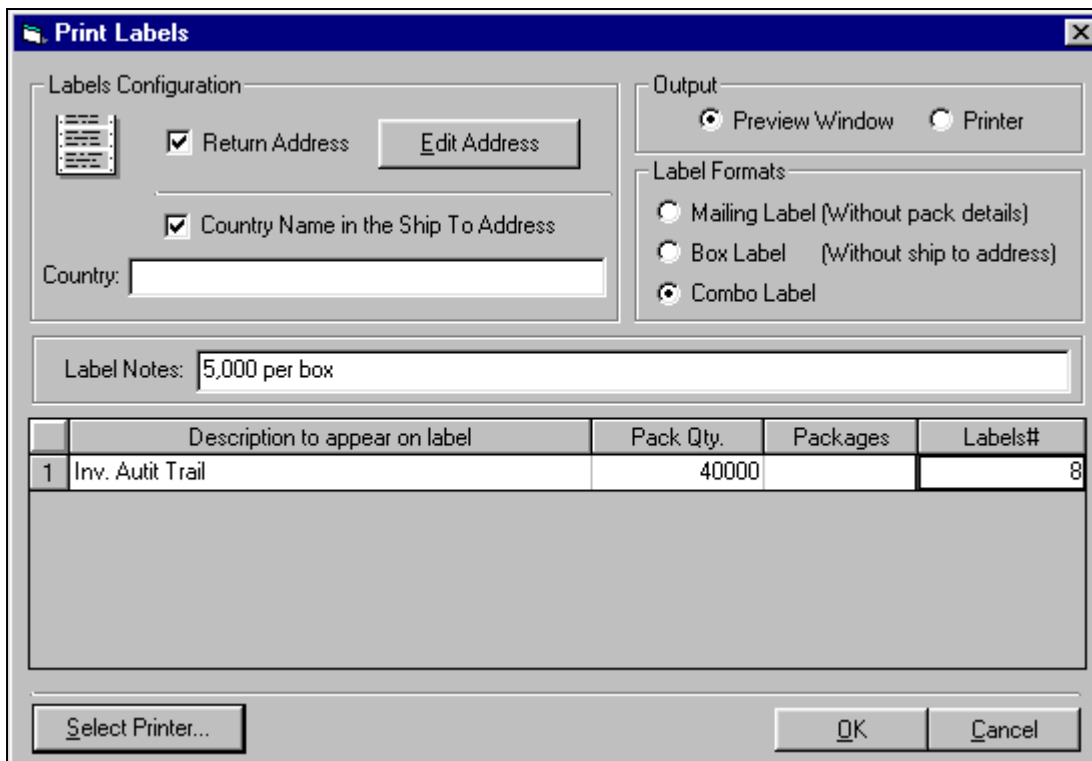
Note The Shipping module was designed for printers who ship their jobs immediately after completion and do not need to warehouse inventory. If you require warehouse transactions and need balances affected by the shipment, use the Ship to Customer module.

To **default your company warehouse address for every customer** in the Shipping module, go to MF-Customer > and enter your warehouse name & address as a *customer with the account #88888888 (eight-eights)*. To search for this address, select the > < (greater than or less than arrows) to scroll through the list.

Print Shipping Labels

To print labels, click the **Print** button under the **Labels** column while in the Editing Shipment screen. You may opt to print a return and/or edit address, enter label notes, and add the country name in the ship-to address. There are three label formats: Mailing Label (without pack details), Box Label (without ship to address), and Combo Label.

To enter/edit packages, double-click line number 1 (gray cell to left of description).



Print Labels

Labels Configuration

☒ Return Address

☒ Country Name in the Ship To Address

Country:

Output

☒ Preview Window ☐ Printer

Label Formats

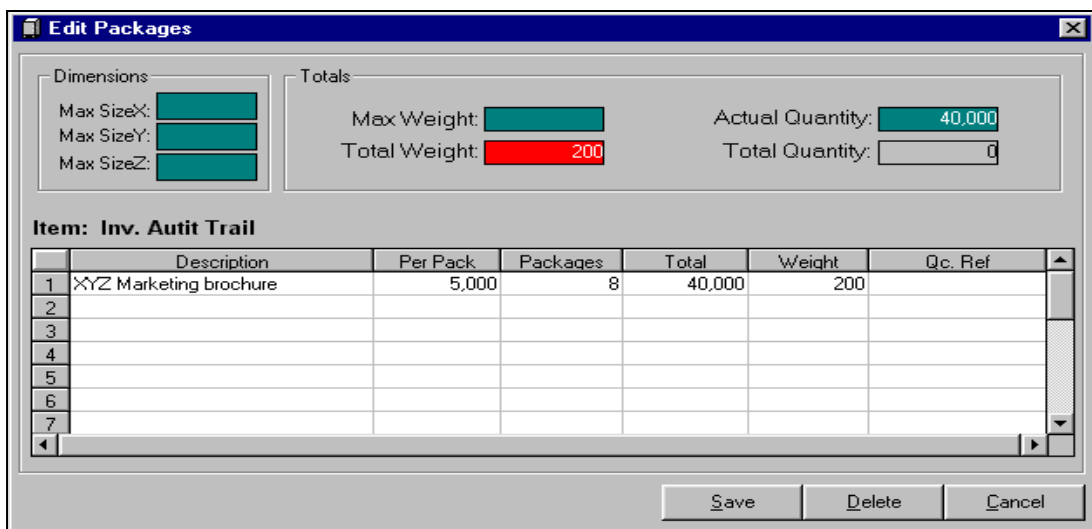
☐ Mailing Label (Without pack details)

☐ Box Label (Without ship to address)

☒ Combo Label

Label Notes:

	Description to appear on label	Pack Qty.	Packages	Labels#
1	Inv. Autit Trail	40000		8



Edit Packages

Dimensions

Max SizeX:

Max SizeY:

Max SizeZ:

Totals

Max Weight:

Total Weight:

Actual Quantity:

Total Quantity:

Item: Inv. Autit Trail

	Description	Per Pack	Packages	Total	Weight	Qc. Ref
1	XYZ Marketing brochure	5,000	8	40,000	200	
2						
3						
4						
5						
6						
7						

Enter per pack, # of packages, weight and **Save**.

In the Print Labels screen, enter the # of Labels to print per sheet and click **OK**.

Note Sample of a Combo Label below.

Mailing & Printing Company

Ship To

Attention: L. SNYDER
STREAMLINE SOLUTIONS
65 Mitchell Blvd.
Suite # 3
San Rafael, CA 94903

5,000 -XYZ Marketing Brochure

Your Part #	Package # 1 of 8
Your Order #	Our Job # 1123

Notes: Send 2-Day Air

Freight

Zip	City	State	County	Ship From	Carrier	
94118	SAN FRANCISCO	CA	SAN FRANCISCO			<input type="button" value="Delete Address"/>

Ship to SAN FRANCISCO								
Version	Books/Carton	Packed Weight	Qty1	Qty2	Qty3	Qty4	Qty5	Qty6
perfect	24	22.13						
sales samples	24	22.13						

No. of Skids Avg Skid Weight Cost Based On No Of Trucks Total Weight Weight Used UOM Freight Rate Freight Cost MarkUp Fuel Surcharge Fuel Surc Markup Other Charges Other Charges Markup Total Freight Charges

Quote Breakdown

Print Order Entry for the Company: (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack Lon

File Changes Refresh Master Data Help

Print Order Entry 1 of 1+ 75% Total: 1 100%

Job Header
Sub Jobs
Text
Soft Cover
Prep/EPP
Sections
Bind
Perfect Bound - 50
Binding Sequence
Final Pricing
Credit Status
Notes
Shipping
Freight
Quote Breakdown
Quote Letter
Order Acknowledgement
Job Specifications
Ink Report
Scripts
Paper Inventory Reser
Proofs
Work Order
Schedule

Quote: 1389.99 Quote Breakdown Job: 1016

Customer: Alaska Inc.
123 West Main
Suite 7
Waterbury, UT 84601

Account No.: ALASKA
Printed: 7/8/2008

Quote Date: 4/13/2007

Estimator: Betty White
Sales Rep: Home Account
CSR: Sue Smith
Finished: 6 x 9

Contract: Sally Samster
Phone/Fax: /801555 1038
Quantity: 5,050
Job Title: Jack London Review

Estimator's Notes:

Materials/Function	\$ Cost	\$ Markup	\$ Sell
Paper	3,732.61	746.52	4,479.13
Prepress Matl	7.00	0.16	7.16
Paper	10.00	2.00	12.00
Ink	296.99	74.25	371.24
Prep Matl	231.14	57.79	288.93
Bind Matl	198.25	39.56	237.81
Freight			
Sub Total	4,485.99	922.37	5,358.36

Cost Summary	\$ Sell	Approximate Markup
Estimated Cost	5,411.45	
Est. Markup %	20.79%	\$ 1,516.45
Lab. Markup %	16.00%	Approximate Variation
Material Cost	5,358.36	\$ 5.00
Variation %	6.10%	Approximate Total Price
Value Added %	87.90%	
Value Added	6,400.16	\$ 10,536.14
Unit Price	2.09	

Labor Center	Hours	\$ Cost	\$ Sell
Artwork	6.37	137.00	617.85
Plate Making	0.17	10.00	11.60
240 Hectog	2.25	366.37	454.88
640 Hectog	1.25	375.11	432.53
Thruok 305	2.16	1,171.54	1,347.27
Cutter	0.67	66.67	76.67
Operator	3.85	993.75	1,149.29
Laminator	2.10	157.50	181.13
Packaging	10.48	261.89	301.17
Sub Total	28.31	3,375.46	4,571.78

Cost Breakout	\$ Cost	\$ Markup	\$ Sell
Compart	0.00	0.00	0.00
Prep	544.00	82.30	626.30
Print/Bind	7,267.45	1,436.39	9,003.83
Variation	0.00	0.00	0.00
Total	8,411.45	1,518.68	9,900.13

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

This report gives a breakdown of all quoted costs and markups. On the first page you see this summary view.

Print Order Entry for the Company: (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London Review - Job: 1016 - [Print Quote Breakdown]

File Changes Refresh Master Data Help

Print Order Entry 2 of 2+ 100% Total: 1 100% 1 of 1

Job Header
Sub Jobs
Text
Soft Cover
Prep/EPP
Sections
Bind
Perfect Bound - 50
Binding Sequence
Final Pricing
Credit Status
Notes
Shipping
Freight
Quote Breakdown
Quote Letter
Order Acknowledgement
Job Specifications
Ink Report
Scripts
Paper Inventory Reser
Proofs
Work Order
Schedule

Estimate: 1389.99 Qty: 5,050

Pre-Press Specifications

Section	Pre-Press Process	Type	Quantity	Hours	\$ Material	\$ Labor
Soft Cover/Soft Cover	Preflight Cover		0	0.17	0.00	17.33
Soft Cover/Soft Cover	CTP - Impose		0	0.52	1.00	52.00
Text 48	Preflight Text			1.37	0.00	137.00
Text 48	CTP - Impose			2.42	2.00	242.00
Text 32	Preflight Text			0.19	0.00	18.67
Text 32	CTP - Impose			0.32	2.00	32.00
Text 24	Preflight Text			0.14	0.00	14.00
Text 24	CTP - Impose			0.24	2.00	24.00
Soft Cover/Soft Cover	Prep Buyout		1		75.00	0.00

>> Gina's Company, QN:

Paper Specifications

Section/Vendor	Paper	Weight	M Weight	Mill Size	Mach. Size	Qty.	Quantity	\$ Rate	\$ Cost	Preout
Soft Cover/Soft Cover	Red Paper Supply									
	Springhill 18PT CTS Cover**0200 White	80.00	344.00	28 x 40	26.12708 x 2	1,551 Shts		110.00/100 Shts	\$85.36	16.67
Text 48	Red Paper Supply									
	Book Makers 60# O pq Web**0**0200 White	60.00	180.00	37.5	37.5 x 38	1 5,227 Shts		75.00/100 lbs.	\$2,823.00	0.00
Text 32	Red Paper Supply									
	Book Makers 60# O pq Web**0**0200 White	60.00	120.00	25	25 x 38	1 5,227 Shts		75.00/100 lbs.	\$471.00	0.00
Text 24	Red Paper Supply									
	Book Makers 60# O pq Web**0**0200 White	60.00	180.00	37.5	37.5 x 38	1 2,614 Shts		75.00/100 lbs.	\$353.25	0.00

1389.99 1016 Alaska Inc. Jack London Review 6 x 9 Accepted: 5,050

The following display much more detail, including run speeds, hours, material costs, hourly rates.

Print Order Entry for the Company : (01) Alaska Incorp - (0200) Print Plant Quote: 1389.99 - Jack London Review - Job: 1016 - [Print Quote Breakdown]

File Changes Refresh Master Data Help

Print Order Entry

Job Header

Sub Jobs

Soft Cover

Text

Prep/EPP

Sections

Bind

Perfect Bound - 50

Binding Sequence

Final Pricing

Credit Status

Notes

Shipping

Freight

Quote Breakdown

Quote Letter

Order Acknowledgement

Job Specifications

Ink Report

Scripts

Paper Inventory Reser

Proofs

Work Order

Schedule

3 of 3

100%

Total:1 100% 1 of 1

Press Specifications

Section	Side	Method	Press	Runs	Over s	Ink Colors	Plates	M/R	Run	Wash
Soft CoverSoft Cover				Section Qty:	5,050	Num Up On Press Sheet :	4 Up			
Front		540 - Heidelberg		1,551	210	Gloss Varn	1 Metal	0.68hr	0.57hr	0.00hr
1 secs		2430 iph	Heavy Coverage 200				\$11.12	\$20.00	\$205.00	\$171.11
Soft CoverSoft Cover-Ren				Section Qty:	5,050	Num Up On Press Sheet :	4 Up			
Front				1,318	0		0 Metal	0.00hr	0.00hr	0.00hr
1 secs		0	Heavy Coverage 200				\$0.00	\$0.00	\$0.00	\$0.00
Soft CoverSoft Cover-Ren				Section Qty:	5,050	Num Up On Press Sheet :	1 Up			
Front		240 - Heidelberg		5,271	221	Dull Varn	1 Metal	0.68hr	1.58hr	0.00hr
1 secs		3240 iph	Heavy Coverage 200				\$15.35	\$20.00	\$119.58	\$275.79
Text 48				Section Qty:	5,050	Num Up On Press Sheet :	1 Up			
Front		Tim son 38		5,227	0	Blk	4 Metal	1.17hr	0.55hr	0.00hr
4 secs		38000 iph	Light Coverage 200				\$98.11	\$160.00	\$495.83	\$233.84
Back					0	Blk	4 Metal	0.00hr	0.00hr	0.00hr
			Light Coverage 200				\$98.11	\$160.00	\$0.00	\$0.00
Text 32				Section Qty:	5,050	Num Up On Press Sheet :	1 Up			
Front		Tim son 38		5,227	0	Blk	1 Metal	0.67hr	0.14hr	0.00hr
1 secs		38000 iph	Light Coverage 200				\$20.52	\$40.00	\$263.33	\$58.46
Back					0	Blk	1 Metal	0.00hr	0.00hr	0.00hr
			Light Coverage 200				\$20.52	\$40.00	\$0.00	\$0.00
Text 24				Section Qty:	5,050	Num Up On Press Sheet :	2 Up			
Front		Tim son 38		2,614	0	Blk	1 Metal	0.17hr	0.07hr	0.00hr
1 secs		38000 iph	Light Coverage 200				\$16.64	\$40.00	\$70.83	\$29.24
Back					0	Blk	1 Metal	0.00hr	0.00hr	0.00hr
			Light Coverage 200				\$16.64	\$40.00	\$0.00	\$0.00

Bindery & Finishing Specifications

Section	Finishing Process	Number Up	InFeed Size	Hours	\$ Material	\$ Labor
Soft CoverSoft Cover	Film Laminate 02			2.10	231.14	157.50
Soft CoverSoft Cover	Trim-No Bleed 02			0.50	0.00	50.00

1389.99 1016 Alaska Inc.

Jack London Review

6 x 9

Accepted: 5,050

This is particularly useful when an actual estimate is being created in Print Order Entry without the Book Estimate having been created.

Quote Letter

This can be used when a Book Estimate has not been created, or extensive changes in the job are made and a new quote letter to the customer is needed.

Select **Quote Letter** from the tree, and the quote letter opens.

Proposal

K P **Alaska Inc.**
123 West Main
Suite 7
Watertown, UT 84601

Proposal # 1389.99
July 08, 2008

Attention: Sally Samster

We thank you for giving us the opportunity to quote on your printing requirements. We look forward to working with you on this project.

Description: Jack London Review

Quantity: 248 pages + Cover

Finished Size: 6 x 9

Preparation of Copy: 4 Pgs. - Springhill 10PT C1S Cover, White

Description of Product: 192 Pgs. - Book Makers 60# Opg, White

32 Pgs. - Book Makers 60# Opg, White

24 Pgs. - Book Makers 60# Opg, White

Materials: Soft CoverSoft Cover - Printed 1 color(s) one side.

Text 48 - Printed 1 color(s) throughout.

Text 32 - Printed 1 color(s) throughout.

Text 24 - Printed 1 color(s) throughout.

Re-run Soft CoverSoft Cover - Printed 1 color(s) one side.

Finishing: Soft CoverSoft Cover - Film Lamination, Trim

Perfect Bind, Carton Pack, Encasing

Packaging: Net 20 termsvcbvcbvcbvcb Net 100 days.

Payment Terms: 5,050

\$10,536.14

Yours Sincerely,

House Account

Acceptance of Proposal:
Please proceed with the production of the above work for the quantity indicated. I understand that pricing will be confirmed on receipt of final art & authors corrections will be additional.

Customer Signature **Date** **P/O #**

Page 1 Sec 1 1/1 At 1.2" Ln 1 Col 1 REC TRK EXT OVR

This can be exported to Word and can have your company's logo.

Job Specifications

Select Job Specifications from the menu and this screen opens:

O.E. Job Specification

Job Number: 1016 P/O Number:

Order Date: 7/1/2008 Final Req. Ship Date: 7/10/2008

Start Date: 4/13/2007 Film File Number:

Previous Job Number: Underrun %: 0

Overrun %: 0 FSC related quote ☐

New Job: Yes Exact Repeat: No

Alter Specs: Yes Art Required: Yes

Film Required: Yes Accepted Quantity: 5,050

Requested Schedule ☐ Standard Order ☒

Save

Order Date – defaults to date the order is entered. This represents the day the order was entered.

Start Date – defaults to date the order is to begin. This becomes the start date for scheduling if scheduled by start date. This date can be overridden.

Due Date – enter as mm/dd/yy. The field next to due date is for due time and is optional.

Previous Job Number – if this job was copied from an older job the previous job number displays here. You can also manually enter the previous job number if you know it. This information prints on the header of the Work Ticket.

Film File Number –prompts you to see if you want to assign a film file number for the flats to be stored.. This is not typically used in most companies, since the flats are referenced by the job number.

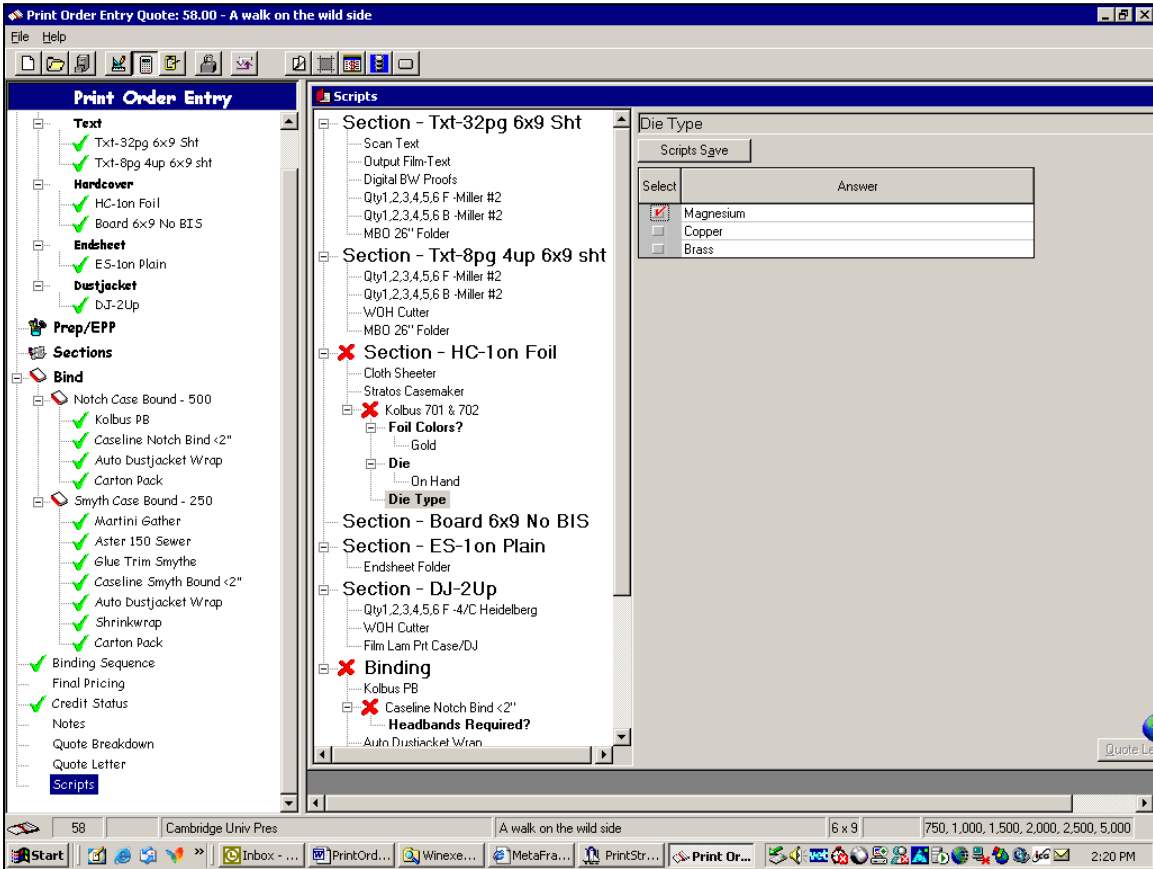
Overs % and Unders % - enter the percentage of overs or unders allowed. This information prints on the header of the Work Ticket.

New Job, Exact Repeat, Alter Specs, Art Required, and Film Required – The answers to these questions print on the Work Ticket.

Requested Schedule populates if this was flagged as a job with a requested schedule in the Book Estimating stage.

FSC related - identifies this job as Forest Stewardship Council related (no validation, it is a flag only)

Scripts



Scripts are setup in Master Files Print and attached to Processes. The scripts display under the processes to which they are associated. After answering the script and saving it, you will see the script answer display under the question. When all scripts are answered, you will see green checks and a green check next to the word **Scripts** on the tree. Scripts can be set as mandatory or non-mandatory. If they are mandatory, you must answer the question before you can print a Work Ticket. Scripts are used to gather additional information for the order. They are for order entry only and are not used on estimates.

Paper Reservations

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Reserved	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printed
Txt-32pg 6x9 Sh	BookMakers 60# Sh	25 x 38	25 x 38	White	6,011 shs	722 lbs.						
Txt-8pg 4up 6x9 s	BookMakers 60# Sh	25 x 38	25 x 38	White	239 shs	29 lbs.						
HC-1on Foil	Pearl Linen	13 5/8 x 10 1/2	46 x 10 1/2 (4)	White	260 shs	0 lbs.						
	Pearl Linen	46	46	White					0 1008			
Board 6x9 No BIS	Estka Board .088	5 13/16 x 9 1/4	24 x 36	Natural	68 shs	19 lbs.						
ES-1on Plain	Glatfelter Endleaf Nat	12 1/2 x 9 1/2	25 x 38	Natural	104 shs	17 lbs.						
DJ-2Up	Sterling Litho Gloss 8	20 1/2 x 28	20 1/2 x 28	White	508 shs	50 lbs.						
	Sterling Litho Gloss 8	20 1/2 x 28	20 1/2 x 28	White					508 1012			

Paper Details - The gray bars on this screen represent the paper information for each printed section on the estimate/order. This information includes the paper description, size, color, estimated paper quantity, and quantity to reserve. Each line item under the estimated papers is color-coded.

- If the estimated paper is not in inventory, the paper line displays with a white background.
- If the estimated paper is in inventory, the paper line displays with a green background.
- If the paper has been reserved previously, the line has a tan background.

Note Colors can be changed from the default setting by right-clicking the colored squares (located in the lower left corner of the screen).

Section - when you click a paper for a section that is in inventory, sections with green background, you will see the following information listed at the bottom of the screen: inventory paper item number, inventory paper code, paper description, paper size, and quantity available in inventory.

Reserve Paper - For each inventoried paper you will see the quantity available, you can reserve the paper even if you do not have enough paper in inventory. The reservation will go negative and the item shows up on the **Inventory Reorder Report** so that it can be ordered.

To reserve paper on the sections that are inventoried, check that the quantity to reserve listed is the quantity that you want to actually reserve. If you want to change the quantity to reserve, click the column **Qty to Reserve**, and change the quantity. When you are ready to reserve the paper, click the **Reserve** button and you will see the paper line for that section turn to a tan color. This paper has been reserved. Paper items that are not in inventory, and do not have a green background, will either need to be purchased for the job only or a new inventory item will need to be created for the paper before you can reserve it. See options below for creating new paper inventory items.

Paper Substitution

Reservation										Sheeting Information			
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Pl	
Txt-32pg 6x9 Sht	BookMakers 60# Sheets	25 x 38	25 x 38	White	6,011 shts	722 lbs.							
	Writers Smooth 500PPI 50#		25 x 38	White				6,011	1009				
Txt-8pg 4up 6x9 Sht	BookMakers 60# Sheets	25 x 38	25 x 38	White	239 shts	29 lbs.							
HC-1on Foil	Pearl Linen	13 5/8 x 10 1/2	46 x 10 1/2 (4)	White	260 shts	0 lbs.							
	Pearl Linen		46	White				0	1009				
Board 6x9 No BIS	Eska Board .088	5 13/16 x 9 1/4	24 x 36	Natural	68 shts	19 lbs.							
ES-1on Plain	Glatfelter Endleaf Natural 80#	12 1/2 x 9 1/2	25 x 38	Natural	104 shts	17 lbs.							
DJ-2Up	Sterling Litho Gloss 80# DJ	20 1/2 x 28	20 1/2 x 28	White	508 shts	50 lbs.							
	Sterling Litho Gloss 80# DJ		20 1/2 x 28	White				508	1012				

Select Inventory Paper for Txt-32pg 6x9 Sht

Item #: 1009

Inv. Code: 12205025038021

Description: Writers Smooth 500PPI 50#

Paper: Writers Smooth 500PPI 50#

Color: White

Size: 25 x 38

On Hand: 128,695

On Order: 0

Commit: 30,421

Avail: 98,274

Select

Clear

☐ - Inventory Paper Doesn't Exist
☒ - Inventory Paper Exists
☐ - Inventory Paper Reserved
☐ - Non-paper inventory

Cancel

Reserve



This option allows you to reserve a paper other than the paper specified on the order. Click the paper reservation line for the paper that you want to substitute, then click the binoculars to search for the inventory item that you want to substitute. You can use any of the search options in the inventory screen to find the paper for which you are searching. When you locate the paper that you want, click **Select**. The substitute inventory item displays in the inventory information at the bottom of the screen. Click the **Select** button, and you will see the substituted item listed underneath the estimated paper. Click the **Reserve** button to reserve the substituted paper.

Reserve Raw Material

Paper/Material Reservation For Job 243

Reservation						Sheeting Information		
Section	Paper	Qty Required	Qty Required	Order	Qty Reserved	Inv. Code	Inv. Code	Qty
Lthd 81/2x11 4up	Husky Offset 60# Continuous		20,363 lbs.					
	Husky Offset 60# Continuous				20,363	251		
Newsletter-8pp	Husky Offset 70#	1,554,948 shts	90,228 lbs.					
	Husky Offset 70#				1,554,948	252		
Cover 8.5x11 2up	Springhill C1s Cover 10Pt	781,312 shts	125,010 lbs.	<input checked="" type="checkbox"/>				

Select Inventory Paper for Lthd 81/2x11 4up W

Item #:  

Inv. Code:

Description:

Paper:

Color: Size:

On Hand: On Order:

Commit: Avail:

☐ - Inventory Paper Doesn't Exist
☐ - Inventory Paper Exists
☐ - Inventory Paper Reserved
☐ - Non-paper inventory

The raw material reservation needs to be attached to an existing paper item displayed. Right-click the paper inventory line and select **Add New Line**. A blank line displays underneath the inventory item selected. Click the blank line then click the icon that is to the right of the binoculars to select the raw material inventory to reserve.

Search Inventory

Inv Type: Job: Item:

Type: Customer: Vendor:

Category: Inv Desc Like:

Sub Category: Inv Code Like:

Color: Load

Weight: Size:

☐ Below Min Qty ☐ Negative Avail ☐ Inactive



Item #	Inv Code	Details	On Hand	On Order	Allocated	Available	Min Lvl	Customer Cd	Customer	Vendo
212	212	track quantities off	0	12	0	12 0				
300	film	consignment	0	0	0	0 0				
309	Consignment	test accounting interactions	0	0	0	0 0				
39	BLK-INK	Black Ink	118	0	0	118 50				
40	PROC MAG-INK	Process Magenta Ink	230	0	0	230 50				
41	PROCCYAN-INK	Process Cyan Ink	299	0	0	299 0				
42	PROCYELLOV	Process Yellow Ink	393	0	0	393 50				
43	PMS185-INK	PMS 185 Ink	163	0	0	163 50				
44	PLATES-640	Heidelberg 640 Plates	0	0	0	0 0				
45	PLATES-ITEK	Itek Plates	1055	0	0	1055 0				
46	PLATES-DIDD	Didde Plates	29990	12000	0	41990 0				
47	PLATES-240	Heidelberg 240 Plates	0	0	0	0 0				
48	CAPTON 114F12	114F12 Plates	750	0	1500	750 150				

The Inventory Search screen opens with the default inventory type set to material. Click the **Search** button and all material displays for you. Click the item that you want to reserve and click the **Select** button to select the item.

Paper/Material Reservation For Job 243

Reservation					Sheeting Information				
Section	Paper	Qty Required	Qty Required	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	
Lthd 81/2x11 4up	Husky Offset 60# Continuous		20,363 lbs.	<input type="checkbox"/>					
	Husky Offset 60# Continuous				20,363	251			
	12 x 18 x 11 Carton				1,500	48			
Newsletter-8pp	Husky Offset 70#	1,554,948 shts	90,228 lbs.	<input type="checkbox"/>					
	Husky Offset 70#				1,554,948	252			
Cover 8.5x11 2up	Springhill C1s Cover 10Pt	781,312 shts	125,010 lbs.	<input checked="" type="checkbox"/>					

Select Inventory Paper for Lthd 81/2x11 4up W

Item #: 48  

Inv. Code: CARTON-1145

Description: 12 x 18 x 11 Carton

Paper:

Color: Size:

On Hand: 750 On Order: 0

Commit: 1,500 Avail: -750

☐ - Inventory Paper Doesn't Exist
☐ - Inventory Paper Exists
☐ - Inventory Paper Reserved
☐ - Non-paper inventory



The material item displays where the blank line was added. Enter the amount to reserve in the **Qty Reserved** column and click the **Reserve** button to reserve it.

Split Paper Reservations

Paper/Material Reservation For Job 1036

Reservation					Sheeting Information							
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Pt
Txt-32pg 6x9 SH	BookMakers 50# Sheets	25 x 38	25 x 38	White	6,011 shts	722 lbs.	<input type="checkbox"/>					
	Writers Smooth 500PPI 50#		25 x 38	White				6,011	1009			
Txt-8pg 4up 6x9	BookMakers 60# Sheets	25 x 38	25 x 38	White	239 shts	29 lbs.	<input type="checkbox"/>					
HC-1on Foil	Pearl Linen	13 5/8 x 10 1/2	46 x 10 1/2 (41)	White	260 shts	0 lbs.	<input type="checkbox"/>					
	Pearl Linen		46	White				0	1008			
Board 6x9 No BIS	Esko Board .088	5 13/16 x 9 1/4	24 x 36	Natural	68 shts	19 lbs.	<input type="checkbox"/>					
ES-1on Plain	Glatfelter Endleaf Natural 80#	12 1/2 x 9 1/2	25 x 38	Natural	104 shts	17 lbs.	<input type="checkbox"/>					
	Glatfelter Endleaf Natural 80#		25 x 28	Natural	50				104	1016		
	Writers Smooth 500PPI 50#		25 x 38	White	54				104	1009		
DJ-2Up	Sterling Litho Gloss 80# DJ	20 1/2 x 28	20 1/2 x 28	White	508 shts	50 lbs.	<input type="checkbox"/>					
	Sterling Litho Gloss 80# DJ		20 1/2 x 28	White				508	1012			

Select Inventory Paper for ES-1on Plain

Item #: 1009  

Inv. Code: 12205025038021

Description: Writers Smooth 500PPI 50#

Paper: Writers Smooth 500PPI 50#

Color: White Size: 25 x 38

On Hand: 128,695 On Order: 0

Commit: 30,525 Avail: 98,170

☐ - Inventory Paper Doesn't Exist
☐ - Inventory Paper Exists
☐ - Inventory Paper Reserved
☐ - Non-paper inventory

Start | Inbox... | Print... | Wine... | Meta... | 2c-Pr... | Print... | 4:20 PM

The reservation for paper on one section can be split onto multiple inventoried papers. To split the paper reservation, click the inventory line for section to split, right-click, and click **Add New Line**. You will see a new line display underneath the original inventory line. Click the Binoculars and find the paper to split the reservation, then click the **Select** button. The inventory code for the split paper displays on the new line you just added. Go to the **Qty to Reserve** column for the original and split paper and enter in the quantity to reserve for each paper. Then click the **Reserve** button to split the reservation between the two papers.

If you want to remove the additional reservation, right-click the new line and select **Undo Reservation**. The reservation is removed on the new line. Click the **Cancel** button and the new line is removed.

Create New Paper Inventory Item(s) Option

The screenshot shows the 'Paper/Material Reservation For Job 1036' window. The main table lists reservations for various paper types and sizes. A 'New Inventory' dialog box is open, allowing the user to create a new inventory item. The dialog has tabs for 'Customer Inventory', 'Finished Goods', 'Paper' (selected), and 'Raw Material'. It includes fields for 'Item #', 'Inventory Code', 'Description', 'Measure', and 'Setup' information. The 'Setup' section includes 'Activity Code', 'Product Code', 'Expense Acc', 'Income Acc', 'P.O. Inv Acc', and 'Branch/Dept'. There are also checkboxes for 'Track Rolls' and 'One time use'. Buttons for 'Save and Quit', 'Cancel', and 'Reserve' are at the bottom.

To create a new paper inventory item for a section, click the inventory line under the section, and then click the **Blank Sheet** icon (located to the right of the **Item #** field). You will see a screen with information needed to create the new inventory item. Click the **Paper** field, type part of the paper description for the item for which you are creating inventory, and use the up and down arrow to locate the correct item. When you locate the item, make sure that the color and size listed match the color and size that is on the section for which you are creating the inventory. Put in a user-defined inventory code, select the activity code for paper, and click the **Save and Quit** button. The inventory information for the new item is displayed on the left side of the screen. Click the **Select** button and the section paper displays with the green background with all the inventory information attached. Click the **Reserve** button to reserve the new inventoried paper you just created.

Note The available quantity goes negative indicating that the reservation occurred, but there was no existing inventory to reserve.

Colors can be changed from the default setting by right-clicking the colored squares (located in the lower left corner of the screen).

Proofs

The screenshot shows the 'Print Order Entry' application window. The title bar reads 'Print Order Entry Quote: 58.00 - A walk on the wild side - Job: 1036'. The main window has a 'Proofs' tab selected, showing a table of components and a 'Proof Address' form.

Subjob	Received	Proof Type	Proof Date	Stage	Proof To
Text	08/26/2003	BlueLine	08/29/03		Customer
Hardcover	08/26/2003	Digital Color	08/29/03		Customer
Dustjacket	08/26/2003	Digital Color	08/29/03		Customer

Job Due Date: 9/15/2003 3 PM
 Additional Work: ☐
 Proof Address:

The 'Proof Address' form contains the following fields:

- Customer: Cambridge Univ Pres
- Address: 40 West 20th Street
- City: New York State: NY Zip: 10011
- Phone/Fax: 914 937-9600 212 924-1764
- Contact: Pauline Ireland
- Email:
- Ship Via:
- Notes:

Buttons:

This screen is used to define the proofing details for each sub job.

Sub job – click the arrow to see a list of sub jobs to select. Click the sub jobs that you want to add proofing information on.

Received – enter the date as mm/dd/yy for the art to be received from the customer. You can also triple click the field and display a calendar to select the dates.

Proof Type – click the arrow to see a listing of proof types. Click the proof type you want for each sub job. The proof types are user defined and were setup in PrintEstWS.

Stage – this field displays the current stage of the proof if you are using the Mark Job Stage program to track the status of each section.

Proof To – click the arrow and select from the list for each sub job to which the proof is to be delivered. This list was created in PrintEstWS.

When you are finished entering the proof types for each sub job, click the **Save Proofs** button.

Proof Address – click this button and you will see a listing of shipping addresses for the customer. Click the address where the proofs should be delivered and save it as the default address.

Master Files Book

Overview



Master Files Book defines the Bind Styles, Spine Types, Sections, Sub sections, Ink Templates, Sub Job Types, and Prepress Workflows needed in Book Estimating and Print Order Entry. The company default packing profile, Customer specific default markups, and Misc. Parameters are also defined here.

For Book Estimating to see activities set up in Master Files Print, links must be created in Master Files Book.

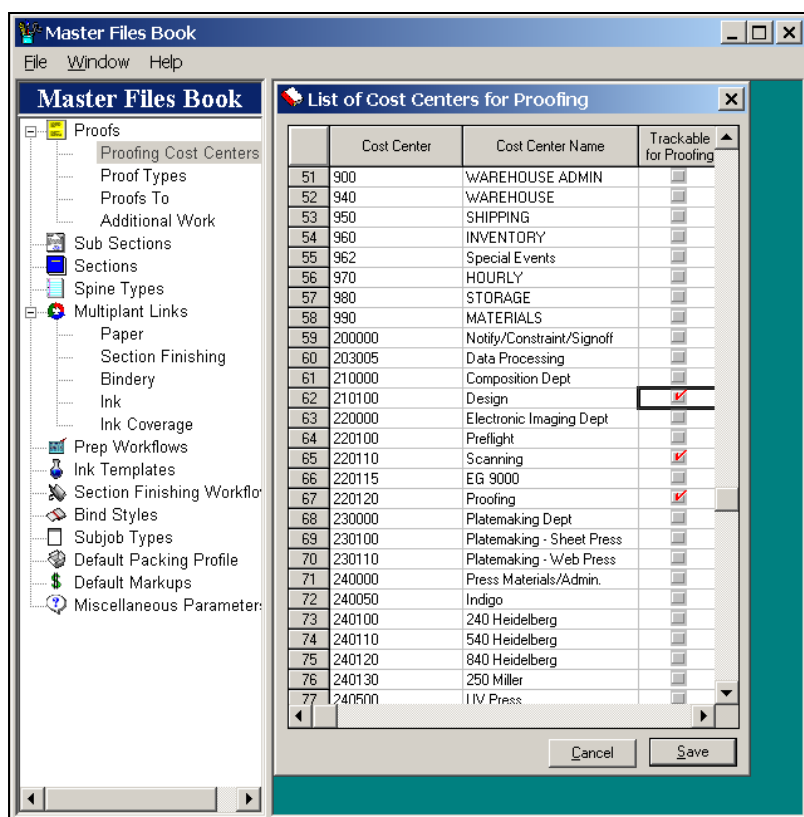
Proofs - Tracking Program (optional)

Proof Tracking allows users to enter proof stages and track proof status, define Proof Types, and Proofs to, and Additional work. This is NOT updated from Shop Floor postings. It is updated by stages that are manually set.

Proofing Cost Centers

Here you nominate all track-able Cost Centers for displaying status of proofs.

By nominating a cost center here, all activity codes for this cost center are available to be selected as a **Stage**.



From the tree, select **Proofs> Proofing Cost Centers** and this screen opens.

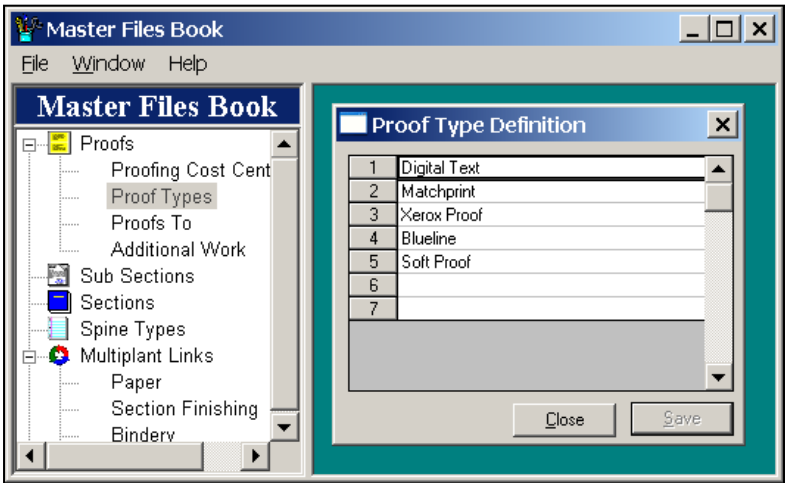
Enter all Cost Centers you decide to track by selecting the appropriate check box as shown.

Note This is called a Proof Tracking system, but any Cost Center you would like to track can be set up to work in this manner.

Save when finished.

Proof Types

From the tree, select Proofs>Proof Types. This screen opens:

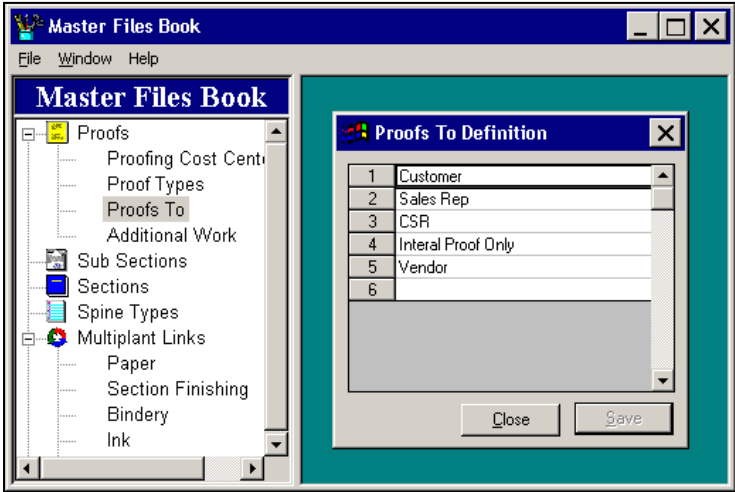


Enter each Proof Type Definition you track. These should be types of proofs you have defined in Master File Reports> Activities. **Save** when finished.

Proofs To

Here you define different **Proof To** categories.

From the tree select **Proofs>Proofs To**. This screen opens:



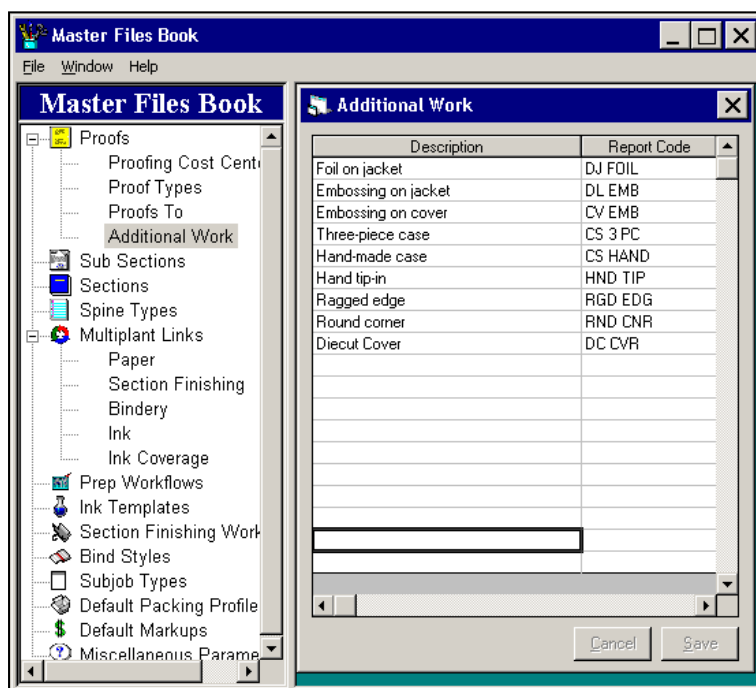
Enter each proof destination category, one per row.

Save when finished.

Additional Work

Creates a User Defined Code that displays on the report representing additional work.

From the tree, select Proofs> Additional Work. This screen opens:



Add the Description in the left column, and the corresponding code in the right column.

Save when finished.

Stages are manually set, and report is run from Print Order Entry. See Print Order Entry for Book Estimating for more details on this program.

Sub Sections

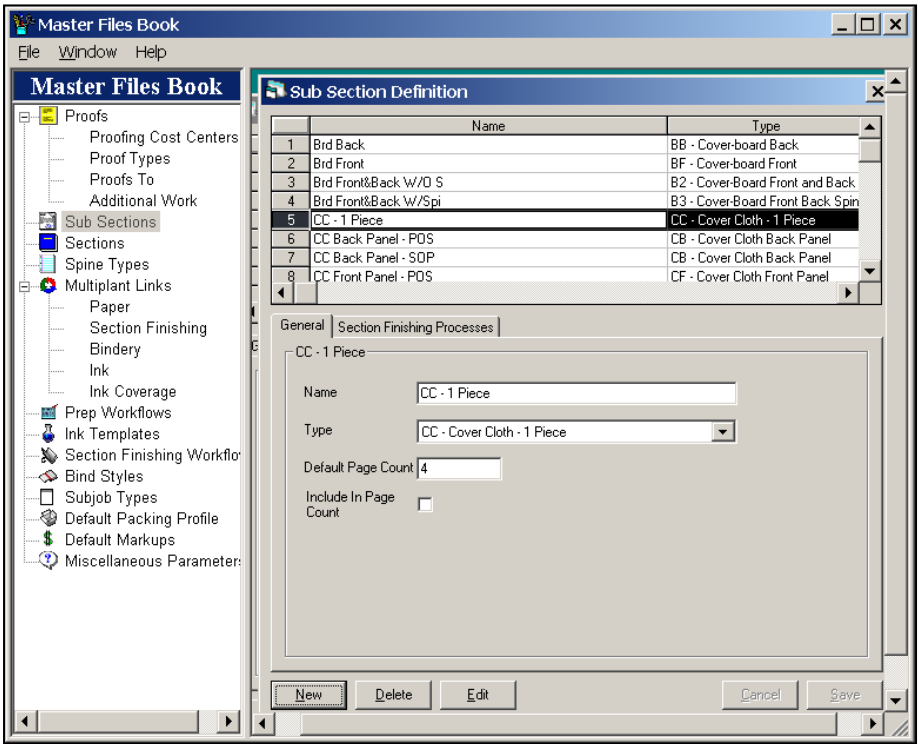
Sub Sections are building blocks that comprise a **Section**.

Each Section must be associated with one or more Sub Sections.

Sub Section Setup

Select Sub Section from the tree, then select New. This is the view of the input screen.

Here is the view when entry is completed, save when finished.



General Screen

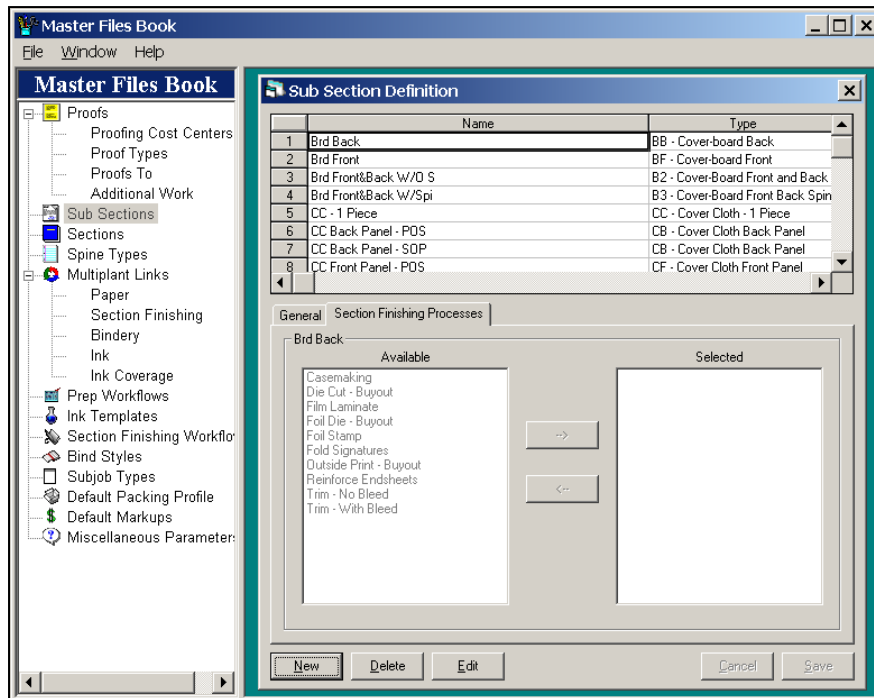
Name - enter the Name of the Sub Section.

Type - select from the drop-down menu set up in MF PRINT, Template Types.

Default Page Count - enter the page count this sub section uses as a default.

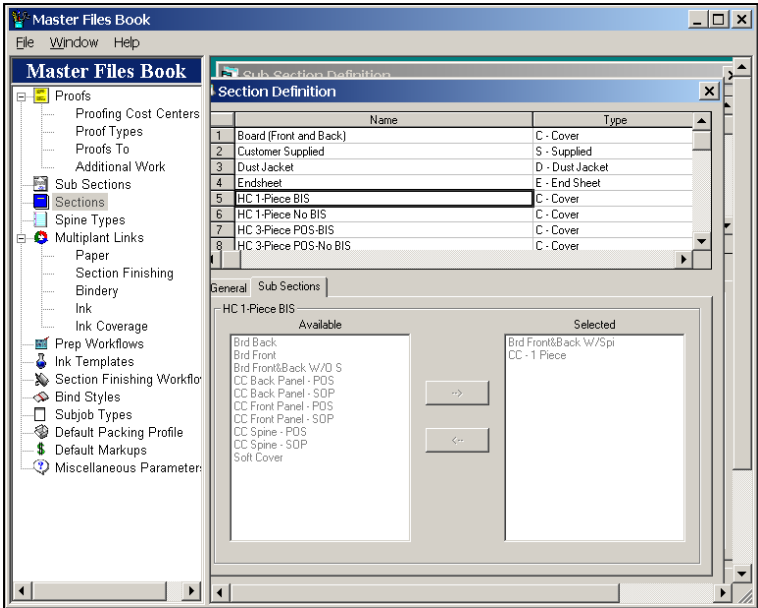
Include in Page Count - select this if the sub section is included in the page count for bindery calculation.

Save, Edit or Delete by selecting buttons at the bottom of this screen.

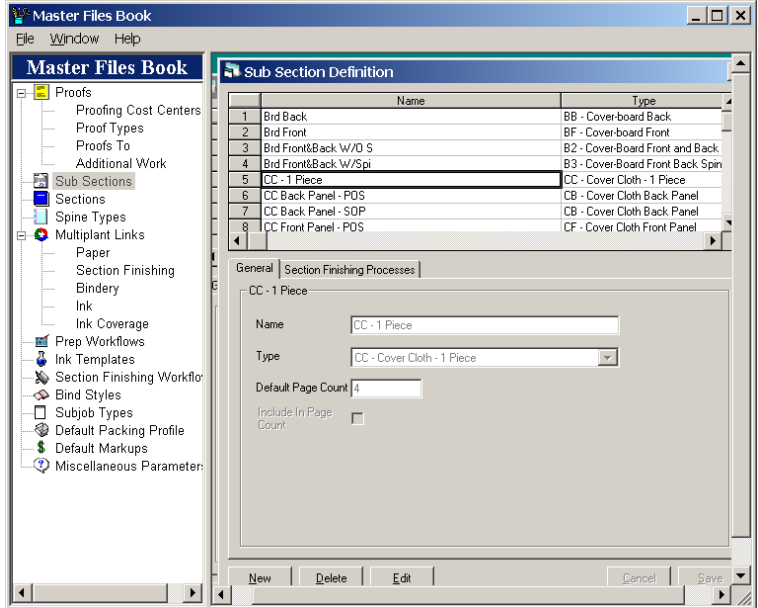


Sections

Section View – links to Sub Sections



Sub Section View- links to Section Finishing Processes



Section Finishing Processes Screen

You can select any available Section Finishing processes and attach to the sub section, if so whenever the sub section is used in Book Estimating, the Section Finishing process pulls in automatically. Or leave this blank and create a Section Finishing workflow described later in this document.

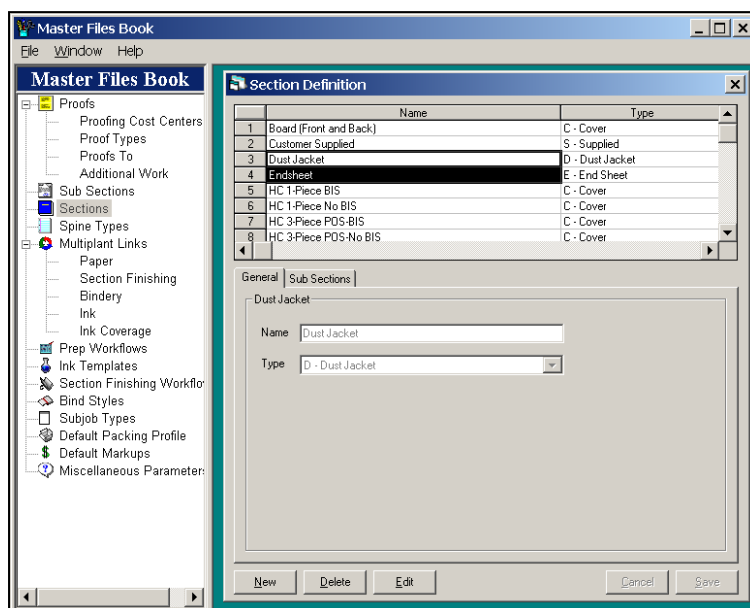
Sections Set Up

Sections must contain at least one sub section and may contain more than one. Select **Sections** from the tree, and the Section Definition screen opens.

General Tab

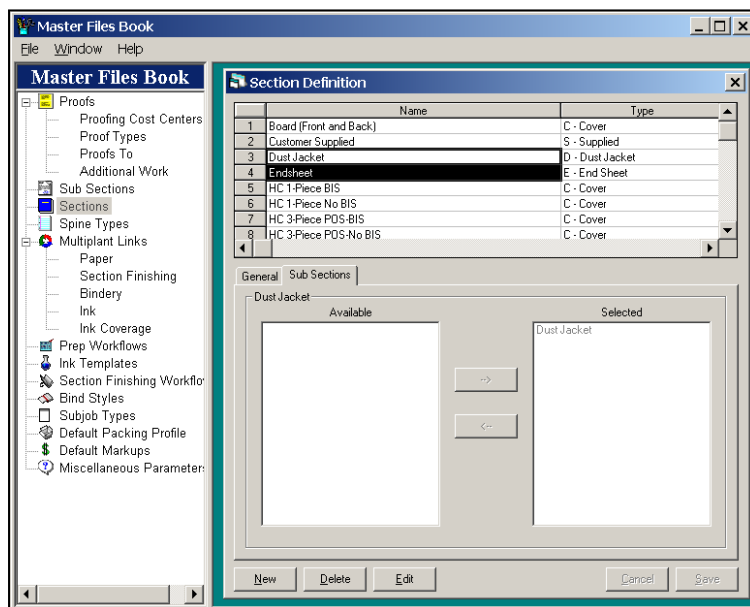
Name - enter the Name of the Section.

Type - select from the drop-down list, these Section Types are hard coded and impact the calculation engine.



Sub Sections Tab

Select the Sub Sections you created in Step one to link to this Section.



In this example there is one Sub Section linked to this Section.

When entering a new Section all the Sub sections display in the **Available** column.

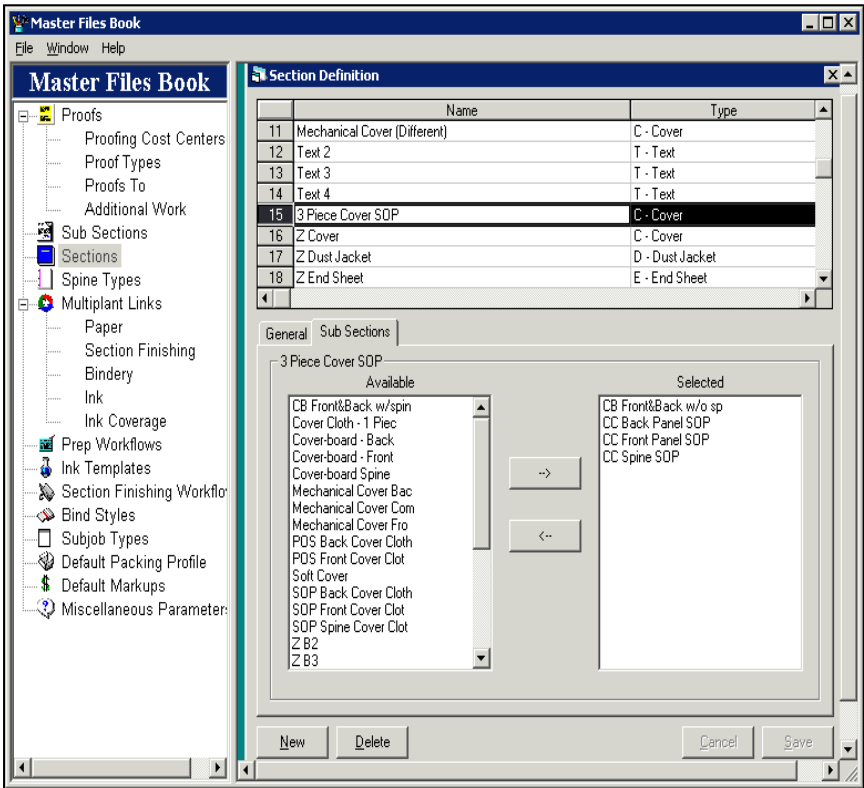
Click the item to highlight, then using the right arrow to select, or if you wish to deselect, highlight the item and use the left arrow.

Save before exiting.

Sub Sections within Sections

These sub sections are the parts of the section, creating links that are used in Book Estimating.

This shows a 3-piece cover cloth and binder boards as sub sections that belong to a single section. When this section is selected in Book Estimating, all of these selected Sub Sections pull in by default.



To select, highlight the sub section in the available area and click the right arrow. Now it displays in the **Selected** area.

To remove, highlight a selected sub section and choose the Left arrow.

Spine Types Setup

Master Files Book

File Window Help

Master Files Book

- Proofs
 - Proofing Cost Centers
 - Proof Types
 - Proofs To
 - Additional Work
- Sub Sections
- Sections
- Spine Types**
- Multiplant Links
 - Paper
 - Section Finishing
 - Bindery
 - Ink
 - Ink Coverage
- Prep Workflows
- Ink Templates
- Section Finishing Workflor
- Bind Styles
- Subjob Types
- Default Packing Profile
- Default Markups
- Miscellaneous Parameter

Spine Type Definition

Name: Case Bound - Round Back

Formulas

Case Bound - Round Back

a - Caliper/PPI: ☒ Use Caliper Coated Factor:

b - Page Count:

General Formula: Rounding: Amount: Result:

	Size	Formula Type	Formula	Rounding	Nearest Amt	Value
1	3/32	Spine	0.3125		0.0000	25
2	3/32	Hinge	0.375		0.0000	
3	3/32	DustJacket			0.0000	
4	1/8	Spine	0.3125		0.0000	26
5	1/8	Hinge	0.375		0.0000	
6	1/8	DustJacket			0.0000	

Descriptive:

Actual:

Test

New Delete Cancel Save

Spine Types - define all spine types that are used for books in your plant here. Select **Spine Types** from the tree.

New - enter a name for this Spine Type.

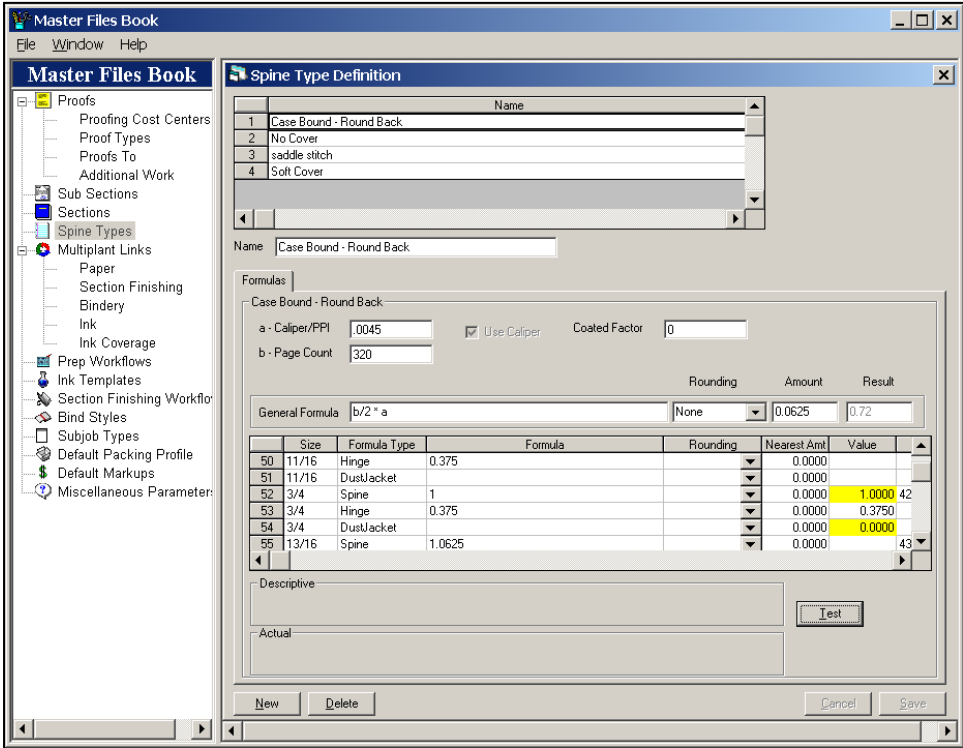
Formulas - this tells the system how to calculate spine thickness for this Spine Type.

1. **Caliper/PPI** of the text. If using caliper instead of PPI, check the Use Caliper box.
2. **Page count**, text page count. The front and back of one leaf or sheet counts as 2 pages, even if it is blank on one side.
3. **Coated Factor**, used as an adjustment for coated paper in the bindery process. With Coated paper the bind edge flares out, causing the book block to be thicker at the bind edge than the trim edge (known as nail heads).

General Formula - you can create any General formula here, and test your results by entering a page count, or PPI, and then clicking the **Test** button. What calculates here is what Book Estimating uses to calculate spine width for this Spine Type.

You have the option to enter a flat value in the **Formula** field, which overwrites the general formula, and is used to calculate spine width for this bind style in Book.

See below:



In this example, the **General Formula** shows the Result to be .75 (3/4") when **Test** was selected. The actual calculated spine is .72, set up to be rounded to the nearest 1/16". (See General Formula line.)

What they put on the actual Formula line (see line 31) indicates that when 3/4" spine was calculated, a 1" (flat value) is to be used. This 1" spine is what is used in Book Estimating, if no rounding is assigned.

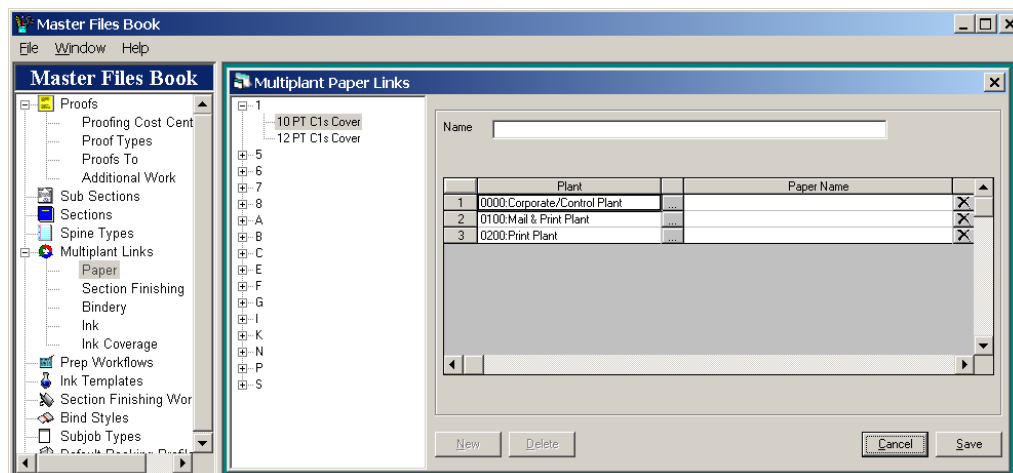
Multi Plant Links

For Book Estimating to see and use processes set up in Master Files Print, the links are set up in Multi plant links. This is so even for a single plant environment.

Prepress is the exception and is dealt with under Prepress Workflows. In Multi-Plant environments, linkage is required to the appropriate plant.

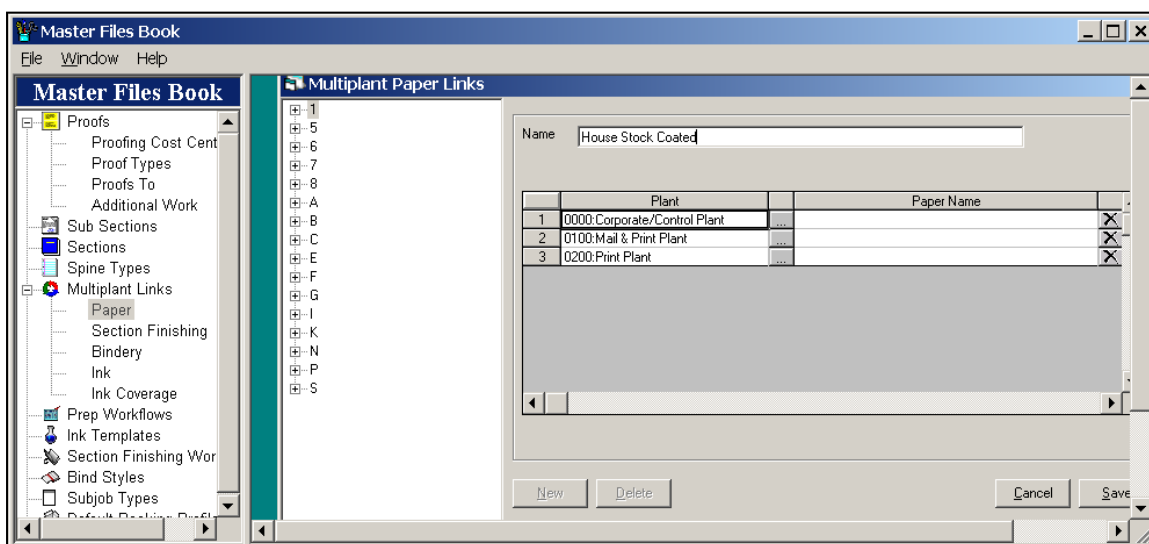
Paper

From the tree, select **Paper**, then **New**.



Name (new) -Type in a Name for this paper. This is the name that displays in the drop-down list in Book Estimating and is intended to be generic, as brand names for house papers could change. This is also useful in multi-plant environments.

Example: In Plant 1, house coated could be Productivity. In Plant 2, it could be Centura. In Book Estimating when House Coated is used, Plant 1 pulls in the cost for Productivity paper, and Plant 2 pulls in the cost for Centura paper.



To link a paper here it must exist in Master Files Print > Paper. It may or may not have the same name in Master Files print, and it may or may not be an inventoried paper.

Then select the ... to bring up the search screen next to the plant you are linking to (in single plant environments there is only one).

Paper Search

Filters

Use filters to narrow your search through all papers set up in Master Files Print. You can use none, one or all.

Floor Stock - click **Yes** or **No** from drop-down choices.

Type - select from drop-down choices. These are hard coded and correspond to Formats in MF PRINT.

Web- Web roll paper.

- Sheet – paper purchased and stocked in Sheets.
- Continuous – Same as web (roll paper) but for use with presses with various cutoffs.
- Materials- Not traditional paper, cover cloth is an example, or Binder Boards could be Materials.
- Flexo- same as web (roll paper) but for use with presses with variable width and cutoff presses.

Category- select from Drop-down displays what was entered in Master Files Print -Misc,-Paper Types.

Sub Category – (optional) allows further filtering, i.e., if Cover is a Category, Sub Category could be coated or uncoated.

Basis Type - Select from drop-down (hard coded industry standard).

Basis Weight - Enter an Industry Standard Basis weight (Definition, the weight of 500 sheets of paper in the Basis Size of the Basis type).

PPI - Pager per inch, used to determine thickness.

Caliper- a different thickness measure, based on thousandths of an inch.

Name Like - Input any similar name.

Descr Like - input any similar description.

Vendor - input vendor number or name.

When you have your desired filters, click **Search** and all papers meeting the criteria display.

To select the paper, highlight the paper and click **Select**.

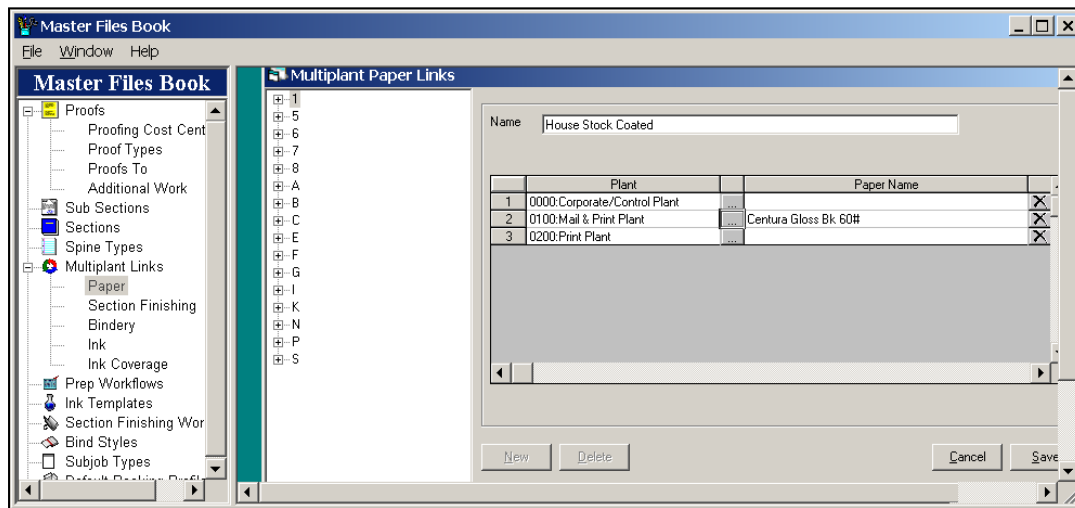
The screenshot shows the 'Paper Search' dialog box with various filters and a table of results. The filters are set as follows:

- Floor Stock: Yes
- Type: (empty)
- Category: (empty)
- Sub Category: (empty)
- Basis Type: (empty)
- Basis Weight: (empty)
- PPI: (empty)
- Caliper: (empty)
- Name Like: (empty)
- Descr Like: (empty)
- Vendor: (empty)

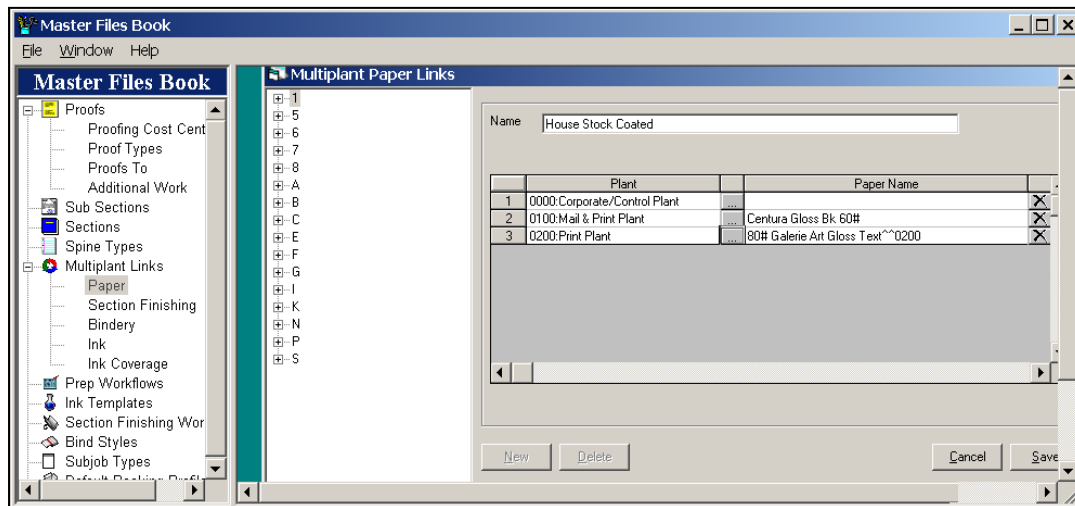
Below the filters, there is a checkbox for 'Show Inactive' and buttons for 'Clear All', 'Select', and 'Stop'.

	Plant Code	Name	Description	Sizes	Colors	Floor Stock	Category
1	0100	Accent Opaque Cover^^0100	Accent Opaque Cover	23 x 35	White	Yes	C-Uncoated
2	0100	C1s Cover 10pt Generic^^0100	C1s Cover 10pt Generic	19 x 25	White	Yes	D-Coated
3	0100	Carnival Cover^^0100	Carnival Cover	20 x 26	White	Yes	C-Uncoated
4	0100	Carnival Text^^0100	Carnival Text	17 1/2 x 23	White	Yes	A-Offset/Bor
5	0100	Centura Gloss Bk 100#	Centura Gloss Bk 100#		White	Yes	B-Coated Tes
6	0100	Centura Gloss Bk 60#	Centura Gloss Bk 60#	19 x 25	White	Yes	B-Coated Tes
7	0100	Centura Gloss Bk 80#	Centura Gloss Bk 80#	18 x 24	White	Yes	B-Coated Tes
8	0100	Centura Matte Book^^0100	Centura Matte Book			Yes	B-Coated Tes
9	0100	Clone of Carnival Cover^^0100	Carnival Cover	20 x 26	White	Yes	C-Uncoated
10	0100	Clone of Clone of Coated Flexo Stoc	Coated Label Stock	9	White	Yes	B-Coated Tes

At the bottom of the dialog, there is a 'Print Out' button, a status bar showing 'Loaded 44 records.', a page number '300', and buttons for 'Continue', 'Search', and 'Close'.



Do the same for the next plant.

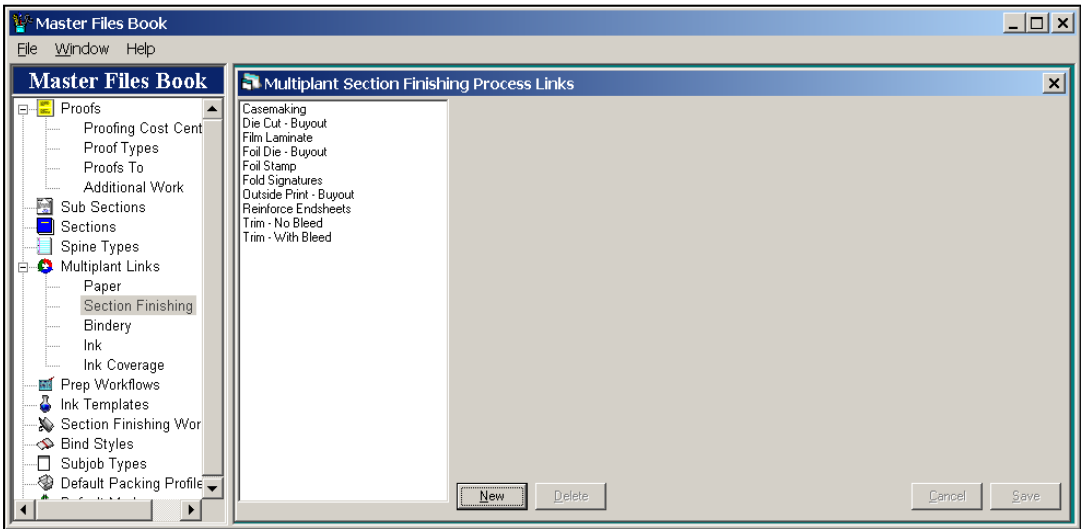


This enables you to define different papers as house coated, for example, at different plants, in a multi-plant environment.

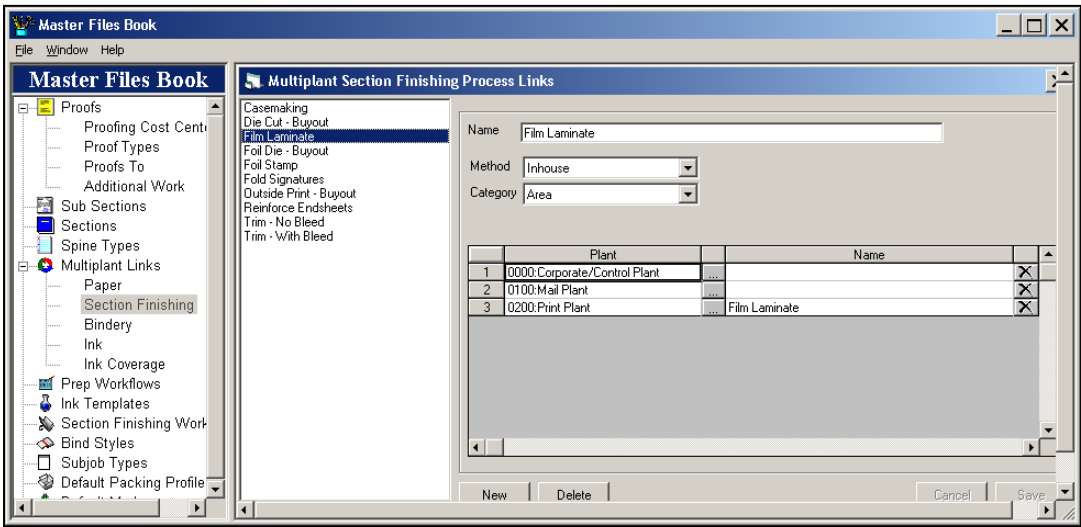
This is how a linked paper looks for one print plant in a Multi Plant environment.

Section Finishing

Click Section Finishing from the tree, this screen display.



Click a Section Finishing process, and this screen opens. When you first open this, the field under **Name** is blank. In this example, the Film Laminate has already been linked.



Method = In house or Subcontract.

Category = Calc method set up in Master Files Print.

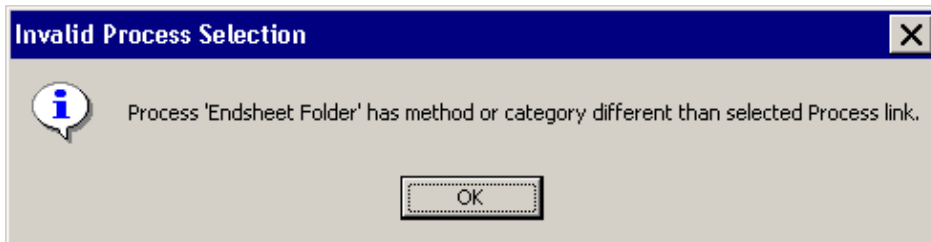
In a Multi Plant environment, when you click a Plant, and select the ellipsis box, the Section Finishing processes set up for this plant displays.



Highlight the process, and then click **Select**. This gives you a link for this process to each plant, if the same process exists in multiple plants. It works the same as paper link for multiple plants described earlier.

To deselect or remove the link, click the X at the far right under the Name field (circled in screenshot above).

If you link a Section Finishing process from the list that is not the same method or category listed at the top of the screen, you receive a warning message and the link is not saved.

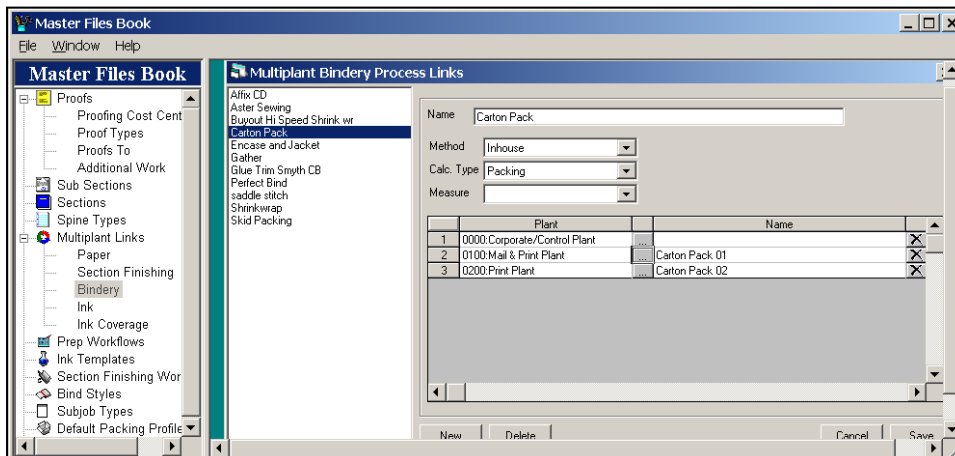


Save when finished.

Bindery Links

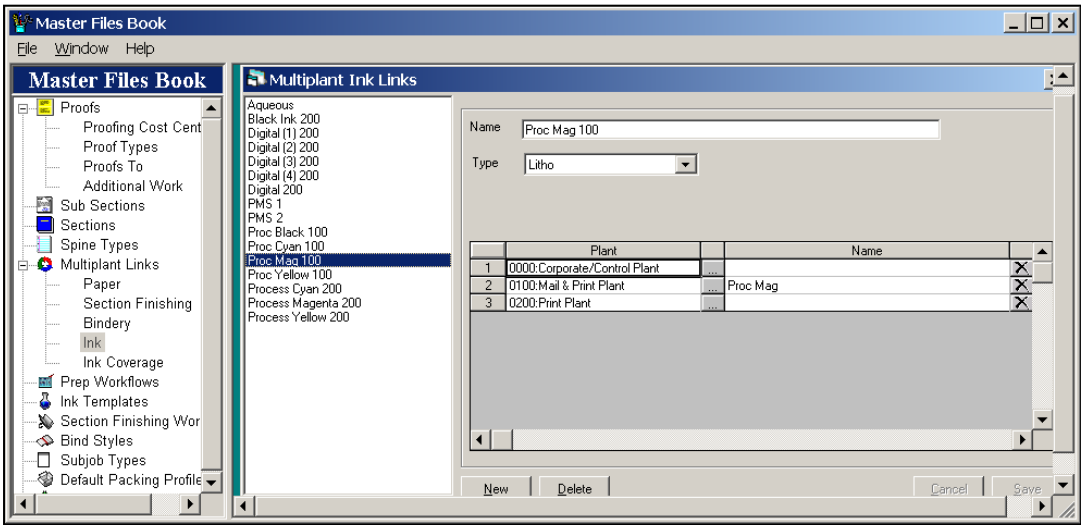
Select Bindery from the tree, and then select a process from the list to link.

This works the same exact way as described for Paper Links and Section Finishing links.



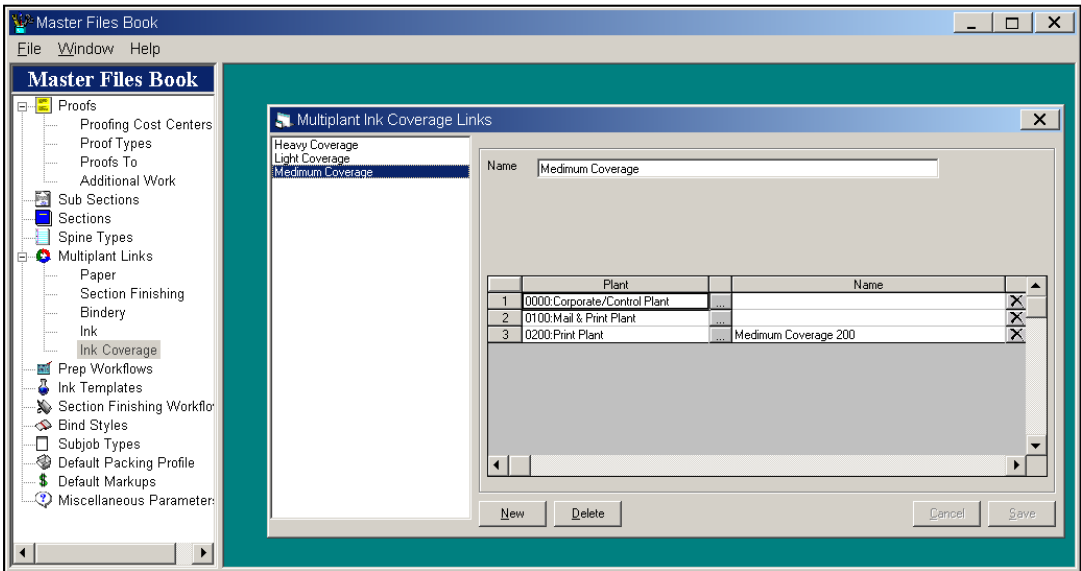
Ink

Select Ink from the tree and select an Ink to link from the list.



We need to create different links for inks for each plant as of this writing. Select the ink and link to the plant exactly as with previous examples in this document.

Ink Coverage



This works exactly the same as described in Section Finishing links (see above). The purpose is to pull in the Ink Coverage defaults as defined in Master Files Print.

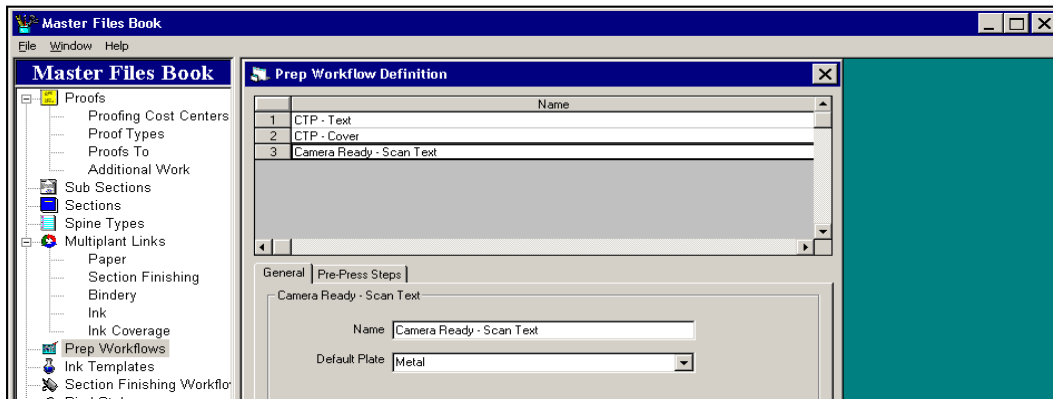
Prep Workflows

The next 3 items on the menu create Workflows, these link one or more processes or materials together for a single entry in Book Estimating.

In order to create Prepress Workflows, you need to have first completed two steps in Master Files Print: 1) create Pre Press Processes, and 2) create Pre Press Steps. A Pre Press Workflow is comprised of one or more Pre Press Steps. A Prepress Step is comprised of one or more Pre Press Processes.

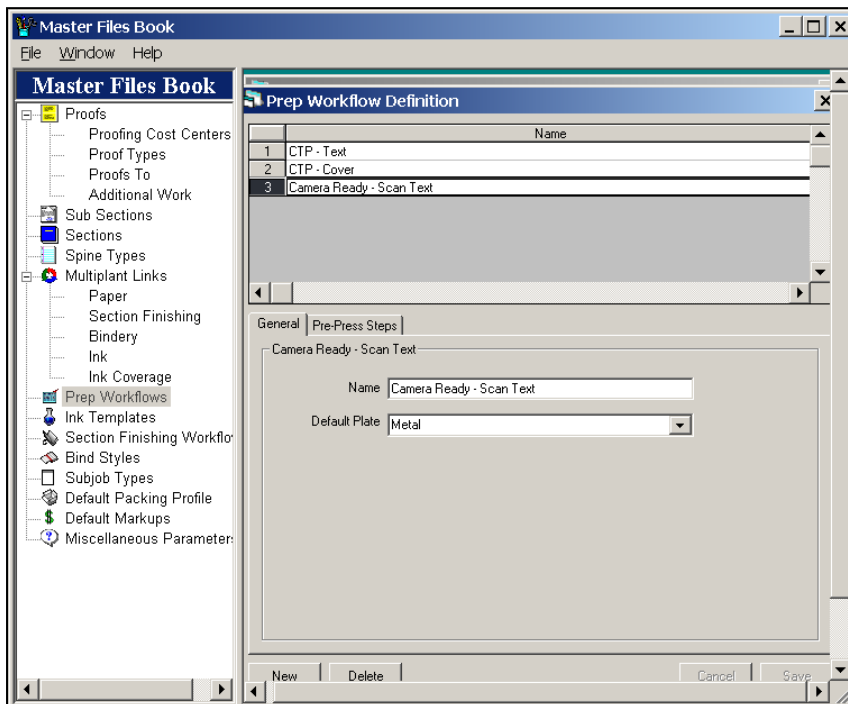
Open Master Files Book and click the **Prep Workflows** tree item. To add a new workflow, click the **New** button.

General Tab

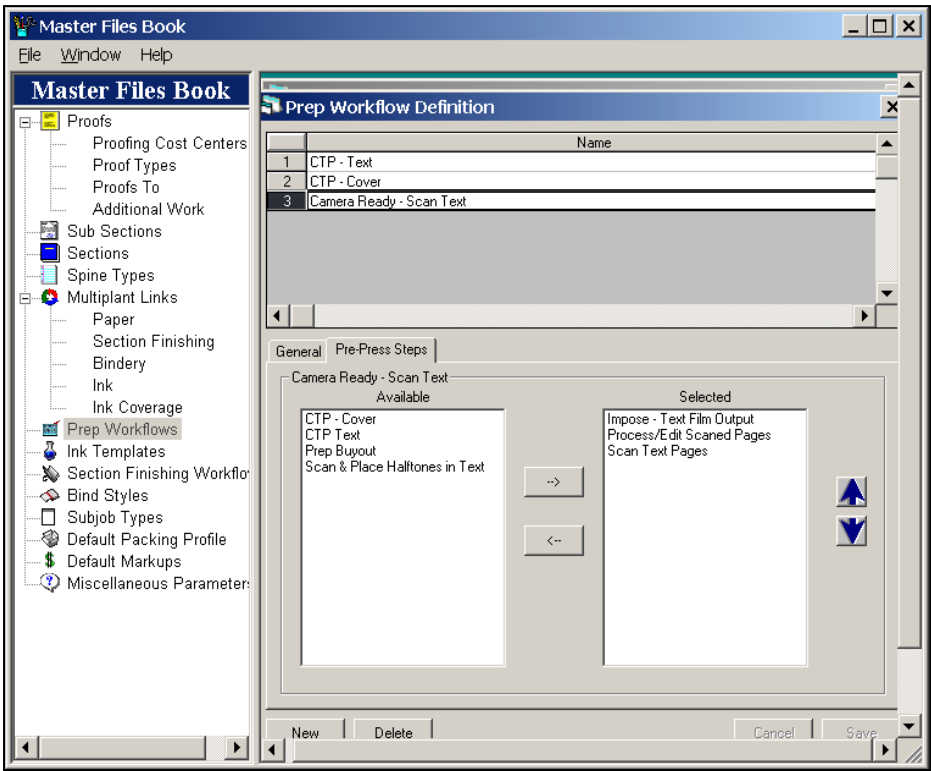


Enter the name for the workflow. This is the description you will see in Book Estimating under the drop-down listing of Prepress Workflows. Optionally you can link a default plate type to the workflow. This is used to automatically pull in a plate type in the Inks screen based on the workflow that is selected.

Pre-Press Steps Tab



This displays all Prepress Steps defined in Master Files Print on the left side of your screen. To **add a step** to the workflow, click the step in the available step listing so that it is highlighted. Then click the arrow pointing to the right. To **remove a step**, click the step under the selected steps then click the arrow pointing to the left.



Save when finished.

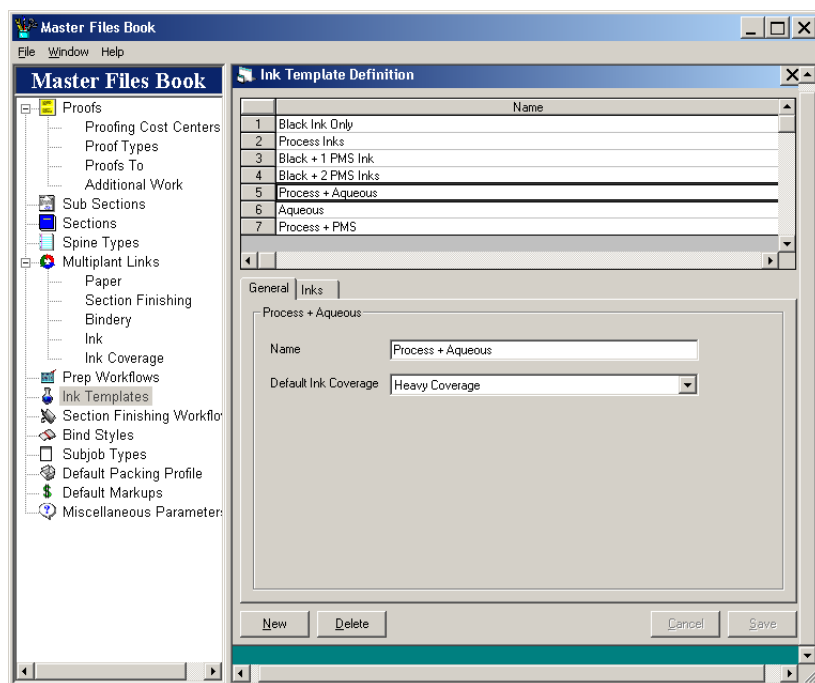
The workflow has now been completed and is ready to use in estimating.

Ink Templates

This allows you to link individual inks to an ink template. An example would be 4-color process. This means in estimating you can make one entry (for a 4 color process), rather than 4 entries (cyan, yellow, magenta, black).

To create an Ink Template, select from the tree and on the **General** tab, select the **New** button.

General Tab



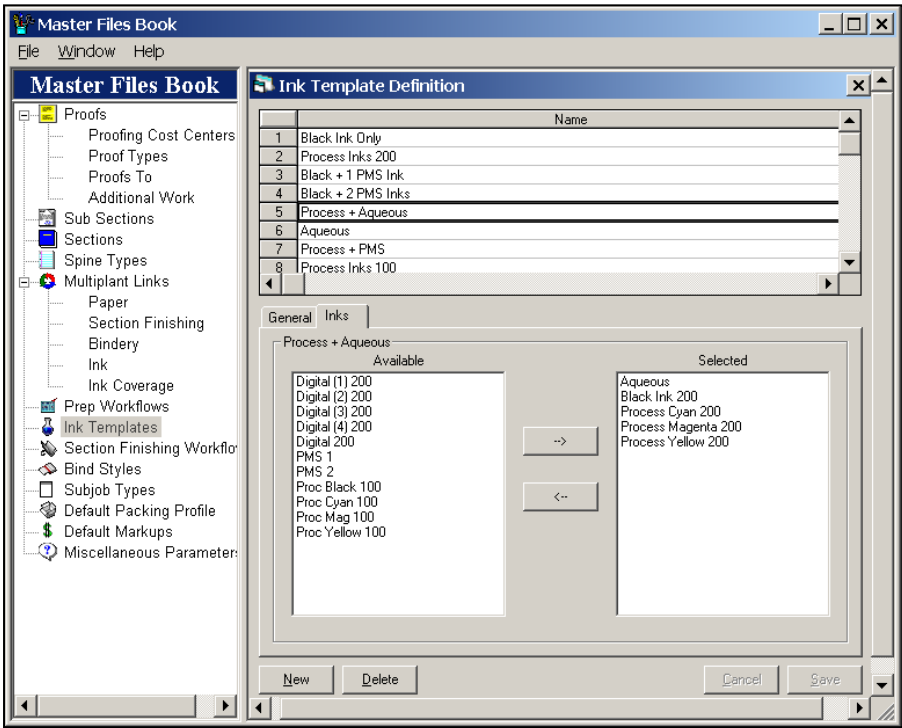
Name – enter name of the ink template.

Default ink coverage – enter a default percentage of ink coverage for this ink template. Set up in Multi-plant Links, Ink Coverage (choose from drop-down list).

Save when finished.

Inks Tab

Highlight the inks to include in this ink template. Select each one by highlighting and clicking the right arrow. To deselect, highlight and click the left arrow.



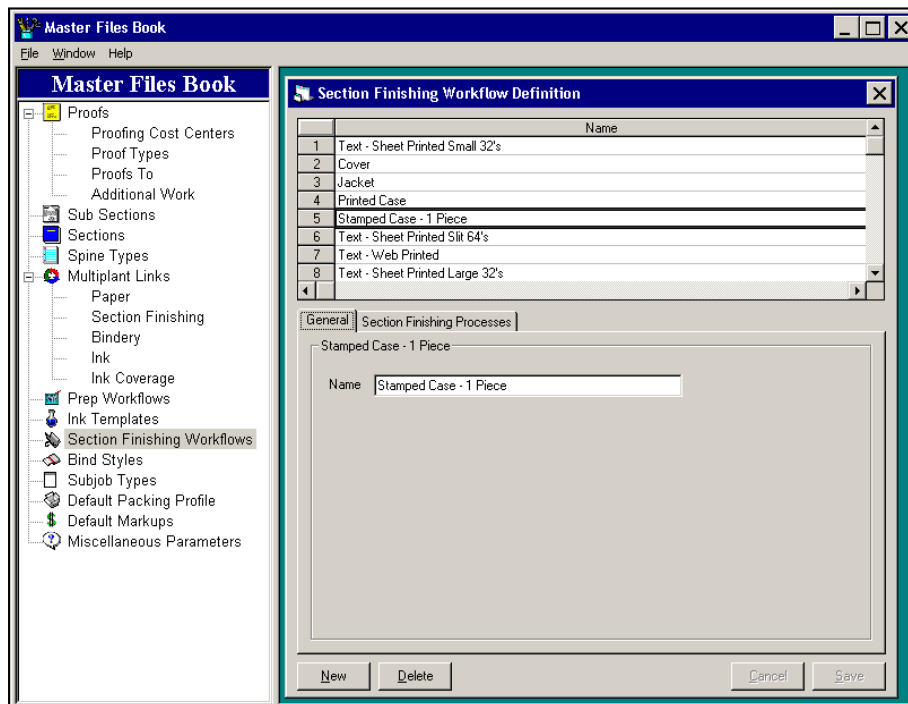
Save.

Section Finishing Workflows

This optional feature allows users to make a “workflow” which is designed to link a group of Section Finishing processes that will all pull into the estimate when the workflow is selected, rather than inputting each process one by one.

General Tab

Enter the name of the section finishing workflow. Click **Save**.



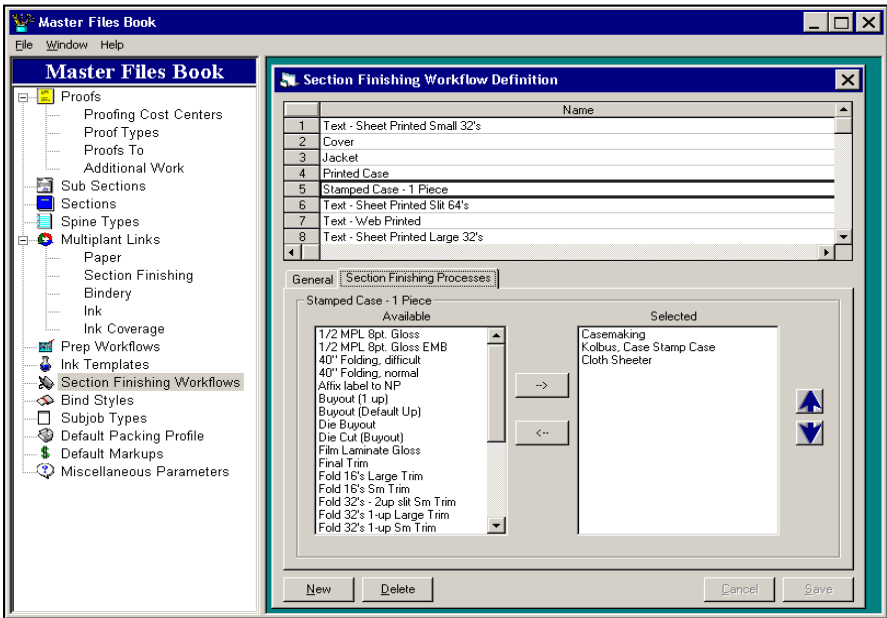
Section Finishing Processes Tab

You create the group of Section Finishing processes for this workflow here.

To select, highlight the Section Finishing Process from the **Available** box, click the right arrow.

To deselect, highlight the Section Finishing process from the **Selected** box, click the left arrow.

Save when finished.



Bind Styles

Definition - a bind style defines the binding method for bound books. Examples are Perfect Bound, Saddle Stitched, 3 Piece Case Bound. Bind Styles are required for use in Book Estimating for calculation.

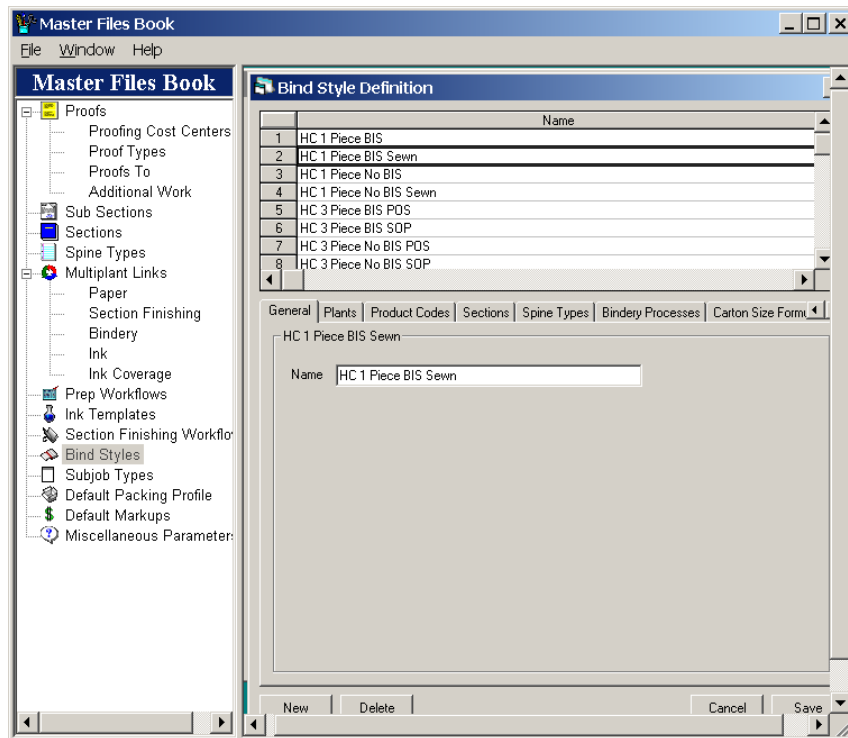
Set up

Here all Bind Styles that are used in Book Estimating are defined.

Click **Bind Style** on the tree and click the **New** button to add a new Bind Style.

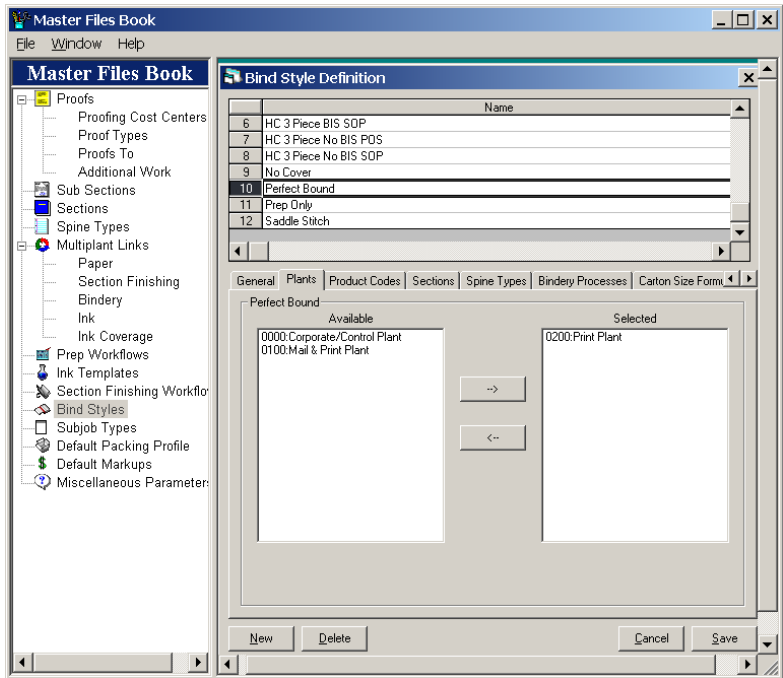
General Tab

Add the name of the new Bind Style.



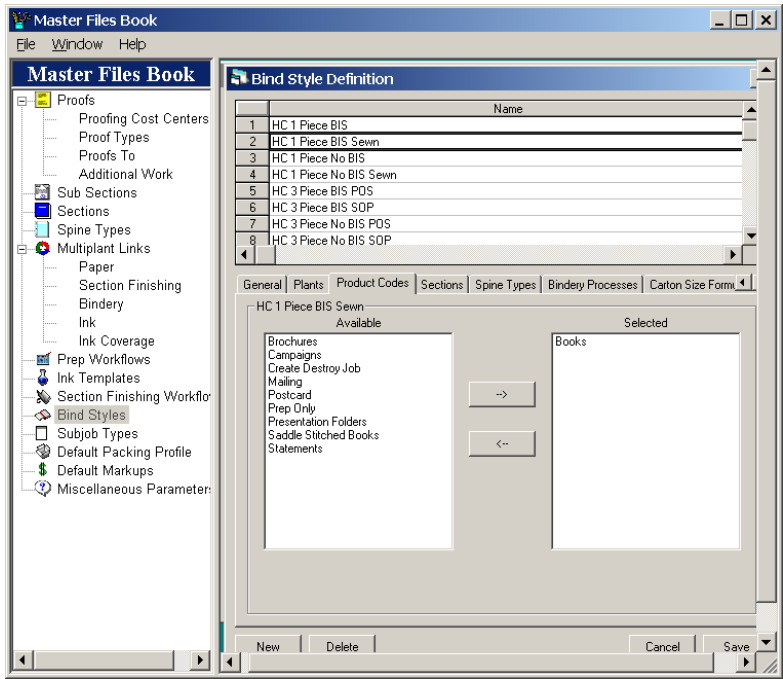
Plants Tab

Select all plants that can accommodate this bind style (for a single plant, this is the only plant and must be selected).



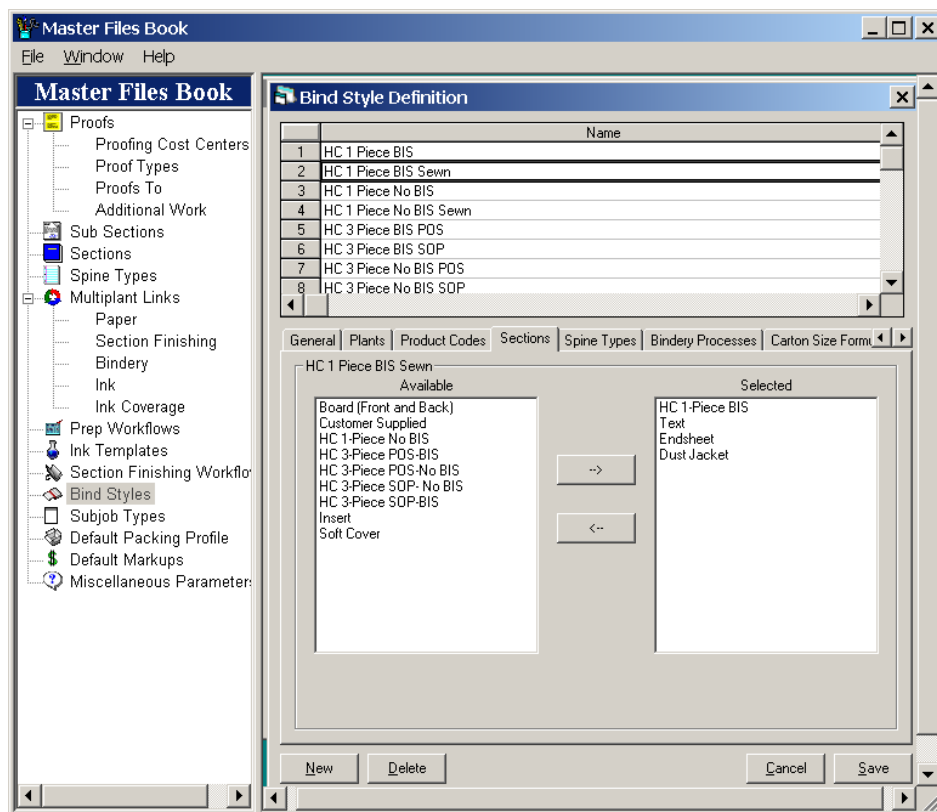
Product Codes Tab

Defines all Product Codes (AKA Product Types) that apply to this Bind Style. Select Product Codes by highlighting and using the right arrow. (Product codes are set up in Master File Print> Misc,> Product Type Categories.)



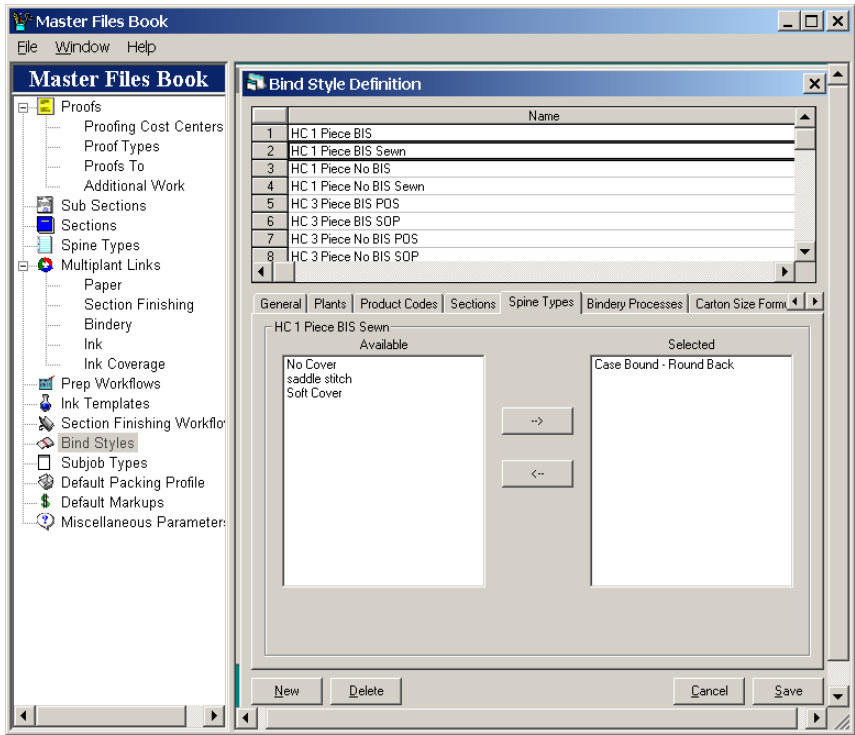
Sections Tab

Here enter all required Sections for this Bind style. Your selection comes up automatically in the Component screen in the Book Estimating with the associated Sub Sections (this was set up in Master Files Book, Sections).



Spine Types Tab

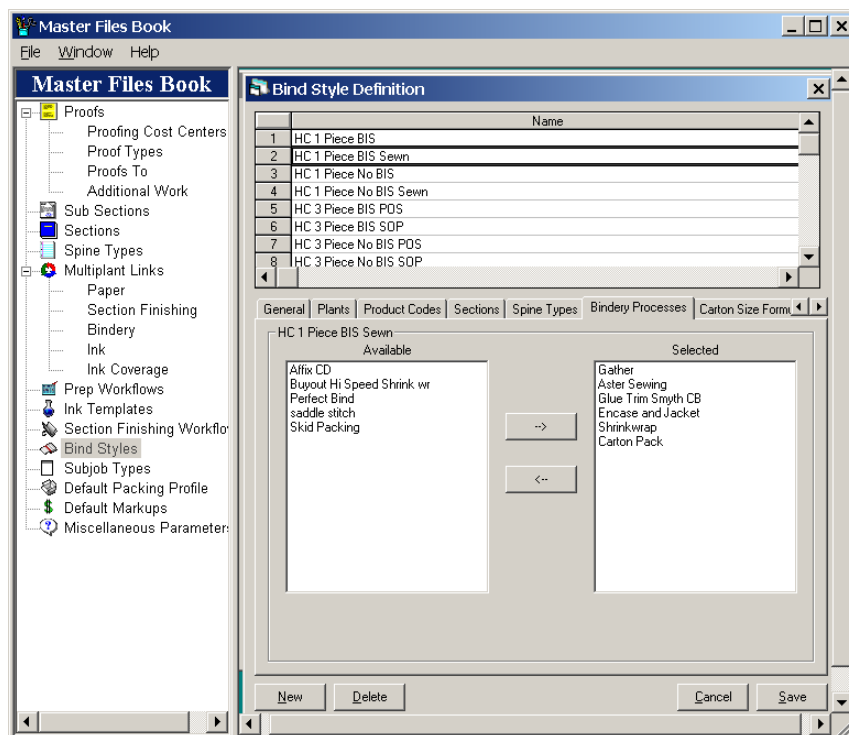
This links all the Spine Types that can be used with this Bind Style. In this case, there is only one. Some Bind Styles can use more than one Spine Type. In this case the spine types should calculate the same. Example would be notch paper and perfect bind, both using soft cover spine types.



To select, highlight the available Spine Type, and select by using the right arrow. To deselect, use the left arrow.

Bindery Processes Tab

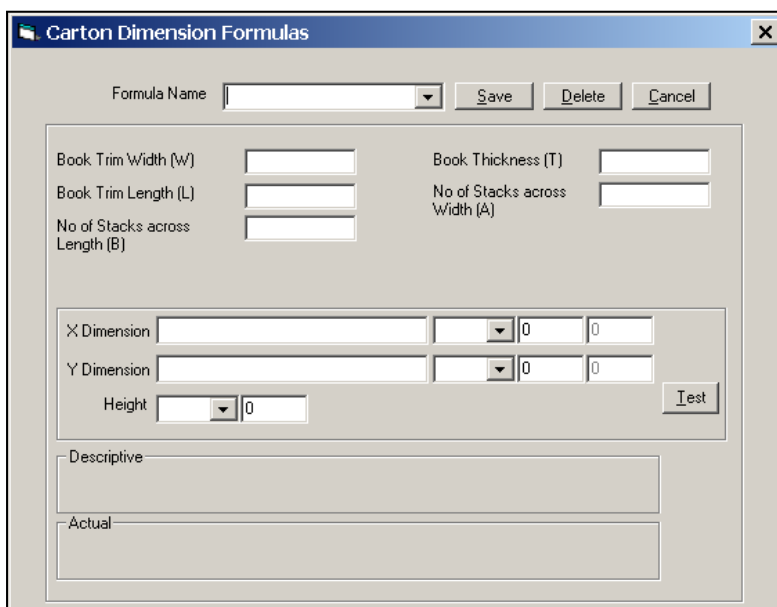
Select all the required bindery processes for this Bind Style here. Any Bindery Processes that use pockets, or that affect the whole job (e.g., carton packing) are selected here.



Carton Size Formulas

Here we define and enter parameters for carton packing for this specific Bind Style. We support user defined formulas which are used in carton selection. You can test your formulas in this screen.

Click **New Formula** this is the opening screen.



Enter the formula name. Using the variables listed in the top portion of the screen create a formula for both the X and Y dimensions. You can also select a rounding option to round the formula result up or down to the nearest value. After saving the formula you can test it by entering values in the fields above, then select **Test** button.

Carton Dimension Formulas

Formula Name: **Hard Cover** [Save] [Delete] [Cancel]

Book Trim Width (W) [] Book Thickness (T) []
Book Trim Length (L) [] No of Stacks across Width (A) []
No of Stacks across Length (B) []

X Dimension: $(W+.5) * A +.25$ to near 0.0625 []
Y Dimension: $(L+.25) * B +.25$ to near 0.0625 []
Height: to near 0.0625 [] [Test]

Descriptive: $(BookTrimLength+.25) * StacksAcrossLength +.25$
Actual: $(0+.25) * 0+.25$

You may create as many formulas as you need based on each of the bind styles that you have entered. After creating the formulas you then need to link them to the specific bind style. You can do this by clicking the bind style in the listing, selecting the **Carton Size Formula** tab then click the **Formula Name** from the drop-down listing and select the formula that goes with the bind style, and **SAVE** the bind style. The completed screen looks like this.

Master Files Book

File Window Help

Master Files Book

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- Bind Styles**
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- Miscellaneous Parameter

Bind Style Definition

Name

- 6 HC 3 Piece BIS SOP
- 7 HC 3 Piece No BIS POS
- 8 HC 3 Piece No BIS SOP
- 9 No Cover
- 10 Perfect Bound**
- 11 Prep Only
- 12 Saddle Stitch

Plants | Product Codes | Sections | Spine Types | Bindery Processes | **Carton Size Formulas** | OPF

Book Trim Width (W) [] Book Thickness (T) []
Book Trim Length (L) [] No of Stacks across Width (A) []
No of Stacks across Length (B) []

Formula Name: **Soft Cover** [New Formula] [Edit Formula]

X Dimension: $W * A + 0.25$ 0 []
Y Dimension: $L * B + 0.25$ 0 []
Height: to near 0.0625 [] [Test]

Descriptive: []
Actual: []

[New] [Delete] [Cancel] [Save]

In this example 1/2" was added to the Width of the Book and 1/4" to the Length. The result in a carton using 1 stack for a 6"x9" book is a carton that is 6-1/2 wide x 9-1/4" long.

OPF Size Formulas Tab

Enter formulas for One Piece Folders to go with this Bind Style here.

The screenshot shows the 'Master Files Book' application window. On the left is a tree view with categories like Proofs, Sub Sections, Sections, Spine Types, Multiplant Links, Paper, Section Finishing, Bindery, Ink, Ink Coverage, Prep Workflows, Ink Templates, Section Finishing Workflow, Bind Styles, Subjob Types, Default Packing Profile, Default Markups, and Miscellaneous Parameter. The 'Bind Styles' category is expanded. On the right is the 'Bind Style Definition' dialog box. It has a list of bind styles: 1. 3 Piece Hard Cover POS, 2. 3 Piece Hard Cover SOP Sewn, 3. Big Perfect Bind Book, 4. Brochure, 5. Folded Sigs, 6. Hard Cover, 7. Hard Cover with Spine Board, 8. HCSEW. The 'OPF Size Formulas' tab is selected. It contains input fields for Book Trim Width (W) = 6, Book Thickness (T) = .25, Book Trim Length (L) = 9, No of Stacks across Length (B) = 1, and No of Stacks across Width (A) = 1. Below these are formula input fields: X Dimension (W + .25), Y Dimension (L + .25), and Height (0). There are also dropdown menus for 'None' and '0' next to the dimensions. A 'Test' button is present. At the bottom are 'New', 'Delete', 'Cancel', and 'Save' buttons.

OPF formulas work the same as Carton formulas, except there is only one book per OPF, and there is NO FILL. On this tab you can define OPF Formulas specific to a Bind Style.

In this example, we input the Book Width (W) 6", Book Length (L) 9", no Stacks across Length (B), Book Thickness as (T), and No of Stacks across Width (A).

In this formula:

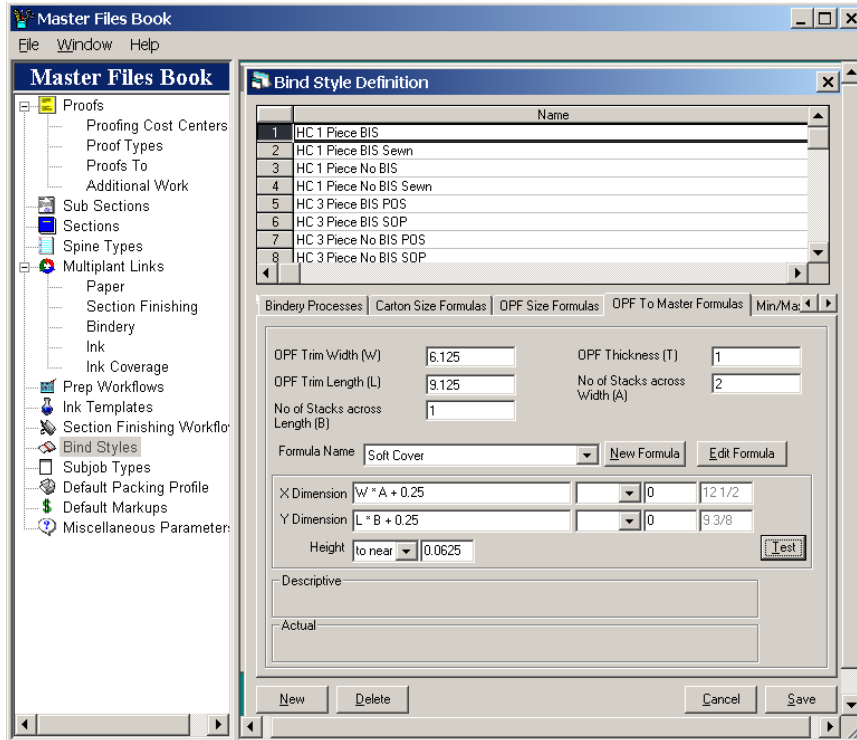
X dimension defines the Width of the One Piece Folder when assembled.

Y dimension defines the length of the One Piece Folder when assembled.

And to each dimension we have added .25. The test result shows the size of a one piece folder for a 6"x9" book calculates as 6.25" x 9.25" based on the formula.

OPF to Master Formula Tab

This is the formula for fitting one piece folders into master cartons. The logic is the same as regular carton formula, except the OUTSIDE dimension of the OPF is used instead of the book dimensions when determining the Master (outer) carton size.

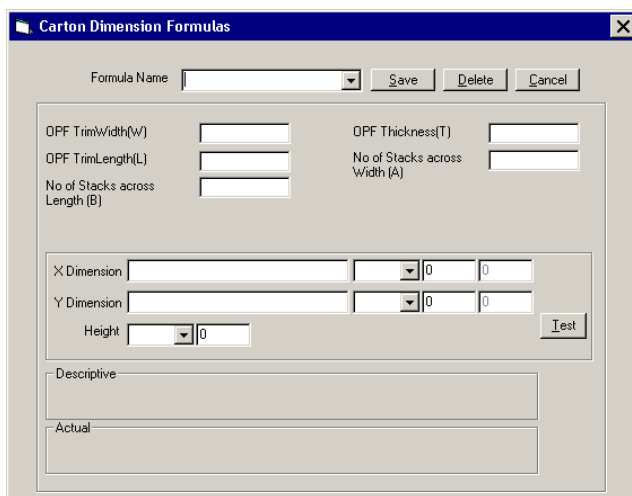


Always enter the overall outside dimension of the OPF as the OPF Trim Width (W) and OPF Trim Length (L). You can test your formula by entering the values of outside dimension of OPF sizes, enter number of stacks across, both length and width, and OPF thickness. Then select **Test**.

Enter an OPF to Master formula that is bind-style specific here.

To create a new formula that is Bind-Style specific:

Click **New**, and this box opens:



Carton Dimension Formulas

Formula Name: **OPF to Master** [Save] [Delete] [Cancel]

OPF TrimWidth(W) OPF Thickness(T)
 OPF TrimLength(L) No of Stacks across Width (A)
 No of Stacks across Length (B)

X Dimension: up to n
 Y Dimension: up to n
 Height: [Test]

Descriptive
 Book.TrimWidth*StacksAcrossWidth
 Actual
 6.25*2

Min/Max Bulk Tab

This screen allows you to set the minimum and maximum thickness allowable with this Bind Style on both coated and uncoated paper. This is generally indicated by bindery equipment specifications.

Master Files Book

File Window Help

Master Files Book

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- Subjob Types
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- Default Markups
- Miscellaneous Parameters

Bind Style Definition

	Name
6	HC 3 Piece BIS SOP
7	HC 3 Piece No BIS POS
8	HC 3 Piece No BIS SOP
9	No Cover
10	Perfect Bound
11	Prep Only
12	Saddle Stitch

Carton Size Formulas | OPF Size Formulas | OPF To Master Formulas | **Min/Max Bulk**

UnCoated Paper

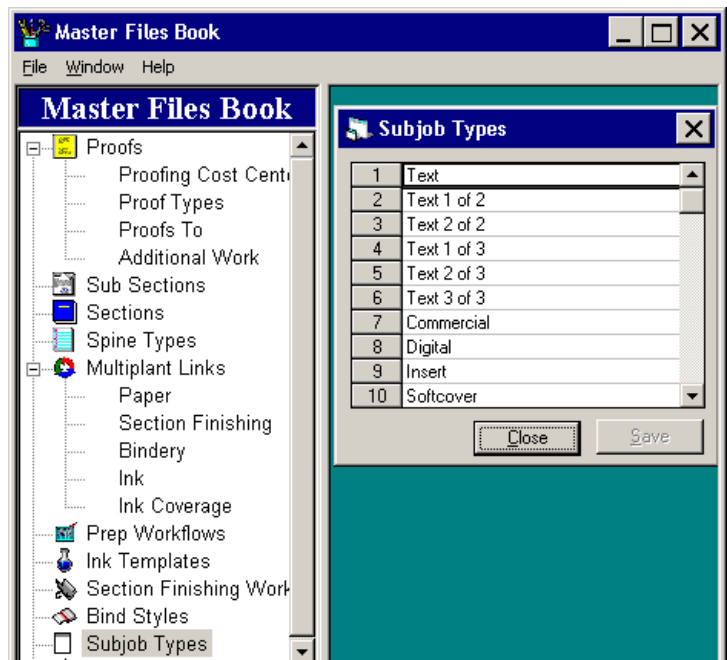
Minimum
 Maximum

Coated Paper

Minimum
 Maximum

[New] [Delete] [Cancel] [Save]

SubJob Types



Sub Job Types are used to define all Sub Jobs that are used in Print Order Entry (these should be set up the same way as Sections).

To add, go to the first available blank field. Enter the **Sub Job Type Name** and click **Save**.

Default Packing Profile

This profile information is used for all estimates where no customer-specific packing profile has been set up in Master Files Customer. (See more on this in the Book Estimating Carton Setup.doc.)

Select Default Packing Profile from the tree. This screen opens.

Packing Profile Parameters	Description/Value
Burst Strength (200/275lb)	200lb
Breakdown Quantity to use Custom Cartons	500
Custom Printed? (Yes or No)	No
Double Wall? (Yes or No)	No
Breakdown Quantity to use InHouse Cartons	9999999
Maximum Carton Height	10.1250
Maximum Carton Length	19.0000
Maximum Carton Weight	45.0000
Maximum Carton Width	12.7500
Maximum Skid Height	54.0000
Maximum Skid Length	48
Maximum Skid Weight	3000.0000
Maximum Skid Width	52.0000
Minimum Carton Height	5.7500
Minimum Carton Length	8.0000
Minimum Carton Width	8.6250
Minimum Fill Height	0.0000
Single Wall? (Yes or No)	Yes

Initially there are no values for any of the displayed fields. The values entered in this profile are used along with the Carton Formulas setup for each bind style to calculate the most efficient carton size for each book size. Maximum and Minimum values should include all book sizes. Some of the key fields in this screen are as follows.


Burst Strength – from drop-down, 200 lb. or 275 lb. These are RSC standards.

Breakdown Quantity to use Custom Cartons – enter the quantity break for ordering custom cartons. If the number of Standard or In-house cartons on an estimate exceeds this quantity, it automatically calculates a custom carton based on the bind style and trim size of the book.

Note Custom cartons will always be calculated regardless of the break point when there are no Standard or In-house cartons that fit the carton size calculated by the formula on the bind style.

Custom Printed - select **Yes** or **No**. Select **Yes** if default cartons are custom printed.

Breakdown Quantity to use In-house Cartons – If your facility has the ability to manufacture cartons, use this field to enter the quantity break for manufacturing In-house cartons. If the number of Standard cartons on an estimate exceeds this quantity, it automatically looks for an In-house carton to fit the book. If no In-house cartons are found that fit the bind style and trim size of the book, it reverts to custom cartons. If your facility does not manufacture In-house cartons, set this value to 999999.



Minimum and Maximum Values - The following minimum and maximum values define the parameters into which cartons and skids must fall to be considered in the estimating process.

- Maximum Carton Height – Maximum allowable height in inches for cartons.
- Maximum Carton Length – Maximum allowable length in inches for cartons
- Maximum carton Weight – Maximum allowable weight in pounds for cartons
- Maximum Carton Width – Maximum allowable width, in inches for cartons
- Maximum Skid Height – Maximum allowable height, in inches for skids
- Maximum Skid Weight – Maximum allowable weight, in pounds for skids
- Maximum Skid Length – Maximum allowable length, in inches for skids
- Maximum Skid Width – Maximum allowable width, in inches for skids
- Minimum Carton Height – Minimum allowable height in inches for cartons
- Minimum Carton Length – Minimum allowable length in inches for cartons
- Minimum Carton Width – Minimum allowable width in inches for cartons
- Minimum Fill Height – Minimum amount of filler material in inches, pre carton
- Single Wall (Yes or No) – select Single or Double wall for your default cartons

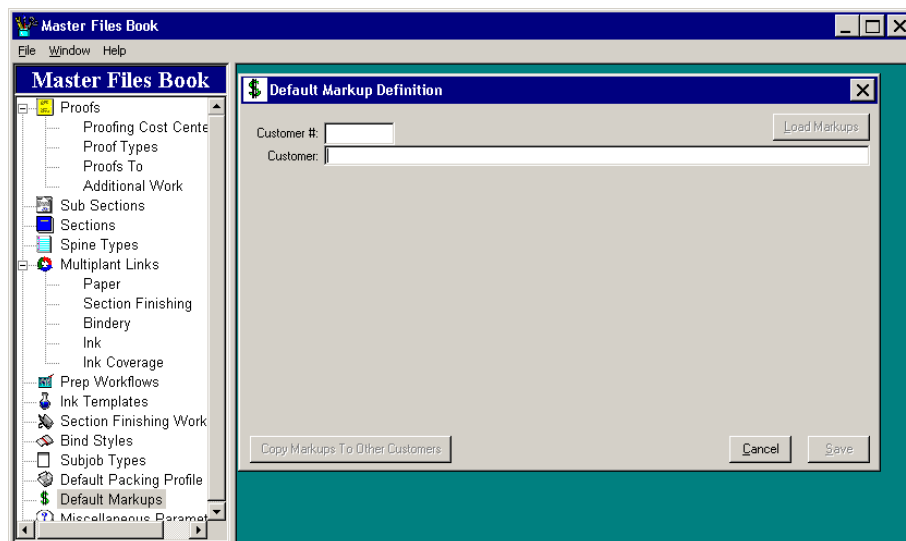
Save when finished.

Default Markups

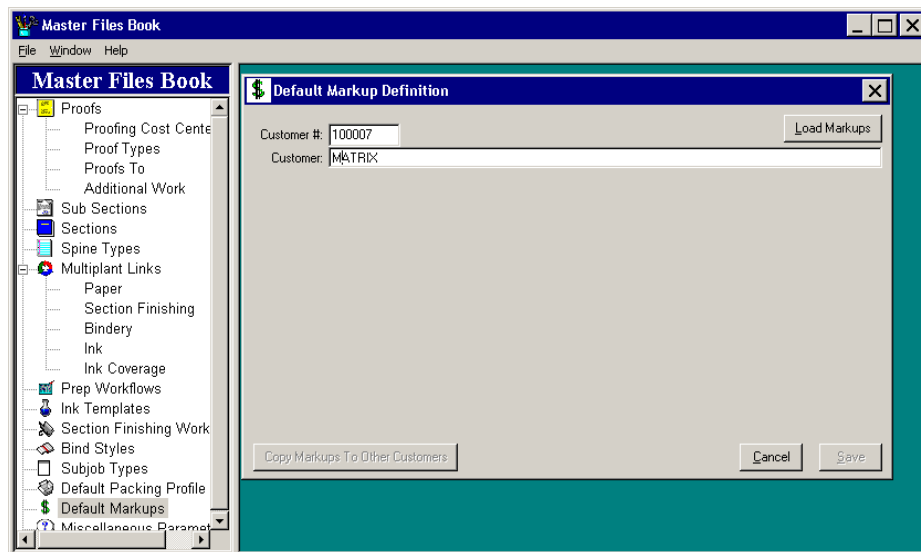
This option allows users to set the default markups at the specific customer level. When no customer specific markup is entered here, the system uses the system default markups set up in Master Files Print >Misc> Default Markups.

Note Customers must already exist and be set up in Master Files Customer to use this feature.

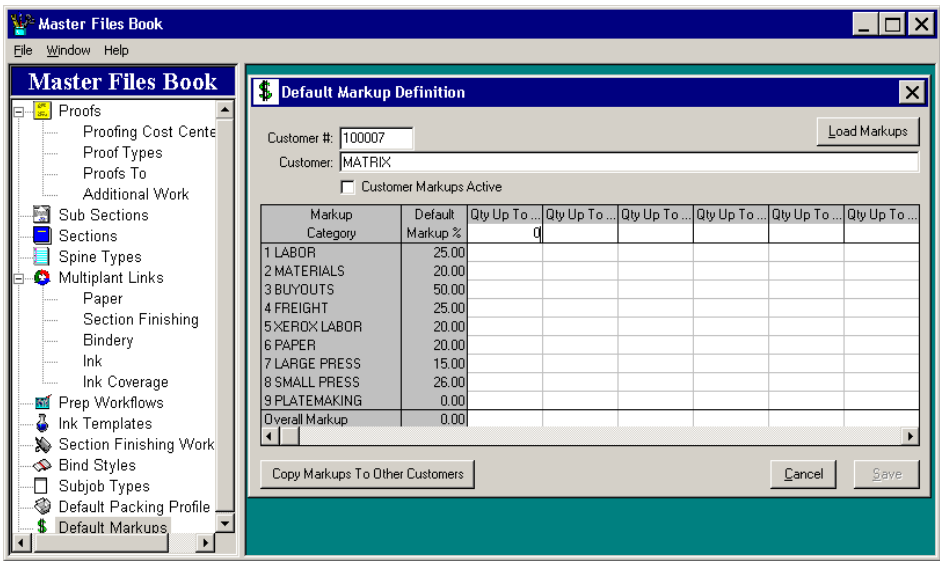
Select Default Markups from the tree. This screen opens:



Enter a customer account number or name, as it was entered in Master Files Customer.

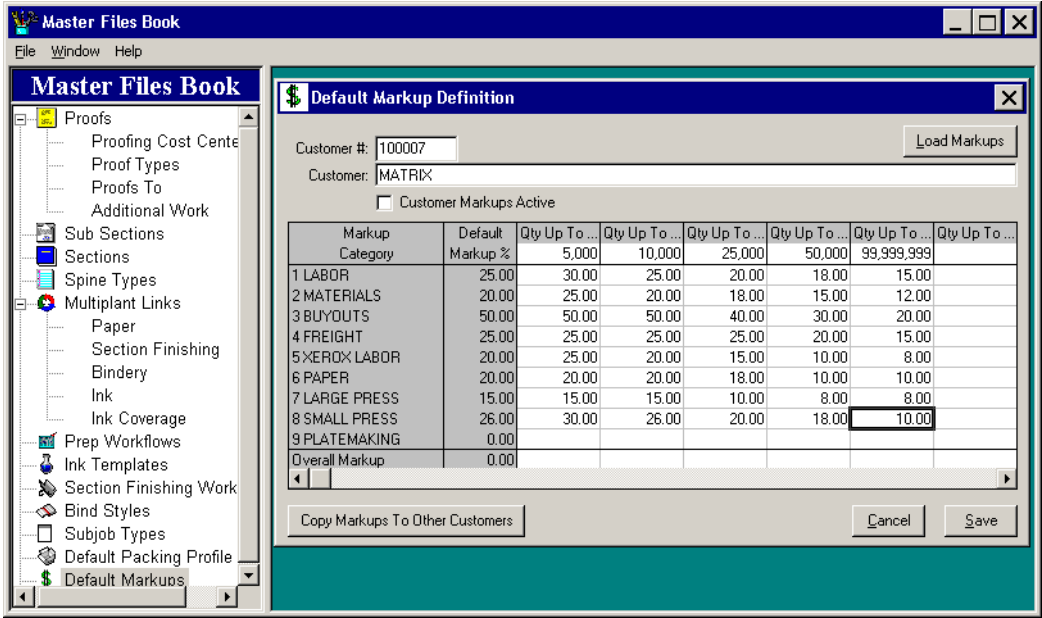


Then click the **Load Markups** button.



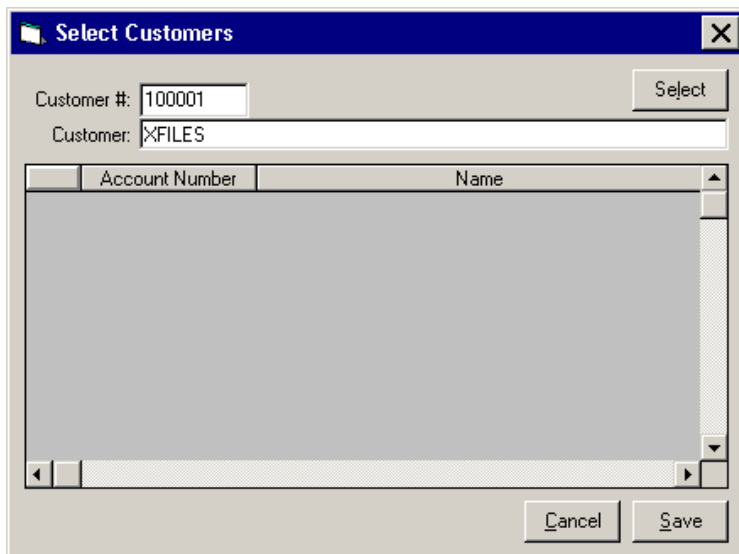
The default markup for the company displays for reference only. From here you can, at different quantities, set any default markup in any area for this customer. You can also use the same markups as the system default for some quantities.

Enter the quantity, then go down the column and add the markup you want for each category. Last quantity must be 99,999,999.



In this example, the 10,000 quantity matched the system default markup. Larger quantities are set to have lower markup percentages applied.

You also have the ability to **copy** this markup screen to other customers by selecting the **Copy to Other Customers** button. This screen opens:

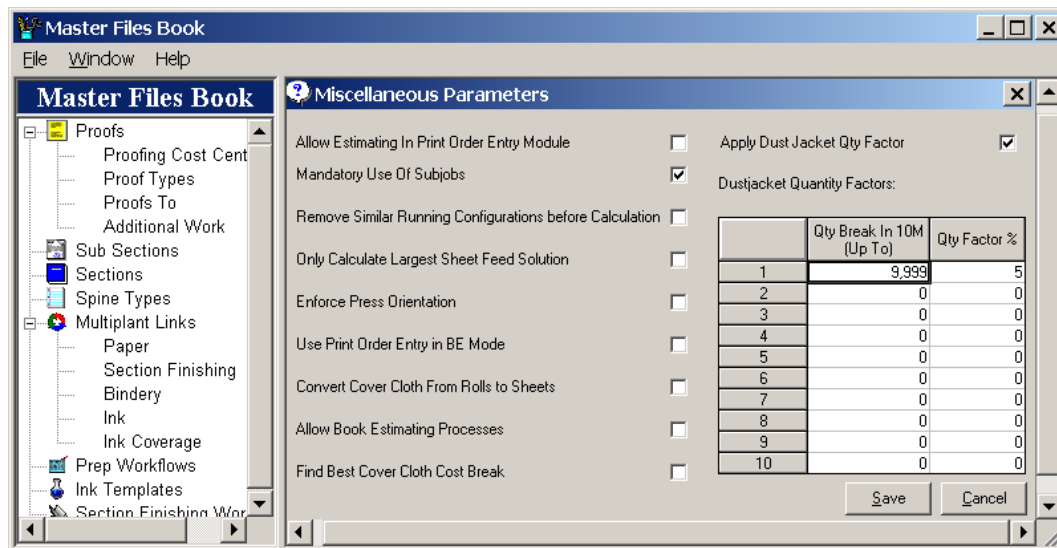


The dialog box titled "Select Customers" has a blue header bar with a close button (X) on the right. Below the header, there are two input fields: "Customer #:" with the value "100001" and "Customer:" with the value "XFILES". To the right of the "Customer #" field is a "Select" button. Below these fields is a table with two columns: "Account Number" and "Name". The table is currently empty. At the bottom of the dialog box are two buttons: "Cancel" and "Save".

Account Number	Name
----------------	------

Enter the customer code or name, click **Select**, and **Save**. These markups are applied to that customer as well.

Miscellaneous Parameters



Allow Estimating in Print Order Entry Module –select this check box if you want the ability for estimates to be generated from the input in Print Order entry when jobs are created.

Mandatory Use of Sub Jobs – always select this check box for Book Estimating jobs. If cleared, all Sections displays in Print Order Entry like a list, not organized by Sub Jobs.

Apply Dust Jacket Quantity Factor (optional) - allows users to define an overrun amount for dust jackets, by quantity. To enable, select the **Apply Dust Jacket Qty Factor** as shown. Once set here on a system level, this additional quantity automatically flows into each Book Estimate using a Dust Jacket but can be overridden. Enter the **quantity up to** in the left column, and the percentage of overrun under **Qty Factor %** in the right column. This percentage can be changed per quantity break. **Save** when finished.

Remove Similar Running configurations Before Calculation - if this check box is selected, nearly redundant configurations are not considered in best cost press comparisons.

Only Calculate Largest Sheet Fed Solution -this is for text only and presumes the largest running solution is the one you prefer to run always.

Enforce Press Orientation - on a sheet fed press, if press is landscape press, and sheet is also a landscape sheet, but will not run an orientation not set up for this press in MF Signature.

Use Print Order Entry in BE mode -not functional at this time.

Convert Cover Cloth from Rolls to Sheets -not functional at this time.

Allow Book Estimating Processes - not functional at this time.

Find Best Cover Cloth Cost Break - not functional at this time.

Master Files Signature

Overview



The Signature Master File holds all of the layouts used in Book Estimating and Print Order Entry. The information in the layouts are used to determine the press method and signature combinations used on the estimate.

Signatures (aka Templates) cannot be made for Book Estimating on the fly, in the Book Estimating or Print Order Entry Programs. In order to be considered and selected the Signature must be created and saved here.

Name	Layout	PageCount	SubSection Type
Timson 8 1/2 x 11	6 X 4	48	Text
Timson 8 1/2 x 11	4 X 4	32	Text
Timson 8 1/2 x 11	3 X 4	24	Text
Timson 8 1/2 x 11	2 X 4	16	Text
Soft Cover	2 X 1	4	Soft Cover
Timson 6 x 9 - 48	6 X 4	48	Text

Signature

General

Signature Name: Timson 8 1/2 x 11 - 48 pg No Lip W/Mill ☒ Active ☐ Use only Combos

SubSection Type: Text ☐ Use only in POE

Description: 48 page Text

Page Layout

Layout: 6 x 4

Page Count: 48

Layout: 6 x 4 ☒ Open Heads

Usage Policies

Minimum: 7 x 10 Maximum: 8 1/2 x 11

Trim Size no bleed: 7 x 10 8 1/2 x 11

Trim Size with bleed: 6 7/8 x 9 7/8 8 3/8 x 10 7/8

PPI: 360 1000

Number Up: 1 1

Bind Edge Grain: With

Default Paper:

Precut: ☐ Yes ☒ No ☐ Auto

PreSlit: ☐ Yes ☒ No

Book Orientation: ☐ All ☐ LandScape ☐ Potrait ☐ Square

To create a new template open this program and click NEW on the tool bar options. You can also view or edit an existing template by click the template from the existing template listing above. Remember to click Save to save any changes that were made.

General Screen

Active – selecting this check box makes the signature active. Clearing it makes the signature inactive. It will no longer be selected for an estimate.

Use Only Combos – select this check box if this signature only is used when binding configuration is different than printing configuration (i.e., print as 1-32, bind as 2-16's)

Use only in POE- Select this check box if this template is for use in Print Order Entry only, not in Book Estimating. This option is useful for layouts you use for existing jobs but do not want to use routinely for new estimates.

Signature Name – enter the description for the signature you are entering. This information is displayed when the signature is selected on and estimate and the estimate information is reviewed. In Print Order Entry this displays as **Template**.

Sub-Section Type – the subsection types are defined in Master Files Book. The signatures are all linked to subsection types. This helps the system narrow down the layout possibilities on a subsection to the templates that are linked to it. Click the drop-down and link the appropriate subsection type to your layout.

Description – this is an optional field and allows you to entered a more detailed description of the signature. This field accepts up to 200 characters. This can be edited in Print Order Entry, which displays as the **Section Title**.

Layout - the layout is entered as the number of images across the layout followed by the number of images going down the layout. Normally this corresponds with the non-binding edge followed by the binding edge. **The layouts are always entered for the 1 up signature size, even when the signature is being setup to run multiple up.** The representation of the layout is graphically displayed on the screen for you.

Open Heads – select this check box when the head of the folded signature is open versus the traditional closed head signature format.

Usage Policies

Trim Size no bleed– enter the minimum and maximum trim size for this signature. The minimum and maximum ranges should be limited to trim sizes that run the same layout configuration.

Trim Size with bleed- enter the minimum and maximum trim size with bleeds for this signature

PPI – enter the minimum pages per inch and maximum pages per inch based on the paper that can run this signature. This is used to determine if the paper selected on the estimate is capable of running this signature on the press.

Number Up – the minimum number up will always be one. If the signature can be run multiple up on any of the presses then enter the maximum number up that the signature can be run on any of the presses. If the signature can only be run one up then enter one here as well.

Bind Edge Grain - the binding edge is always defined as the second dimension of the Trim Size. If the paper grain must run parallel with the binding edge of the signature, select **With**. If the paper grain runs against the binding edge of the signature, select **Against**. If the paper grain can run either with the binding edge or against it, then select **Both**.

Default Paper - if you want to default a particular paper to this signature you can select from the list of papers by clicking the drop-down box. Make sure that if the template is designed for web presses that you select a web paper and for sheet fed presses a cut sheet paper. If you default a paper to a signature it will always pull in when the signature is selected on the estimate. It may be overridden but is the default.

Precut – this only applies to paper on sheet fed signatures.

If you are entering a web signature set this to **No**.

If the signature is a sheet fed signature and the press sheet will be cut from a larger parent sheet size then select **Yes** if you want it to cut the press sheet down to the exact signature size which is determined by taking the number of images on the sheet and adding the allowances for head, foot, face, grippers and guide allowances on the press.

Select **Auto** to split the parent sheet size evenly based on the number of press sheets that come out of a parent sheet.

If the signature is the same size as the parent sheet paper size, select **No**.

If there are multiple number ups for the signature and any of these combinations cuts down from the parent sheet size, you must say Yes or Auto. If the estimate picks a number up that does not require pre-cutting, there is none calculated.

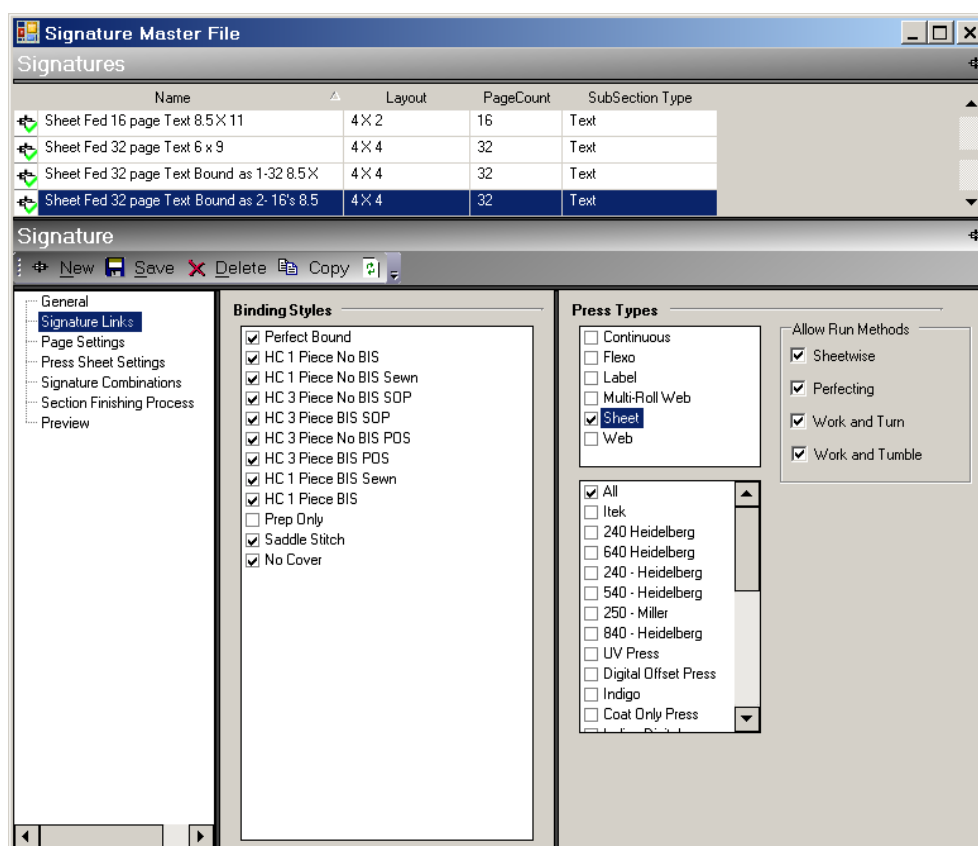
Pre-Slit – this option is used only for Cloth signatures (slit down from rolls) or Binder Board signatures (slit from larger sheets). If you are creating a template for either then select **Yes**. In the case of Board templates, if the board does not come in the correct cut size it selects the master size and cut it down when this option is turned on. This option is dependent on having a Section Finishing Process with the **Calc Method** of **Pre-Slit**. It uses the formula setup up on this section finishing process to calculate the slitting time.

Book Orientation

This is an optional field, if none is selected the default is **All**.

This feature allows users not to have to enter one signature with Min and Max sizes set for upright (Portrait) Book Orientation, and a different signature with Min and Max trim sizes set for Oblong (Landscape) orientation. This can limit the number of calculations required in Book Estimating, but it may also increase the number of templates you need to create.

Signature Links



The Signature Link screen is used to link the signature to Bind Styles and Press Platforms.

Binding Styles

Click the box for each bind style that will work with the signature you are entering.

Press Type

At least one press type must be selected for each signature entered. These press types are hard coded and cannot be altered. The drop-down displays a list of specific presses from your Press Master File in Master Files Print. If a press type is selected but no press specified **All** displays in this box and the system will find the best press within that type to run the signature on. If you want to force the press, click the Press type that is checked so that it is highlighted then click the drop-down box and click the press to force for that type.

Note that if you do attach a press to a signature here, when you attempt to use the press override feature in Book Estimating, this template will not be found for use with any other press.

Another option is to select more than one press instead of **All** if you do not want all presses evaluated. To do so, clear the **All** check box and highlight **Sheet** or **Web**, then select all presses you want to be evaluated for this template.

Allow Run Methods

This setting reduces calculation time by limiting the number of run options to be considered for each press. This is an optional setting. For a web run, for example, you would not check work and turn, work and tumble or sheet wise, but perfecting only. If you have perfecting presses you only run as perfectors you would select Perfect as the only run method.

Note Even for templates that WILL NOT PRINT (plain endsheets or binder boards) at least one Run Method must be selected.

For 1 side only items, like cover cloth, select Sheetwise.

Page Settings

Enter the page settings to be used for this template, for Bleed and No Bleed margins, for Head Trim, Face Trim, Foot Trim, and spine.

Signatures

Name	Layout	PageCount	SubSection Type
Soft Cover	2X1	4	Soft Cover
Timson 6 x 9 - 48 Pg No Lip W/Mill	6X4	48	Text
Timson 6 x 9 - 24 Pg No Lip W/Mill	3X4	24	Text
Timson 6 x 9 - 32 Pg No Lip W/Mill	4X4	32	Text
Timson 6 x 9 - 16 Pg No Lip W/Mill	2X4	16	Text
CC 1 Piece	2X1	4	Cover Cloth - 1 Piece

Page Trim Settings

Spine: Bleed: 0 No Bleed: 0 Foot: Bleed: 3/8 No Bleed: 3/8 Max Size: 0

Head: Bleed: 1/8 No Bleed: 1/8 Max Size: 0

Face: Bleed: 1/4 No Bleed: 1/4 Max Size: 0

Lip: 0 No Bleed: 0 LipType: None

☐ Allow margins to expand so book block size will be based upon Maximum trim size of this template

Max Slit Size: 0 Slit/Expansion Location: [Dropdown]

Cover Settings

Dust Jacket: Flaps: 0 Flap W/rap: 0 Case Cover: W/rap: 0 Extend: 0 Board Adjustment: 0 3 Piece Case: Overlap: 0 Show: 0 Include hinge in show: ☐

The Page Settings allow you to enter the values for bleed and non-bleed for the Head, Foot, Face and Spine. These values are added to the trim size to build the press sheet size of the signature.

Allow margins to expand so book block size is based upon Maximum trim size of this template, plus the minimum page margins

- when this check box is selected, the estimate considers the maximum trim size in the **General** screen to be the ideal size for the signature on the press. The margins on any size between the minimum trim size and maximum trim size grow so that the sheet size is the same as the maximum sheet size. If this check box is cleared, the sheet size is calculated by taking the trim size and adding the page settings. This was developed to enable all text sections to calculate a consistent book block size.

Max Size –this setting is used only in conjunction with “Allow margins to expand so book block size will be based upon Maximum trim size of this template”

It allows you to say where the excess trim allowance is placed on trim sizes that have grown to fit the ideal signature press sheet size.

Max Slit Size- enter the maximum total amount you would slit when you have slit capability at the end of a press

Slit/Expansion location- select if you do not want the default described above to apply.

None
Head
Foot
Both, Start with H
Both, Start with F

None- select for NO slit or expansion to be taken.

Head- take the slit or expansion only to the Max size head trim.

Foot- take slit or expansion only to Max size foot trim.

Both - taking slit/expansion dimensions to the foot.

Both Start with F- Take the slit or expansion dimension starting with the Foot, to foot Max trim, then start taking slit/expansion dimension to the head.

Both Start with H- Take the slit or expansion dimension starting with the Head, to the Head Max trim, then start taking slit/expansion dimension to the foot.

Lip – if the signature is for a saddle stitched book or a sewn book it should include a lip. Enter the allowance for the lip for bleed and non-bleed.

Lip Type - if the signature has a lip you need to select either High Folio or Low Folio to tell the system the placement of the lip on the pages.

Note If no lip is needed, select NONE, do not leave this blank.

Cover Settings

Dust Jacket Flap – this is only used on dust jacket templates, or soft covers that have flaps you can enter the flap size you want to apply when this template is selected on an estimate. If no flap setting is specified the program uses the default setting from Master Files Book. Flap is defined by the width of the dust jacket that wraps around the book and displays on the inside front and inside back cover of the finished book

Flap Wrap – this is used with dust jacket templates to determine the space needed for the jacket to wrap around the front and back covers to accommodate the board and cloth thickness. It is added in addition to the flap size when calculating the layout and is displayed on the layouts in Book Estimating and Print Order Entry

Case Cover Wrap – this is used for hard cover templates. Enter the amount of wrap needed to wrap the cover around the board. This wrap is applied to all four sides of the cover.

Extend – this is used on board layouts to extend the board size top and bottom beyond the trim size of the text. The amount added here is applied to both the top and bottom of the board. It is also used on soft cover layouts to indicate the amount needed for a glue trap on the top and bottom of the cover.

Board Adjustment – this is used on board layouts to adjust the width of the board. To decrease the board size you need to enter a negative value, to increase a positive value. This adjustment is needed to accommodate opening and closing the hard cover finished book.

Three Piece Case Overlap – this is used to indicate the amount of overlap on a three piece case and is applied to the sine or panel layouts depending on whether the panel is over the spine or spine is over the panel.

Show – is the amount of the spine material that is displayed on the front and back cover of the book. By default the hinge is not be included in the show amount it is from the edge of the hinge going onto the front or back cover. If you want to include the hinge in the show amount, select this check box. The option to include the hinge in the show is also used on Dust Jacket layouts. If this check box is selected, the spine size of the jacket includes the hinge. If it is cleared, the hinge is calculated separately from the spine size and displayed separately on the Dust Jacket layouts in Book Estimating and Print Order Entry.

Press Sheet Settings

Signature Master File

Signatures

Name	Layout	PageCount	SubSection Type
Timson 8 1/2 x 11	6X4	48	Text
Timson 8 1/2 x 11	4X4	32	Text
Timson 8 1/2 x 11	3X4	24	Text
Timson 8 1/2 x 11	2X4	16	Text
Soft Cover	2X1	4	Soft Cover

Signature

New Save Delete Copy

Press Sheet Margins

New Delete

Name: Standard

Margins

General Section Finishing

General

Margin Name: Standard Signature Spacing: 0

Margins Settings

Gripper Overlap: 0

Bleed: 0 No Bleed: 0

Side Guide: 0

Bleed: 0 No Bleed: 0

Tail: 0

Bleed: 0 No Bleed: 0

Head: 0

Bleed: 0 No Bleed: 0

Non Side Guide: 0

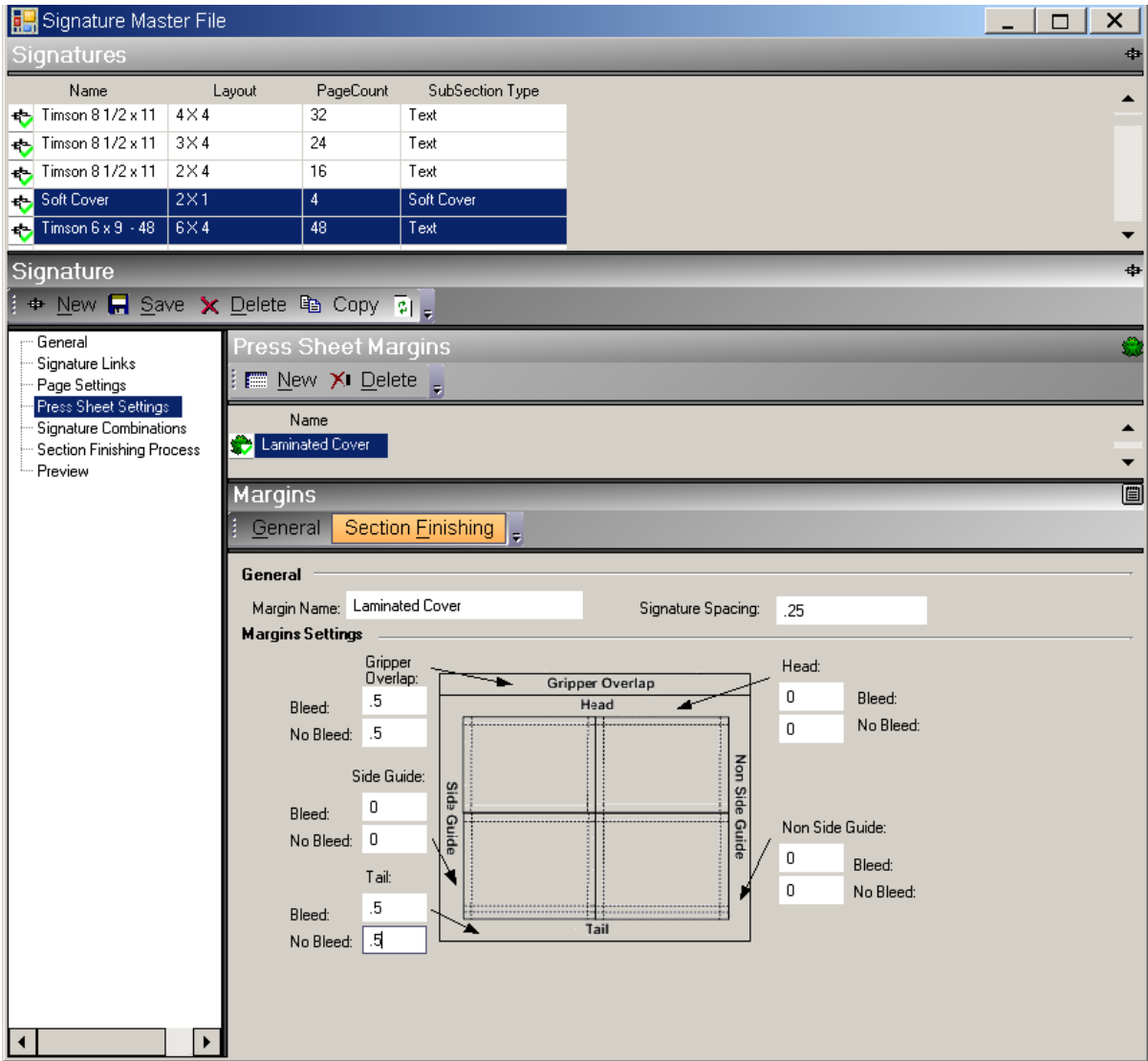
Bleed: 0 No Bleed: 0

Diagram: A diagram of a press sheet layout showing a central rectangle divided into four quadrants. The top edge is labeled 'Gripper Overlap' and 'Head'. The bottom edge is labeled 'Tail'. The left edge is labeled 'Side Guide'. The right edge is labeled 'Non Side Guide'.

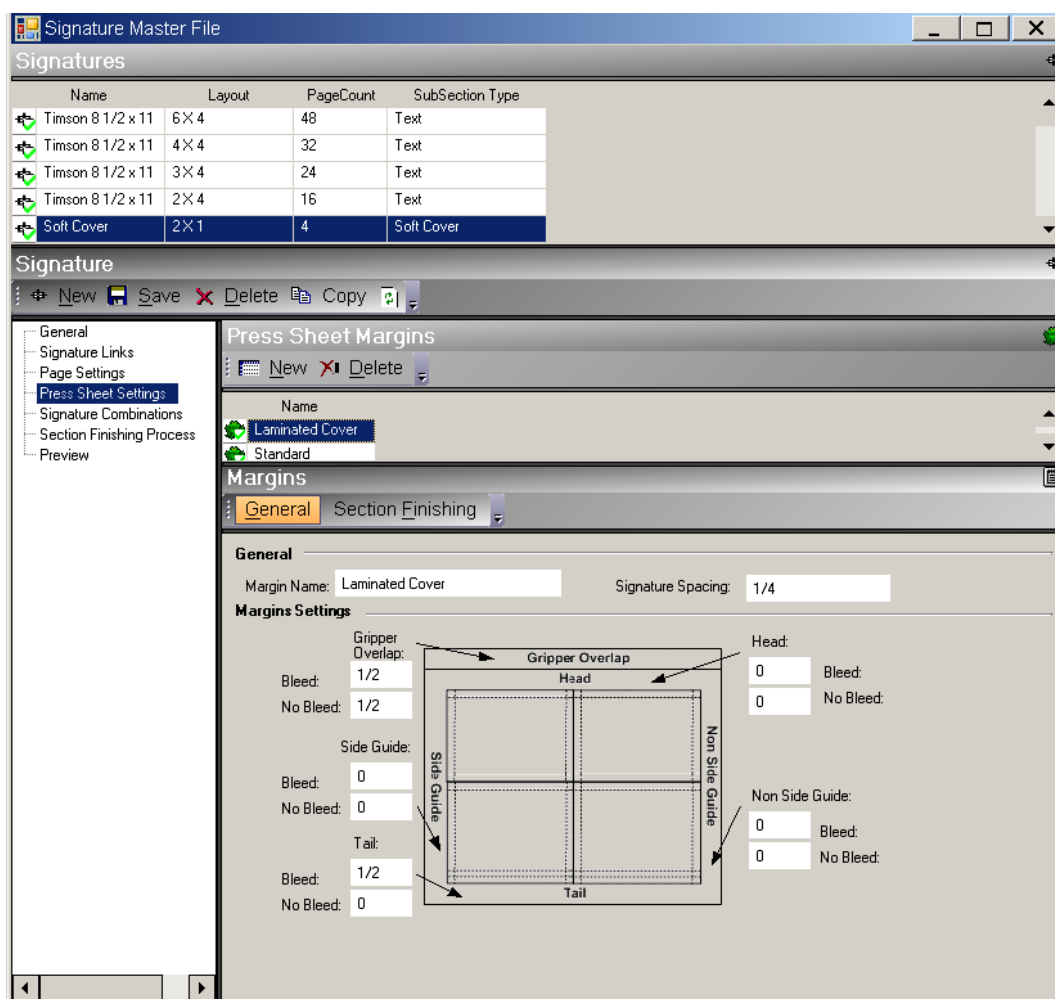
General

This screen allows you to set the press sheet settings for Gripper Overlap, bleed, and non-bleed for the press sheet. These margins are applied in addition to the margins set up on Page Settings

Margin Name: The is called the **Standard** layout but multiple layouts can be created and linked to **Section Finishing** processes. For example if an oversize sheet is needed for cover templates that Laminate. A new sheet size can be created with extra spacing around the edges and linked to a section finishing process for Film Laminating. When this process is selected on an estimate in conjunction with this template it uses the layout that it is assigned to. To create a new Press Sheet Margin for press sheet settings click the **New** button and add the correct measurements for this new layout aka Margin Name



Note One layout MUST be created as the Standard layout, before additional layouts are created. When adding new layouts, make the Margin Name recognizable to all users, example would be “film lamination”.

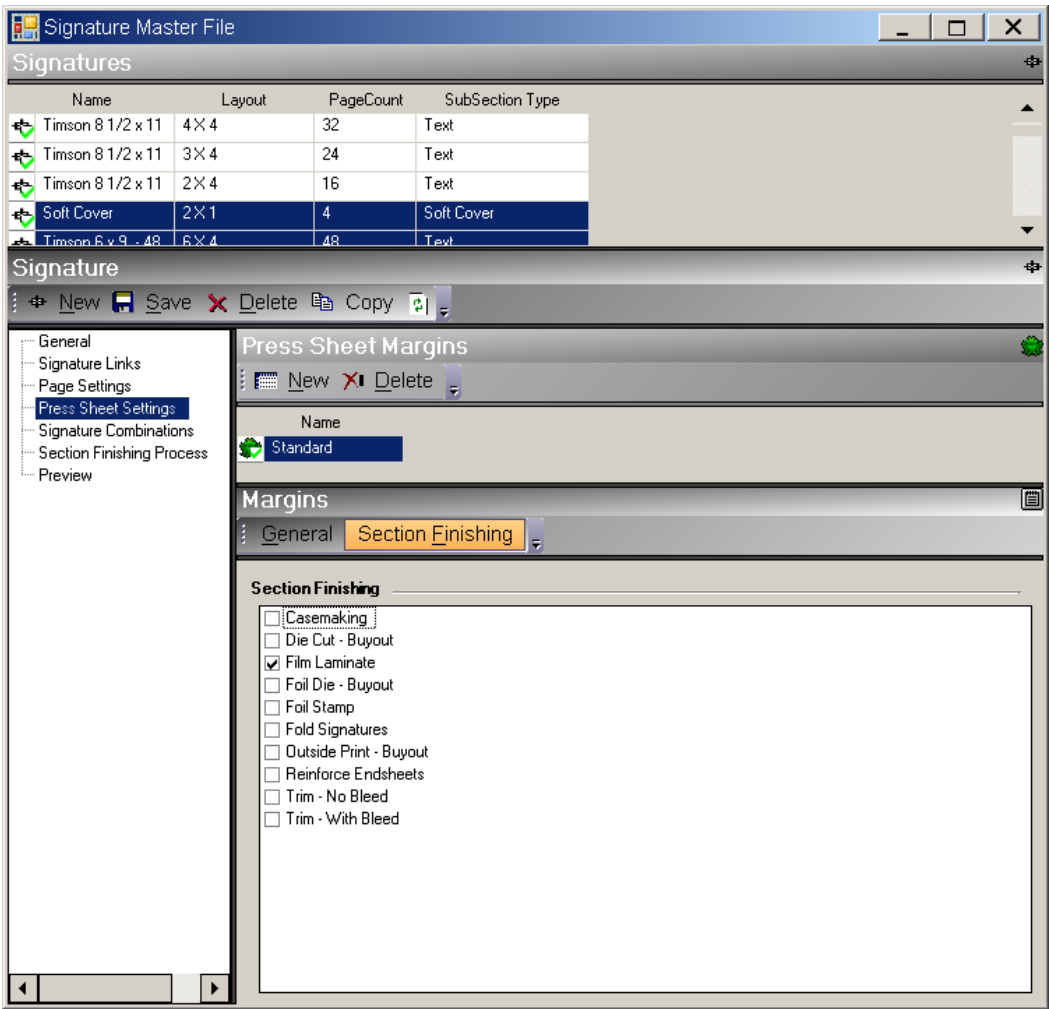


When more than one press sheet setting has been created it displays as a drop-down choice.

Signature Spacing – this is only used when the layout is run multiple up. The spacing amount entered is added between the inside edges of the images, this allows more spacing between the images on the layout.

Gripper Overlap – this setting works with the **Gripper Margin** setting in the **Press Master File**. If the press has a Gripper value, the Gripper Overlap tells how much of Gripper Margin can go into image area of signature. For example, if the Gripper Overlap is set to zero and the Gripper Margin of the press is set to 3/8", the signature will always add a 3/8" gripper onto the signature. If the Gripper Overlap is set to 1/8", and the Gripper Margin is set to 3/8" on the click the signature will only add 1/4" inch for the gripper on the signature since the press can grip 1/8" into the page margin area of the signature.




Note In the event on no bleed work, if you want to have the gripper actually grip INTO the live page image area of the book, add a NEGATIVE value to the No Bleed Margin Setting where you want this to occur (in the gripper overlap field).



Signature Combinations

The signature combination is for defining layouts for signatures inside a master signature.

The area under **Signature Combinations** displays what you input in the Signature Combination area. You also have the Delete option in this area, and the ability to add or delete buttons from this toolbar.

Signature Combinations			
 			
MaxQty	Description	Press	TotalPages
 9999999	Bind as 3 - 2pg tip	0	6






To create a signature combination, click the **New** button.

Signature Master File



Signatures

Name	Layout	PageCount	SubSection Type
Insert Sheet Fed 16 page Text 2up 6 x 9	4X2	16	Insert
Sheet Fed 32 page Text Bound as 2-16's 8.5 x 11	4X4	32	Text
Endsheet - Printed	2X2	8	End Sheet

Signature

Signature Combinations

MaxQty	Description	Press	TotalPages
 9999999	32 pg Sheet Fed	0	32
 0		0	0

Signature Combination

General

Description:



Total Pages:

Max Quantity:

Press:

Section Finishing:

Signature Combination Details

Pages	Layout	Blank	Sec Finishing

Signature Combination is area for input.

Enter the page count for each combination followed by the layout configuration for the page count. If there are combinations of blank pages insert a separate line and after entering the number of blank pages and the layout click the **Blank** box.

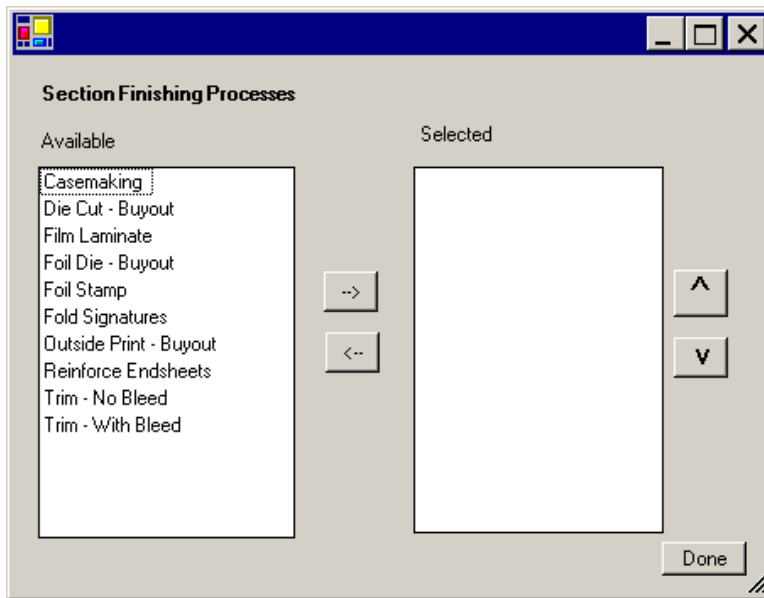
Description- enter how you will bind or finish this combination. Use a name your employees will easily recognize

Total Pages - is the total number of printed pages for the combination. This does not include pages that are flagged as blank pages

Max Qty – max quantity to run combination. Based on Impressions and not estimate quantity. 999999999 = no upper quantity limit

Press – displays all available presses and allows a specific press to be forced for the combination. If no press is selected the system looks at all appropriate presses to determine the best press to run the combination.

Section Finishing- the ellipsis box brings up available Section Finishing processes that can be attached to this combination at the press sheet level. An example could be, on the press sheet level you may want to add trimming.



Select by highlighting a process from the available column and click the right arrow or double-click.

Deselect by highlighting a process from the Selected column and click the Left arrow.

Save when finished.

Name	Layout	PageCount	SubSection Type
Sheet Fed 32 page Text Bound as 2-16's 8.5 x 11	4 X 4	32	Text
Endsheet - Printed	2 X 2	8	End Sheet
test	3 X 2	12	Cover-board Back

MaxQty	Description	Press	TotalPages
99999999	32 pg Sheet Fed	0	32
0	New Combo Sign	0	0

Pages	Layout	Blank	Sec Finishing
16	4 X 2	<input type="checkbox"/>	
16	4 X 2	<input type="checkbox"/>	

Signature Combination Details

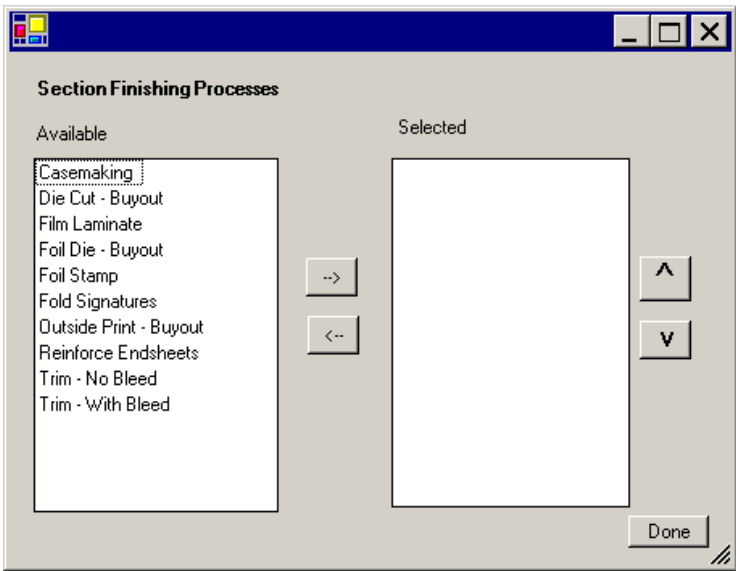
This area defines the details of the signature combinations. For each different folding configuration you will need to enter a new line.

Add button opens the first line for input

- **Pages** Enter # pages
- **Layout**, # pages or images across followed by # pages or images down
- **Blank check box**. When you have blank pages, for example a 12 page combination that folds as 1-8, 1-4, and one blank 4 page, you would enter 3 lines and select the **Blank** check box for the blank 4 page signature

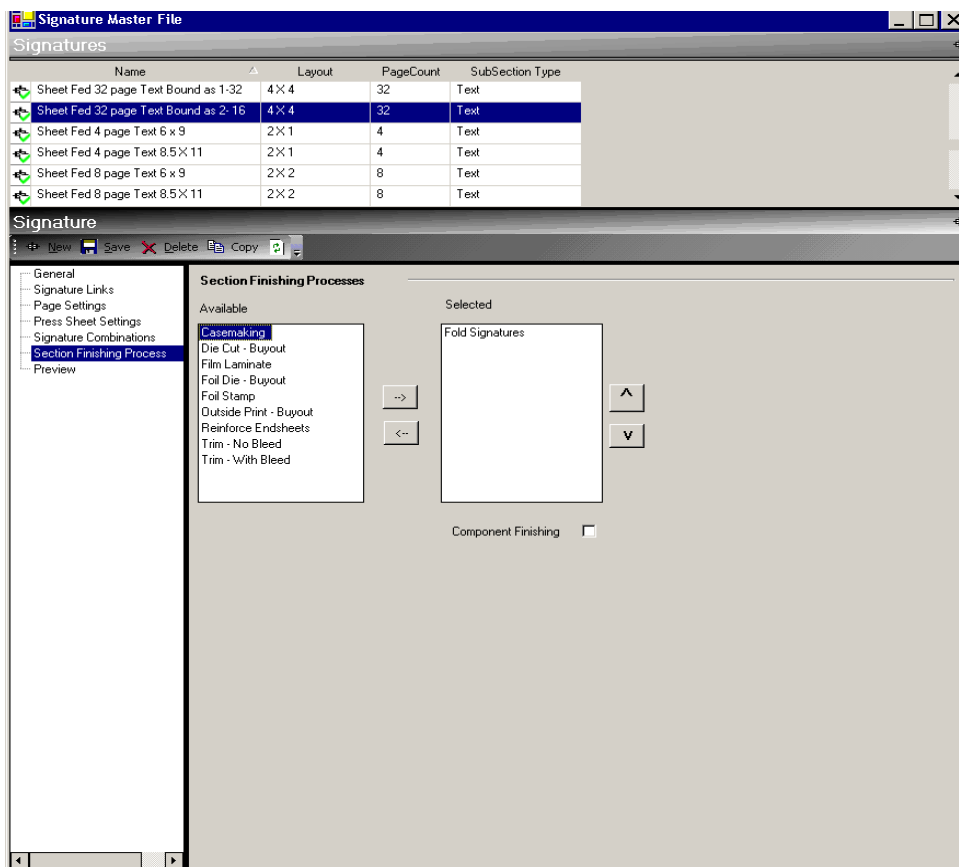
Sec Finishing can be assigned to each combination, by selecting the Sec Finishing section box to the left of each combination. An example could be folding for each combination after it is trimmed from the press sheet.

Which brings up this same Section Finishing Processes screen.



You select Section Finishing processes the same way as described above for each combination, to attach specific section finishing processes to specific combinations, after the press sheet has been split apart

Section Finishing Processes



This screen allows you to link default processes from the **Section Finishing Processes** in **Master Files Print**. Examples of this would be like the screen shot above. Folding is linked to this sheet fed signature so that when it is selected on the estimate the folding is added automatically to the estimate. If processes are added in this area they should not be added in the estimate. To add a process click it so that it is highlighted then click the arrow pointing to the right. Selected process can be removed by clicking to highlight the selected process then clicking the left arrow.

Note Section Finishing added in this area applies to the entire Template. Use care not to link the Section Finishing processes in more than one area it can result in multiple charges for the same process.

Component Finishing- select this if the Section Finishing Process you have selected affects more than one section. This tells the program to apply waste to the two or more sections when selected in Book Estimating. An example of this would be cover cloth and board material, if they are both used to create a case before a foil stamp process occurs. The stamping would show on the case section only, but the appropriate overs for waste would be applied to both the cover cloth and the binder boards.

The Signature has now been created. Signatures can be copied to create other signatures by selecting a signature in the listing above then click the **Copy** icon on the tool bar.

Preview

This is not functional at this time.