efi PrintStream

User Guide

Master Files Mail
V21.1.0200

EFI PrintStream | *V21.1.0200 Master Files Mail User Guide*

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

Trademarks

Table of Contents

Introduction

Overview

This guide provides information about the Master Files Mail.

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.

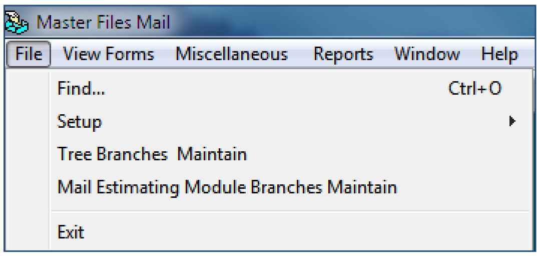
Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

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.

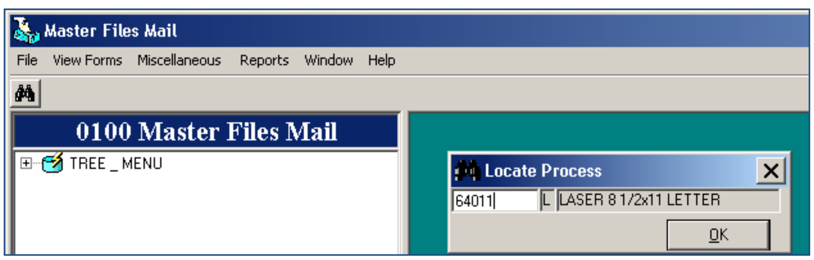
File Menu



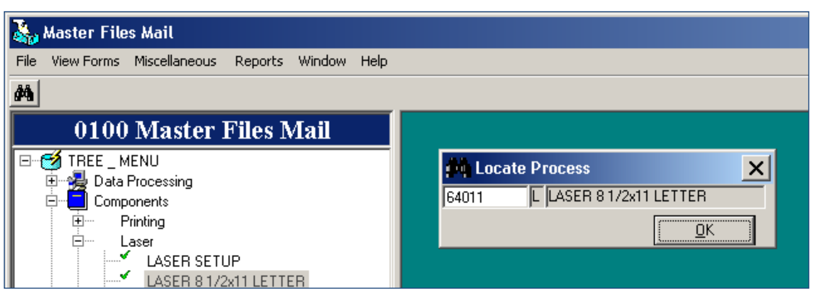
Find – Locate Process

To locate a process in Master Files Mail

1. Go to **File > Find**. Enter the activity code for the process and click **OK**. You can also select the binocular icon.

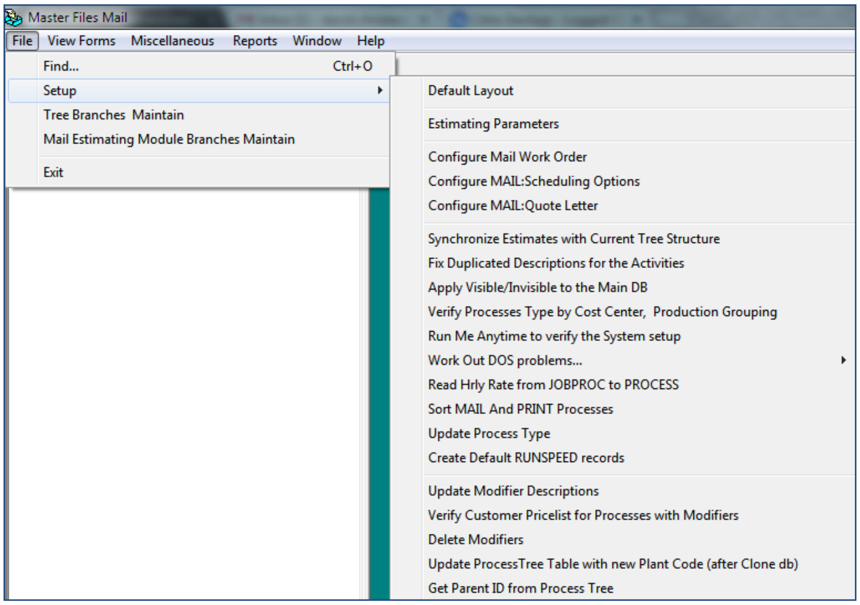


2. View processes in the tree. The tree will expand to display where the process is located in the estimating tree.



Setup

This section describes the setup of utilities for Master Files Mail.

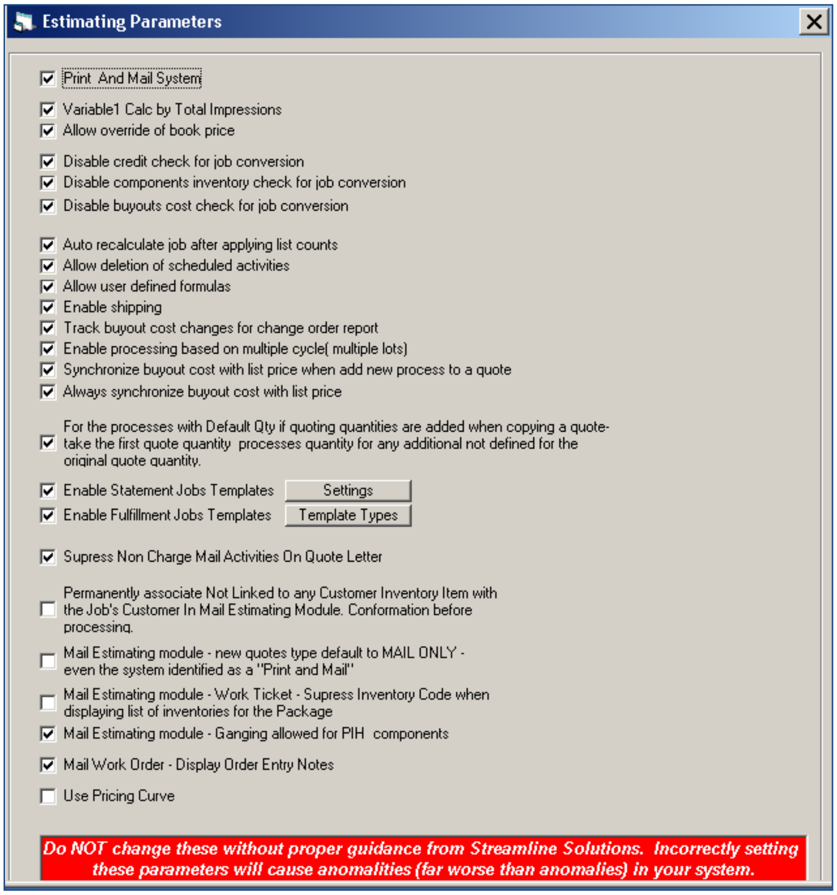


Default Layout

Resets the display to the default display settings.

Estimating Parameters

To view or change Estimating Parameters. go to **Master Files Mail > select File > Setup > Estimating Parameters**. **Do NOT change any of the Estimating Parameters** without proper guidance from PrintStream. Incorrectly setting these parameters will cause anomalies in your system.



Print and Mail System - ONLY select this check box if the customer has purchased both the Print & Mail Systems.

Variable 1 Calc by Total Impressions – select this check box only for customers using special **form length** modifiers and who want the qty. breaks based on total # of inches instead of total qty.

Allow Override of Book Price - do not select this check box for one customer.

Disable credit check for job conversion – select this check box to disable checking the credit status when an estimate is converted to a job.

Disable components inventory check for job conversion – select this check box to disable checking to ensure component inventory items have been defined when an estimate is converted to a job.

Disable buyouts cost check for job conversion - select this check box to disable checking to ensure buyout costs are resolved before an estimate can be converted to a job.

Auto recalculate job after applying list counts - Auto re-calculates job after postage list counts are entered in the Postage Statements module.

Allow deletion of scheduled activities - allows a user to delete an activity/process after the job has been scheduled.

Allow user defined formulas - allows a user to define formulas for activities.

Enable Shipping - allows user to enter/view the Shipping module from the Mail Estimating Tree.

Track buyout cost changes for change order report - select this check box to track changes to the cost of any buyout in the change order report.

Enable processing based on multiple cycle (multiple lots) - select this check box to allow the ability to designate which activities will use lot based pricing. See the **Create Batch of Processes - Pricing and Process Standards** section of this document for further details.

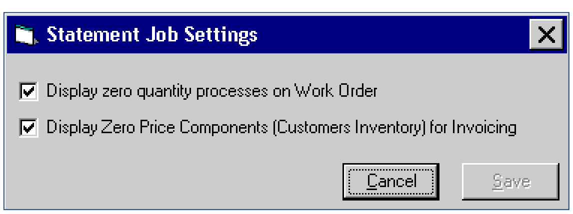
Synchronize buyout cost with list price when add new process to a quote - if this option is selected, then when a buyout process is added to an estimate, its cost is defaulted to its total list price or entered price. If the user overrides the buyout cost, this cost override is always retained, even if the process quantity and list price changes. See the following examples:

- If the buyout/subcontract activity has a price set up for the activity in MF-Mail Process, system will auto-populate the buyout cost field with the buyout book price total when process is added to an estimate.
- If the buyout/subcontract activity does not have a price set up in MF – Mail Process and the user keys in a rate per 1000 on the final pricing screen, the total calculated on the final pricing screen will auto-populate the buyout cost field.
- If the quantity changes for the entire quote/job or for a component/section, user needs to double check and adjust the rate per 1000 for each buyout accordingly. Any edits will auto-populate the buyout costs field; but this step will not be done automatically when quantities change.

Always synchronize buyout cost with list price - when also selected, then the buyout cost still defaults to the sell price when a process is added to an estimate. However, (unlike selecting only the first option) when a buyout process quantity changes, its cost, as well as price, will revert to the total list price. If the buyout cost was overridden, the override would be lost if the process quantity is altered.

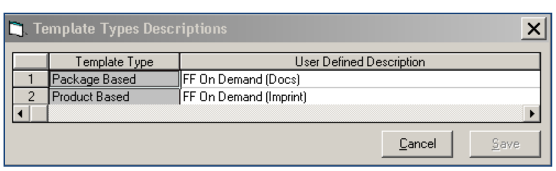
For processes with Default Qty if quoting quantities are added when copying a quote – take the first quote quantity processes quantity for any additional not defined for the original quote quantity: when this check box is selected and a quote is copied, the processing quantities on the copied quote will be pulled from the original quote whenever an additional process is added to the copied quote that was not defined on the original quote.

Enable Statement Jobs Templates



Note The Work Order setting only impacts Statement Jobs.

Enable Fulfillment Jobs Templates



Note Do NOT change these settings without proper guidance from PrintStream.

Suppress Non Charge Mail Activities on Quote Letter - Non-chargeable activities should be set up in Master Files Reports > Production System > Activities (For the System) because these activities do not print on the Quote Letter. If a non-chargeable activity was set up in Master Files Mail, however, and you do not want it to print on the Quote Letter, activating this parameter will stop the activities from printing on the Quote Letter.

Permanently associate Not Linked to any Customer Inventory Item with the Jobs Customer In Mail Estimating Module. Confirmation before processing - When this check box is selected, any inventory item on a job that is not linked to any customer in Master Files Inventory would be linked automatically to that customer. This item number would hold that customer link regardless of any other customer's job for which the item number is selected. The customer link for the item number in Master Files Inventory is "grayed out" and cannot be changed to another customer.

Mail Estimating module – new quotes type default to MAIL ONLY – even if the system is identified as a Print and Mail - All new quote types would default to MAIL, even though the Print and Mail Estimating Parameter is checked, if this parameter is selected.

Mail Estimating module – Work Ticket – Suppress Inventory Code when displaying list of inventories for the Package - On the work ticket, the inventory code would not display when listing the inventories for the packages. If the item number (automatically numbered by PrintStream) and the inventory code are the same entry, both are set to print on inventory lists in reports. Setting this in the Estimating Parameter will keep the duplication occurring when the inventory code is not named something other than the item number. If the inventory code is a descriptive entry that does not mimic the item number and you want both the item number and the inventory code to print on inventory lists, do not check this Estimating Parameter in Master Files Mail.

Mail Estimating module – Ganging allowed for PIH (Printed In-house) components - When this Estimating Parameter is checked, Ganging is allowed. Ganging is the function that allows the user to print multiple versions on one press sheet. For example, if the job requires a letter, a brochure and a business card and they will fit on one press sheet, ganging the three versions onto one press sheet is an option with this Estimating Parameter checked.

Mail Work Order – Display Order Entry Notes - When this Estimating Parameter is checked, the Mail Work Order notes that are set up for the customer in Master Files Customer will print on the work order. These notes pull into the work order from the customer's master file **Order Entry Notes**.

Use Pricing Curve - When this Estimating Parameter is checked, PrintStream will plot out a pricing curve based on the price breaks and quantities being processed. For example, if your price breaks for Insert, Meter, Sort #10 2 pieces is set in Master Files Mail at $53.00 for quantities under 10,000 and $44.25 for quantities of at least 10,000 but less than 25,000, and the quantity on your estimate is 17,500, PrintStream will set the price for the "in between" quantity at a curve between $53.00 per thousand and $44.25 per thousand at a point where that quantity calculates the price based on the curve. If this option is not checked, the price per thousand will set the price at the price breaks defined for that process in Master Files Mail. Run speeds are not likewise affected.

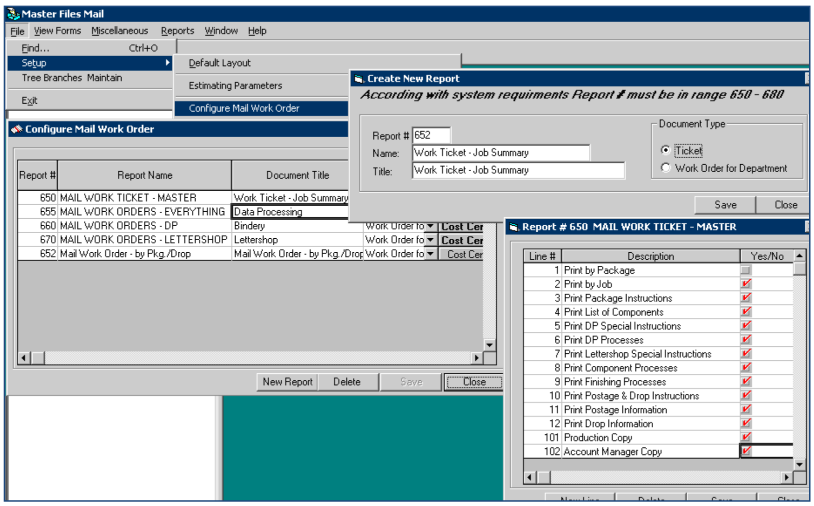
Configure Mail Work Order

To create new Work Orders and Work Tickets

1. To access, select **File > Setup > Configure Mail Work Order**.

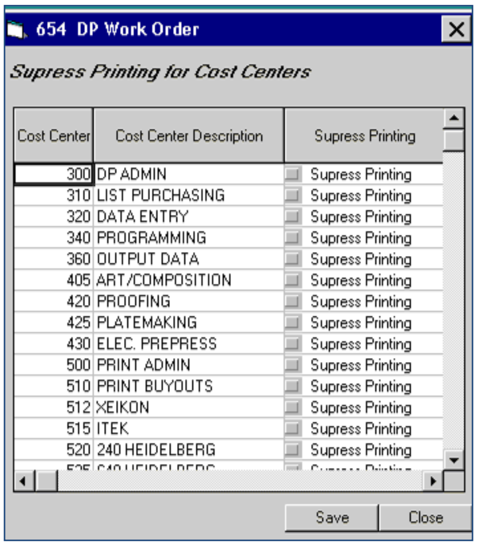
   The Configure Mail Work Order window is displayed.

2. Select the **New Report** button.

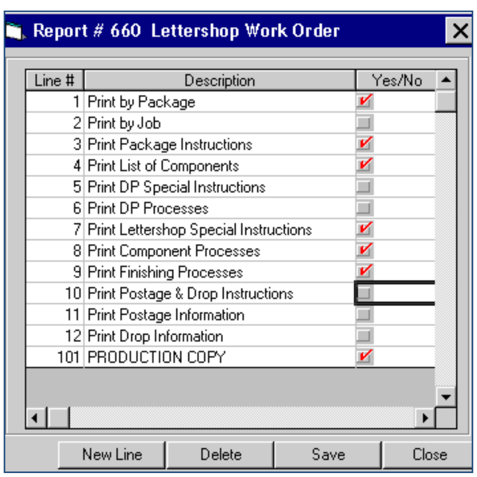


3. Up to 100 customized work orders can be created in PrintStream. Give the report an unused number between 650 and 699 or between 750 and 799.
4. Give the report a **Name**; this will appear in Mail Estimating when selecting work orders.
5. Give the report a **Title**; this will print on the heading of the actual report.
6. Select the **Ticket** or **Work Order for Department** option.
7. **Save** the report.

8. The report will now appear in the list illustrated above. Next to the new report, select the **Cost Centers** button. This is a list of all of the cost centers in the system. Customize this report by selecting which cost centers this report will not include (Suppress Printing). **Save** the selections.



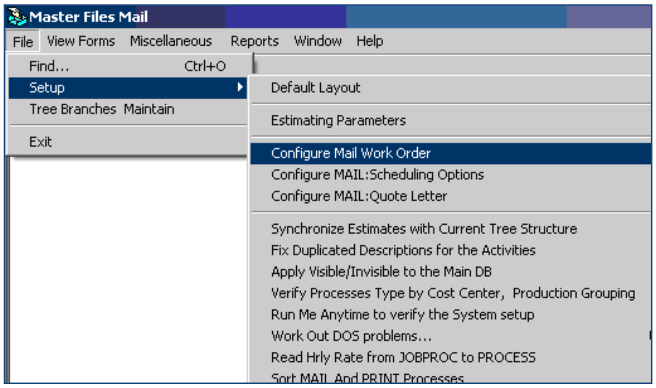
9. Select the **Lines** button. This lists all the possible information for this report. Customize this report by selecting what should print on it. Note that **Print by Package** and **Print by Job** are mutually exclusive. Select only one.



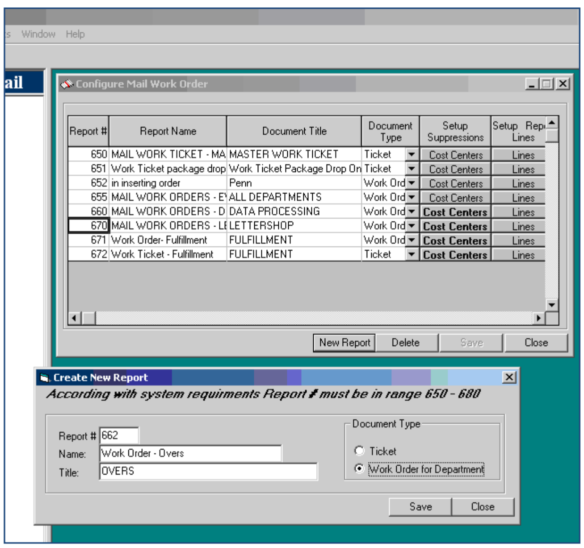
To setup **additional copies** to print when **Set** is selected for a Work Order/Work Ticket, begin by adding line 101 Production Copy, line 102 Data Processing Copy, etc. **Save** the selections.

To create an Overs Work Order

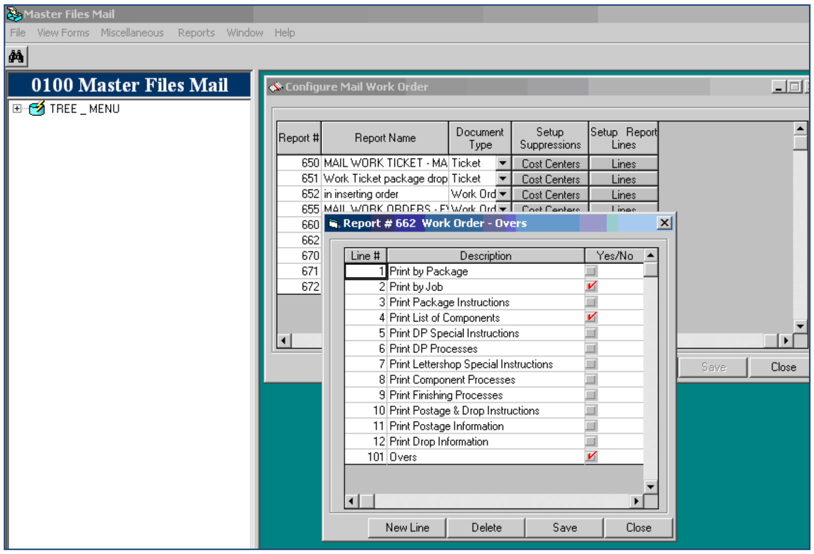
1. Go to **Master Files Mail>File>Setup>Configure Mail Work Order**.



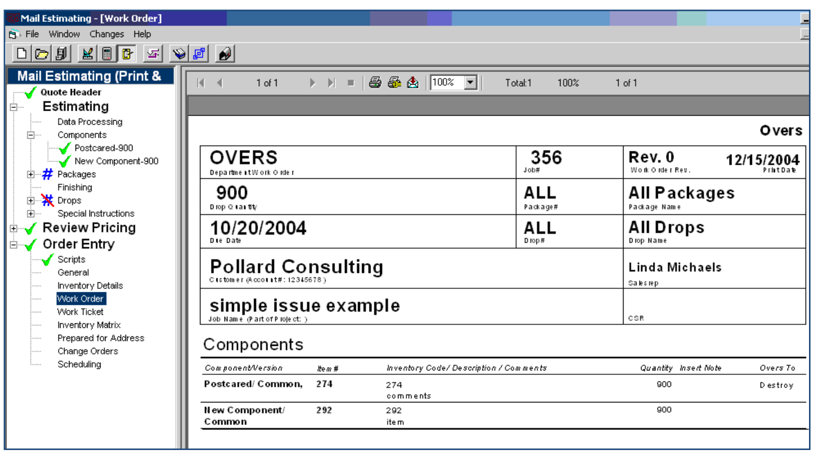
2. Using the instruction above, enter the report number, report name, and title. **Save**.



3. Now find the **Overs** work order in the list and select lines. Click **Print by Job**, **Print List of Components**, add a line number 101, 102, or 103, and write **Overs**.



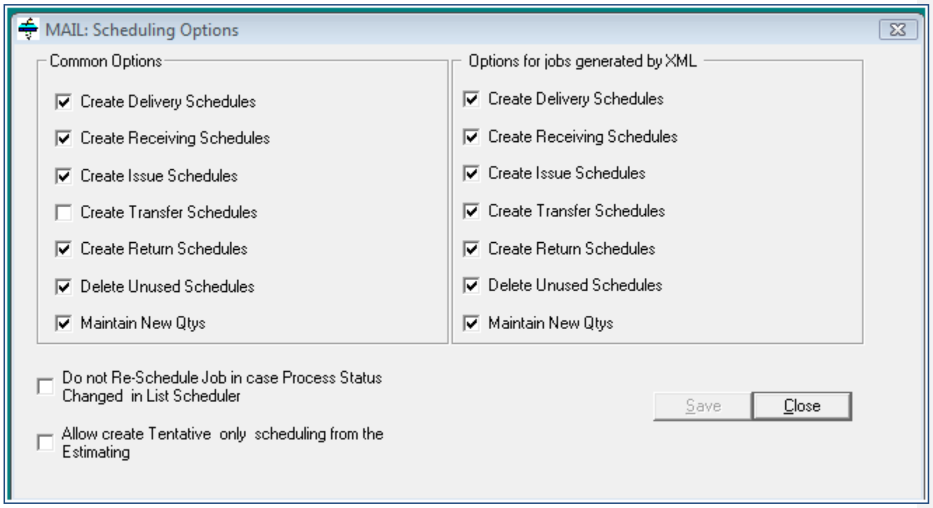
Now when you do a job and select work order, you will get a choice to select **overs**, and if you follow what is above, you will get:



Configure Mail Scheduling Options

Mail Scheduling Options

These options allow you to define system defaults for the scheduling feature. These options apply to all users of the scheduling modules. Some of these options can be adjust on a user/workstation basis within the scheduling module.



Common Options:

Create Delivery Schedules – allows delivery schedules to be set in Print and Mail Estimating/Order Entry > Shipping module.

Create Receiving Schedules – allows receiving schedules to be set in Print and Mail Estimating/Order Entry > Scheduling screen.

Create Issue Schedules – allows issue schedules to be set in Print and Mail Estimating/Order Entry > Scheduling screen.

Create Transfer Schedules – allows transfer schedules to be set in Print and Mail Estimating/Order Entry > Scheduling screen.

Create Return Schedules – allows return schedules to be set in Print and Mail Estimating/Order Entry > Scheduling screen.

Delete Unused Schedules – allows deletion of schedules that were set in Print and Mail Estimating/Order Entry > Scheduling screen that have been changed or deleted from the estimate.

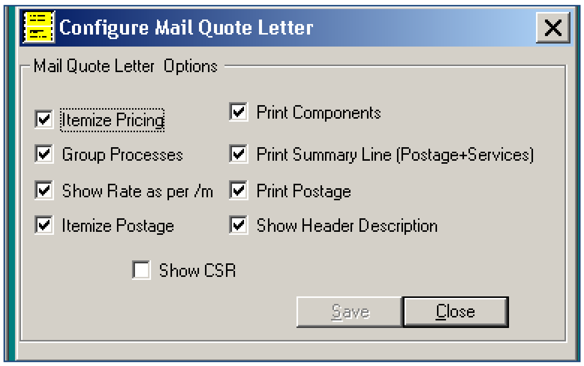
Maintain New Qtys – allows changes to the quantities to pull into the Scheduling screen if changed after the job is calculated and updated.

Do not Re-Schedule Job in case Process Status Changed in List Scheduler - This option prevents jobs from going into the re-schedule bucket when only the process status is changed. When it is checked it will not automatically send your scheduled job to a Rescheduled status when you make a change to the Status column in the List Scheduler. Mail Estimating, Print Estimating and MileStone Scheduler List Scheduler will read this setting.

Allow create Tentative only scheduling from Estimating - This option is a new feature that is currently being worked on.

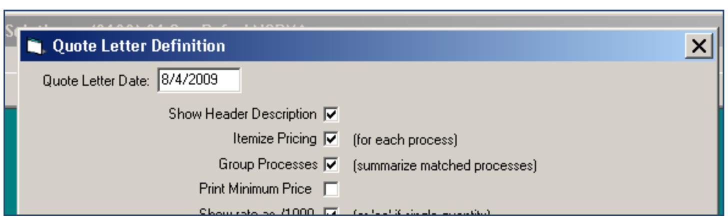
Configure Mail Quote Letter

These options allow you to define system defaults for the Quote Letter feature. These options apply to all users of the scheduling modules. Some of these options can be adjust on a user/workstation basis within the scheduling module.



Itemize Pricing – when this check box is selected, the **Itemize Pricing** check box in the Quote Letter Definition screen will default to selected.

Group Processes – when this check box is selected, the **Group Processes** check box in the Quote Letter Definition screen will default to selected.



If cleared in **Configure Mail Quote Letter**, these check boxes will default to cleared in the Quote Letter Definition screen.

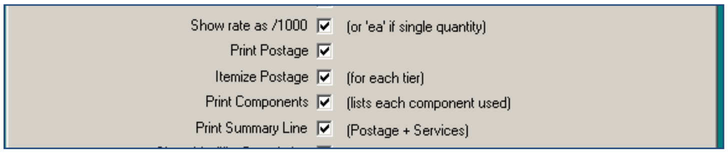
Show Rate as per/M – when this check box is selected, the **Show Rate as /1000** check box in the Quote Letter Definition screen will default to selected.

Itemize Postage – when this check box is selected, the **Itemize Postage** check box in the Quote Letter Definition screen will default to selected.

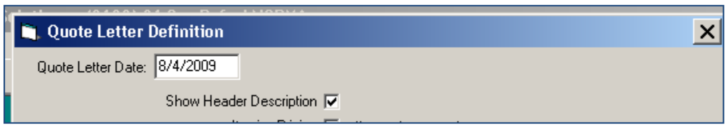
Print Components – when this check box is selected, the **Print Components** check box in the Quote Letter Definition screen will default to selected.

Print Summary Line (Postage + Services) – when this check box is selected, the **Print Summary Line (Postage + Services)** check box in the Quote Letter Definition screen will default to selected.

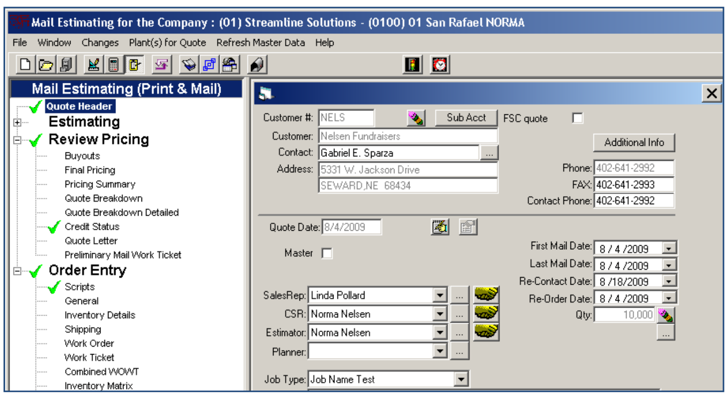
Print Postage – when this check box is selected, the **Print Postage** check box in the Quote Letter Definition screen will default to selected.



Show Header Description – when this check box is selected, the **Show Header Description** check box in the Quote Letter Definition screen will default to selected.

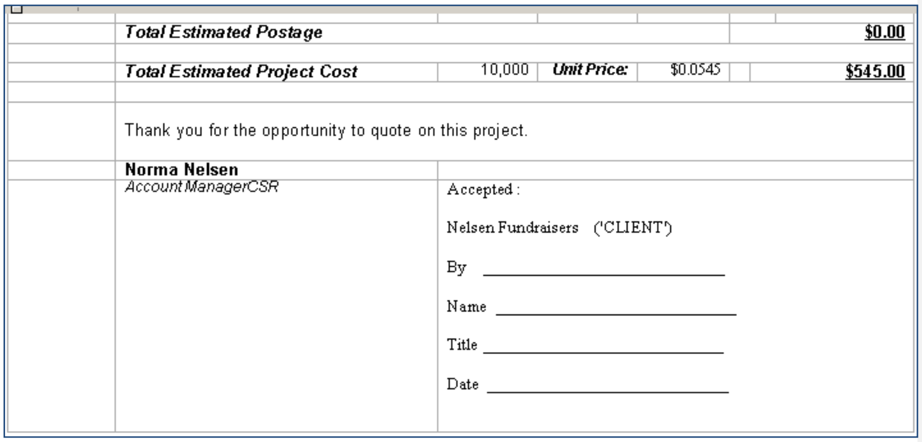


Show CSR – when this check box is selected, the **Mail Quote Letter** will display the CSR at the bottom to the left of the **Accepted** signature box.



Note the Sales Rep is Linda Pollard and the CSR is Norma Nelsen in the job Quote Header screen. If the **Show CSR** check box is selected in **Configure Mail Quote Letter**, the quote letter shows Norma Nelsen CSR at the bottom left. If this is cleared, the Sales Rep on the job Quote Header will display.

Show CSR check box selected:



Total Estimated Postage					**$0.00**
Total Estimated Project Cost	10,000	***Unit Price:***	$0.0545		**$545.00**

Thank you for the opportunity to quote on this project.

Norma Nelsen
Account ManagerCSR

Accepted :

Nelsen Fundraisers ('CLIENT')

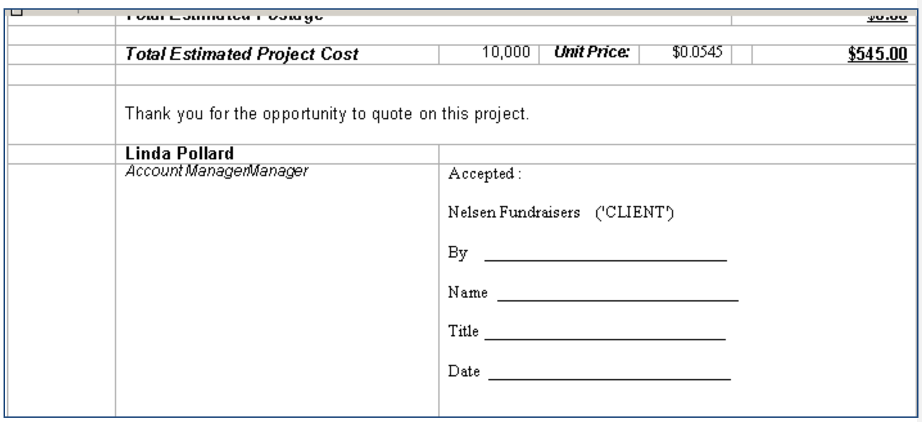
By __________________________

Name __________________________

Title __________________________

Date __________________________

Show CSR check box cleared:



Total Estimated Project Cost	10,000	***Unit Price:***	$0.0545		**$545.00**

Thank you for the opportunity to quote on this project.

Linda Pollard
Account ManagerManager

Accepted :

Nelsen Fundraisers ('CLIENT')

By __________________________

Name __________________________

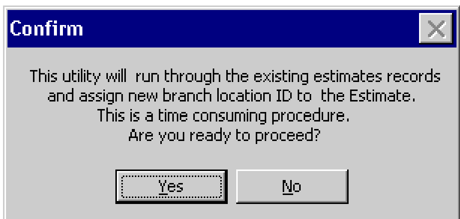
Title __________________________

Date __________________________

The Sales Rep displays.

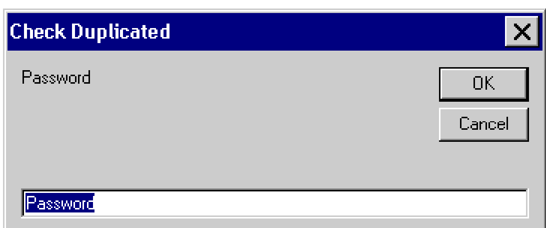
Synchronize Estimate with Current Tree Structure

Run this utility in live system if the tree structure has been rearranged and current quotes/jobs do not reflect those changes.

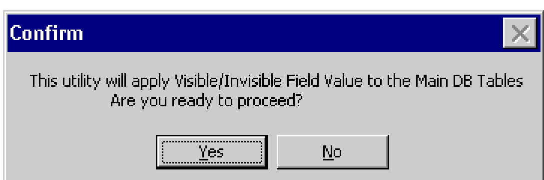


Fix Duplicated Descriptions for the Activities

This utility is used to identify and fix duplicate descriptions for activity codes in the Tree Structure. Password is required to access. Contact EFI PrintStream Support for password.



Apply Visible/Invisible to the Main DB



Verify Processes Type by Cost Center, Production Grouping

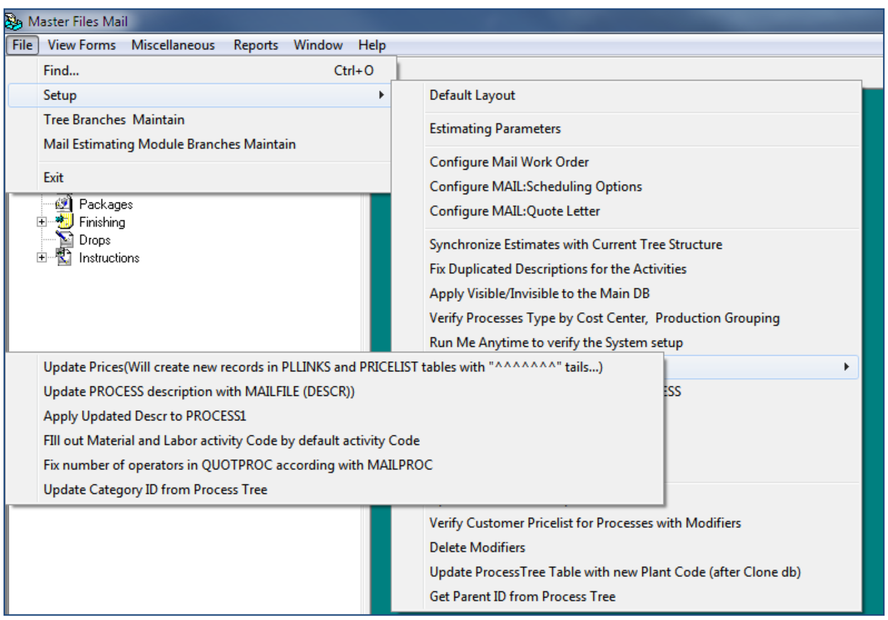
This is a utility that will check your setup verifying accuracy and completeness.

Run me Anytime to Verify System Setup

Use this utility anytime during the definition process to verify that your setup is correct. Any discrepancies are identified and displayed. You are given an option for the system to automatically fix the problem or it can be fixed manually.

* The following options will only be completed with the help of EFI PrintStream. They are being listed to provide information only.

Work Out DOS problems . . .



- **Update Prices**
- **Update Process description with MailFile**
- **Apply Updated Description to Process1**
- **Fill Out Material and Labor Activity Code by Default Activity Code**
- **Fix Number of Operators in QUOTPROC according with MAILPROC**
- **Update Category ID from Process Tree**

Read Hourly Rate from JOBPROC to PROCESS

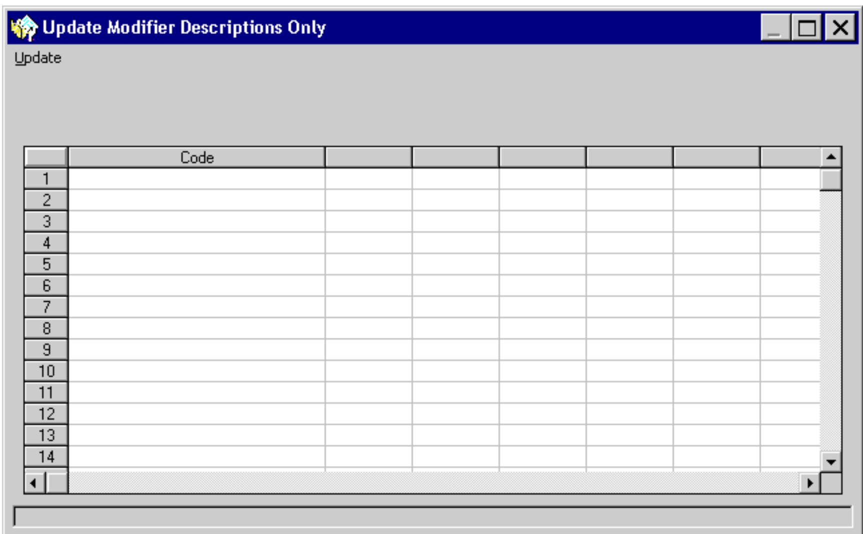
Sort MAIL and PRINT Processes

Update Process Type

Create Default RUNSPEED Records

Update Modifier Descriptions

Clicking **Update** will perform a utility that will update modifier descriptions.

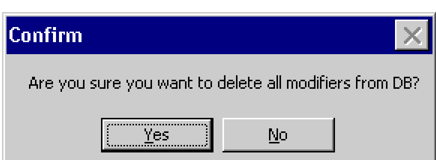


Verify Customer Pricelist for Processes with Modifiers

Run this utility to verify the customer Price list for activities with modifiers.

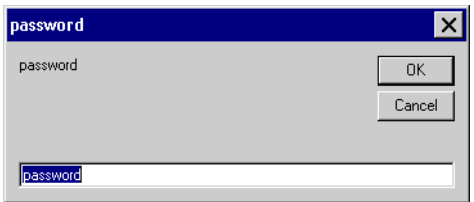
Delete Modifiers

This should be used with extreme caution and with the assistance of EFI PrintStream Solutions. This utility will delete ALL MODIFIERS from the database.



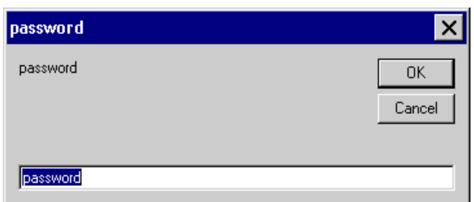
Update Process Tree Table with New Plant Code (after Clone Db)

This utility is run to update all activities in the tree structure with the new plant code after a database has been cloned. This utility is intended to be run by PrintStream Support only. Please contact PrintStream before attempting to run this utility.



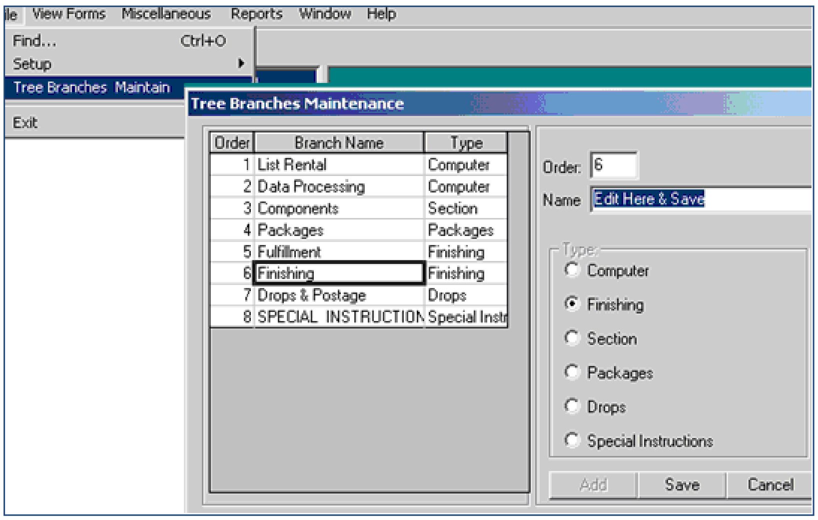
Get Parent ID from Process Tree

This utility is run to update all activities in the tree structure with the Parent ID. This utility is intended to be run by PrintStream Support only. Please contact PrintStream before attempting to run this utility.



Tree Branches Maintain

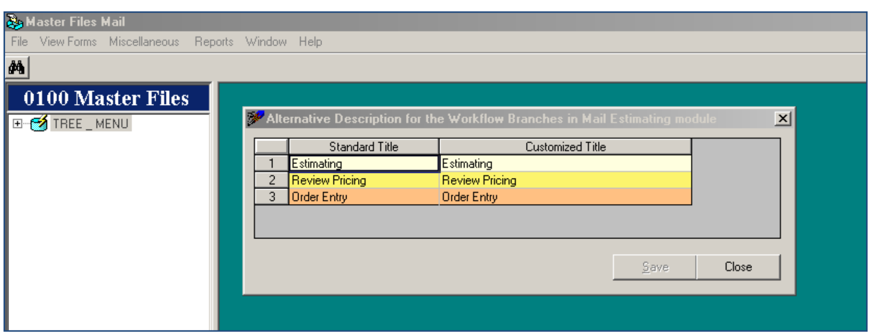
To edit the names of the main tree branches, select File > Tree Branches Maintain from the menu bar. Single-click the name of the branch you wish to change, enter the new name in the Name field on the right of the screen and save. You can also add new branches from this screen.



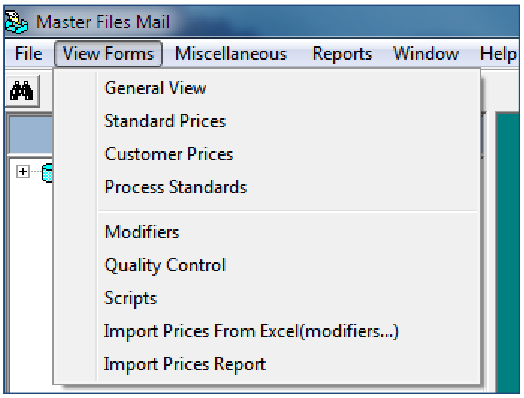
Mail Estimating Module Branches Maintain This feature allows you to rename the main tree branches that appear in Print and Mail Estimating. The default name is the same as the standard title. You can change the name by entering a new title under the Customized Tile fields. When you re-open Print and Mail Estimating after changing the titles here you will see the new names that you have created.

Mail Estimating Module Branches Maintain

To edit the 3 main tree branches in Print and Mail Estimating use this utility to make changes.

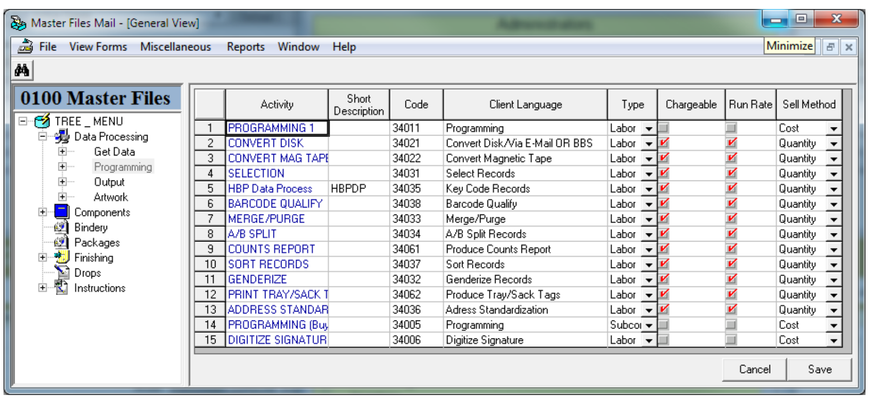


View Forms Menu



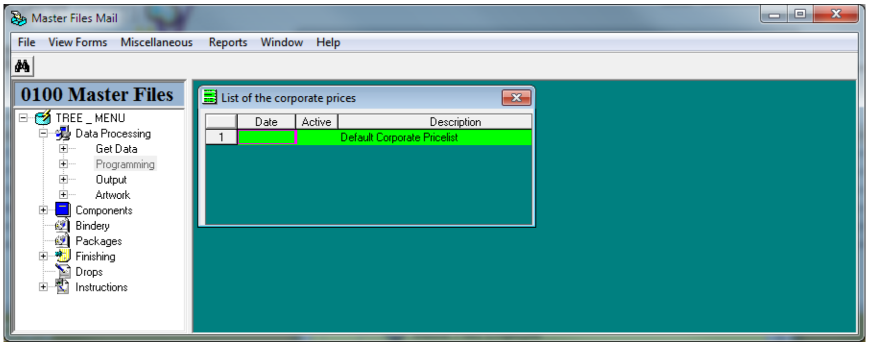
General View

Select a tree branch then select **General View** to access the screen below.

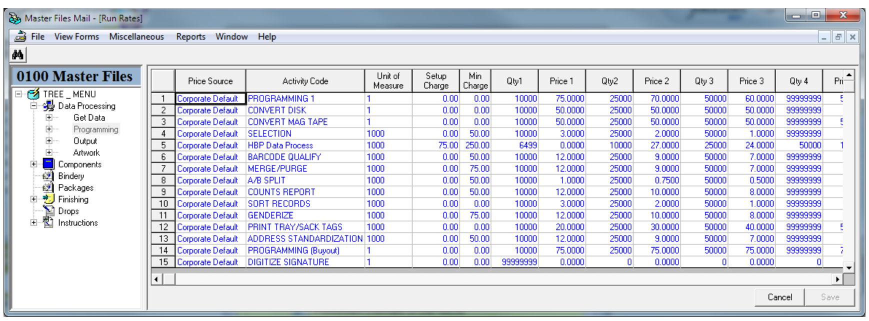


Standard Prices

Select a tree branch then select Standard Prices to access the screen below.

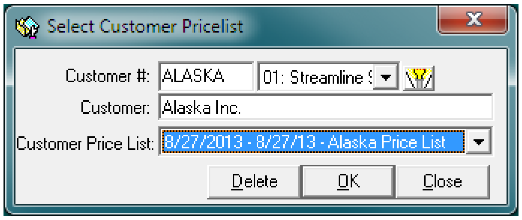


Select Corporate Pricelist to open the screen below. Make edits as needed.

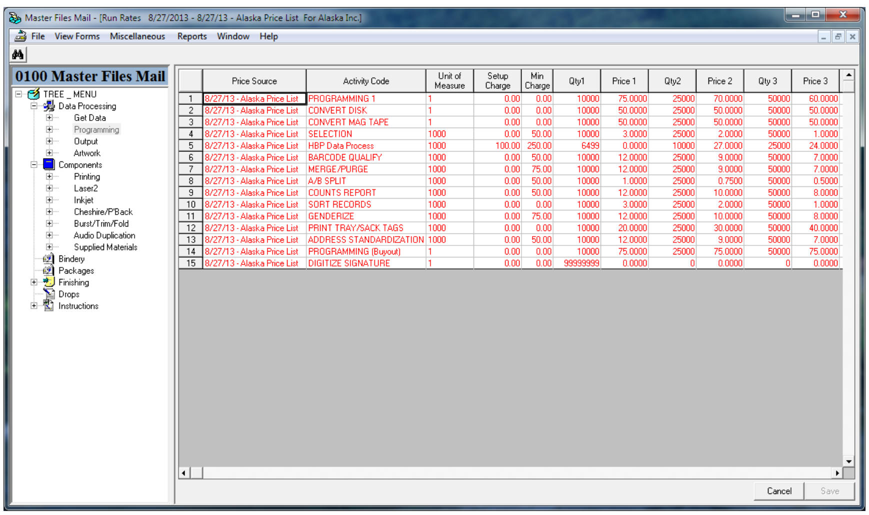


Customer Prices

Select a tree branch then select **Standard Prices** to access the screen below.



Select **Customer** and existing Pricelist to open the screen below. Make edits as needed.



Create Customer Price Lists

Customer-specific prices can be created after Corporate (i.e., standard) prices have been entered for an activity or group of activities.

To create a price list for an individual customer for any or all of the activities in the selected subgroup

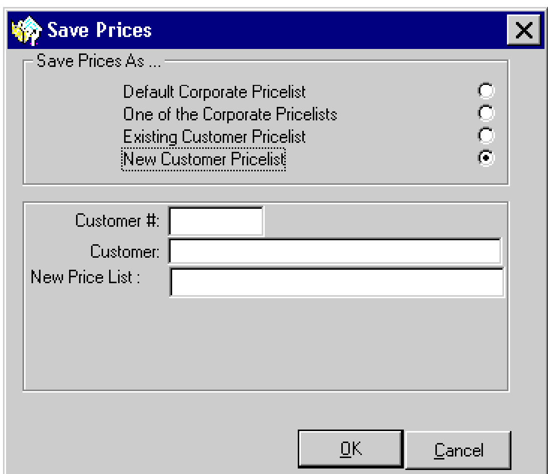
1. First edit the existing corporate prices.

   Refer to the **Create Batch of Processes: Pricing** section in this document for instructions on access and editing the corporate price list.

2. After prices have been edited, click the **Save** button.

   An entry screen called **Save** Prices will allow four choices.

3. Choose an appropriate Customer related option – one of the last two in the list – and click **OK**.



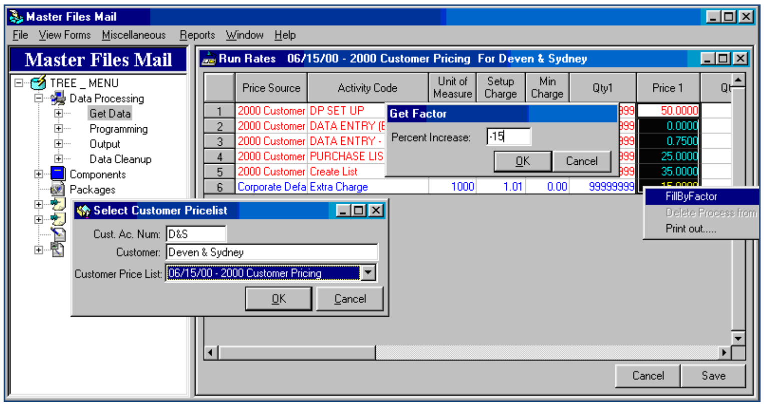
   Existing Customer Pricelist allows you to enter a customer number or name and select from a list of existing price list for that customer.

   New Customer Pricelist allows you to enter the customer number or name and the name of a new customer price list.

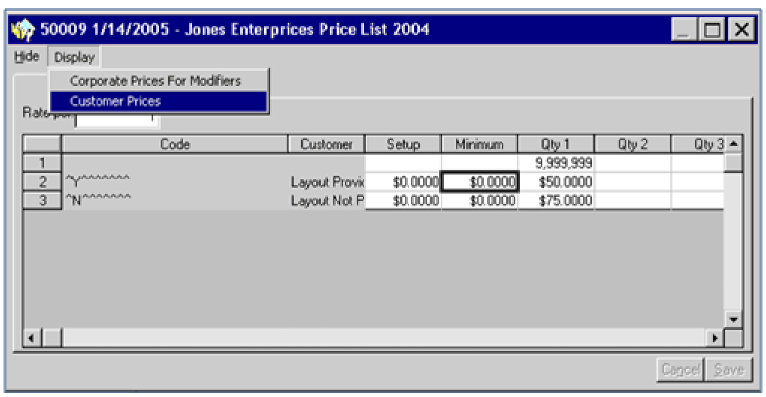
To view the Customer Price list

1. Highlight a branch in the estimating tree. Select **View Forms** from the menu, then **Customer Prices**.
2. In the Select Customer Prices entry screen, enter the customer name or account number.
3. Select from the drop-down list the desired price list, for this customer, for this subgroup of activities.

   The price list table will display customer prices in red; corporate prices (for those activities in the subgroup that do not have separate customer prices) will display in blue.



4. If you are using **modifiers**, you will need to select **View Forms > Modifiers**. Select each modifier then select **Edit Prices and Run Speeds**. Select **Display > Customer Prices**.

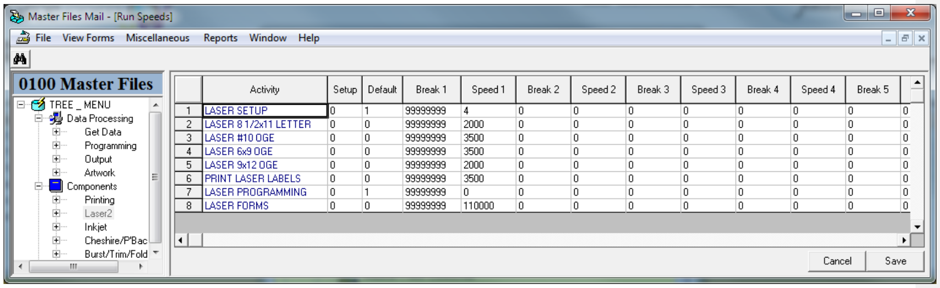


5. Select a **Customer Price List**, **Edit**, and **Save**.
6. Select a **New or Existing Customer Price List** option, then enter or select the customer price list and **OK**. Continue for each modifier until complete.

Note Modifier customer prices are not highlighted in a different color than corporate prices. Special Modifiers and Formula Modifier cannot be adjusted by customer.

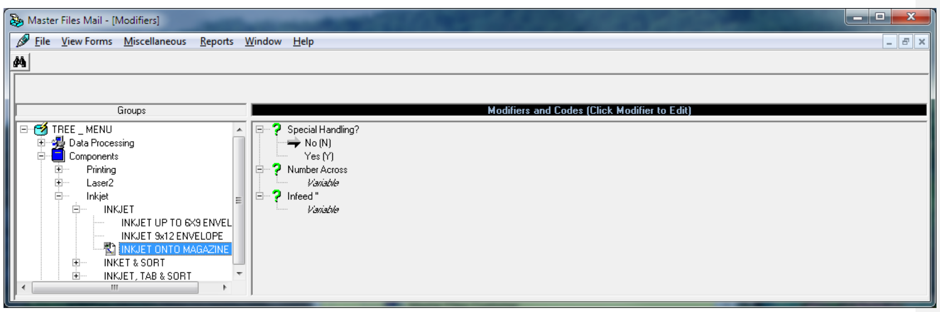
Process Standards

Select a tree branch then select **Process Standards** to access the screen below. Make edits as needed.

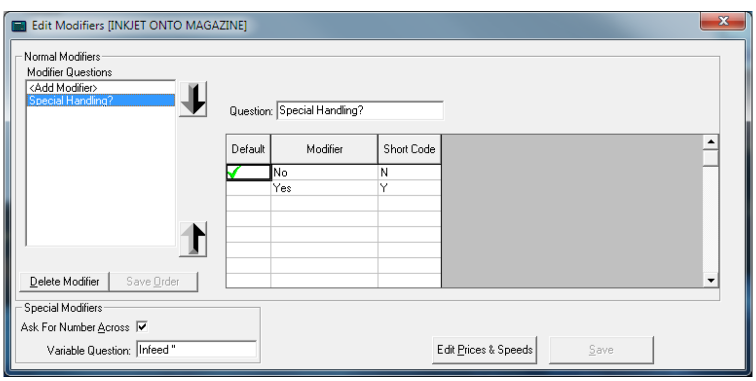


Modifiers

Select a Mail Process with an icon to the left to view existing process modifiers tree branch then select **Process Standards** to access the screen below. Make edits as needed.



Select **Question** from the area on the right to view/edit modifier.



Modifiers reduce the number of activity codes, to allow for multi-level pricing and run speeds or to use them to create unique formulas for activity codes.

1. **Modifiers**
2. **Special Modifiers**
3. **Formula Modifiers**
4. **User Defined Formulas**

Listed below are the current advantages and disadvantages for each type of modifier:

Modifiers

Advantages	Disadvantages
Reduce the # of activities needed, Answers print on: Quote Letter, Quote Breakdown, Work Order, Work Ticket, PO & Invoice.	Answers do not print/display on: Reports, Shop Floor, Timesheet, Scheduling module.

Special Modifiers

Advantages	Disadvantages
Reduce the # of activities needed, answers print on: Quote Letter, Quote Breakdown, Work Order, Work Ticket, PO & Invoice.	Answers do not print/display on: Reports, Shop Floor, Timesheet, Scheduling module.

Formula Modifiers

Advantages	Disadvantages
Reduce the # of activities needed, answers print on: Quote Letter, Quote Breakdown, Work Order, Work Ticket, PO & Invoice.	Answers do not print/display on: Reports, Shop Floor, Timesheet, Scheduling module.

User Defined Formulas

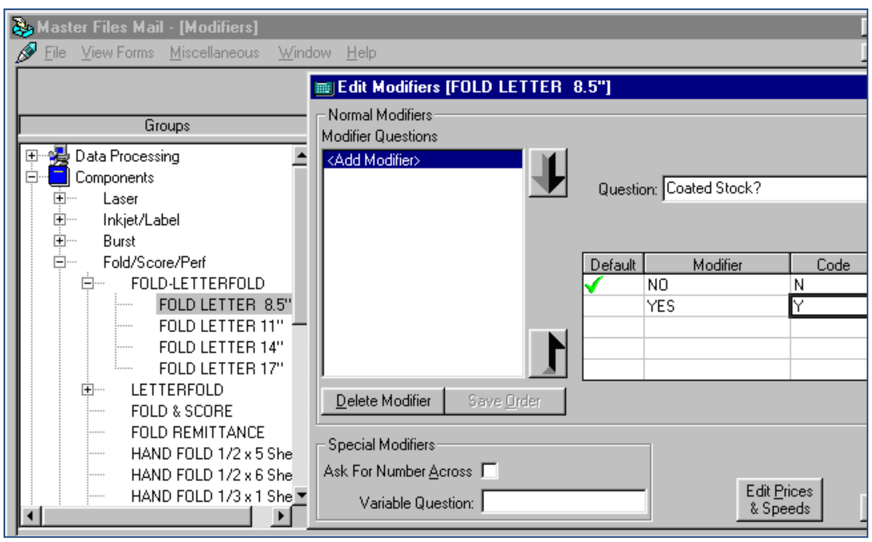
Advantages	Disadvantages
Can create unique formulas for activity codes that calculate labor costs, material costs, **and** sell price, questions and answers print on: Work Order (Need to add custom WO to FORMATS table: WOMain_Diecutting).	Answers do not print/display on: Reports, Shop Floor, Timesheet, Scheduling module.

SUMMARY

Modifiers 4 Options:	Quote Letter Paragraph	Quote Letter Itemized	Print Quote Letter	Mail Quote Breakdown	Combo Work Ticket	Invoice	Reports	Shop Floor	Time Sheet	Scheduling
Modifiers	Yes	Yes	N/A	Yes	Yes	Yes	No	No	No	Yes
Special Modifiers	Yes	Yes	N/A	Yes	Yes	Yes	No	No	No	Yes
Formula Modifiers	Yes	Yes	N/A	Yes	Yes	Yes	No	No	No	Yes
User Defined Formulas	No	No	No	No	No	No	No	No	No	No
MF Print Modifiers	Yes	No	No	N/A	Yes	No	No	No	No	Yes

Note See next several pages for setup instructions for each type of modifier.
We recommend consulting the EFI PrintStream Support team before setting up modifiers.

Create Modifiers for an Activity Code



Modifiers allow for further definition of an existing activity code, including prices and run speeds.

To attach modifiers to an activity code

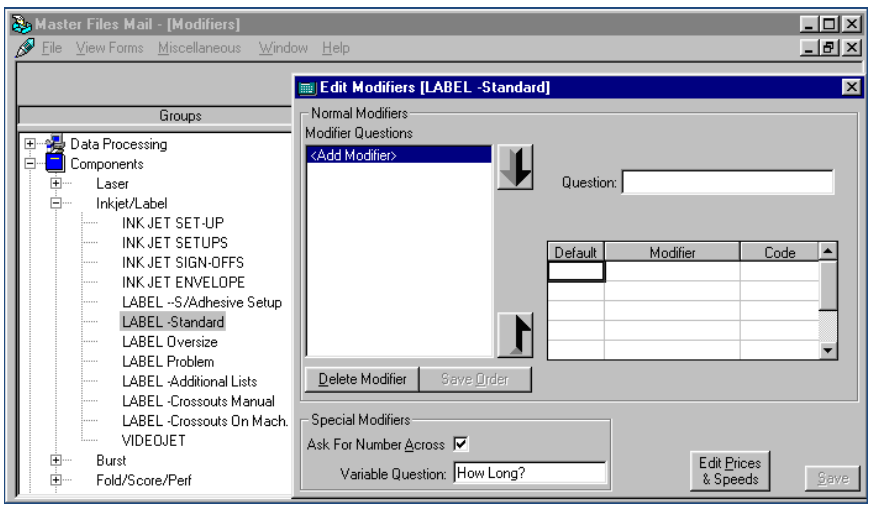
1. Choose **View Forms** from the menu at the top of the screen, then choose **Modifiers**.
2. Highlight the activity to which modifiers will be applied. Click in the gray area to the right of the process tree, titled **Modifiers and Codes**. This will access the Edit Modifiers entry screen.

3. Enter a question next to **Question:** in the **Edit Modifiers** entry field. Enter answers, including a default answer if desired. Make sure that descriptive information exists in the modifier answer. Only modifier answers print on the quote letter, work ticket & work order. Enter a code (shorthand for each answer) and **Save**. Additional questions are entered by selecting **<Add Question>**, then following the same procedure. Be aware that the number of possible sets of prices and run speeds is equal to the sets of answers multiplied by each other (e.g., a question with three answers plus a question with two answers = six sets of prices and run speeds. Adding another question with three answers will create eighteen sets of prices and run speeds).

4. Once all questions and their answers have been entered, select **Edit Prices & Speeds**. Enter a **Rate Per** to establish the measure to which the price will apply. The first row of cells is used to enter quantity breaks. Prices and speeds apply up to the designated quantity breaks. For Price, enter the desired set-up price, minimum price, and price for the various combinations of answers. For Run Speeds, enter the desired number of operators, set-up time (in minutes) and run speed for the various combinations of answers. These combinations are designated by the **Code** entered in the previous entry field. **Save** the entries. The **Hide** menu item gives the option to hide the code.

5. Modifier questions and the related answers, prices and speeds can be **deleted** by highlighting the question in the field titled **Modifier Questions**, then selecting **Delete Modifier**. Questions, answers, prices and run speeds can be edited by selecting the cell, entering new data and saving.

Special Modifiers



There are two types of **Special Modifiers**. They do not require additional price and run speed entries. They will calculate using the measure (per 1000), prices and run speeds attached to a modifier (or to the activity code, if it has no modifiers).

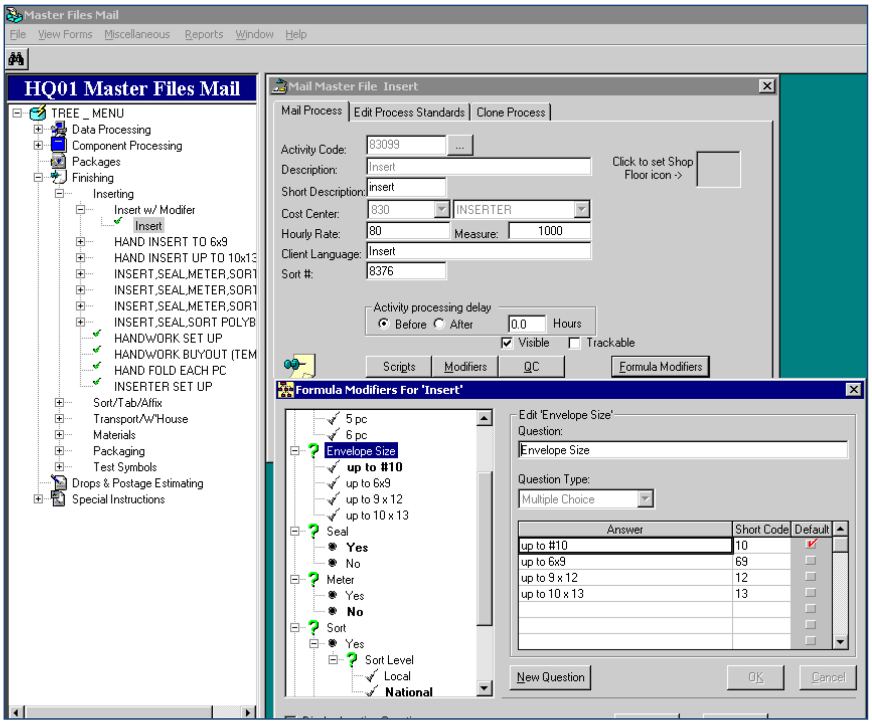
Special Modifiers can only be used if the activity is priced per 1000.

Ask For Number Across is used to calculate prices and run speeds for processes that can run multiple up. The default is 1-across. The number entered to answer this question (in Estimating and Order Entry) acts as a divisor.

The basic **Variable Question** is How Long? or Form Length? The default answer is 1". The purpose of this question is to calculate prices and run speeds for processes that are sold by length. The number entered to answer this question acts as a multiplier.

Processes that are charged by the inch (E.g., Continuous) would utilize the special modifier feature.

Formula Modifiers: Setup Question, Question Type & Answers



To create a Formula Modifier

1. Go to **Master Files-Mail Process**, click the process name, select the **Formula Modifiers** button, and select the **New Question** button.
2. Enter a **Question** in the first field.
3. Select a **Question Type** (drop-down menu):
   - **Multiple Choice:** if selected, enter: each possible answer, enter a short code and option to check a Default Answer (most common answer) or leave cleared.
   - **Y/N:** if selected, **Yes** & **No** will display under the Answer column. You have the option to check a Default Answer (most common answer) or leave cleared.

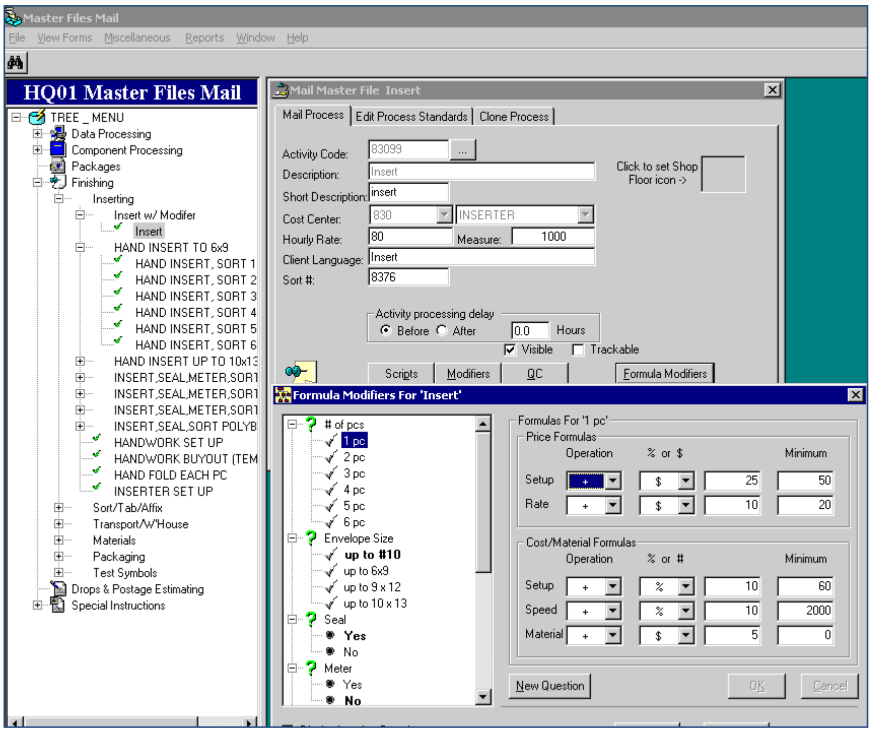
Note	If the modifier is set up as a Y/N question, the YES answer will display the Question. (i.e., Question = Seal, Yes answer = Seal, No answer = blank which will result in the No answer not displaying at all on the Mail Quote Letter, Quote Breakdown, Work Order, or Work Ticket.

   For Multiple Choice type questions, the same Y/N logic is also applied.
4. Select **OK** to **Save**. **Save**d Q&A's display along the left side of the screen.
5. If more Questions are needed Select the **New Question** button and repeat above steps. To **delete** a Question, right-click the saved question and select **Delete Question**.

6. Users have the option to create a Sub-Question by right-clicking the answers and selecting **Add Sub Question**. (**EXAMPLE**: Sort > Yes > if Yes > Local, National, International.)

Note See next page to setup price and cost formulas.

Formula Modifiers: Setup Price & Cost Formulas



All formula modifiers will modify the base activity code price and cost for the standard default pricelist, corporate pricelists and customer pricelists. All fields do <u>not</u> have to be filled in – you can leave fields blank if you do not want the answer to change the price or cost. If there are multiple modifier questions – the system will take the base rates from the main activity against the first formula modifier factors. That new figure is then run against the second formula modifier factor – and so on.

To create a **Formula Modifier** go to > MF-Mail Process > click process name > select the **Formula Modifiers** button. Once questions are saved (see previous page), select the first answer which will display the Price Formulas screen.

Price Formula:

Operation Setup: Option to modify the main activity price based on each answer.

Setup: (+ or -), (% or $), (enter % or $ amount), enter modified (**Minimum $)** price to use for the next step of the formula calculation.

Operation Rate: Option to modify the main activity per each (1) or per 1000 based on each answer.

Rate: (+ or -), (% or $), (enter % or $ amount), enter modified (**Minimum $)** price to use for the next step of the formula calculation.

Cost / Materials Formulas:

Operation Setup: Option to modify the main activity cost based on each answer.

Setup: (+ or -), (% or #), (enter % or #), enter modified (**Minimum cost)** to use for the next step of the formula calculation.

Operation Speed: Option to modify the main activity speed based on each answer.

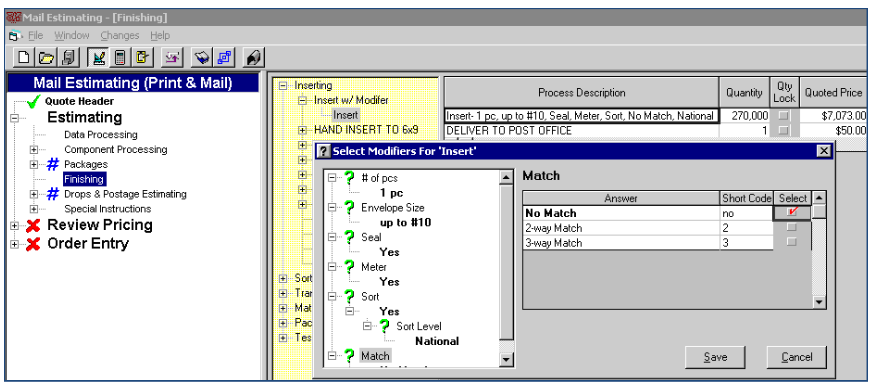
Speed: (+ or -), (% or #), (enter % or #), enter modified (**Minimum run speed per hour).**

Operation Material: Option to modify the main activity material cost based on each answer.

Material: (+ or -), (% or $), (enter % or $), enter modified (**Minimum Material cost).**

Select **OK** to **Save**.

Formula Modifiers: Mail Estimating/Order Entry Interface



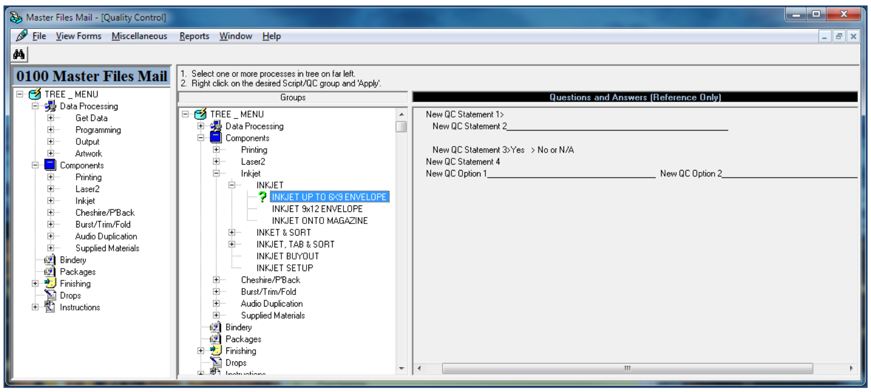
After a user double-clicks the process name, he/she will be prompted to answer the formula modifier (multiple-choice or yes/no) questions. After selecting **Save**, the answers will display under the process description. All formula modifier questions must be answered as they affect the end rates and costs. If you select an activity by mistake that has formula modifiers - you can **Cancel** the modifier screen without answering any questions. If you select **Cancel**, the process is not saved as part of the quote.

If you select **Cancel** after any of the questions have been answered, you will be prompted to save or discard your answers. If you elect to save, all questions must be answered. If you select not to save, answers are discarded and process is not selected.

Note Formula modifiers currently display the modifier answers on the: Quote Letter, Quote Breakdown, Work Order, Work Ticket and Invoice. Formula modifiers do not currently print/display on: Reports, Shop Floor, Timesheet & the Scheduling module.

Quality Control

Select **Quality Control** and navigate to the middle column to a Mail Process with a **?** icon to left to view/edit existing Quality Control Statements.



Create/Edit QC (Quality Control) Questions for an Activity Code

To create or edit QC (Quality Control) questions that will Print on the Mail Work Order

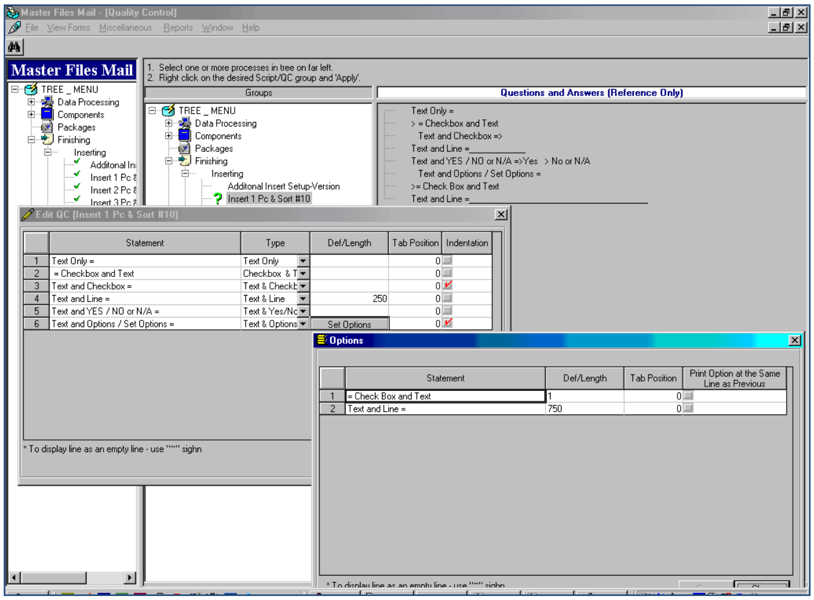
1. Select **View Forms** from the menu bar at the top of the screen and choose **Quality Control**.
2. Expand the **Tree_Menu** under **Groups** and highlight the activity, right-click and select **Edit** from the drop-down menu.

   This will access an entry screen called **Edit QC**.

To add a line

1. Right-click and select **Add line**.
2. Edit the default description (New QC Statement) under the **Statement** column.
3. Select one of the options under the **Type** column:
   - **Text only** = prints text entered under the statement column.
   - **Check box & Text** = prints a check box before text.
   - **Text & Check box** = prints text before a check box.
   - **Text & Line** = prints text before a line (line length is entered under the **Def/Length** column as a number (E.g., 250 = 1", 500 = 2", 750 = 3", 1000 = 4", 1,250 = 5", etc.).
   - **Text & Yes/No** = prints text, a check box then **Yes**, a check box then **No** & **N/A**.
   - **Text & Options** = prints custom setup. Need to **Save** then select the **Set Options** button….
4. Right-click to **add** each line.
5. Edit the default description (New QC Option) under the **Statement** column.
6. Enter a **Def/Length #** for the text and line option (E.g., 250 = 1", 500 = 2", etc.).
7. For a check box with text, enter a 1 under the **Def/Length** column.
8. Select the **Print at the Same Line as Previous** check box; or clear the check box to print text on the next line.

9. Click **Save** and **Close**.
10. To greatly indent a line, enter a number in the **Tab Position** field.
11. To slightly indent a line, select the small gray check box under the **Indentation** column.
12. Click **Save** and **Close**.



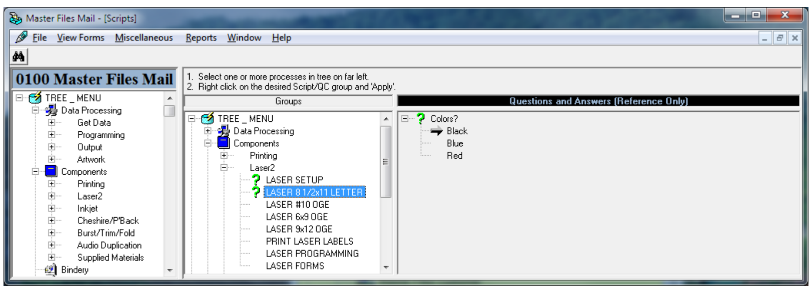
Other options: To remove, insert, or move a line up or down, right-click the cell and select the appropriate choice. To display a blank line, enter **~** in the **Statement** column.

Note QC questions can also be edited/added by clicking the mail activity in the **Master File – Mail Process** tree structure and selecting the **QC** button under the **Mail Process** gray tab.

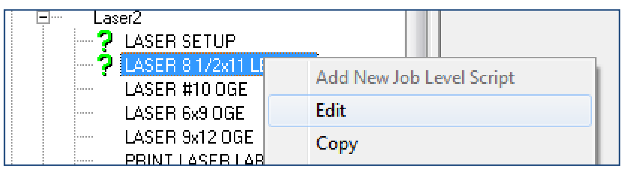
Scripts

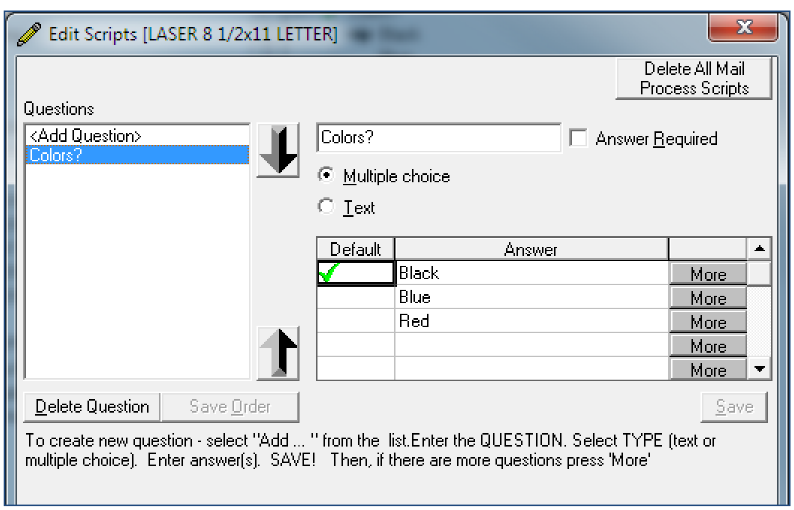
To create Scripts

1. Choose **View Forms** from the menu at the top of the screen, then choose **Scripts**.
2. Expand the **Tree Menu** under the **Groups** heading and locate desired activity to which you wish to attach scripts.
3. Right-click the activity and select **Edit** from the drop-down menu. This will access an entry screen called **Edit Scripts**.



4. Right-click the process and select **Edit** to open the script.





Selecting **Delete All Mail Process Scripts** will remove all scripts for all processes. Only use this option if you are sure you want to remove all the scripts in your database.

5. Enter the question in the entry field directly above **Multiple choice**. Select the check box to the right if an answer is required for this question. Script questions with required answers will display a red X in Estimating/Order Entry until they are answered. Select **text** to create a text box for answers. Select **Multiple choice** if the answer should be chosen from a predetermined list. One of the answers can be designated as the default answer; this will appear in bold in Estimating/Order Entry. Click **Save** after a question and answers are entered.
6. To enter a **second question**, select **<Add Question>,** then enter additional questions using the method described above. To **delete** a question, highlight it in the field titled **Questions**, and select **Delete Question**.
7. To **change the order of the scripts**, highlight the script question under the question heading and select the up or down arrow to move questions to desired order. Click **Save Order** when done.
8. Multiple choice answers can lead to a second question. To enter this question, click the **More** button and enter the second question. **More** changes to bold next to multiple choice answers with another question attached. If the second question is designated **Answer Required**, the first question that leads to it must also be designated **Answer Required**.

Activity codes with scripts attached will have a green question mark to the left in the process activity tree under **Groups**. Highlighting any code will display a list of the questions and answers in the field below **Questions and Answers**. Questions with mandatory answers will display in bold; default answers will display an arrow.

To **Copy** a script to another activity, highlight the activity that you wish to **copy to** in the Master Files Tree (far left), then highlight the activity under Groups that you wish to **copy from**, right-click, and select **copy**. This attaches the script of the **copy from** activity to the **copy to** activity.

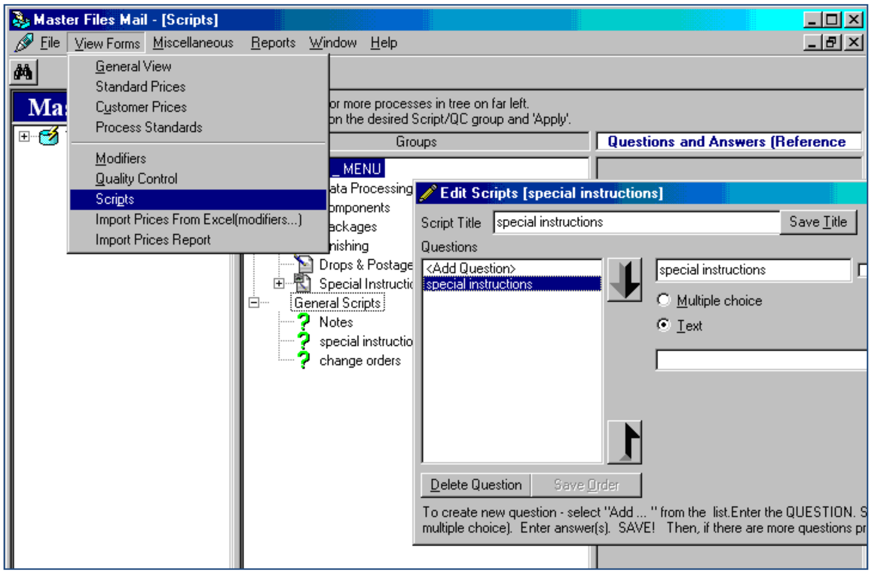
Tip	Scripts are used for production information only. If your script answers affect price, you may want to setup Modifiers.

Create and Apply General Scripts

Warning for General Scripts

You are trying to edit a general , this will change this general script and update each
activity with the new data after saving.
Please contact a Streamline support person if unsure

The above warning was added to the entry window for all **General** Scripts. All changes to scripted questions and answers are effective immediately, and can cause data loss on jobs. General Scripts can be applied to multiple processes. Changes to these scripts can affect multiple processes.



General Scripts is a place to store scripts that are to be attached to multiple activity codes. To create, right-click **General Scripts** in the tree under Groups and select **Edit**. This will access an entry field called **General Scripts.** Enter the **General Script Title** and **Save Title**. Then enter the question(s) in the entry field directly above **Multiple choice**.

Select the check box to the right if an answer is required for this question. Select **text** if the answer should be typed in. Select **Multiple choice** if the answer should be chosen from a list of predetermined answers. It is possible, but not necessary, to designate one of the answers as the default answer. Click **Save** after a question and answers are entered.

To enter a **second question**, select **<Add Question>** then enter additional questions using the method described above. To **delete** a question, highlight it in the field titled **Questions**, and select **Delete Question**.

To **change the order of the scripts**, highlight the script question under the Question heading and select the up or down arrow to move questions to desired order. Click **Save Order** when done.

Multiple choice answers can lead to a second question. To enter this question, click the **More** button and enter the second question. **More** will change to bold next to multiple choice answers with another question attached. If the second question is designated **Answer Required**, the first question that leads to it must also be designated **Answer Required**.

To **Apply** a **General Script**, highlight the process on the tree on the **far left**. Right-click the **General Script's Name** and select **Apply**.

Tip	Scripts are used for production information only, if your script answers affect *price* you may want to setup Modifiers.

Editing General Scripts

To edit a general script, access General Scripts as described above. Expand the General Script tree item and right-click the script to be edited.

To change the Script Title, click in the Script Name field, make changes and click **Save** Title.

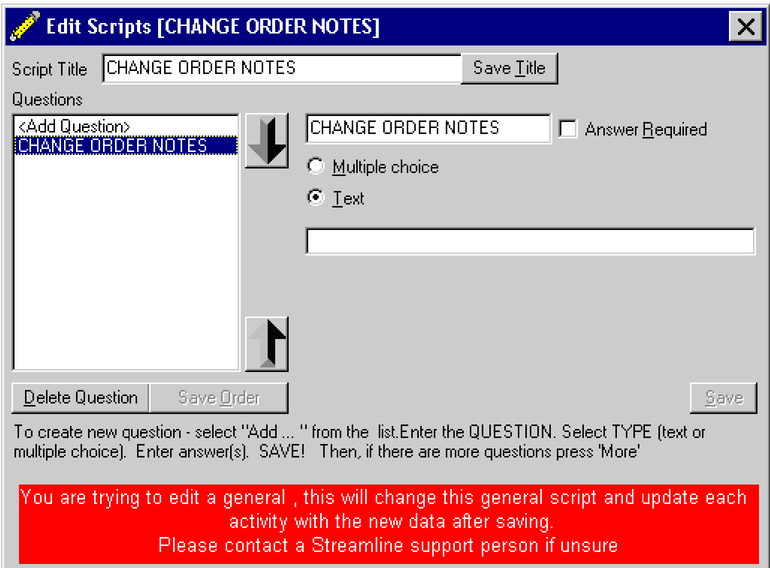
To change a script answer, double-click the answer and make changes.

To add an answer in the middle of existing answers, you must first move the existing answers. Do this by highlighting the answer (double-clicking), right-click, select **Cut**, then **Paste** in new location.

To delete a script answer, double-click the answer, right-click and select **Delete**. Deleting an answer in the middle, then **Save** will automatically move the other answers up.

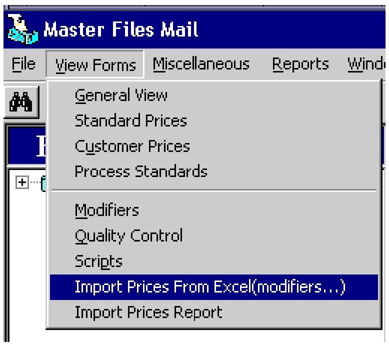
You can change the script type from Multiple Choice to Text and vice-versa.

Note Changes made to General Scripts get applied to all processes associated with that script.



Import Prices From Excel - Modifiers

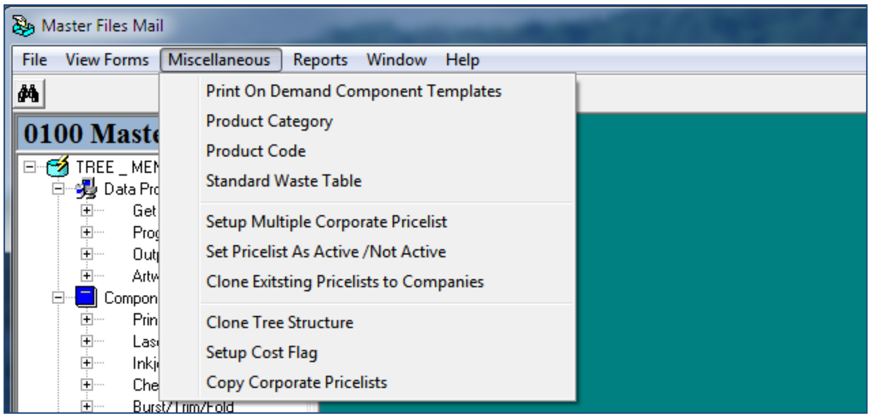
Use this option to import activity and modifier pricing from an excel spreadsheet. See EFI-PrintStream Support for format of spreadsheet.



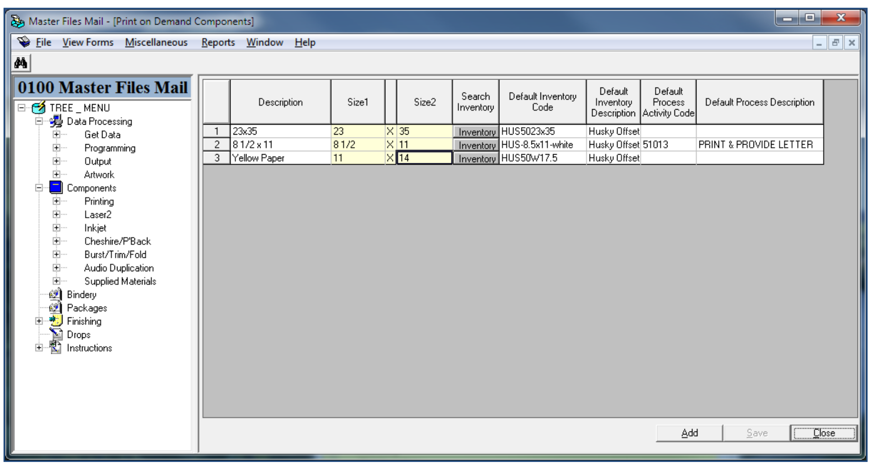
Import Prices Report

See EFI-PrintStream Support for assistance.

Miscellaneous Menu

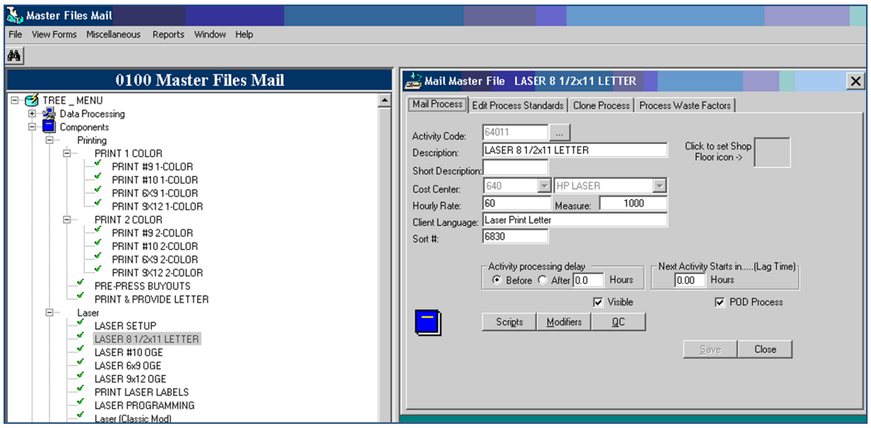


Print on Demand Component Templates

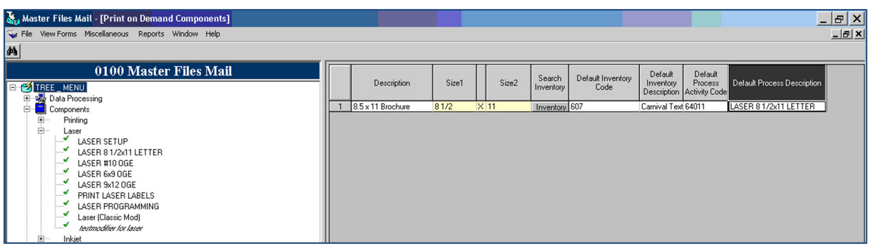


POD Components (Print On Demand)

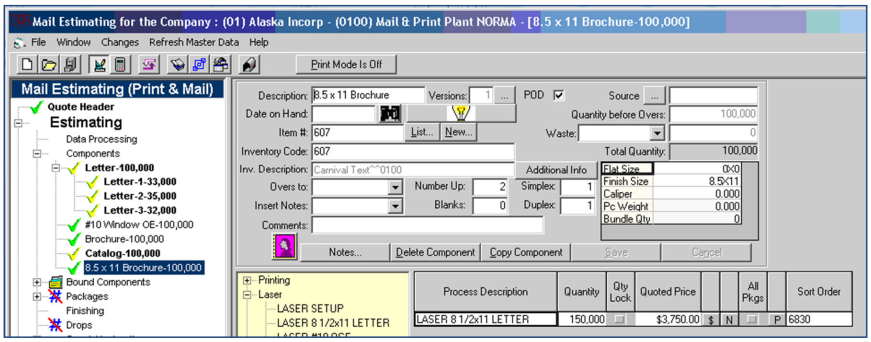
Print on Demand processes can be created in Master Files Mail Processes. To create a POD process, go into the **Components** tree in **Master Files Mail Processes** and set up the process as you would any other printing process, except select the **POD Process** check box to indicate to PrintStream that this is a POD process.



Optional: Click the **Miscellaneous** tab at the top of the screen and select **Print on Demand Component Templates**. Set up the description, size, default inventory code, and default process activity code. If you know the inventory code item number, key it in. If the item number is not known, click the gray **Inventory** button to search for the inventory item using a number of available search choices. Click **Save**.



This will link the stock and the processing activity to the POD process. When this process is chosen in the job in Mail Estimating, and the **POD** tab is selected on the right side of the screen, the process and stock information will automatically populate for the component.

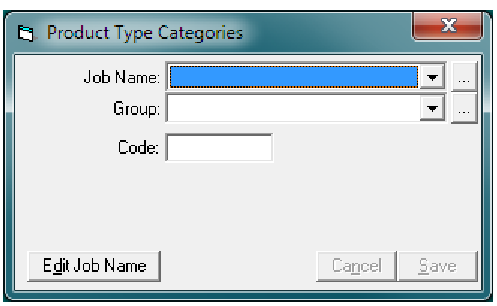


Print-on-Demand processes have optional entry fields to define the number of simplex, duplex and blank pages. Enter the desired POD selections and click **Save**. Then select the Mail Activity for this component. Print quantities are calculated automatically using the job quantity, number of simplex, duplex and blank pages, then divided by the number-up to arrive at the actual processing quantity and price for the paper.

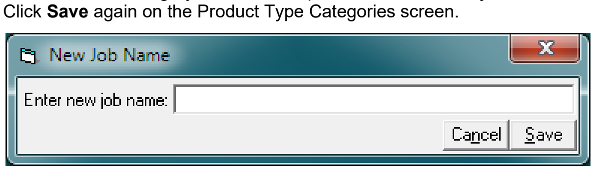
Product Category

Product Categories are displayed in the **Job Types** field when creating a new estimate/quote.

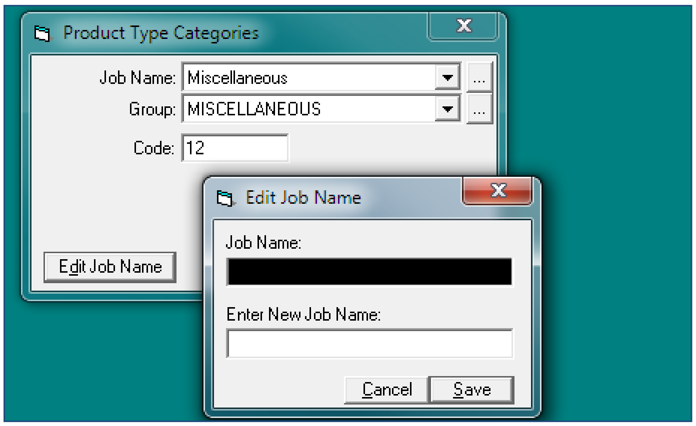
To define these values, select **Miscellaneous > Product Category** from the **Master Files – Mail Process** menu bar.



To **ADD** a new category, select the ellipsis **…** button next to job name. Enter the new job name and click **Save**. Click **Save** again on the Product Type Categories screen.

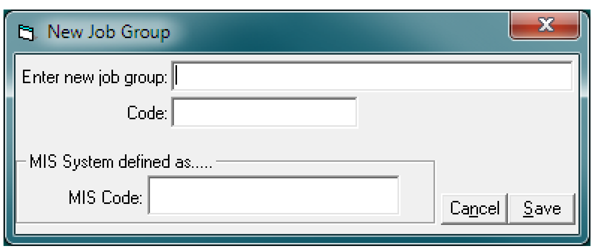


To **EDIT** an existing category, select the job name from the list and select the **Edit Job Name** button. The **Edit Job Name** screen is displayed with the current category name in the **Job Name** field. Enter the **New Job Name** and click **Save**.



The **Product Type** or **Job Name** can be selected as a report option on several Production and Sales reports.

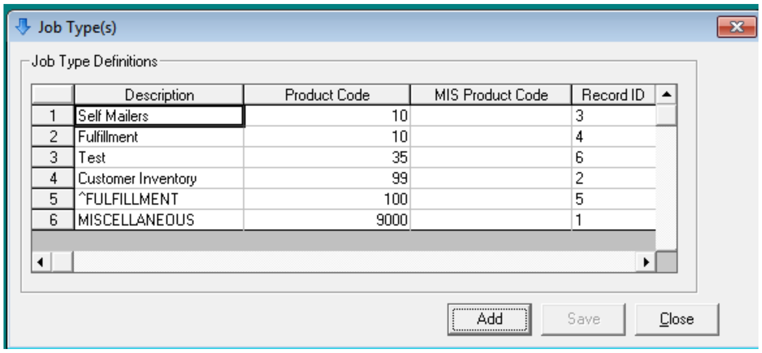
The **Group Feature** is used to define the type of inventory items you will be storing in the inventory system. To add a new **Group**, click the ellipsis**…** button next to the **Group** field. Enter a New Job Group name and Code and click **Save**. The Code must be a unique number between 1 and 32,700.



The product code/group is used for sorting inventory items and displays on Reports (E.g., Inventory Summary Report).

Product Code

The same as Group in the above Product Category screen. You can create new Product Codes/Groups in this screen. These are also used for Inventory Items.



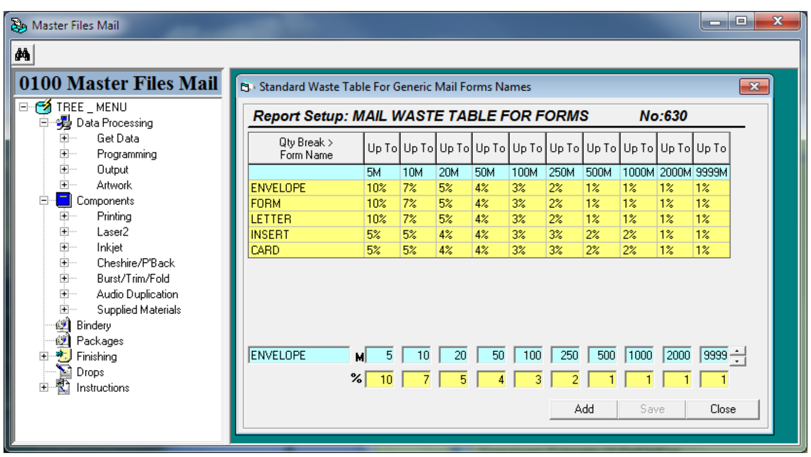
	Description	Product Code	MIS Product Code	Record ID
1	Self Mailers	10		3
2	Fulfillment	10		4
3	Test	35		6
4	Customer Inventory	99		2
5	^FULFILLMENT	100		5
6	MISCELLANEOUS	9000		1

Standard Waste Table

Select **Miscellaneous > Standard Waste Tables**.

To create a new waste table item

1. Click the **Add** button.
2. Type the name of the new item in the empty entry field on the lower left.
3. Type up to ten quantity breaks. Note that the quantities entered are calculated as thousands: enter 1 for one thousand, 10 for ten thousand, etc.
4. Enter below each quantity break the average spoilage for that type of item for all Component Finishing processes.
5. Click the **Save** button.



Qty Break > Form Name	Up To	Up To	Up To	Up To	Up To	Up To	Up To	Up To	Up To	Up To
	5M	10M	20M	50M	100M	250M	500M	1000M	2000M	9999M
ENVELOPE	10%	7%	5%	4%	3%	2%	1%	1%	1%	1%
FORM	10%	7%	5%	4%	3%	2%	1%	1%	1%	1%
LETTER	10%	7%	5%	4%	3%	2%	1%	1%	1%	1%
INSERT	5%	5%	4%	4%	3%	3%	2%	2%	1%	1%
CARD	5%	5%	4%	4%	3%	3%	2%	2%	1%	1%

To edit an existing Standard Waste Table

1. Click the row displaying the item's current **Standard Waste Table**.

   The item will appear in the bottom entry field, available for editing.

2. **Save** after editing.

To use an existing Standard Waste Table to create a new table

1. Select the item as if editing, then click the **Add** button.

   This will delete the item name and waste percentages, but save the quantity breaks.

2. Enter a new item name, then the average spoilage, at each quantity break, for that type of item.

3. Click **Save**.

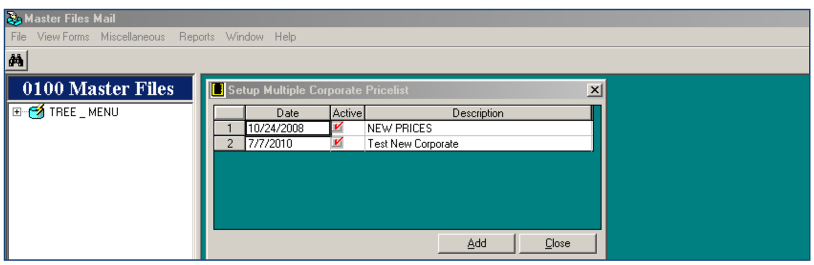
   Entries in the standard waste tables do not have to be physical items. It may be more logical to attach projected waste to types of activities (e.g., generic or personalized, or easy, medium and difficult). The language in these tables is user-defined.

Note The quantity breaks displayed at the top of the list represent the currently selected item. To see the quantity breaks for a specific item, locate it in the list and select it. The quantity breaks for that item will display at the top of the list and in the fields at the bottom for editing.

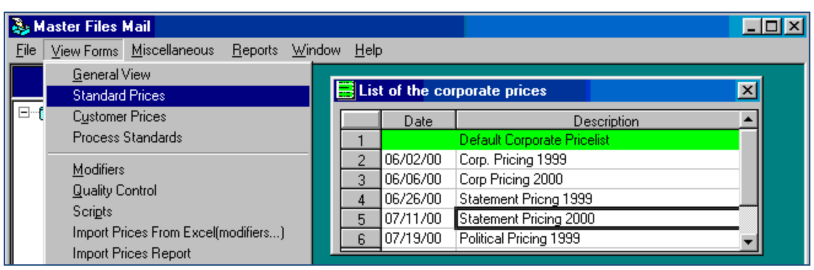
Setup Multiple Corporate Pricelist

To setup multiple corporate pricelists

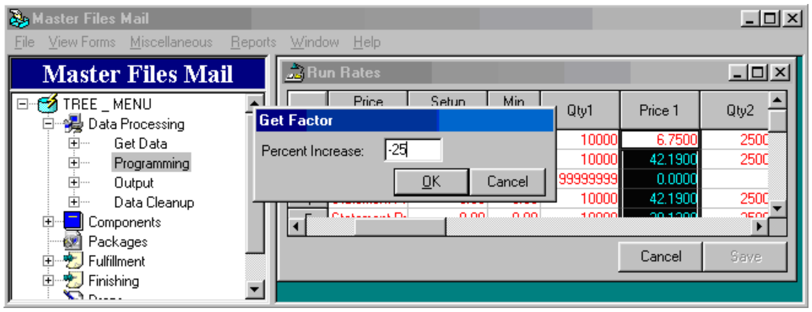
1. Select **Miscellaneous > Setup Multiple Corporate Pricelist**, then select the **Add** button. Enter the name of the price list under the description field and **Save**.



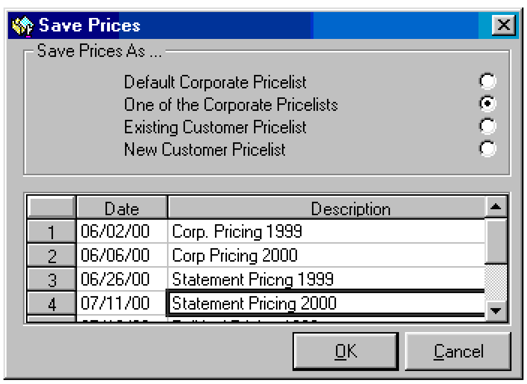
2. Highlight a sub-group of existing activities. From the menu, select **View Forms – Standard Prices**. Then select one of the corporate price lists.



3. Option to manually edit each price or click/drag and highlight a group of existing prices then right-click and select **Fill by Factor**. Enter a positive (%) or negative (%) number in the factor field and **OK**. This will adjust all highlighted prices automatically by the % entered.



4. Select **Save** when complete. Select the option **One of the Corporate Pricelists**, then click the corporate price list and **OK**.



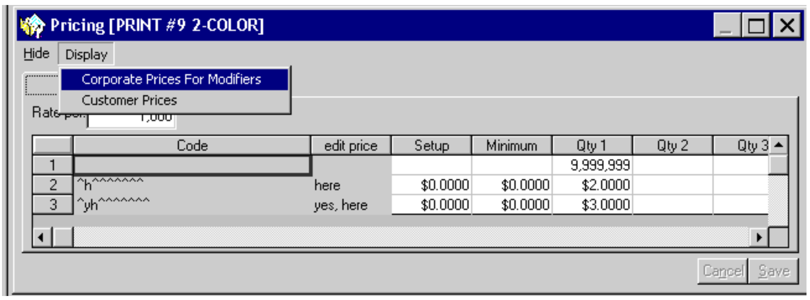
Default Corporate Pricelist saves the edits to the Default Corporate Price list.

One of the Corporate Pricelist allows you to select from a list of additional corporate pricelists already defined.

5. Continue for each sub-group of pricing until complete.

To edit a corporate price list description

1. Select: **Miscellaneous > Setup Corporate Price List** from menu bar. Double-click in the description field, edit, click the **Enter** key (on your keyboard) and **Save**.
2. If you are using **modifiers** you need to select: **View Forms > Modifiers**. Select a modifier then select **Edit Prices and Run Speeds**. Select: **Display > Corporate Pricing for Modifiers**.



3. Select a **Price List**, edit/make changes and **Save**. Select **One of the Corporate Pricelists** option, then select the corporate price list description and **OK**. Continue for each modifier until complete.

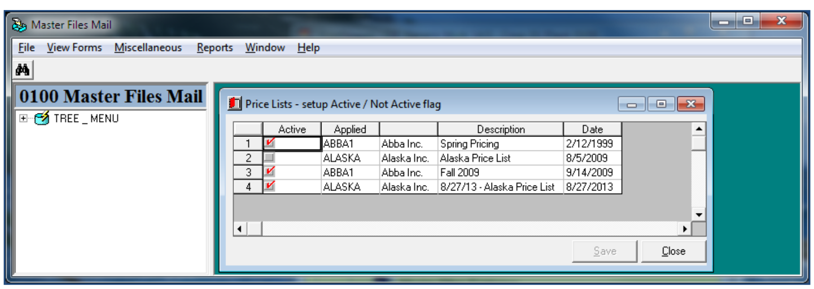
Note Special Modifiers and Formula Modifiers cannot be adjusted by corporate price list.

Setup Pricelist As Active / Not Active

To access this feature

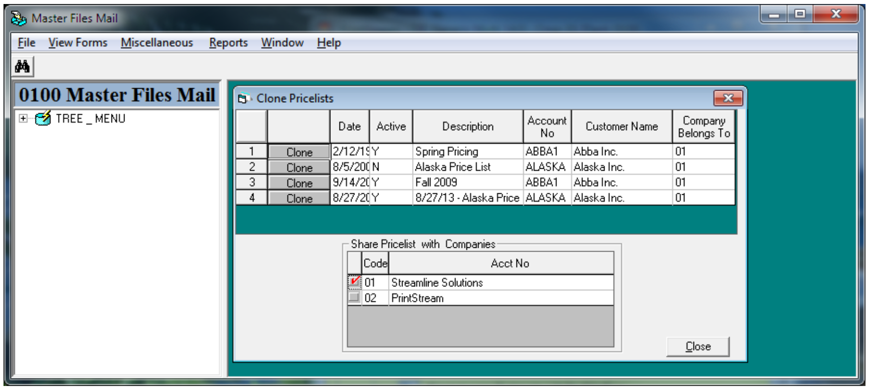
1. Click **Miscellaneous > Set Price List As Active/Not Active**.

   You will see a list of all the price lists in the system both customer and corporate price lists.
2. You can activate or make inactive by selecting or clearing the check box and saving.



Clone Existing Pricelists to Companies

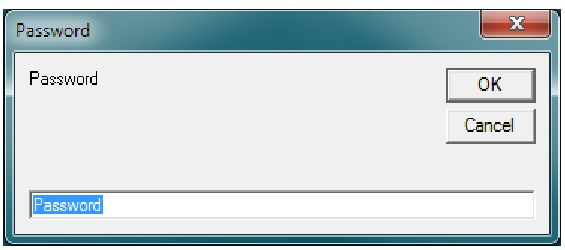
To access this feature, click **Miscellaneous > Clone Existing Price Lists to Companies**.



This feature is only available for sites using PrintStream Multi Company programming. You can copy a price list from one company to another by clicking the company that you want to copy the price list to then click the **Clone** button for the pricelist that you want to copy to that company.

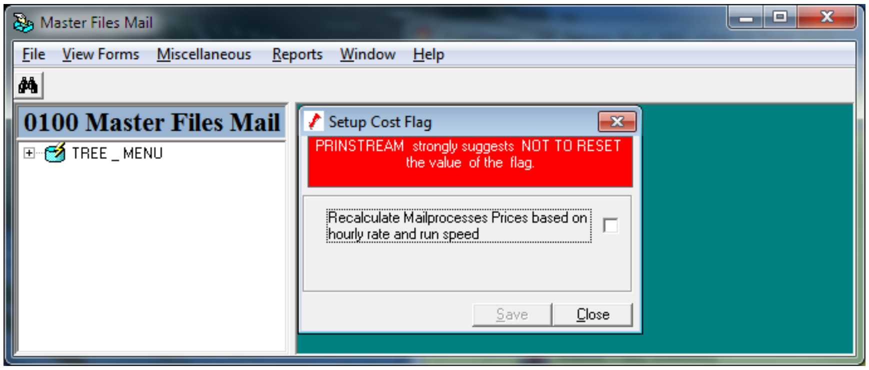
Clone Tree Structure

Contact EFI-PrintStream Support for assistance.



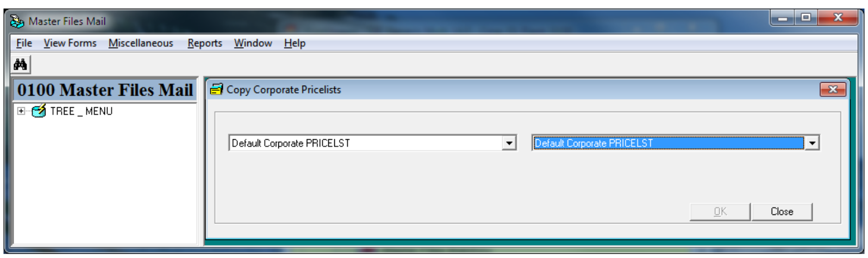
Setup Cost Flag

Contact EFI-PrintStream Support for assistance.



Copy Corporate Pricelists

Contact EFI-PrintStream Support for assistance.

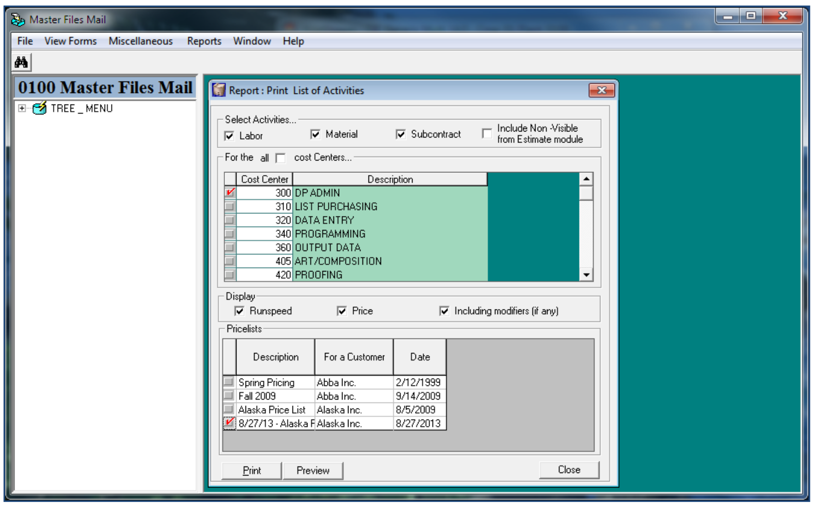


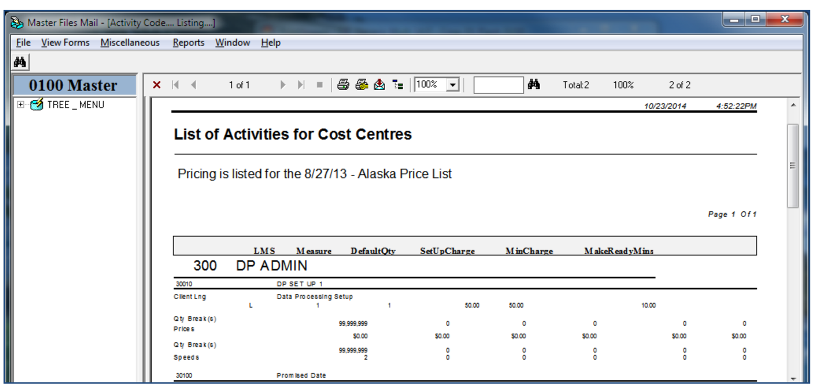
Reports Menu

Commented [RB1]: Need a screen shot here of the items in the Reports menu as you did in the earlier menus.

Activity List

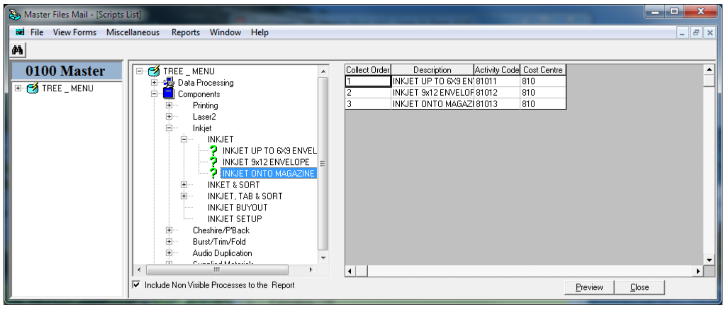
To print a customer or corporate price list report that lists: labor, material and/or sub-contract activity codes, process descriptions, modifiers, run speeds, pricing, etc., select **Reports > Activity List** from the menu bar. Use the controls to describe which cost centers, price lists/information for the report.



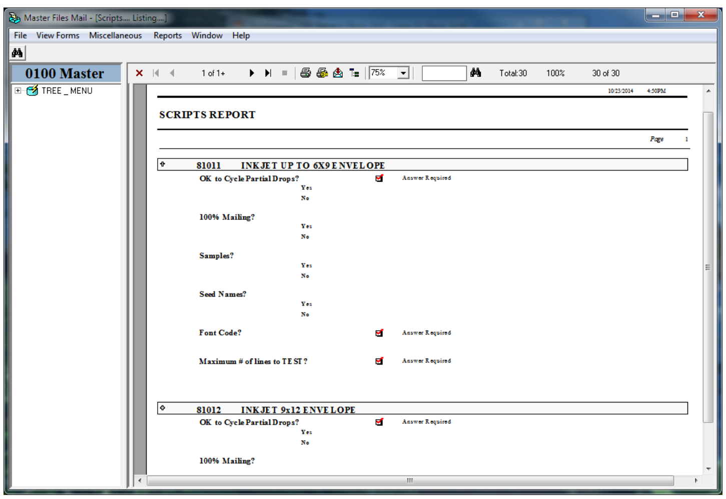


Scripts List

To print a report that lists scripts: select **Reports > Scripts List** from the menu bar.



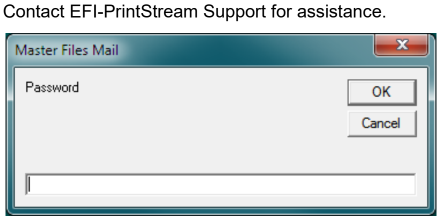
Select a branch (e.g., Programming) to display all scripts under that branch or click each script you want to display on the report and select **Preview**.



Note Option to **export** to: MSWord, Excel, Crystal Reports, etc. (envelope w/ red arrow icon).

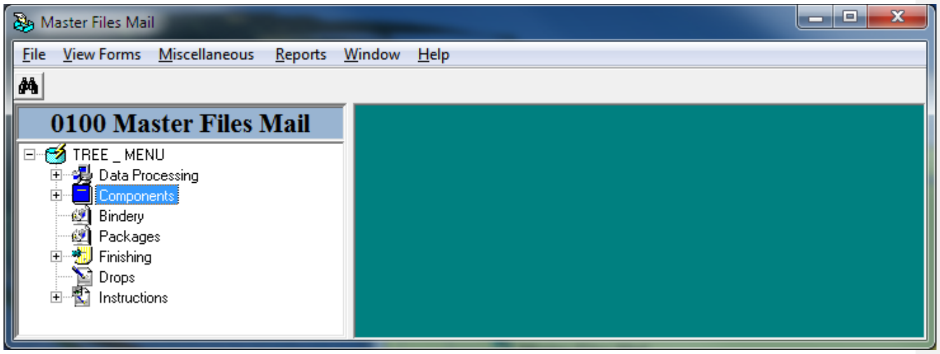
Correction for Installs

Contact EFI-PrintStream Support for assistance.



Tree Menu

The 3 main tree branches (departments) are **Data Processing**, **Components**, and **Finishing**. The other branches are mainly for display and will appear and be functional in Mail Estimating Order Entry.



Mail Estimating Menu Suggestions and Examples

Below are examples for designing the menu structure for Mail Estimating and Order Entry.

There is the option available to set up Modifiers to reduce the number of activity codes, to allow for multi-level pricing and run speeds or to use them to create unique formulas for activity codes.

- Modifiers
- Special Modifiers
- Formula Modifiers
- User Defined Formulas

See previous **Modifiers** section in this document for the current advantages and disadvantages for each type of modifier:

Data Processing

+ Get Data

  Data Entry

  List Rental

+ Process Data

  Merge/Purge/Dedupe

  Postal Qualify…

+ Output Data

  Inkjet File

  Clint Labels…

+ Programming

  CASS & PAVE Certify…

Components (or Component Processes)

+ Printing (Offset)

    Buyout…

+ Laser

    Laser, 8.5 x11 **(option to use special modifiers for continuous laser for form length & #up if charge per inch)**

+ Inkjet/Bryce

    Inkjet Letter…

+ Cut/Burst/Fold

+ Component Hand Work

    Hand Affix…

Finishing

+ Insert

+ Insert #10, [2-level Modifier E.g.] Question #1: how many pieces? A: 1-2 pcs, 3-4 pcs, 5-6 pcs; Question #2: # of matches? A: no match, 1-match, 2-way match, 3-way match

+ Insert 6x9 (same type of modifiers may be used as above)

    6x9 Seal & Meter…

+ Insert 9 x 12 (same type of modifiers may be used as above)

+ Handwork

    Hand Insert

    Hand Stamp

+ Affix/Seal

+ Sort/Tie/Band

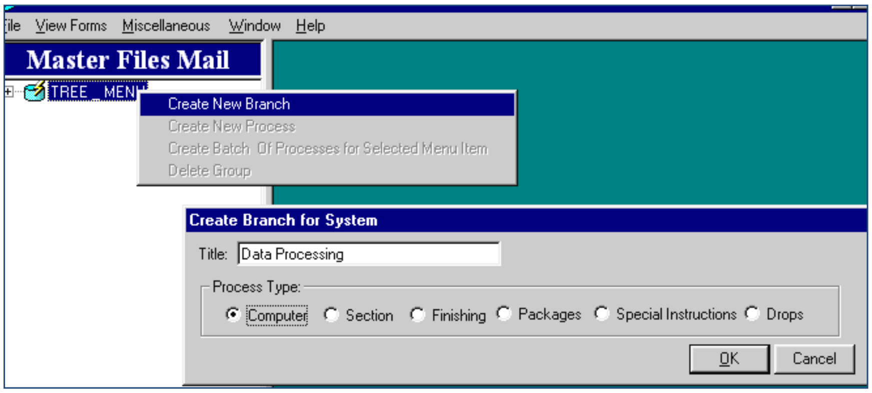
    Sort Tray

    Polywrap…

+ Warehouse/Transport

    Deliver to P.O…

Create Departments & Packages



To create a Computer Department

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter title of department (e.g., Data Processing).
3. Select **Computer** and click **OK**.

   Other names for Data Processing include Data Development, Programming, etc.

To create a Section Department

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter title of department (e.g., Components).
3. Select **Section** and click **OK**.

   The **Component** branch represents all processes that apply to individual items only (i.e., Inkjet, Laser, Folding, Cutting, Section Handwork, Tabbing, etc.)

   Other names for Components include Component Processes, Assembly Items, etc.

To create a Finishing Department

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter title of department (e.g., Finishing).
3. Select **Finishing** and click **OK**.

   The Finishing section represents all the processes that apply to the entire package (i.e., Inserting, Handwork, Affix/Seal, Sort/Tie/Band, Warehouse, Transportation, etc.)

   Other names for Finishing include Lettershop, Mailshop, etc.

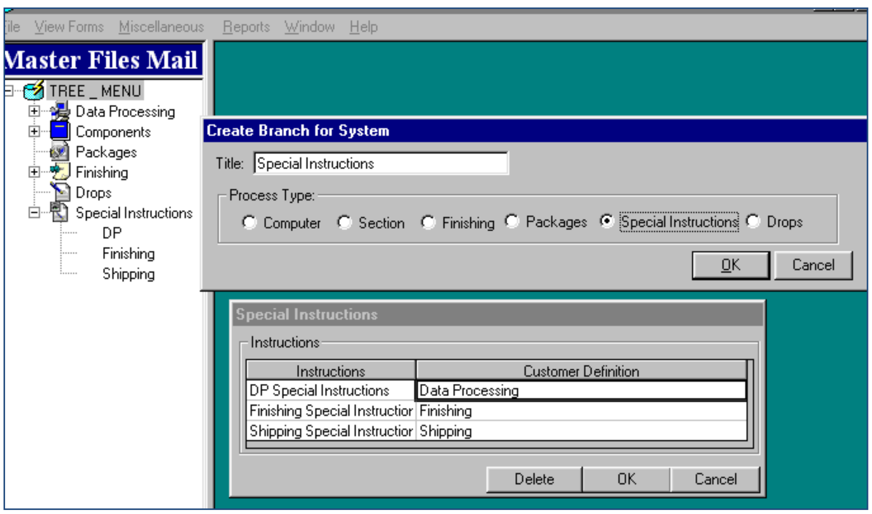
To create Packages

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter the title (e.g., Packages).
3. Select **Packages** and click **OK**.

   Other names for Packages include Kits, Assembly, etc.

Note A department can be deleted by highlighting it, right-clicking and selecting **Delete Group**. However, it cannot be deleted if there are any branches under that department; these branches and any processes attached to them would first have to be deleted. Multiple **Computer** and **Finishing** departments can be defined. However, only a single **Section** or **Packages** department can be defined.

Create Drops & Special Instructions



To create a Drop

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter the title (e.g., Drops).
3. Select **Drops** and click **OK**.

   Other names for Drops include Drops & Postage Estimating, etc.

To create Special Instructions

1. Right-click the **TREE _ MENU** icon and select **Create New Branch**.
2. Enter the title **Special Instructions**.
3. Select **Special Instructions** and click **OK**.

   Special Instructions creates 3 separate text fields that print on the Work Ticket and Work Order.

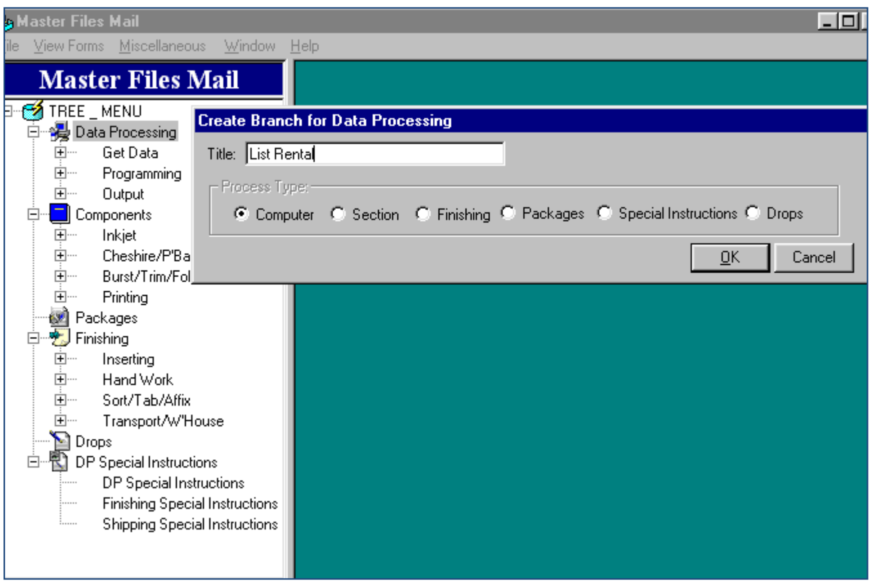
To customize the language used for Special Instructions

1. Right-click **Special Instructions**.
2. Enter your own terms under the **Customer Definition** column.
3. Click **OK**.

   Steps 1-6 (above) create the Mail Estimating Tree in their recommended order. To correct the display order or to edit language for the Mail Estimating Tree structure, select **File** from the menu, then **Tree Branch Maintain** and edit the number sequence and/or language and **Save**.

Note A department can be deleted by highlighting it, right-clicking and selecting **Delete Group**. However, it cannot be deleted if there are any branches under that department; these branches and any processes attached to them would first have to be deleted. Only a single **Section**, **Packages**, **Special Instructions** or **Drops** department can be defined. Special Instructions print on the work order. Data Processing special instructions print *above* the Data Processing activities, Component special instructions print above the Component Processes activities, Finishing special instructions print *above* the Finishing Processing activities and Shipping prints *below* the Finishing activities. All three print at the end of the Work Ticket.

Create Branches in Departments



To create a Branch under each Department

1. Right-click the **Department name** (e.g., Data Processing, Components, Finishing).
2. Select **Create New Branch**.
3. Enter the **Title** of the branch (e.g., List Rental) and click **OK**.

   Use this method to create sub-branches under branches to better organize your processes. Branches can extend down to four levels (i.e., **Insert #10s** under **Insert Envelopes** under **Insert Inline** under **Inserting**); processes can be attached to any of these levels.

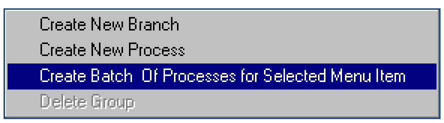
To delete a branch

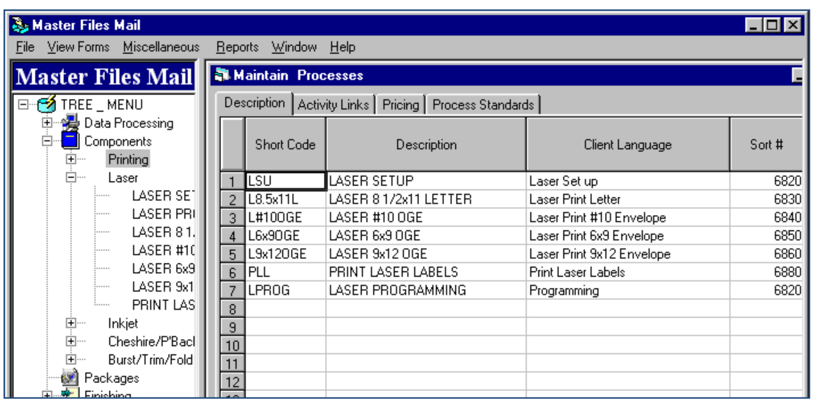
1. Highlight it.
2. Right-click and select **Delete Group**.

   However, it cannot be deleted if there are any sub-branches or processes under that branch. These branches and the processes attached to them would first have to be deleted or moved.
3. Any branch <u>or</u> process can be moved by holding down the control (Ctrl) key, highlighting the branch or process, and dragging it to the desired new location. When the new branch is highlighted, the procedure has succeeded. A **sun** icon will appear while the branch or process is being dragged. Moving a branch also moves all the processes attached to that branch. Branches and processes can only move within departments (e.g., Finishing processes cannot be dragged and placed under Data Processing or Components, etc.).
4. The moved branch or process will always appear at the bottom of the tree structure. To move a branch or process to the top you must move all existing branches or processes until they are in your desired order.

Note Each activity you move will appear at the bottom of the branch. To change the current order of activities hold the **Ctrl** key down and drag and drop each activity (in reverse order) until activities are in your desired order.

Create Batch of Processes for Selected Menu Item





Right-click the branch in the process tree and select **Create Batch of Processes for Selected Menu Item**. This will open an entry field called section, which consists of four spreadsheets (tabs). These must be filled in for each activity. This is where data is entered for new activities and where data is edited for existing activities. Use the **Section** button in the lower right corner to undo incorrect entries, and the **Save** button next to it to save desired entries.

<u>Activity codes and process descriptions MUST be unique.</u> They cannot be edited or deleted from live systems. Other information attached to the activity code can be edited. Be aware that changes to an activity's prices will apply to all uses of that activity. This includes the prices for that activity on previous estimates, *<u>if these estimates are updated or copied</u>*.

Right-click any cell in one of the above-mentioned spreadsheets to access the following drop-down menu of data entry aids (these will be grayed where they cannot be used):

Copy First Row Into Selected: allows for the copying of a highlighted row with data into empty, highlighted rows.

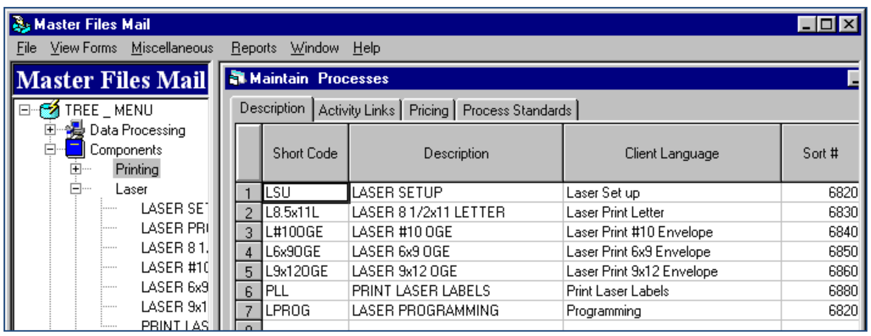
Delete Selection: used to delete item from an individual cell (not for deleting processes).

Auto increment: allows for numbering by a chosen increment into selected cells.

Activity Code Look-up: accesses a search field that displays all existing activity codes.

Delete Process From System: will **delete** an activity code and all the attached data while in the **Activity Code** cell ONLY.

Create Batch of Processes: Description Tab



Short Code – This language appears on all five spreadsheets of the **Maintain Processes** entry field. It identifies the individual activity in each row to facilitate data entry in these spreadsheets.

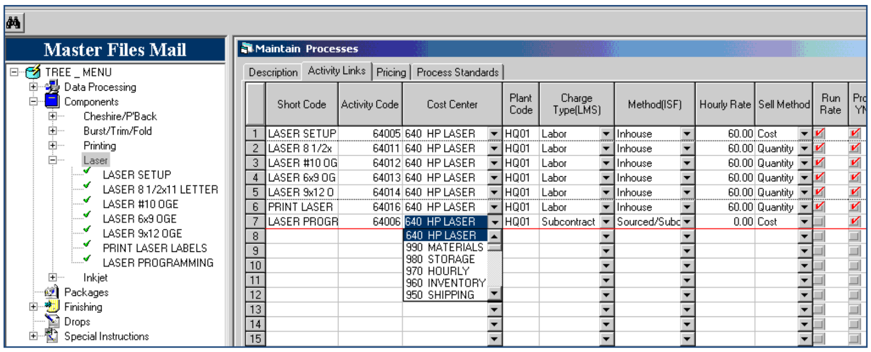
Description – This language appears on the process tree, quote, work ticket and work order. It identifies the individual activity for internal communication. It must be unique to each activity, and cannot be changed. **DO NOT use apostrophes, asterisks and other such symbols. The maximum number of characters is 30**.

Client Language – This language appears on the quote letter and the invoice. It identifies the individual activity for the customer. It does not have to be unique. The maximum number of characters is 40. **This field will automatically default to the process description, but can be changed.**

Sort # - This number establishes an order in which activities will appear within the tree structure – Data Processing or Components or Finishing, on the quote letter, work ticket and work order. It is best to number activities in a sequence that conforms to their likely production order. However, this order can be altered on any individual estimate.

Plant Code – This is a view only column. The plant code is pulled in from the Facility screen in Master File – Reports. Most customers will have 1-Facility code displayed. Only those customers who have purchased the multi-plant / multi-company option will see the various plant's / company's activities, depending on which plant / company they selected before logging into the system.

Create Batch of Processes: Activity Links Tab



Short Code – This language appears on all five spreadsheets of the **Maintain Processes** entry field. It identifies the individual activity in each row to facilitate data entry in these spreadsheets.

Activity Code – This is a numerical entry (up to nine digits) that is unique for each process activity. Activity codes are the links between processes, prices and standards, and the estimates and jobs they create. The first digit(s) of an activity code come from the Department to which the activity is linked (see Master Files – Reports: Production Departments). The next digit(s) come from the Cost Center, which corresponds to a machine or labor center (see Master Files – Reports: Production Cost Centers). The last digits represent the individual activity. Sequential activities (e.g., set-up machine, run machine) are usually given sequential activity codes. Right-click after selecting activity code cell to access **Activity Code Look-up**, which displays all existing activity codes.

Cost Center – The arrow displays a drop-down list of existing Cost Centers to place this activity within. Process activities are scheduled by Cost Center. Cost Centers are entered in Master File – Reports.

Plant Code – This is a view only column. The plant code is pulled from the Plants screen in Master File – Reports. Most customers will have one Plant code displayed. Only those customers who have purchased the multi-plant/multi-company option will see the various plant's/company's activities, depending on which plant/company they selected before logging into the system.

Charge Type – The arrow displays a drop-down list of three choices: labor, material or subcontract. Pick labor or subcontract (also referred to as buyout, outside purchase, outsource). Mail Activity Codes w/ **Charge Type** = Material need to have **Method** = Sourced/Subcontract. If **Method** = In-house is desired, then make-ready & labor activity codes need to be added in the single code entry field in **Master File – Mail Process**.

Method – The arrow displays a drop-down list of three choices: in-house, sourced or freight. Pick in-house for labor activities or sourced for subcontract activities.

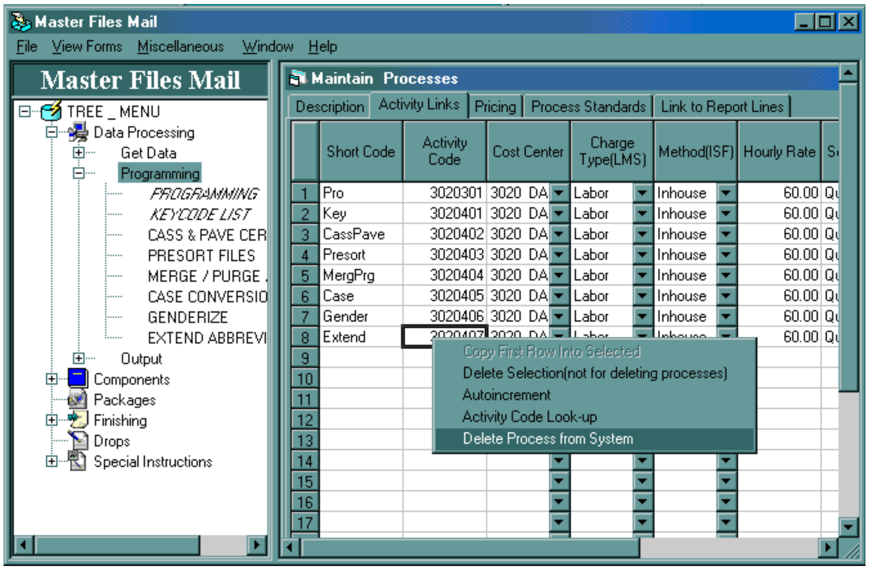
Hourly Rate – This is the average Hourly Cost to perform the activity. It includes the cost of labor, equipment, materials not directly charged to a job, plus a percentage of the total overhead. It is used to create a number to compare to the estimated price and to the actual production costs charged to a job. Hourly rate must be entered to properly calculate the Quote Breakdown, Billing Worksheet and to utilize the **Scheduling** module.

Sell Method – Clicking the arrow displays a drop-down list of two choices: cost and quantity. Choose quantity.

Run Rate – Checking this will require run quantities to be entered when entering labor time in Time Sheets, Time Cards and Shop Floor.

Prod Y/N – Always check this for both Labor and Subcontract/Buyout activities. If a Subcontract/Buyout activity is not checked, accounting will not be able to link the activity to purchasing and to the general ledger.

Deleting Activity Codes



To delete an activity code*

1. Highlight the branch to which it is attached and right-click.
2. Select **Create Batch of Processes for Selected Menu Item**.
3. Select the **Activity Links** tab, left-click the activity code under the activity code column (a bold box will outline the activity); then right-click.
4. Select **Delete Process from System** and **Save** after <u>each</u> delete.

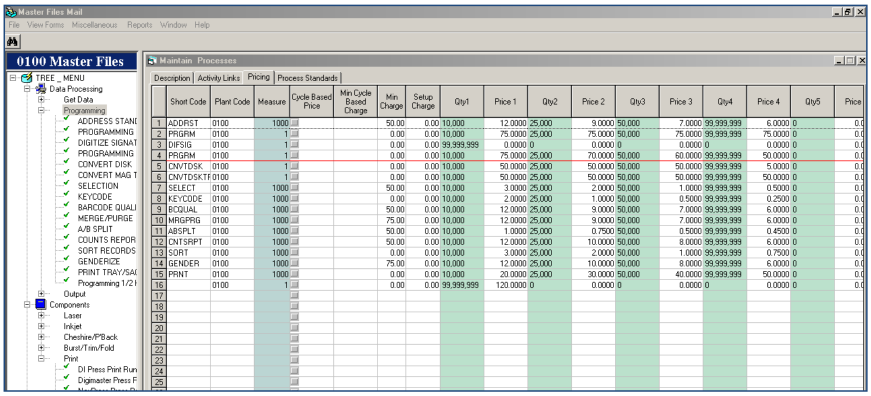
WARNING ACTIVITY CODES SHOULD NOT BE DELETED FROM LIVE SYSTEMS!

Once a system is live, any missing activity codes will jeopardize report compiling. If that activity was used, even once, any report that requires that process will not print. Once a database has been used "live", it is strongly recommended that **activity codes never be deleted.** The recommended method is to **hide** codes that are no longer useful. This is done by clearing the **Visible** check box, then saving. The activity will not display in Estimating/Order Entry, but will remain in **Master Files – Mail Process** (in an italic font), available to be collected in various reports. Invisible activity codes can be dragged to a branch whose sole purpose is to store these codes away from active estimating codes. Create a branch within each of DP, Components and Finishing and call it Retired (or Invisible, or Inactive, etc.)

The **Delete Activity Code** feature should only be used to correct entries while a system is being setup.

Create Batch of Processes: Pricing Tab

This spreadsheet stores the pricing details for the activities in the selected branch.



The **Measure** is the unit used to calculate sell price (e.g., process sells per 1,000 or per single unit).

Cycle Based Price and **Min Cycle Based Charge** are used if the system has been configured to use Cycle Based Pricing. Select the check box under **Cycle Based Price** to indicate that the pricing for the activity will be based on the number of cycles defined for the job. With this option, the quantity used to determine the unit price is the cycle quantity, not the whole job quantity. Setups are added per cycle, and cycle minimum prices (**Min Cycle Based Charge**) can be established. If the total process price of all the cycles added together is less than the minimum price for the process, then the process minimum price is used.

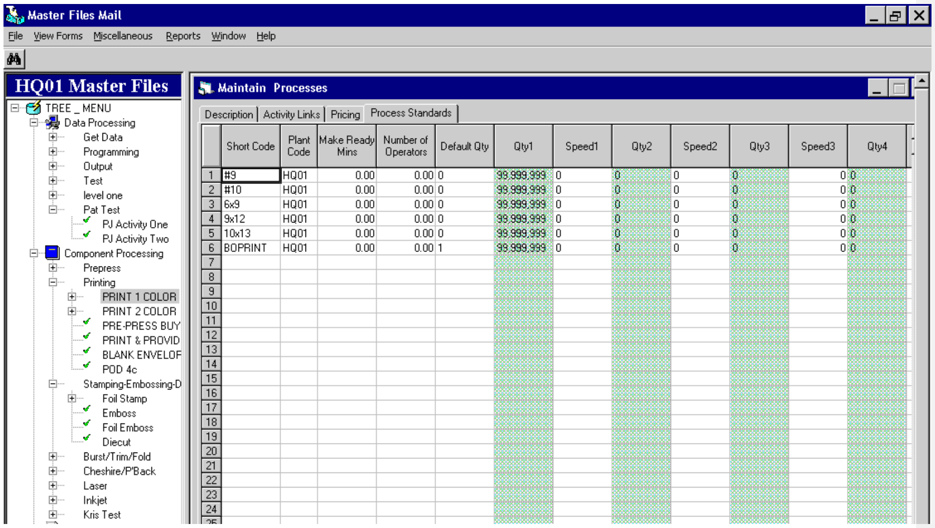
The **Minimum Charge** will override the price only if it is higher than the setup charge plus the price to process the estimate quantity.

If there is a **Set-up Charge,** and it will not be applied via a set-up estimating activity process, enter it here.

Enter up to six **Qty. and Price** breaks in this field. **Price 1** is the price (per unit of measure explained above) to process up to **Qty1. Price 2** is the price to process from Qty1 (plus 1) up to **Qty2**. It is not necessary to have more than one price break; however, the last price break should be 99,999,999, to accommodate any size job.

Create Batch of Processes: Process Standards Tab

The Process Standards spreadsheet stores information about processing speed.

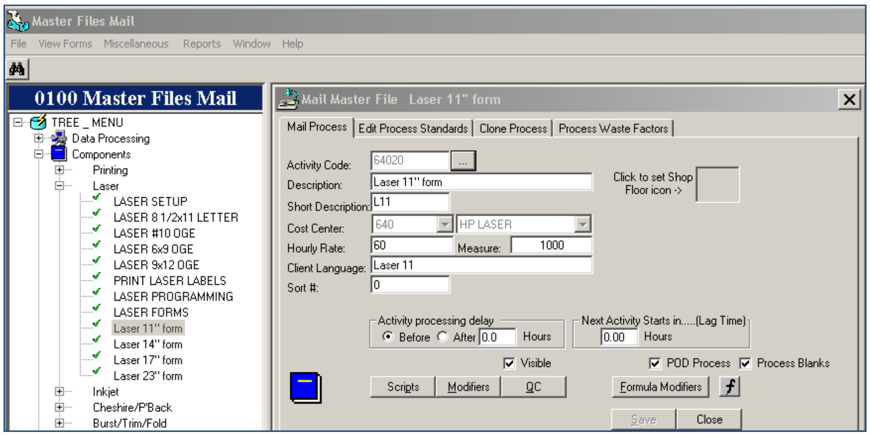


Enter the Make Ready Minutes, if any, and the Number of Operators (minimum of 1) that are normally required for each process. This data will be used in the **Scheduling** module.

A Default Qty of zero will use the estimate quantity to figure price, cost and processing time. Any other number entered in Default Qty will replace the estimate quantity to figure price, cost and processing time. Certain processes are normally sold as a single unit, regardless of the estimated quantity (e.g., Programming, Delivery, Buyout); in this case the Default Qty would be 1. If a process quantity will usually be different than the estimated quantity (e.g., Data Entry), enter 1 as the default and key in the exact quantity for that process on the estimate. To charge a process by the hour, make the Measure, Default Qty and Speed1 = 1. To charge a process by 15-minute intervals, they should equal 4. Key in the (quantity of) time needed for that process on the estimate. General Rule: the majority of the time for a price-per-thousand activity will have a default qty = 0. If the activity is priced per hour or per 1 the default qty = 1. There are a few exceptions (EXAMPLE: If you charge laser copying per 1 or each, you should have a default qty of 0 in this case).

Enter up to six Qty. and Speed breaks in this field. Speed1 is the number of pieces that can be processed in one hour, up to Qty1. Speed2 is the number of pieces that can be processed in one hour from Qty1 (plus 1) up to Qty2. It is not necessary to have more than one speed break; however, the last speed break should be 99,999,999, to accommodate any size job. It is not necessary for prices and run speeds to have the same breaks.

Create a Single Process



To create a single new process, right-click the branch and select **Create New Process**.

Required fields for defining a new process are:

Activity Code – This is a numerical entry (up to nine digits) that is **unique** for each process activity. The ellipsis **…** button to the right of the activity code is used to look up existing activity codes to verify the uniqueness of any new codes.

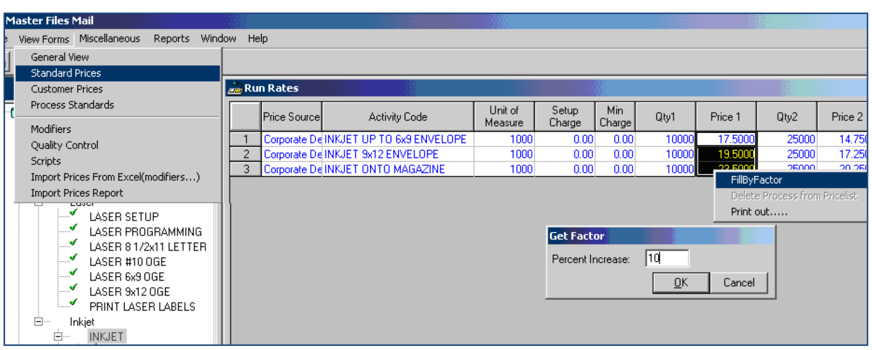
Description – This language appears on the process tree, quote, work ticket and work order. It identifies the individual activity for internal communication. It must be unique to each activity, and cannot be changed. **DO NOT use apostrophes, asterisks and other such symbols. The maximum number of characters is 30.**

Short Description – The internal code used to track the activity through the system. This value displays at the **Short Code** on the Edit Batch of Processes screens.

Cost Center – The arrow displays a drop-down list of existing Cost Centers to place this activity within.

Refer to the respective **Edit…** sections in this document for information on the remaining fields.

Alternative Method to Edit Process Information



There is an alternative method to edit process information. Highlight a branch of activities, and then select **View Forms** from the menu.

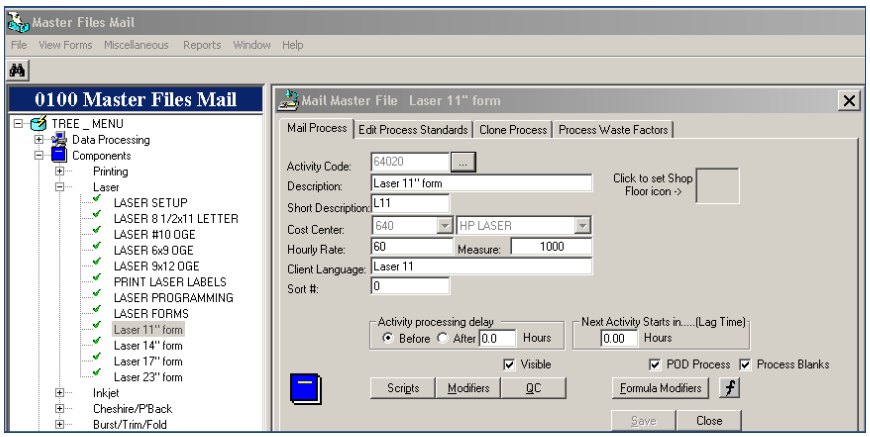
Choose **General View** to access the table of process descriptions.

Choose **Standard Prices** to access the table of existing corporate prices. **Choose Customer Prices** to access the table of existing customer prices. Option to change all prices in a column by a fill factor (+ or - %) by highlighting a price column, right-clicking, selecting **FillByFactor** and enter a (+ or - %) and OK. The **Print Out…** option prints a copy of the pricing grid as it is displayed on the screen.

Choose **Process Standards** to access a table of existing processing speeds.

To **Print a Report** that lists labor, material and/or sub-contract activity codes, process descriptions, processing speeds, pricing, etc., select **Reports** from the menu bar. Then select **Activity List**.

Mail Process Tab



Any single (mail estimating) activity code can be edited via an **individual activity code screen.** To access this field, left click the process. To **edit**, enter desired changes then **Save**. The ellipsis **…** button to the right of the activity code is used to **look up existing activity codes** to verify the uniqueness of any new codes.

Once a database has been used "live", it is strongly recommended that **activity codes never be deleted.** The recommended method is to **hide** codes that are no longer useful. This is done by clearing the **Visible** check box, then saving. The activity will not display in Estimating/Order Entry, but will remain in **Master Files – Mail Process** (in an italic font), available to be collected in various reports. Invisible activity codes can be dragged to a branch whose sole purpose is to store these codes away from active estimating codes. Create a branch within each of DP, Components and Finishing and call it Retired (or Invisible, or Inactive, etc.)

Option to setup a **Shop Floor** icon that will display next to each process name if utilizing the **Shop Floor Classic** module. Click in the blank field (upper right), select an icon and **Save**.

The **Scripts, Modifiers** and **QC (Quality Control)** buttons are shortcuts to those entry fields and should be used for **editing pricing and run speeds only**. Enter **NEW** scripts, modifiers and/or QC scripts in a different screen (see relevant sections in this document).

Next activity starts in . . . Lag Time if this process can overlap time for other processes in scheduling enter the number of hours from the time the previously scheduled process starts until this process can begin. If nothing is entered here scheduling will always assume that you must complete the total scheduled time on the previous step before beginning this step.

POD Process – check this option if this process is to be used with the POD feature.

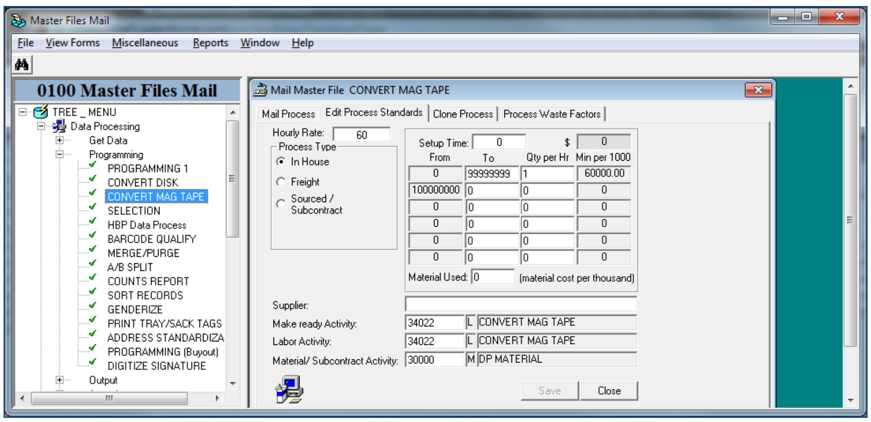
POD Process Blanks – when this option is checked the quantity calculation for the blanks on a POD Component will be included in the process quantity and run speed calculation. If the option is not checked the blanks will not be included in the calculation.

The POD feature is designed to allow you to easily estimate the correct qty and cost and price for processes where a single component actually encompasses multiple page counts and number up. E.g., a Component is a 20 page document printed 2up on a digital press.

In order for the POD process to calculate correctly the process itself must be setup in Master Files mail with the **POD** check box selected. AND the **POD** check box must also be selected for the component in the Estimating component screen and the user has correctly entered the appropriate Number Up, Simplex, Duplex and Blanks fields.

User defined formulas can also be used for POD processes but it is not a requirement.

Edit Process Standards Tab



Under the **Edit Process Standards** tab, the standards for setup time and run time can be edited. Make ready Activity codes (a.k.a., Setup codes) and/or Material Activity codes can be assigned to the Labor Activity code if more detailed reporting is desired. (The default code for Make ready and Material is the Labor activity code, when more detailed reporting is unnecessary.)

Use distinct Make ready and/or Material Activity codes if:

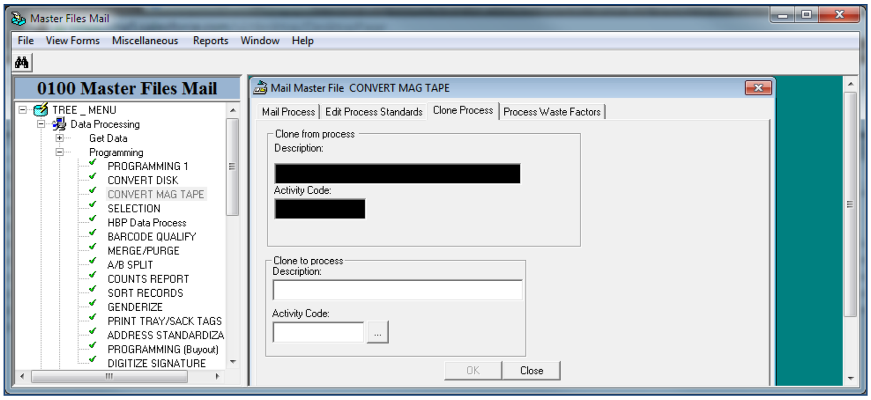
A separate setup activity code exists for labor capture only; this code should be entered next to **Make ready Activity**. Workers can then record their setup time using a different code than run time, and reports can be generated which separate the two tasks. Estimators need only select the run activity, and only this activity will appear in the quote, quote letter, work order, work ticket and invoice.

It is desirable to track material usage; an appropriate material activity code should be entered next to **Material/Subcontract Activity**.

This activity is a buyout. The activity code is put next to **Material/Subcontract Activity**. No prices, run speeds or hourly rates are necessary for processes which are being purchased from an outside supplier.

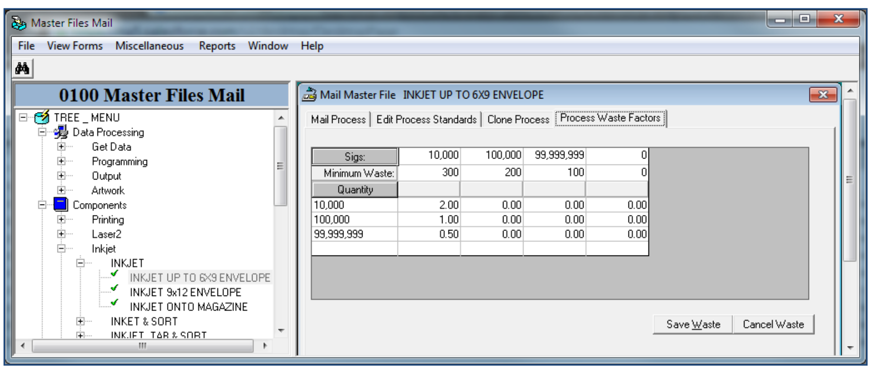
The cost of materials used in any process, which are not charged separately to a job, can be entered next to **Material used**. Enter the per-thousand cost.

Clone Process Tab



Any existing (mail estimating) activity code can be **cloned** to create a slightly different activity code. To **clone** an activity, select the **Clone Process** tab and enter a unique description and activity code. Remember to edit the Short Code, Hourly Rate, Client Language, Run Speeds, etc. for any cloned process(es) that may differ from the original. The cloned activity will need to be linked to report lines.

Process Waste Factors Tab



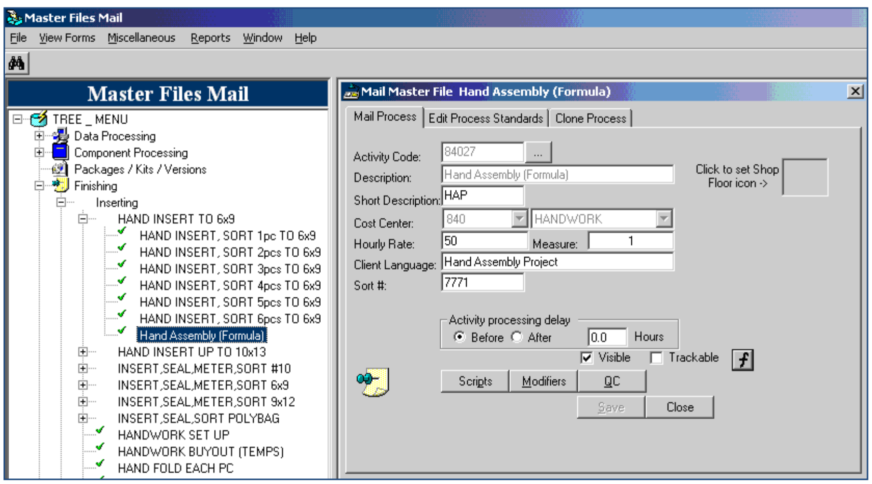
Optional - use this screen to setup Mail Process waste to be calculated on a Print Component when a Mail Process is used on a Print Component.

User Defined Formulas

User Defined Formulas can be created to calculate labor costs, material costs and sell price.

1. A one-time setup is required to utilize this modifier option. Go to **> MF-Mail Process > File > Setup > Estimating Parameters >** (check) **Allow user defined formulas**.
2. Customer using **User Defined Formulas** also need to request a win zipped DLL file (Ucalc32) from EFI PrintStream Support. This is a client system requirement for all workstations that utilize the formula modifiers feature. Unzip the file and copy to each workstation's System directory. This directory may be different on various operating systems.

This file needs to be registered by copying and pasting it on system folder's REGSVR32.exe or simply rebooting the **PC.User Defined Formulas: Formula** button.

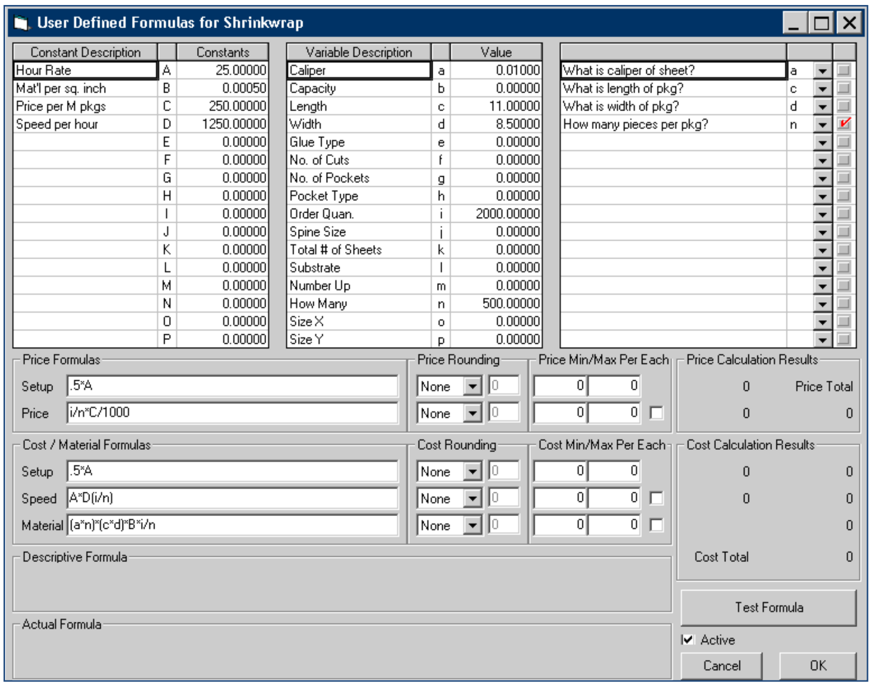


User Defined Formulas can be created to display labor costs, material costs and sell price.

To create a user defined formula, go to > MF-Mail Process > click process name > select the ***f*** button.

 Button will turn RED once the formula is created, saved and check **active**.

Create Formula



User Defined Formulas can be created to show labor cost, material cost, and sell price. To create a user defined formula go to MF-Mail Process > click process name > select the ***f*** button.

Hour Rate-A is automatically assumed into the cost formula and **Order Quantity** is assumed into the **Price Formula**.

Constants are fixed numbers, but only the Hour Rate-A is assumed as part of the cost formula; any other Constants that are entered in fields B-P would not automatically be assumed into either cost or price formulas.

Variable Descriptions are currently hard coded, (future versions will be user defined). There is no inherent meaning to the hard coded variable descriptions as shown, only that which is given by the formula. It is these variables which create the fields in the estimating/order entry user interface, allowing users to enter the numeric answers which will result in pricing and standards adjustments at the estimate/job level. Variable and Constant descriptions do not appear in the user interface, however, questions that refer to the variable descriptions do appear in the estimating/order entry interface at the point of activity selection.

This mirrors the structure of **Master Files - Mail Processes** which allows the definition of price lists to arrive at sell price, as well as standards which use Hour Rate ($) and time (Speed of equipment per hour) to calculate job costing information.

The **Setup field** allows the creation of a Price per Setup and the Price field allows the creation of a price for the run, assuming the Job Quantity as part of the formula.

An entry in the Setup field will result in minutes/hours in the **Cost Calculation Results** area of the screen, and when factored against Hour Rate-A will result in dollar value in the cost field. An entry in the Speed field defines the standards of equipment/labor operation, i.e., how many per hour.

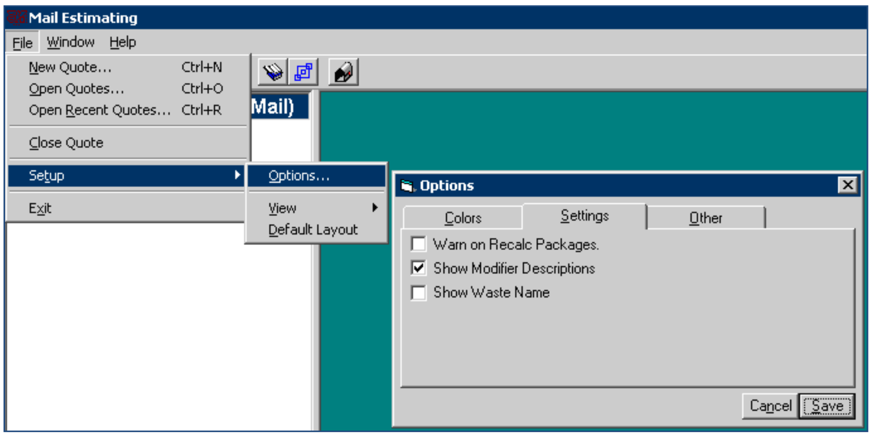
Note	An entry in **material field** defines the cost of materials. Speed per hour multiplied by Hour Rate will show the cost in dollars. **Cost of Materials** is entered as a formula.

Option to **Test a Formula** or make a formula **Active** or inactive.

One Time **Show Modifier Description** Setup per Workstation.

To display modifier answers on Work Order and Work Ticket, each user must perform the following one-time setup in Mail Estimating/Order Entry per workstation.

File > Setup > Options… > Settings > Show Modifier Descriptions > **Save**.



UDF for Digital Press Using Mail POD Process

Problem

Simple way to setup a process (on the mail side) that can mimic cost based calculations but still use user defined formulas and also support multiple up and page counts for digital printing.

Sample Requirements

If sheet size is less than 9" then run at 8,000 per hour

If sheet size is greater than 9" then run at 4,000 per hour

If printing on just 1 side then charge 1 Click

If printing on 2 Sides then charge 2 Clicks

Sample Assumptions

Use the following assumptions so you can follow along in this example. Please adjust your numbers to suit when setting up the process and the formulas.

Hourly Rate for Equipment = 60.00 per Hour

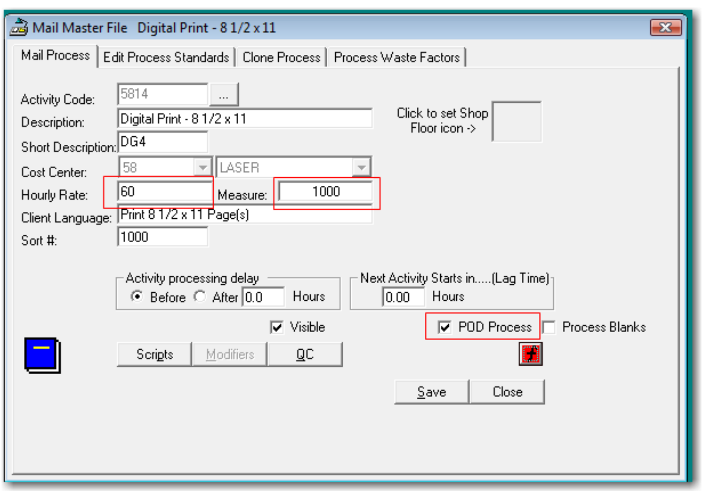
Click Charge = 0.006 ($6.00 per thousand)

Setup Time is 5 minutes – regardless of number of sides or paper size.

Process Setup Screen

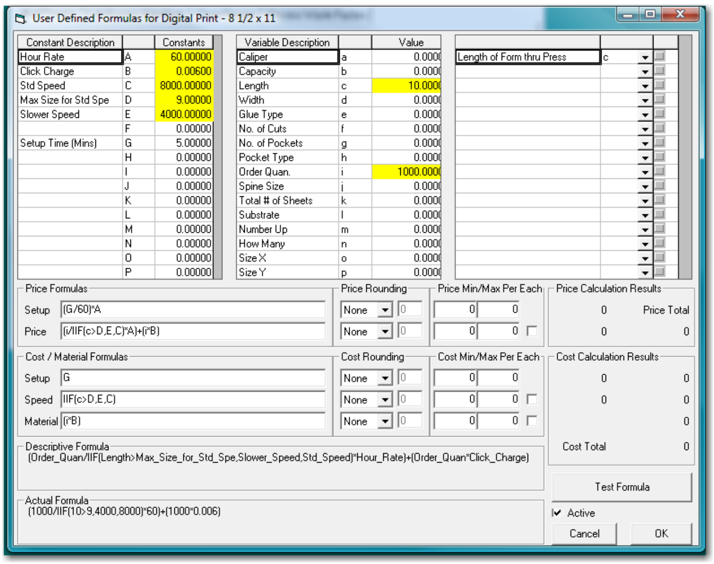
Note that the hourly rate has been put into the appropriate field. Please also note that the **POD** check box has been selected so you can use the multiple up and multiple pages features when estimating. I have specified a unit of measure of per 1000 for the process for ease of use in the estimating final pricing screen and for quote letters etc.

Note Ignore the description of my process **Digital Print 8 ½ x 11** as it implies that the process can only be used for this sheet size – this is not the case, I just changed the formula on an existing process in my database so I could get this to you quickly. Please use whatever appropriate language you wish for your process. E.g., Laser Print.



User Defined Formula

The following formulas were used to work with your requirements:



<u>Constants</u>

A = Hourly Rate – You must provide this so the pricing formulas can mimic the cost calculation

B = Standard Click Charge – e.g., .006

C = Standard Run Speed – e.g., 8000

D = Maximum Sheet Size for Standard Speed – e.g., 9 (to represent 9")

E = Slower speed once sheet size is greater than 9" – e.g., 4000

F – Do not use F in any formulas where you will also use the IFF statement

G = Setup Time in Minutes – e.g., 5

<u>Variables</u>

c = Length – entered 10 here so you can test the formula with sample data

i = Order Quan – entered 1000 here so you can test the formula with sample data

<u>Question</u>

Length of Form Thru Press – Associated to variable **c**.

<u>Price Formulas</u>

Setup: (G/60)*A

(Setup Time / 60) x Hourly Rate)

Run: (i/IIF(c>D,E,C)*A)+(i*B)

ProcessQty / (IF size > 9" then 8000 per Hr else 4,000 per hr) * Hourly Rate + Click Charge of .006 * Qty of Process

Cost / Material Formulas

Cost Calculation for Setup: G

5 minutes for setup (formula feeds minutes to system which then calculates this by the hourly rate for the process.

Cost Calculation for Run Time: IIF(c>D,E,C)

If size > 9” then 8000 per hr else 4000 per hr, (formula calculates the speed and then the system calculates hours and multiplies by the hourly rate for the process)

Cost Calculation for Material (Click Charges): (i*B)

ProcessQty * Click Charge

Use of Formula – Within an Estimate/Job

When the process is selected on an estimate the following rules are applied.

Is the POD check box SELECTED for the Process itself in Master Files Mail?

NO - Then just use the default qty for the process (i.e., Component Qty etc).

YES – Then get ready to use the special POD logic for calculating the process qty.

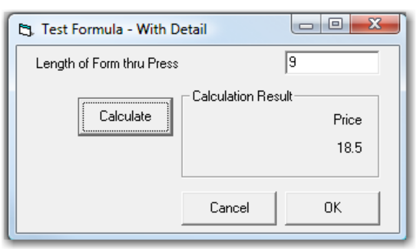
Is the POD check box SELECTED for the Component in the quote/job?

NO – Then just calculate the process based on the standard process qty.

YES – Then expect the user to enter the number up and the number of Simplex, Duplex, and Blank pages for the component / process. Once the user has entered this information – they should click to SAVE the POD settings and then select the process. The system will then perform the following calculations: (((Simplex * 1) + (Duplex * 2) + (Blanks * 1)) / NumberUp). This calculation will then be used for the process qty. In effect the system is calculating how many clicks there are on the equipment based on page count and number up.

Please Note	If the user ever manually overrides (changes) the number up or simplex, duplex, blank fields, and have previously added a POD based process then they MUST delete the process and re-add it so the new calculations are done based on the new page count, number up and number of sides etc. At some point in the future we may provide a feature where the system will automatically recalculate the process qtys on the component when these fields are changed.

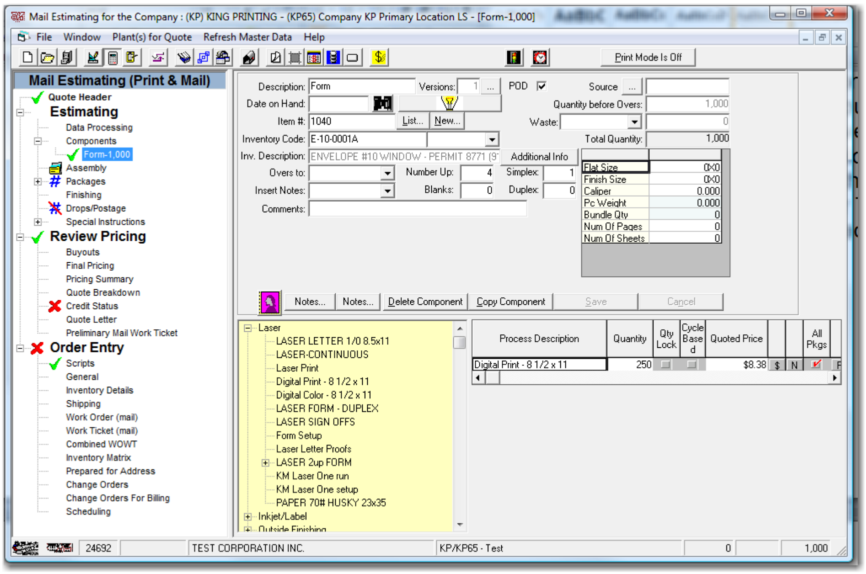
Screen that will appear when POD Process is Added to Estimate/Job



The number of questions that are presented is based on how many questions were setup in the formula in Master Files Mail.

User confirms numerical answer to each question and then clicks the **Calculate** button.

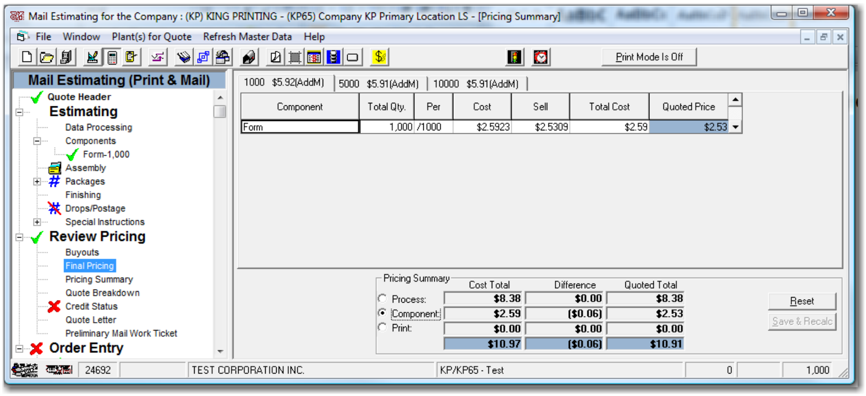
In the following screenshot, you will see that even though the qty of the component is 1,000 – I have entered that it is running 4up – and that it is just one page printing simplex. So the system has automatically calculated a qty of 250 clicks for the process.



If an inventory Item number is entered for this component – the system will also base its inventory reservations and estimated costing based on the number of sheets required.

If the component is to run 4up and there is just one simplex page – then the system will compute that just 250 sheets of material are required for the job.

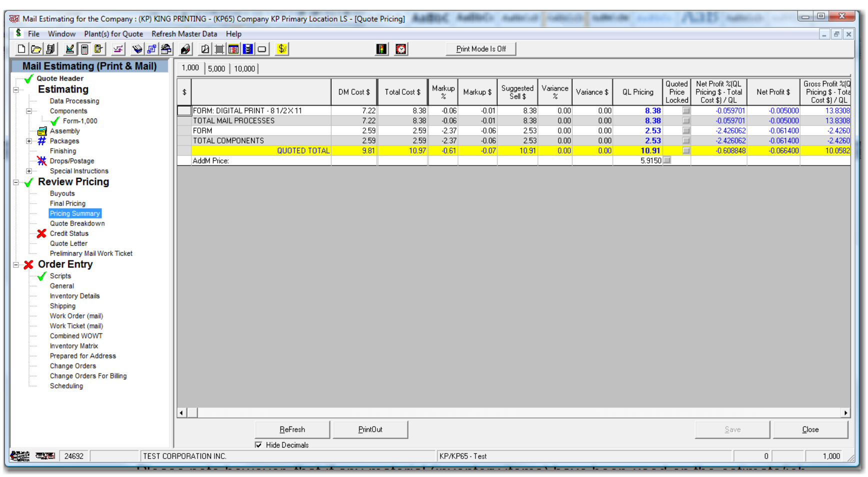
In the final pricing screen – (when clicking the component radio button) the system will display a list of all inventory items used on an estimate/job (that have value). You may notice that the items are displayed with the associated **Component** qty (e.g., 1,000) however please note that even though this qty shows 1,000 – the system has dynamically made a calculation that takes into account the 4up printing, and has adjusted the price per thousand of the inventory item in this screen accordingly. E.g., Unit Price of Inventory may be: $10.3692 per Thousand – but given the 4up nature of the printing the price for 1,000 printed items has been recalculated accordingly to ($10.3692 / 4up) = $2.5923 per thousand.



Checking Results

Use the Pricing Summary Screen to review the results of both the cost calculations and price calculations that your formulas have computed.

If you have entered these formulas correctly then you should note that the cost should be the same as the suggested sell and quoted price (before any user override of pricing).



Please Note If any material (inventory items) have been used on the estimate/job and this material has value, the system will still appropriately calculate separate cost and suggested sell for the material itself based on the settings you have made for that inventory item in Master Files Inventory.