



User Guide

Customer Support  
V21.1.0200

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EFI PrintStream | V21.1.0200 Customer Support User Guide

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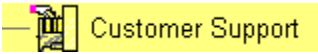
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# Introduction

## Overview



The Customer Support module provides a single-source program for the CSRs to find and enter information relating to their jobs that are scheduled to begin production, currently in production or even past AR invoicing. This module is a combination of many of the larger PrintStream modules and creates access to those areas without leaving the customer support screen.

## 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:	<a href="mailto:printstream.support@efi.com">printstream.support@efi.com</a>
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:	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>
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.	

## Quote/Job Selection

1. Click the binoculars icon in the left top of the screen or choose **File > Find**. A search screen will display that looks similar to the Quote/Job search screen in the PrintStream estimating module.

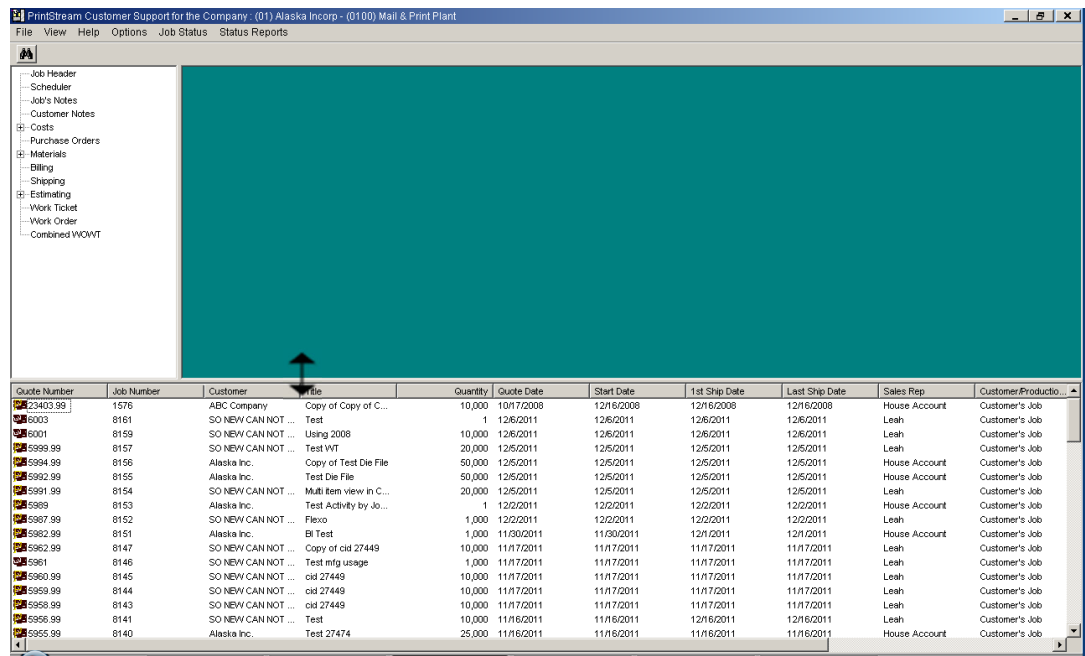
Searches may be queried using a Quote Number Range, Job Number Range, by First Ship Date Range, Customer AND Job or Quote Number range or by Sales Rep AND Quote Date or Quote Number. Additional filters include 'List Jobs Only' which will exclude all quotes, and 'Only Jobs in Production' which will provide the user with only those jobs currently in production.

2. Click on the binoculars OR go to **File > Find**.
3. Select the method to search for the Quote/Job on the left side of the **Select Quotes** screen.
4. The selected search option displays options for the selection on the right side of the **Select Quotes** screen.
5. Complete the necessary information and click **Find**.

**Note** If search option of 'Customer AND Job or Quote Number Range' is chosen, a Customer Number or Name **MUST** be entered to list any jobs. If no customer is entered and **Find** is selected, no quotes or jobs will be found.

6. Select **List Jobs Only** or list **Only Jobs** in Production.

7. Search results display in the lower third of the screen. This area can be dragged to cover more of the screen to allow more jobs to display. Jobs list from highest to lowest number.



Quote Number	Job Number	Customer	Title	Quantity	Quote Date	Start Date	1st Ship Date	Last Ship Date	Sales Rep.	Customer/Production
23403.99	1576	ABC Company	Copy of Copy of C...	10,000	10/17/2008	12/16/2008	12/16/2008	12/16/2008	House Account	Customer's Job
5999.99	8161	SO NEW CAN NOT ...	Test	1	12/6/2011	12/6/2011	12/6/2011	12/6/2011	Leah	Customer's Job
5999.99	8159	SO NEW CAN NOT ...	Using 2008	10,000	12/6/2011	12/6/2011	12/6/2011	12/6/2011	Leah	Customer's Job
5999.99	8157	SO NEW CAN NOT ...	Test WIT	20,000	12/5/2011	12/5/2011	12/5/2011	12/5/2011	Leah	Customer's Job
5994.99	8156	Alaska Inc.	Copy of Test Die File	50,000	12/5/2011	12/5/2011	12/5/2011	12/5/2011	House Account	Customer's Job
5992.99	8155	Alaska Inc.	Test Die File	50,000	12/5/2011	12/5/2011	12/5/2011	12/5/2011	House Account	Customer's Job
5991.99	8154	SO NEW CAN NOT ...	Multi Item view in C...	20,000	12/5/2011	12/5/2011	12/5/2011	12/5/2011	Leah	Customer's Job
5989	8153	Alaska Inc.	Test Activity by Jo...	1	12/2/2011	12/2/2011	12/2/2011	12/2/2011	House Account	Customer's Job
5987.99	8152	SO NEW CAN NOT ...	Plexo	1,000	12/2/2011	12/2/2011	12/2/2011	12/2/2011	Leah	Customer's Job
5982.99	8151	Alaska Inc.	BI Test	1,000	11/30/2011	11/30/2011	12/1/2011	12/1/2011	House Account	Customer's Job
5962.99	8147	SO NEW CAN NOT ...	Copy of cid 27449	10,000	11/17/2011	11/17/2011	11/17/2011	11/17/2011	Leah	Customer's Job
5961	8146	SO NEW CAN NOT ...	Test mfg usage	1,000	11/17/2011	11/17/2011	11/17/2011	11/17/2011	Leah	Customer's Job
5960.99	8145	SO NEW CAN NOT ...	cid 27449	10,000	11/17/2011	11/17/2011	11/17/2011	11/17/2011	Leah	Customer's Job
5959.99	8144	SO NEW CAN NOT ...	cid 27449	10,000	11/17/2011	11/17/2011	11/17/2011	11/17/2011	Leah	Customer's Job
5958.99	8143	SO NEW CAN NOT ...	cid 27449	10,000	11/17/2011	11/17/2011	11/17/2011	11/17/2011	Leah	Customer's Job
5956.99	8141	SO NEW CAN NOT ...	Test	10,000	11/16/2011	11/16/2011	12/16/2011	12/16/2011	Leah	Customer's Job
5955.99	8140	Alaska Inc.	Test 27474	25,000	11/16/2011	11/16/2011	11/16/2011	11/16/2011	House Account	Customer's Job

Job list screen includes the **Quote Number, Job Number, Customer, Job Title, Job Quantity, Quote Date, Start Date, First Ship Date** (mail date), **Last Ship Date** (mail date), **Sales Rep**, and any job-related purchase order number(s).

8. Highlight a job for information or instruction.

## Job Header

With the Quote/Job highlighted in the display at the bottom of the screen, click the Job Header tree branch to view job header details. Details include:

- **Cust. Num.** – Customer Number from Master File Customer
- **Customer** – Customer Name as defined in Master File Customer
- **Contact** – Name of contact established in Master File Customer
- **Phone** – Contact phone number
- **CSR** – CSR on this quote/job
- **Sales Rep** – Sales Rep on this quote/job
- **Estimator** – Estimator on this quote/job
- **Part Num** – If a part number was entered in the Order Entry Job Header when the quote was converted to a job, the part number will display.

- **Inv. Code** – No longer used since the programming for Multiple Manufactured Items.
- **Ordered** – Date the estimate was converted to a job
- **Started** – Date job started production
- **Due Date** – Due date (print) or first mail date (mail)
- **P.O. Num** – PO number from customer when entered in the Order Entry Job Header screen

- **Shipped** – Ship date when shipped using Shipping module in Print and Mail Estimating. Also adds a boxed notice that the 'Job is finally shipped . . .' and the ship date.

### VB Shipping

### .Net Shipping

- **Invoiced** – Date the job was invoiced
- **Quoted Hours** – Total hours to produce the work from the estimate
- **- Hours** – The hours for transactions that have been entered against the job
- **= Hrs. Left** – The number of hours that are left to produce the job (quoted hours minus hours transacted to job)
- **Quoted Price** – Price from the Final Pricing screen in the estimating module
- **Invoiced** – Invoiced amount
- **Job Description** from Estimating



# Scheduler

The Scheduler screen displays the schedule from the Scheduling screen in the Estimating module.

Scheduling screen from Print and Mail Estimating for job # 8139:

Mail Estimating for the Company - (01) Alaska Inc. - (0100) Mail & Print Plant L6 - ([8139] Testing)

File Window Changes Plant(s) for Quote Refresh Master Data Help

Print Mode Is On

Mail Estimating (Print & Review Pricing Order Entry)

Quote Header  
Estimating  
Review Pricing  
Order Entry

Scripts  
NetScripts  
General  
Inventory Details  
Shipping  
New Shipping  
Work Order (mail)  
Work Ticket (mail)  
Combined WOWIT  
Inventory Matrix  
Prepared for Address  
Change Orders  
Change Orders For Billing  
Scheduling

Display Types: ☒ (Processes) ☒ (Receipts) ☒ (Issues) ☒ (Transfers) ☒ (Returns) ☒ (Printing)

Display Statuses: ☒ No Status ☒ Open ☒ Hold ☒ Closed ☒ Wait Order ☒ Wait Approval ☒ Approved ☒ Other

Process	Cost Center	Part Code	Inventory Code	Activity Code	Quantity	Est. Hours	MR Hours	Total Hours	Helper Hours	Status	Promised	Scheduled	EF Last Run on	On Hand Quantity	Mach #	Approval	Completed
Receive-Letter	0	1420			1,101					<none>		11/25/2011		0	0		
Letter Overs->???	0	1420								<none>		12/2/2011		0	0		
EPS Overs->???	0	1011								<none>		12/2/2011		70000	0		
Letter HP LAS->HANDWK					1,101					<none>				0	0		
Issue Letter->HP LAS			HP LASER		1,101					<none>				0	0		
Receive-EPS	0	1011			1,101					<none>				70000	0		
EPS INKJET->HANDWK			HANDWORK		1,101					<none>				70000	0		
Issue EPS->INKJET			INKJET		1,101					<none>				70000	0		
PROGRAMMING			Prep	34011	1	1.00		1.00		<none>					0		
Sort RECORDS			Prep	34037	1,000	0.01		0.01		<none>					0		
GENDERIZE			Prep	34032	1,000	0.05		0.05		<none>					0		
OUTPUT TO TAPE DISK			Prep	36014	1,000	0.04		0.04		<none>					0		
HAND INSERT, SORT 1pc			Mail	84031	1,000	5.50		5.50		<none>					0		
DELIVER TO POST OFFICE			Mail	95017	1	1.00		1.00		<none>					0		
Laser (Classic Mod)			Common	64020	1,000	4.00		4.00		<none>				0	0		
INKJET 9x12 ENVELOPE			Common	81012	1,000	1.10		1.10		<none>				70000	0		
Dylux Proof 01			Cover		1	1.05		1.05		<none>					0		
BlueLine Proof			Cover		1	1.26		1.26		<none>					0		
BlueLine Proof			Text		1	1.02		1.02		<none>					0		
Film Process-NO UDF			Text		1	0.10		0.10		<none>					0		
MBO Fold 01			Text		1,000	0.53	0.24	1.17		<none>					0		
Final Trim 01			Cover		1,000	0.10		0.10		<none>					0		
SaddleStitch 01			Bindery	75011	1,000	0.25	0.20	0.45		<none>					0		
Carton Pack 01			Bindery	79010	1,000	0.26		0.26		<none>					0		
Carton Stock			48	79000	2					<none>					0		
Paper Stock			Cover		1,000					<none>					0		
Printing			Cover		296	0.06	1.20	1.26		<none>					0		

5953.99 8139 Alaska Inc. 0100 - Testing 1,000 12/1/2011 2,000

Scheduler screen from Customer Support module for job # 8139:

PrintStream Customer Support for the Company - (01) Alaska Inc. - (0100) Mail & Print Plant - ([8139] Testing)

File View Help Options Job Status Status Reports

Scheduler

Job Header  
Job's Notes  
Customer Notes  
Costs  
Purchase Orders  
Materials  
Billing  
Shipping  
Estimating  
Work Ticket  
Work Order  
Combined WOWIT

Display Types: ☒ (Processes) ☒ (Receipts) ☒ (Issues) ☒ (Transfers) ☒ (Returns) ☒ (Printing)

Display Statuses: ☒ No Status ☒ Open ☒ Hold ☒ Closed ☒ Wait Order ☒ Wait Approval ☒ Approved ☒ Other

Process	Cost Center	Part Code	Inventory Code	Activity Code	Quantity	Est. Hours	MR Hours	Total Hours	Helper Hours	Status	Promised	Scheduled	EF Last Run on	On Hand Quantity	Mach #	Approval	Completed
Receive-Letter	0	1420			1,101					<none>		11/25/2011		0	0		
Letter Overs->???	0	1420								<none>		12/2/2011		0	0		
EPS Overs->???	0	1011								<none>		12/2/2011		70000	0		
Letter HP LAS->HANDWK					1,101					<none>				0	0		
Issue Letter->HP LAS			HP LASER		1,101					<none>				0	0		
Receive-EPS	0	1011			1,101					<none>				70000	0		
EPS INKJET->HANDWK			HANDWORK		1,101					<none>				70000	0		
Issue EPS->INKJET			INKJET		1,101					<none>				70000	0		
PROGRAMMING			Prep	34011	1	1.00		1.00		<none>					0		
Sort RECORDS			Prep	34037	1,000	0.01		0.01		<none>					0		
GENDERIZE			Prep	34032	1,000	0.05		0.05		<none>					0		
OUTPUT TO TAPE DISK			Prep	36014	1,000	0.04		0.04		<none>					0		
HAND INSERT, SORT 1pc			Mail	84031	1,000	5.50		5.50		<none>					0		
DELIVER TO POST OFFICE			Mail	95017	1	1.00		1.00		<none>					0		
Laser (Classic Mod)			Common	64020	1,000	4.00		4.00		<none>				0	0		
INKJET 9x12 ENVELOPE			Common	81012	1,000	1.10		1.10		<none>				70000	0		
Dylux Proof 01			Cover		1	1.05		1.05		<none>					0		
BlueLine Proof			Cover		1	1.26		1.26		<none>					0		
BlueLine Proof			Text		1	1.02		1.02		<none>					0		
Film Process-NO UDF			Text		1	0.10		0.10		<none>					0		
MBO Fold 01			Text		1,000	0.53	0.24	1.17		<none>					0		
Final Trim 01			Cover		1,000	0.10		0.10		<none>					0		
SaddleStitch 01			Bindery	75011	1,000	0.25	0.20	0.45		<none>					0		
Carton Pack 01			Bindery	79010	1,000	0.26		0.26		<none>					0		
Carton Stock			48	79000	2					<none>					0		

Quote Number	Job Number	Customer	Title	Quantity	Quote Date	Start Date	1st Ship Date	Last Ship Date	Sales Rep	Customer/Product
5953.99	8139	Alaska Inc.	Testing	2,000	11/15/2011	11/15/2011	12/1/2011	12/1/2011	House Account	Customer's Job

Preview/Print the Production Schedule from the Scheduling screen by clicking **Print** at the top of the screen.

Alaska Incorp

## Production Schedules

Printed : 12/7/2011

3:54:51PM

For : LS

Scheduled Dates : 11/15/2011 - 12/2/2011

Due Dates :

Page 1 of 1

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**Job # : 8139**

Customer : Alaska Inc.

Job Description : Testing

Quantity : 2,000

Sales Rep : House Account

Estimator : Betty White

CSR : Sue Smith

Account # : ALASKA

Job Name :

Customer Ac. # ALASKA

1st Due Date : 12/1/2011

Last Due Date : 12/1/2011

Job Status :

Project # :

Job Started : 11/15/2011

Postage Required : \$ 0.00

Postage Received : \$ 0.00

---

Cost Center	Process	Item # / Inv. Code	Version / Component Name	Quantity	Status	Sched. Date	Apprv Date	Comp. Date	Mach #
PROG RA	PROG RANMING		Prep	1					
PROG RA	SORT RECO RDS		Prep	1,000					
PROG RA	GENDERIZE		Prep	1,000					
OUTPUT	OUTPUT TO		Prep	1,000					
PROOF	TAPE/DISKETTE								
PROOF	Dylix Proof D1		Cover Cover	1					
PROOF	Blue line Proof		Cover Cover	1					
PROOF	Blue line Proof		Text Text	1					
PLATE	Platemaking		Cover Cover	1,000					
PLATE	Platemaking		Text Text	1,000					
E PREP	Film Process-NO UDF		Text Text	1					
INV	Paper Stock		Cover Cover	1,000					
INV	Paper Stock		Text Text	1,000					
240	Printing		Text Text	1,000					
KO MORI	Printing		Cover Cover	1,000					
MBO	MBO Fold D1		Text Text	1,000					
CUTTER	Final Trim D1		Cover Cover	1,000					
HP LAS	Letter Letter->HP LAS	7176-PO#:1026-LI ne#:1	7176-PO#:1026-L line#:1 1420	1,101					
HP LAS	Laser (Class to Mod)	7176-PO#:1026-LI ne#:1	7176-PO#:1026-L line#:1	1,000					

View the Job Header by clicking **Job Header** at the top of the Scheduling screen.

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

Materials

Billing

Shipping

Estimating

Work Ticket

Work Order

Combined WOWT

[8139] Testing

Add Spec. Events | Bypass Dates | Close out job | Cancel | Job Notes | Change CCs

Delete Events | Clone Materials | Print | Save | Job Header | Print Out....

Display Types: ☒ (Pro) ☒ (Spe) ☐ (Print) ☐ (Print)

Job Header for Job#: 8139 - Quote#: 5953.99

Cust. Num.: ALASKA	Ordered: 11/15/2011	Quoted Hrs.: 27.11
Customer: Alaska Inc.	Started: 11/15/2011	- Hrs.: 0.00
Contact: Sally Samster	Due Date: 12/1/2011	= Hrs. Left: 27.11
Phone: 801555 0133	P.O. Num: 12345	
CSR: Sue Smith	Shipped: 12/7/2011	Quoted Price: \$2,900.26
Sales Rep: House Account	Invoiced:	Invoiced: \$0.00
Estimator: Betty White	Job is finally shipped 12/7/2011	
Part Num: 54321		
Inv. Code:		
Job Description	Testing Testing Job	

Status	Promised	Scheduled	EF Last Run on
<none>		11/25/2011	
<none>		12/2/2011	
<none>		12/2/2011	

Select **Print Out** to send the Production Schedule straight to the user's default printer.

**PrintStream Customer Support for the Company: (01) Alaska Incorp - (0100) Mail & Print Plant - ([8139] Testing)**

File View Help Options Job Status Status Reports

Job Header Scheduler Job's Notes Customer Notes Costs Purchase Orders Materials Billing Shipping Estimating Work Ticket Work Order Combined WOWT

Display Types: ☒ G (Processes) ☒ W (Receipts) ☒ I (Issues) ☒ T (Transfers) ☒ R (Returns) ☒ P (Printing)

Display Statuses: ☒ Job Status ☒ Open ☒ Hold ☒ Closed ☒ Wait Order ☒ Wait Approval ☒ Approved ☒ Other

Process	Cost Center	Part Code	Inventory Code	Activity Code	Quantity	Est. Hours	MR Hours	Total Hours	Helper Hours	Status	Promised	Scheduled	EF Last Run on	On Hand Quantity	Mach #	Approval	Completed
Receive-Letter	0	1420			1,101					<none>		11/25/2011		0	0		
Letter Overs->???	0	1420								<none>		12/2/2011		0	0		
EPS Overs->???	0	1011								<none>		12/2/2011		70000	0		
Letter HP LAS->HANDW	HANDWORK				1,101					<none>				0	0		
Issue Letter->HP LAS	HP LASER	1420			1,101					<none>				0	0		
Receive-EPS	0	1011			1,101					<none>				70000	0		
EPS INKJET->HANDW	HANDWORK				1,101					<none>				70000	0		
Issue EPS->INKJET	INKJET	1011			1,101					<none>				70000	0		
PROGRAMMI	PROGRAMMI	Prep	Prep	34011	1	1.00		1.00		<none>					0		
Sort RECORDS	PROGRAMMI	Prep	Prep	34037	1,000	0.01		0.01		<none>					0		
GENEERIE	PROGRAMMI	Prep	Prep	34032	1,000	0.05		0.05		<none>					0		
OUTPUT TO TAPEDISKE	OUTPUT DAT	Prep	Prep	36014	1,000	0.04		0.04		<none>					0		
HAND INSERT, SORT 1pc	HANDWORK	Mail	Mail	84031	1,000	5.50		5.50		<none>					0		
DELIVER TO POST OFFC	SHIPPING	Mail	Mail	95017	1	1.00		1.00		<none>					0		
Laser (Classic Mod)	HP LASER	Common		64020	1,000	4.00		4.00		<none>				0	0		
INKJET Sh12 ENVELOPE	INKJET	Common		81012	1,000	1.10		1.10		<none>				70000	0		
Dylux Proof 01	PROOFING	Cover	Cover -> Non 42010		1	1.05		1.05		<none>					0		
BlueLine Proof	PROOFING	Cover	Cover -> Non 42010		1	1.26		1.26		<none>					0		
BlueLine Proof	PROOFING	Text	Text -> Non 42010		1	1.02		1.02		<none>					0		
Film Process-NO UDF	ELEC. PREPR	Text	Text -> Non 42010		1	0.10		0.10		<none>					0		
MBO Fold 01	MBO FOLDF	Text	Text -> Non 42010		1,000	0.53	0.24	1.17		<none>					0		
Final Trim 01	CUTTER (PRE	Cover	Cover -> Non 59015		1,000	0.10		0.10		<none>					0		
Saddlestitch 01	SADDLE STT	Bindery	Bindery	75011	1,000	0.25	0.20	0.45		<none>					0		
Carton Pack 01	Pack/Ship	Bindery	Bindery	79010	1,000	0.26		0.26		<none>					0		
Carton Stock	Pack/Ship	48	48	79000	2					<none>					0		

Quote Number	Job Number	Customer	Title	Quantity	Quote Date	Start Date	1st Ship Date	Last Ship Date	Sales Rep	Customer/Product
5953.99	8139	Alaska Inc.	Testing	2,000	11/15/2011	11/15/2011	12/1/2011	12/1/2011	House Account	Customer's Job

**Display Types** and **Display Statuses** can be selected from the Scheduler screen in the Customer Support module to display only the types and statuses the user wants to see. The Display Types and Display Statuses are identical to those in the Estimating module, Scheduling screen. The Scheduling screen in Customer Support is a view-only screen. Changes to this schedule must be made in Print and Mail Estimating modules and/or Milestone Scheduler.

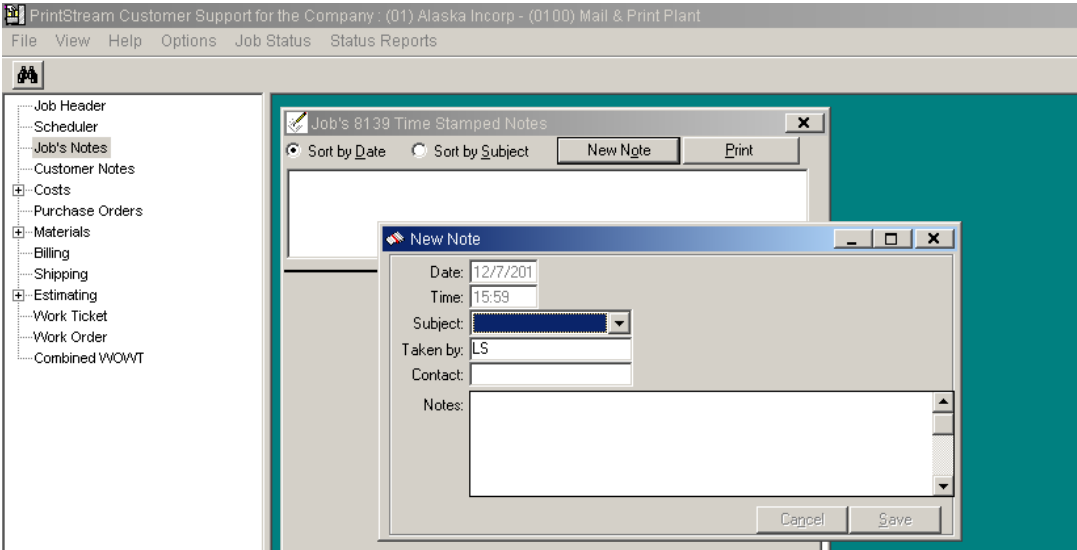


# Job’s Notes and Customer Notes

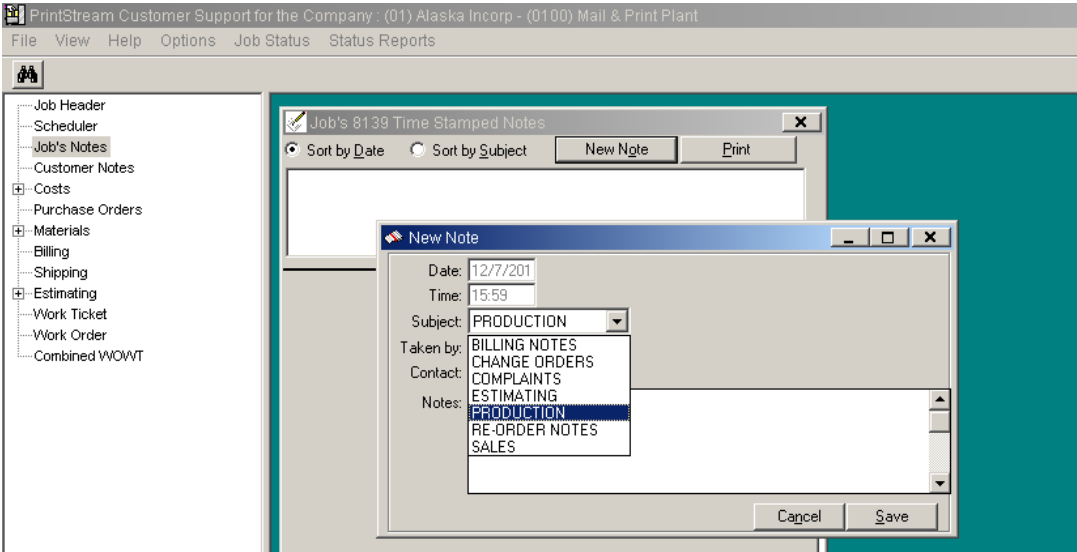
## Job Notes

Notes relating to the job are entered by clicking the **Job’s Notes** branch.

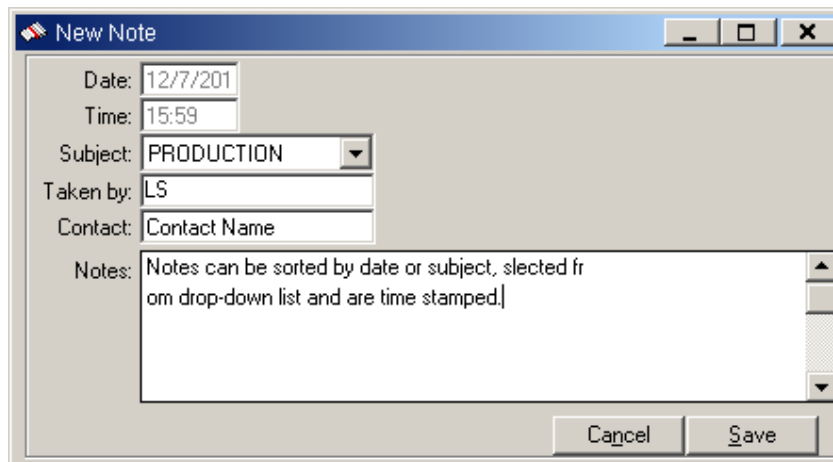
- 1. Click **New Note**.



- 2. Select **Subject**.



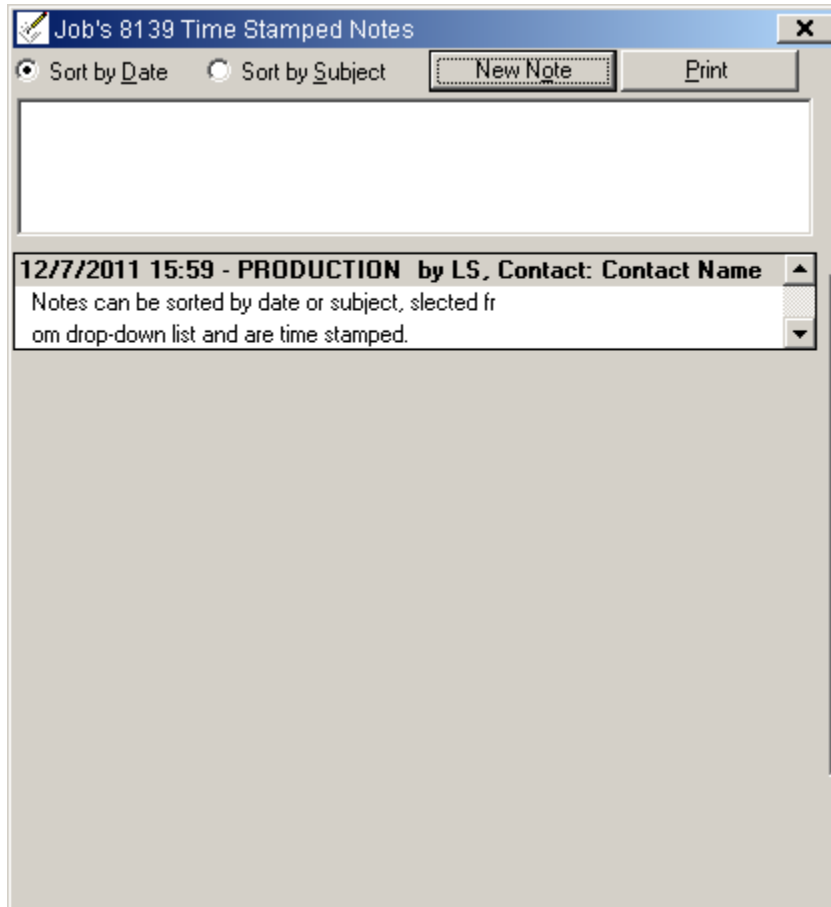
3. Enter **Contact Name** for follow up. Enter Note in the **Notes** field and **Save**.



The 'New Note' dialog box contains the following fields and controls:

- Date:** 12/7/2011
- Time:** 15:59
- Subject:** PRODUCTION (dropdown menu)
- Taken by:** LS
- Contact:** Contact Name
- Notes:** Notes can be sorted by date or subject, selected from drop-down list and are time stamped.
- Buttons:** Cancel, Save

4. Notes can be printed or viewed.



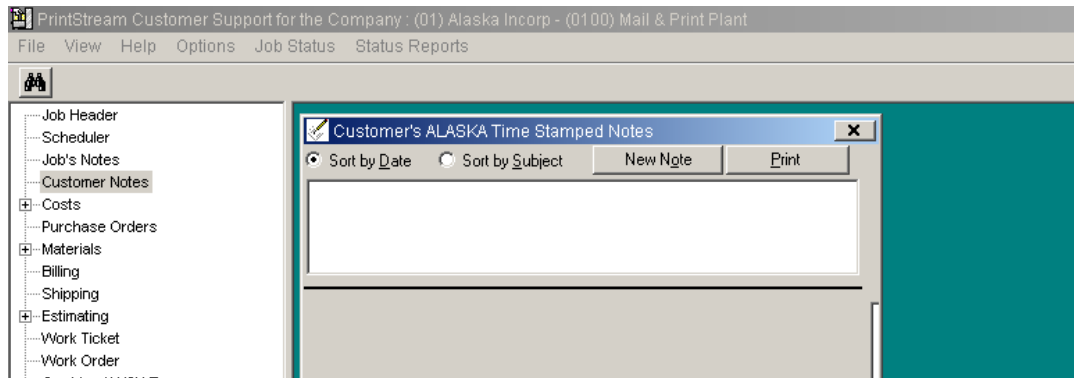
The 'Job's 8139 Time Stamped Notes' window displays the following elements:

- Sort Options:** ☒ Sort by Date, ☐ Sort by Subject
- Buttons:** New Note, Print
- Note Header:** 12/7/2011 15:59 - PRODUCTION by LS, Contact: Contact Name
- Note Content:** Notes can be sorted by date or subject, selected from drop-down list and are time stamped.

**Note** Notes do not wrap text and are limited to the length of the field which is 50 characters in length for each line.

## Customer Notes

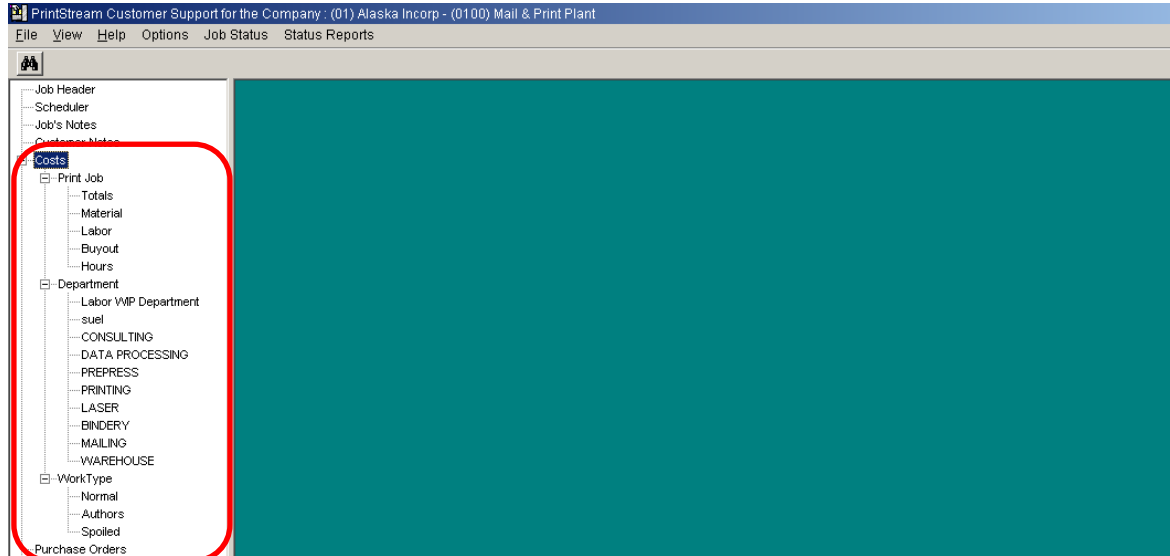
1. Select **Customer Notes**.



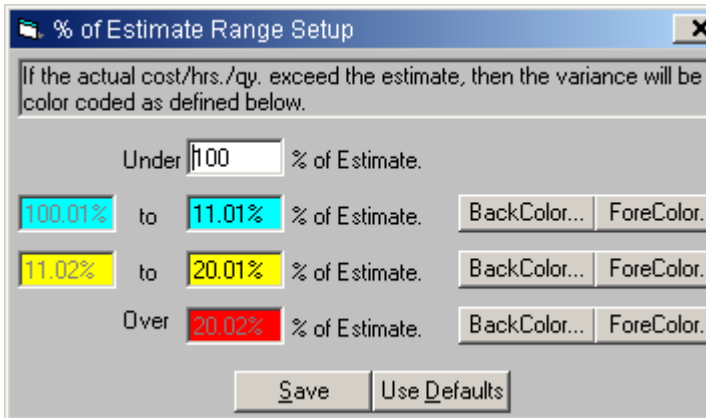
2. Enter notes the same way that the job notes are entered. **View** and/or **Print**.

## Costs

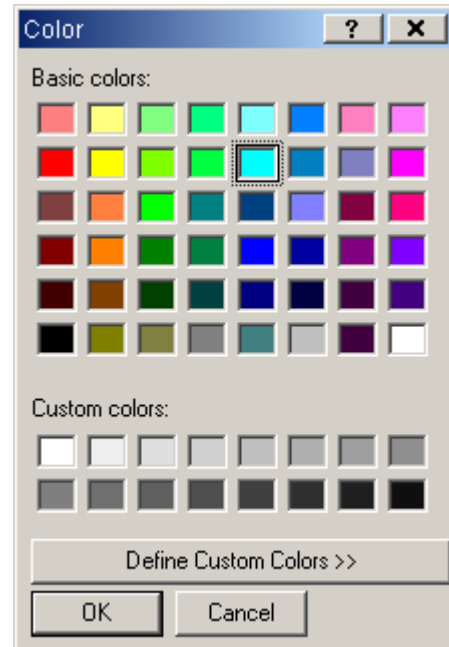
Expand the **Cost** tree branch to display Estimated and Actual costs that can be transacted to the job, and the percentage of the Actual to the Estimated costs.



If the Actual Cost, Hours or Quantity exceed the estimate, the variance will be color-coded as defined below.



The background and foreground colors are changed *per workstation* by navigating to **File > Setup > Variances** and clicking **BackColor** and/or **ForeColor** and selecting the desired color.



## Costs – Print Job Sub Branches

**Totals** display each area of production with a possible Estimated Cost and a total of all production areas.

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

Job Header  
Scheduler  
Job's Notes  
Customer Notes  
Costs  
  Print Job  
    **Totals**  
    Material  
    Labor  
    Buyout

Description	Estimate Costs	Actual Costs	% of Estimate
Artwork	\$58.83	\$150.00	254.97
Film	\$182.17	\$150.00	82.34
Plates	\$162.50		
Printing	\$1,611.94	\$77.79	4.83
Finishing	\$566.59	\$593.75	104.79
Postage*			
<b>TOTALS</b>	<b>\$2,582.03</b>	<b>\$971.54</b>	<b>37.63</b>

**Material, Labor, Buyout, and Hours** display only the costs for each of these categories and the variances by category.

Material

Description	Estimate Costs	Actual Costs	% of Estimate
Artwork	\$0.00	\$0.00	
Film	\$21.00	\$0.00	
Plates	\$80.00	\$0.00	
Printing	\$51.88	\$77.79	149.94
Finishing	\$13.81	\$0.00	
Postage*			
<b>TOTALS</b>	<b>\$166.69</b>	<b>\$77.79</b>	<b>46.67</b>

Labor

Description	Estimate Costs	Actual Costs	% of Estimate
Artwork	\$58.83	\$150.00	254.97
Film	\$161.17	\$150.00	93.07
Plates	\$82.50	\$0.00	
Printing	\$1,560.06	\$0.00	
Finishing	\$552.78	\$593.75	107.41
Postage*			
<b>TOTALS</b>	<b>\$2,415.34</b>	<b>\$893.75</b>	<b>37.00</b>

Buyout

Description	Estimate Costs	Actual Costs	% of Estimate
Artwork	\$0.00	\$0.00	
Film	\$0.00	\$0.00	
Plates	\$0.00	\$0.00	
Printing	\$0.00	\$0.00	
Finishing	\$0.00	\$0.00	
Postage*			
<b>TOTALS</b>	<b>\$0.00</b>	<b>\$0.00</b>	

Hours

Description	Estimate Hours	Actual Hours	% of Estimate
Artwork	1.16	3.00	258.62
Film	3.72	2.00	53.76
Plates	1.92	0.00	
Printing	9.67	0.00	
Finishing	10.63	4.75	44.68
Postage*			
<b>TOTALS</b>	<b>27.10</b>	<b>9.75</b>	<b>35.98</b>



## Costs – Department Sub Branch

Departments that are set up with the implementation of your system are displayed under **Costs > Department**. Department totals display in the **Departments** branch.

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant - [Department Costs]									
File View Help Options Job Status Status Reports									
<div> <div> Job Header Scheduler Job's Notes Customer Notes Costs Print Job Totals Material Labor Buyout Hours Department Labor WIP Department </div> </div>									
by Department	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate	
Labor WIP Department	0.00	0.00				\$0.00	\$0.00		
suel	0.00	0.00				\$0.00	\$0.00		
CONSULTING	0.00	0.00				\$0.00	\$0.00		
DATA PROCESSING	1.17	3.00			256.41	\$58.83	\$150.00	254.97	
PREPRESS	5.63	2.00			35.52	\$445.67	\$150.00	33.66	
PRINTING	7.12	0.00				\$1,492.99	\$77.79	5.21	
LASER	4.33	0.00				\$240.00	\$0.00		
BINDERY	1.18	4.75			402.54	\$140.40	\$593.75	422.90	
MAILING	7.83	0.00				\$220.83	\$0.00		
WAREHOUSE	1.00	0.00				\$50.00	\$0.00		

Click each **Department** to display a view of the Estimated vs. Actual costs within the department.

### Data Processing

DATA PROCESSING	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
DP MATERIAL								
PROGRAMMING	1.00	3.00			300.00	\$50.00	\$150.00	300.00
GENDERIZE	0.08					\$4.00		
SORT RECORDS	0.02					\$0.83		
OUTPUT TO TAPE/DISK	0.07					\$4.00		

### Prepress

PREPRESS	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
DYLUX PROOF	3.55					\$142.00		
PROOFING MATERIALS						\$21.00		
PLATE MAKING	1.25					\$62.50		
Platemaking-240 Press	0.67					\$20.00		
PLATE MATERIALS						\$50.00		
Plates-240 Press						\$30.00		
OUTPUT FILM	0.17	2.00			1176.47	\$19.17	\$150.00	782.47

## Printing

PRINTING	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
PAPER							\$77.79	
INK						\$51.88		
240 HEIDELBERG M/R	1.67					\$250.00		
240 HEIDELBERG RUN	1.06					\$159.22		
240 HEIDELBERG WASH	0.25					\$37.50		
640 KOMORI MR	1.33					\$433.33		
640 KOMORI RUN	0.10					\$33.75		
640 KOMORI WASHUP	1.25					\$406.25		
MBO FOLDER RUN	0.88					\$44.17		
MBO Folder M/R	0.40					\$20.00		
CUTTER RUN	0.17					\$5.00		

## Laser

LASER	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
Laser (Classic Mod)	4.33					\$240.00		

## Bindery

BINDERY	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
BINDERY MATERIALS						\$10.31		
Saddle Stitch Make Ready	0.33					\$41.67		
Saddle Stitch Run	0.41	4.75			1158.54	\$51.55	\$593.75	1,151.79
Carton Pack	0.43					\$19.56		
Pack/Ship Materials						\$3.50		

## Mailing

MAILING	Estimate Hours	Actual Hours	Estimate Qty	Actual Qty	% of Estimate	Estimate Cost	Actual Cost	% of Estimate
MAILING MATERIALS								
INKJET 9x12 ENVELOPE	1.17					\$16.67		
INKJET MATERIALS								
HAND INSERT, SORT 1p	6.67					\$204.17		

This provides a view of the Department's Estimated Cost and Actual cost and variances for each job activity/process.

## Costs – Work Type Sub Branch

Work Types displayed on each activity are detailed in the **Normal**, **Authors** and **Spoiled** grids.

### Normal

by WorkType	Estimate Hours	Actual Hours	% of Estimate	Charge Hours	Estimate Cost	Actual Cost	% of Estimate	Charge Cost
PROGRAMMING	1.00	3.00	300.00		\$50.00	\$150.00	300.00	\$0.00
GENDERIZE	0.08	0.00			\$4.00	\$0.00		\$0.00
SORT RECORDS	0.02	0.00			\$0.83	\$0.00		\$0.00
OUTPUT TO TAPE/DISKE	0.07	0.00			\$4.00	\$0.00		\$0.00
DYLUX PROOF	3.55	0.00			\$142.00	\$0.00		\$0.00
PLATEMAKING	1.25	0.00			\$62.50	\$0.00		\$0.00
Platemaking-240 Press	0.67	0.00			\$20.00	\$0.00		\$0.00
OUTPUT FILM	0.17	2.00	1,176.47		\$19.17	\$150.00	782.47	\$0.00
240 HEIDELBERG M/R	1.67	0.00			\$250.00	\$0.00		\$0.00
240 HEIDELBERG RUN	1.06	0.00			\$159.22	\$0.00		\$0.00
240 HEIDELBERG WASHI	0.25	0.00			\$37.50	\$0.00		\$0.00
640 KOMORI MR	1.33	0.00			\$433.33	\$0.00		\$0.00
640 KOMORI RUN	0.10	0.00			\$33.75	\$0.00		\$0.00
640 KOMORI WASHUP	1.25	0.00			\$406.25	\$0.00		\$0.00

### Authors

by WorkType	Estimate Hours	Actual Hours	% of Estimate	Charge Hours	Estimate Cost	Actual Cost	% of Estimate	Charge Cost
PROGRAMMING	0.00	0.00			\$0.00	\$0.00		\$0.00
GENDERIZE	0.00	0.00			\$0.00	\$0.00		\$0.00
SORT RECORDS	0.00	0.00			\$0.00	\$0.00		\$0.00
OUTPUT TO TAPE/DISKE	0.00	0.00			\$0.00	\$0.00		\$0.00
DYLUX PROOF	0.00	0.00			\$0.00	\$0.00		\$0.00
PLATEMAKING	0.00	0.00			\$0.00	\$0.00		\$0.00
Platemaking-240 Press	0.00	0.00			\$0.00	\$0.00		\$0.00
OUTPUT FILM	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG M/R	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG RUN	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG WASHI	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI MR	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI RUN	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI WASHUP	0.00	0.00			\$0.00	\$0.00		\$0.00

### Spoiled

by WorkType	Estimate Hours	Actual Hours	% of Estimate	Charge Hours	Estimate Cost	Actual Cost	% of Estimate	Charge Cost
PROGRAMMING	0.00	0.00			\$0.00	\$0.00		\$0.00
GENDERIZE	0.00	0.00			\$0.00	\$0.00		\$0.00
SORT RECORDS	0.00	0.00			\$0.00	\$0.00		\$0.00
OUTPUT TO TAPE/DISKE	0.00	0.00			\$0.00	\$0.00		\$0.00
DYLUX PROOF	0.00	0.00			\$0.00	\$0.00		\$0.00
PLATEMAKING	0.00	0.00			\$0.00	\$0.00		\$0.00
Platemaking-240 Press	0.00	0.00			\$0.00	\$0.00		\$0.00
OUTPUT FILM	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG M/R	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG RUN	0.00	0.00			\$0.00	\$0.00		\$0.00
240 HEIDELBERG WASHI	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI MR	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI RUN	0.00	0.00			\$0.00	\$0.00		\$0.00
640 KOMORI WASHUP	0.00	0.00			\$0.00	\$0.00		\$0.00

# Purchase Orders

Job-related purchase order details are available to display the **Delivery Date, Invoice Status** (partial 'P' or final 'F'), **Invoice Number, Invoice Date, Quantity** and **Cost**.

PrintStream Customer Support for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant

FileViewHelpOptionsJob StatusStatus Reports

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

1279-Draper Paper

Materials

Billing

Shipping

Estimating

Work Ticket

Work Order

Combined WOVW

Purchase Order Details

Item No.: 1

Details: Purchase Testing

Due Date: 12/8/2011

Quantity: 5

Cost: \$50.00

Job No.: 8139

Title: Testing

Quantity Delivered: 5

Cost to Date: \$50.00

Delivery Docket	Delivery Date	Part/Final	Invoice Number	Invoice Date	Quantity	Cost
1	12/8/2011	F			5	\$50.00

# Materials

Materials committed and issued to the job are displayed in the **Paper** and **Raw Materials** screens.

Paper

Part	Code	Size	Paper	Reserved	Issued
	48	0 x 0		2	0
Cover	1437	23 x 35	Quintessence Gls Cvr 80#^^0100	1,250	0
Text	851	23 x 35	Centura Gloss Bk 60#	2,000	0

Raw Materials

Part	Material Code	Description	Quantity Required	Quantity Received
Cover			1,000.00	0.00
Text			1,000.00	0.00
Letter	1420	Art Gloss Book^^0100	1,000.00	0.00
EPS	1011	ENVELOPE 9x12	1,000.00	0.00
Stitch			1,000.00	0.00

## Billing

The Billing node displays the **Invoice Number(s)**, **Invoice Date**, **Transaction Date**, **Bill Type**, **Invoice Amount** and **Tax**. Under the Estimate column the **Standard Price**, **Price Variance**, **Quoted Price**, **Reported Sell**, **Variance Total**, **Freight**, **Total Tax** and **Invoice Totals** are displayed in comparison to the Estimate.

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

**Billing**

Inv. #	Inv Date	Trans. Date	Bill Type	Batch	Inv. Amt.	Tax	Estimate
1099	2/7/2011	2/7/2011	Partial	4162	\$120.00	\$0.00	Standard Price \$4.79
1100	2/7/2011	2/7/2011	Partial	4162	\$120.00	\$0.00	Price Variance \$115.21
1101	2/7/2011	2/7/2011	Partial	4162	\$120.00	\$0.00	Quoted Price \$120.00
							Reported Sell \$360.00
							Variance Total 0
							Freight 0
							Total Tax 0
							Invoice Totals 360

## Shipping

The VB Shipping node displays **Job Shipments** set up in the Print and Mail Estimating modules.

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

**Job Shipments**

File Shipping Methods Find Shipment Set Shipping Status

**Job Shipping Information**

Enter Job#:

Customer: Alaska Inc. Job's First Delivery 1/21/2011

Job Description: Testing Job Qty: 2,000 Job's Last Delivery 1/21/2011

Shipments Status: FINAL ☒ Flag as Final Shipped Shipment Hold: No

**Shipments Summary (Double Click on a Shipment to open the edit window)**

	Delivery#	Shipment ID	Backorder ShipmentID	Date	Total Qty	Company	Address	ZIP Code	Stage	Freight Cost
1		225	534	12/7/2011	2000	Alaska Inc.	Loading Dock 12300 S Alley Way Sandy, UT	84090-4		0.00

# Estimating

The **Estimated Margins** node displays **Final Pricing** from the Print and Mail Estimating modules. Changes cannot be made from this screen, but pricing summaries can be viewed for the processes and printed components.

Processing Final Pricing Screen:

PrintStream Customer Support for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

Materials

Billing

Shipping

Estimating

Estimated Margins

Work Ticket

Work Order

Combined WOWT

Pricing Summary

Final Pricing

C	Process	Min. Charge	Setup Charge	Qty.	per	Book Rate	Markup %	Qtd. Rate	Book
<input type="checkbox"/>	PROGRAMMING	\$0.00	\$0.00	1	each	5,000.0000	0.00	\$75.0000	
<input type="checkbox"/>	SORT RECORDS	\$0.00	\$0.00	1,000	/1000	\$3.0000	0.00	\$3.0000	
<input type="checkbox"/>	GENDERIZE	\$75.00	\$0.00	1,000	/1000	\$12.0000	0.00	\$12.0000	
<input type="checkbox"/>	OUTPUT TO TAPE/DISKE	\$50.00	\$0.00	1,000	/1000	\$5.5000	0.00	\$5.5000	
<input type="checkbox"/>	HAND INSERT, SORT 1pc	\$175.00	\$0.00	1,000	/1000	\$88.0000	0.00	\$88.0000	
<input type="checkbox"/>	DELIVER TO POST OFFICE	\$50.00	\$0.00	1	each	0.000.0000	0.00	\$50.0000	
<input type="checkbox"/>	Laser (Classic Mod)- Simplex	\$10.00	\$50.00	1,000	/1000	\$74.2000	0.00	\$24.2000	
<input type="checkbox"/>	INKJET 9x12 ENVELOPE	\$0.00	\$0.00	1,000	/1000	\$19.5000	0.00	\$19.5000	

Total @ Book Rate:

\$521.70

Desired Markup (%):

Effective Markup (%):

0.00%

Desired Total:

Quoted Total:

\$521.70

Pricing Summary

☒ Process:

\$521.70

☐ Component:

\$0.00

☐ Print:

\$2,378.56

\$2,900.26

Reset

Save & Recalc

## Printing Final Pricing Screen by component:

PrintStream Customer Support for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant

File View Help Options Job Status Status Reports

Job Header  
Scheduler  
Job's Notes  
Customer Notes  
Costs  
Purchase Orders  
Materials  
Billing  
Shipping  
Estimating  
Estimated Margins  
Work Ticket  
Work Order  
Combined WOWT

### Pricing Summary

Final Pricing

Component	Quantity	Cost	Markup % (Avg.)	Sell	Variation %	Quoted Rate/1000	Quoted Price
Cover	1,000	\$1,143.90	18.67	\$1,357.51	0.00	\$1,357.51	\$1,357.51
Text	1,000	\$641.87	30.44	\$837.23	0.00	\$837.23	\$837.23
Bindery	1	\$126.59	45.22	\$183.84	0.00		\$183.84
<b>Total</b>		<b>\$1,912.36</b>	<b>24.38</b>	<b>\$2,378.58</b>	<b>0.00</b>		<b>\$2,378.58</b>

Item	Cost	Markup (%)	Sell
LABOR	\$520.75	17.40	\$611.36
MATERIALS	\$51.20	31.64	\$67.40
BUYOUTS	\$0.00	0.00	\$0.00
FREIGHT	\$0.00	0.00	\$0.00
POSTAGE	\$0.00	0.00	\$0.00
PAPER	\$0.00	0.00	\$0.00
CLICK CHARGE	\$0.00	0.00	\$0.00
FREIGHT MATERIAL	\$0.00	0.00	\$0.00
	\$0.00	0.00	\$0.00
Flat Charges	\$0.00	0.00	\$0.00
Commissions	\$0.00	0.00	\$0.00

Quote Letter Description:  
Cover

Standard (Cost/Sell):	\$571.95	\$678.76
Variation (%/)\$:	0.00	\$0.00
Quoted Price		\$678.76
Unit (Cost/Sell):	\$0.5720	\$0.6788
Value Added (%/)\$:	87.72%	\$0.60

Per 1000 pricing ☒

Save

Pricing Summary

Process: **\$521.70**

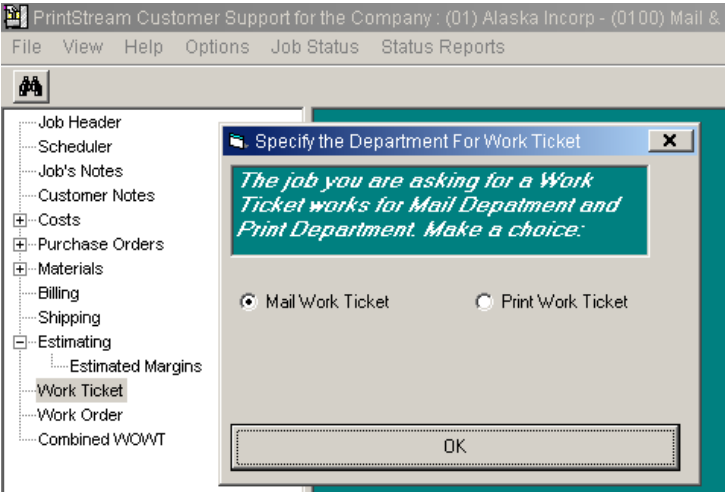
Component: **\$0.00**

Print: **\$2,378.58**

**\$2,900.28**

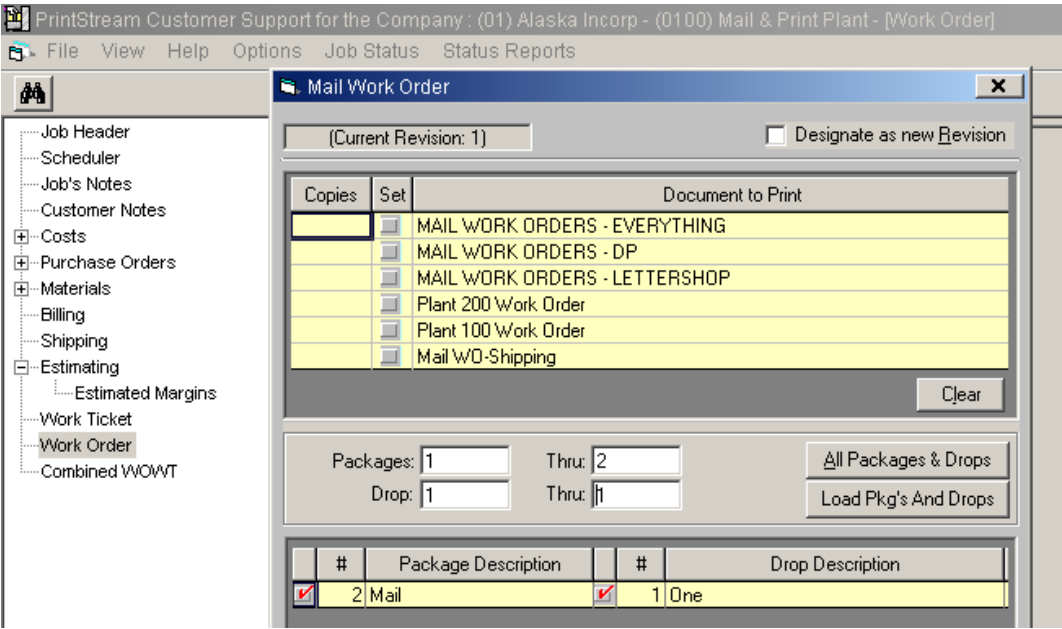
# Work Ticket

Both the **Mail Work Ticket** and **Print Work Ticket** display from the Customer Support module. Choose the desired Work Ticket and select **OK**.



# Work Order

The **Mail Work Order** displays from the Customer Support module. Complete the Mail Work Order request and select **Preview** or **Print**.





# Combined WOWT

Combined WOWT can be accessed in the Customer Support node:

PrintStream Customer Support for the Company: (01) Alaska Incomp - (0100) Mail & Print Plant

File View Help Options

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

Materials

Billing

Shipping

Estimating

Estimated Margins

Work Ticket

Work Order

Combined WOWT

Select Report Options

Quote No: 5953.99      Job No: 8139      Job Qty: 2000

Select Components

Components

☒ Cover

☒ Text

☒ Letter

☒ EPS

☒ Stitch

Select Report Sections

Summary

☒ Components

☒ Paper and Material

☒ Bound Components

☒ Assembly and Packaging

☒ Mfg Items

☒ Buyout Summary

Detail

☒ Data Processing

☒ Assembly and Packaging

☒ Pre-Press

☒ Packages

☒ Print Components

☒ Drops

☒ Other Components/Buyouts

☒ Postage

☒ Shipping

Other Options

☒ Print Bar Codes

☒ Print First & Last Mail Date

☒ Print Scripts

☒ Print Shipping Notes

☒ Print Modifiers

☒ Print Mail Modifier Questions?

☒ Print Formula Modifier Questions?

Report Type

☒ Work Ticket

☐ Report by Package

Select Packages

Department/Cost Center

Enter Report #

Valid ranges: (650 - 699) or (750 - 799)

Design Report

☐ View DataSet

Print Ticket

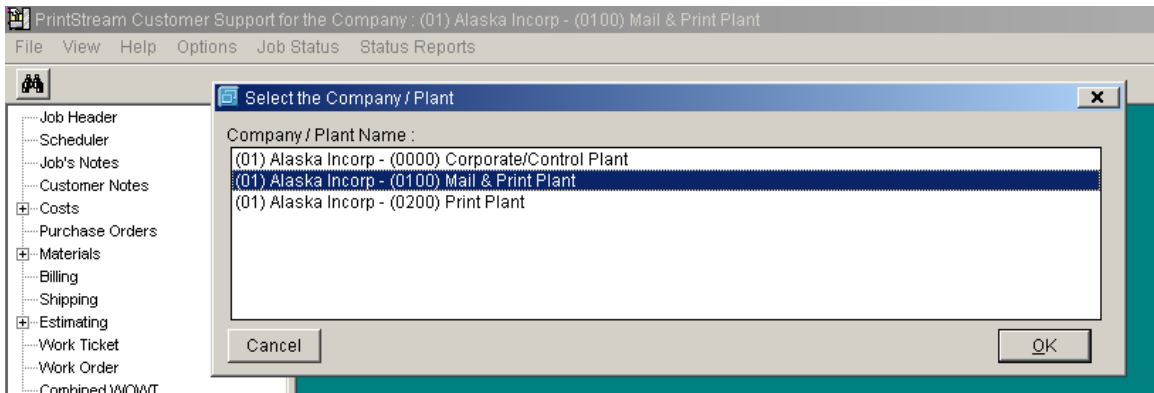
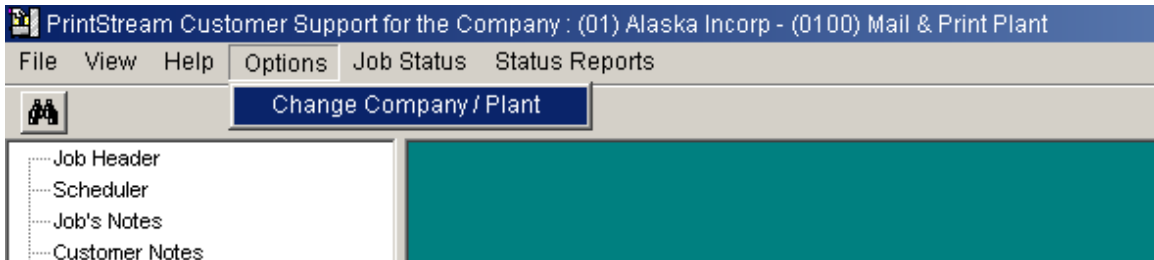
View Ticket

Cancel

Quote Number	Job Number	Customer	Title	Quantity	Quote Date	Start Date	1st Ship Date	Last Ship Date	Sales Rep
5953.99	8139	Alaska Inc.	Testing	2,000	11/15/2011	11/15/2011	12/1/2011	12/1/2011	House Account

# Options

Select the **Customer Support** module screen under the **Options** menu to change Company/Plant if operating in a multi-company or multi-plant environment as long as the user has access to all Companies/Plants as configured in Menus and Users.



## Job Status

The **Job Status** dropdown menu includes two options:

- Search for Job to Review/Set
- Review/Set Job Status

Select **Search for Job to Review/Set** to display a screen with existing and recent jobs. The **Existing** screen allows querying to find the job in the same manner as the Job Header screen or the Quote Header screen in the Print and Mail Estimating/Order Entry modules.

Quote Num.	Job Num.	Company	Customer	Title	Q
387	859863	01	Tree's and More	9331-PHARMA B	1
386	859842	01	Tree's and More	WHRSRF	1
385	859841	01	Tree's and More	SIR1	1
384	859838	01	Tree's and More	9340I	1
383	859837	01	Tree's and More	9330L	1
382	859836	01	Tree's and More	7289-1G	1
381	859835	01	Tree's and More	7288L	1
380	859834	01	Tree's and More	7289N	1
379	859833	01	Tree's and More	7854K	1

Click the job in the list of jobs to display the **Set/Review Job Status** screen.

## Set/Review Job Status

The header displays **Job Number**, **Job Title**, **Customer Number**, **Customer Name** and **Due Date** (first mail date). If the job has been placed on hold, a check mark will display in **Job is on Hold**.

Job Details display:

Set/Review Job Status

Job Number: 8139

Title: Testing

Customer: ALASKA

Name: Alaska Inc.

Due Date: 12/1/2011

☐ Job is on Hold

Not Scheduled

Save Changes

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

Terms : Net 20 termsvcvcbvcvcbv

Contact : Sally Samster

Phone : 801555 0133

New job. No previous job entered

Job Entry Date : 11/15/2011

Quote : 5953.99

Quantity : 2,000

Quote Entry Date : 11/15/2011

Quoted Price : \$2,378.58

Customer Order No : 12345

Requested Ship Date : 12/1/2011

Promised Ship Date : N/A

Expected Job In Date : N/A

Sales Rep : House Account

Planner : Cherry Terrell

Estimator : Betty White

CSR : Sue Smith

Version : Stitch

Add New Code

Code

Description (add comments below if desired)

Source/Cause of Status code: ☐ Internal ☐ Customer ☐ Vendor

Expected close date: 12/8/2011

Comments:

Cost Center:

Add

Cancel

Search

Schedule Details

Work Order

Open Status Codes screen display:

Set/Review Job Status

Job Number: 8139

Title: Testing

Customer: ALASKA

Name: Alaska Inc.

Due Date: 12/1/2011

☐ Job is on Hold

Not Scheduled

Save Changes

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

Close	Code	Description	Set By	Date Set	Caused By	Exp Close	Cost Center	Comment
	CUS	Waiting on Customer Supplied Material	LS	12/8/2011 2:22:14 PM	Internal	12/8/2011	CREATIVE CONSULTING	

**Closed Status Codes display:**

**Set/Review Job Status**

Job Number: 8139 Title: Testing **Not Scheduled**

Customer: ALASKA Name: Alaska Inc. **Save Changes**

Due Date: 12/1/2011 ☐ Job is on Hold

Job Details | Open Status Codes | **Closed Status Codes** | Schedule Overview | Component Tracking | Material | Buy Outs | Shipping

Date Closed	Code	Description	Set By	Date Set	Caused By	Exp Close	Cost Center
12/8/2011 2:23:08 PM	CUS	Waiting on Customer Supplied Material	LS	12/8/2011 2:22:14 PM	Internal	12/8/2011	CREATIVE CONSULTIN

**Schedule Overview display:**

**Set/Review Job Status**

Job Number: 8139 Title: Testing **Scheduled Committed**

Customer: ALASKA Name: Alaska Inc. **Save Changes**

Due Date: 12/1/2011 ☐ Job is on Hold ☐ Job needs to be Re-Scheduled

Job Details | Open Status Codes | Closed Status Codes | **Schedule Overview** | Component Tracking | Material | Buy Outs | Shipping

Quote Entry Date	Job Entry Date	Job In Date	Promised Ship Date
11/15/2011	11/15/2011	N/A	N/A

Route No.	Description	Due Date	Scheduled Compl.	Source
1	Testing		12/9/2011	

**Component Tracking display:**

**Set/Review Job Status**

Job Number: 8139 Title: Testing **Scheduled Committed**

Customer: ALASKA Name: Alaska Inc. **Save Changes**

Due Date: 12/1/2011 ☐ Job is on Hold ☐ Job needs to be Re-Scheduled

Job Details | Open Status Codes | Closed Status Codes | Schedule Overview | **Component Tracking** | Material | Buy Outs | Shipping

Route	Component	Last Step	Current Step	Hours	Due Out	Next Step	Due to start
Testing	Pre-Press		PROGRAMMING	1.0	12/8/2011 shift 2	SORT RECORDS	12/8/2011 shift 2
	Cover		Dylux Proof 01	1.1	12/8/2011 shift 2	Blueline Proof	12/8/2011 shift 2
	Text		Blueline Proof	1.0	12/8/2011 shift 2	Film Process-NO UDF	12/8/2011 shift 2
	Cover		Platemaking	1.3	12/8/2011 shift 2		
	Text		Platemaking	0.7	12/8/2011 shift 2		

Material display:

Set/Review Job Status

Job Number: 8139

Title: Testing

Scheduled Committed

Customer: ALASKA

Name: Alaska Inc.

Save Changes

Due Date: 12/1/2011

☐ Job is on Hold

☐ Job needs to be Re-Scheduled

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

Material	Type	Component/Area	Inven. Code	Size	Qty Required	Scheduled Date	Qty Received
Art Gloss Book^^0100	Customer Item	Letter	7176-PO#:1026-Line#:1		1,101	12/8/2011	
ENVELOPE 9X12	Customer Item	EPS	RR-0912-1011-ENV		1,101	12/8/2011	
300	Carton	48	CARTON-1145	18 x 12 x 11	2 Cartons	Not Avail.	

Buy Outs display:

Set/Review Job Status

Job Number: 8139

Title: Testing

Reschedule Reqd.

Customer: ALASKA

Name: Alaska Inc.

Save Changes

Due Date: 12/1/2011

☐ Job is on Hold

☒ Job needs to be Re-Scheduled

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

Material	Component/Area	Qty Required	Scheduled Date	Qty Received	Complete	Delivery Date	Vendor	PO #	PO Due
PURCHASE LIST	Prep	2,000	12/8/2011	0	<input type="checkbox"/>			1281	12/8/2011

Shipping display:

Set/Review Job Status

Job Number: 8139

Title: Testing

Scheduled Committed

Customer: ALASKA

Name: Alaska Inc.

Save Changes

Due Date: 12/1/2011

☐ Job is on Hold

☐ Job needs to be Re-Scheduled

Job Details

Open Status Codes

Closed Status Codes

Schedule Overview

Component Tracking

Material

Buy Outs

Shipping

Status: FINAL

Shipment Hold: No

Customer Notes

Job Notes

Note Summary

	Qty	Date	Delivery#	Company	Address	ZIP Code	Stage
1	2000	12/7/2011	225	Alaska Inc.	Loading Dock 12300 S Alley Way Sandy, UT	84090-4534	-1 is undefined

## Review/Set Job Status

Select this screen to review or configure **Status Codes**.

**Set/Review Job Status**

Job Number: 8139 Title: Testing Reschedule Reqd.

Customer: ALASKA Name: Alaska Inc. Save Changes

Due Date: 12/1/2011 ☐ Job is on Hold ☒ Job needs to be Re-Scheduled

Job Details | Open Status Codes | Closed Status Codes | Schedule Overview | Component Tracking | Material | Buy Outs | Shipping

Terms : Net 20 termsvcvbcvbcvbcvbcv  
 Contact : Sally Samster  
 Phone : 801555 0133  
 New job. No previous job entered  
 Job Entry Date : 11/15/2011  
 Quote : 5953.99  
 Quantity : 2,000  
 Quote Entry Date : 11/15/2011  
 Quoted Price : \$2,378.58  
 Customer Order No : 12345  
 Requested Ship Date : 12/1/2011  
 Promised Ship Date : N/A  
 Expected Job In Date : N/A  
 Sales Rep : House Account  
 Planner : Cherry Terrell  
 Estimator : Betty White  
 CSR : Sue Smith

Version : Stitch

Add New Code

Code Description (add comments below if desired) Put Job on Hold

**HLD** Source/Cause of Status code: ☒ Internal ☐ Customer ☐ Vendor Expected close date: 12/8 /2011

Comments: The proof is in and requires rework.

Cost Center: 4:ELEC. PREPRESS [01] Add

Done Search Schedule Details Work Order

**Set/Review Job Status**

Job Number: 8139 Title: Testing On Hold

Customer: ALASKA Name: Alaska Inc. Save Changes

Due Date: 12/1/2011 ☒ Job is on Hold

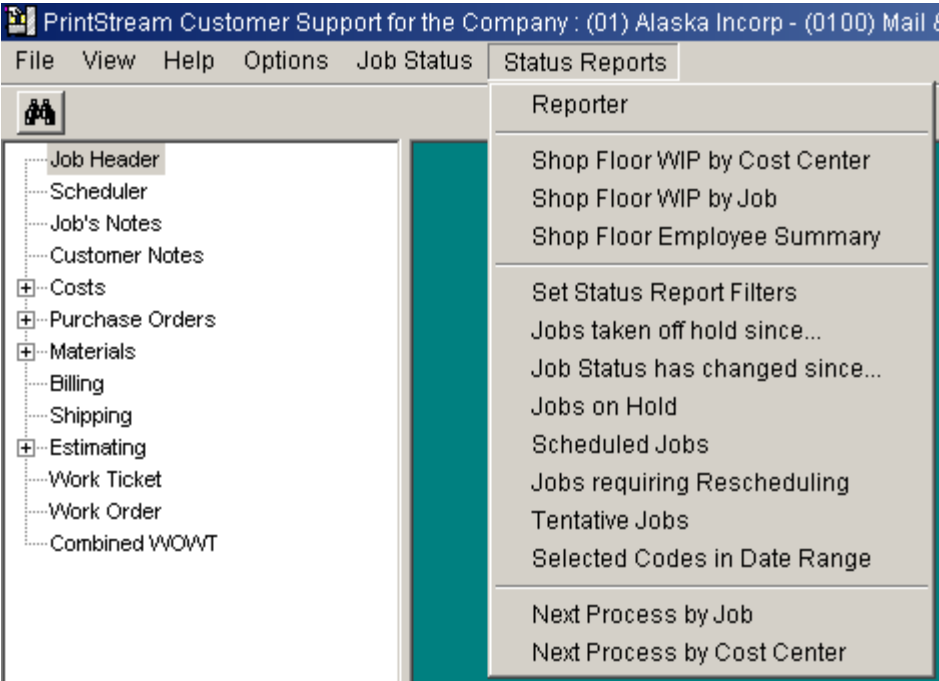
Job Details | Open Status Codes | Closed Status Codes | Schedule Overview | Component Tracking | Material | Buy Outs | Shipping

Close	Code	Description	Set By	Date Set	Caused By	Exp Close	Cost Center	Comment
	HLD	Put Job on Hold	LS	12/8/2011 2:49:39 PM	Internal	12/8/2011	ELEC. PREPRESS	The proof is in and requires rework.
N/A	02	Reschedule Reqd.	LS	12/8/2011 2:26:58 PM	Internal	N/A	N/A	Mail Estimating: Calculate Estimate

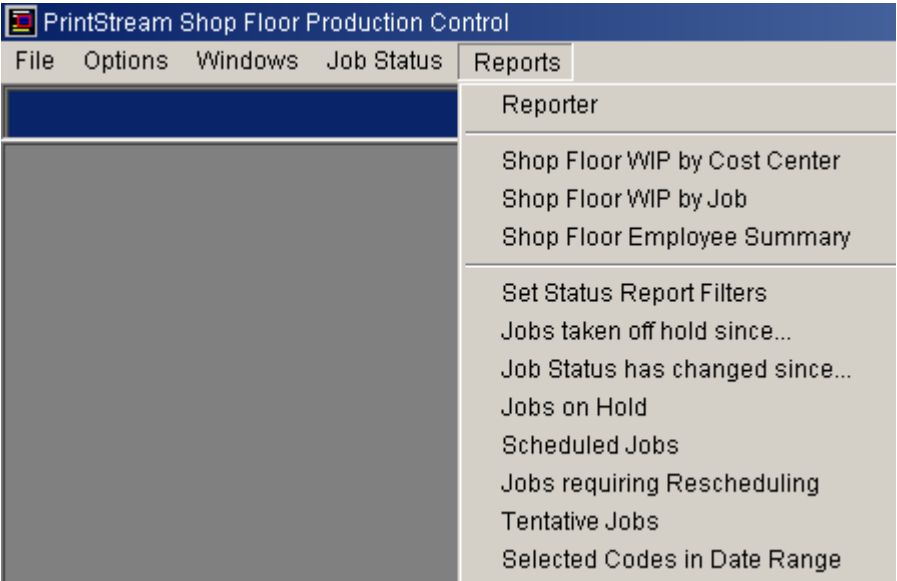
## Status Reports

Print Status Reports from the Customer Support module by selecting the **Status Reports** dropdown list. These Reports are identical to those listed under the lock/key icon in **MR Shop Floor** and in the **PrintStream** menu bar.

Customer Support

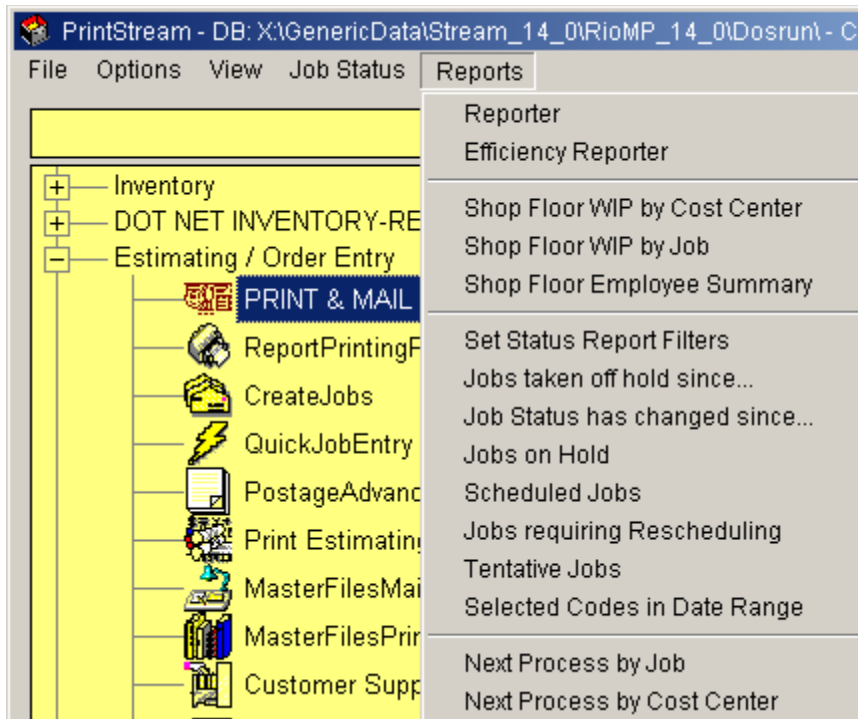


MR Shop Floor





## PrintStream Menu Bar



# Security Events - Customer Support

Security events are included to prohibit viewing of **Costs**, **Estimating**, and **Purchase Orders**.

Sub Roles

Sec. Events

Security Events

Customer Support

CS Costs

CS Estimating

CS View PO

Dashboard

Edit Print Templates

Estimating

Fulfillment

GeneralLedger

GLFinancialReports

Inv.Mgr Inventory Setup

Inv.Mgr Master Files

Inv.Mgr Settings/Utilities

Inv.Mgr Transactions

Inventory Display

Inventory Import

Inventory Issue Multi Item

Inventory Location Builder

Inventory Manager

Inventory Purge

Inventory Reports

Everything

Select All

Deselect All

	Security Event	Program	Read	Write	Update	Delete	Author	Admin
78	Delete CSR Matrix Report	CSR Matrix	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
79	CS Costs	Customer Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
80	CS Estimating	Customer Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
81	CS View PO	Customer Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
82	Dashboard Admin	Dashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
83	Edit Print Templates	Edit Print Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
84	Delete Job	Estimating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
85	Delete Quote	Estimating	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
86	ExitApp	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
87	NAICS	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
88	StatusCode	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
89	StatusReasonCode	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
90	TaxTable	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
91	TCDCodes	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
92	BEFulfillment	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
93	TemplateType	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
94	SourceCode	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
95	Territory	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
96	FFEvents	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
97	SOReturnCSR	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
98	BlanketOrder	Fulfillment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel

Save