efi PrintStream®

User Guide

Print Estimating Order Entry
V21.1.0200

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Introduction

Overview

This guide provides information about the Print Estimating Order Entry. It describes how a new print estimate is created from Edit Mode, how the Review Mode is utilized, the purpose of Order Entry, and describes other information relating to Print Estimating.
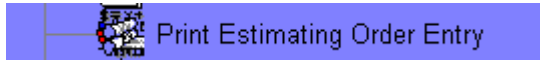
Contact Information

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.

Edit Mode – Create a New Print Estimate

To create a New Estimate

1. Click the **Print Estimating Order Entry** module located under the Estimating Menu Bar.

2. Select the **New Estimate** icon ("blank paper" upper left) and enter:

    a. Customer # or Customer Name (case sensitive fields) or Add a New Customer

    b. Sales Rep

    c. CSR

    d. Estimator

    e. Product Type

    f. Title and/or (optional) Description field

    g. Up to Six quantities (**Tip:** Type **K** after a number and **000** will populate qty field)

    h. Default Section Size

    i. Re-contact date defaults 2-weeks from estimate date, change date if needed

Note   To create a new prospect customer that is not in the database, click the **Add…** button.

When information is completed, click **Save** and the estimate screen appears in the Edit Mode.

Note   Customers, Sales Reps., CSR's and Estimators are setup in **Customer Master Files**. If you add a new customer, a credit limit will need to be established and the account status (Prospect) needs to be changed in **Customer Master Files** before the estimate can be converted to a job. Product Types are set up in **Master Files Print**.

Estimator Notes

To add notes to the estimate

1. Click the **Estimator Notes** icon ("hand writing on note pad").

2. Enter note and click **Save**.

This note prints on the Quote Breakdown and Work Order.
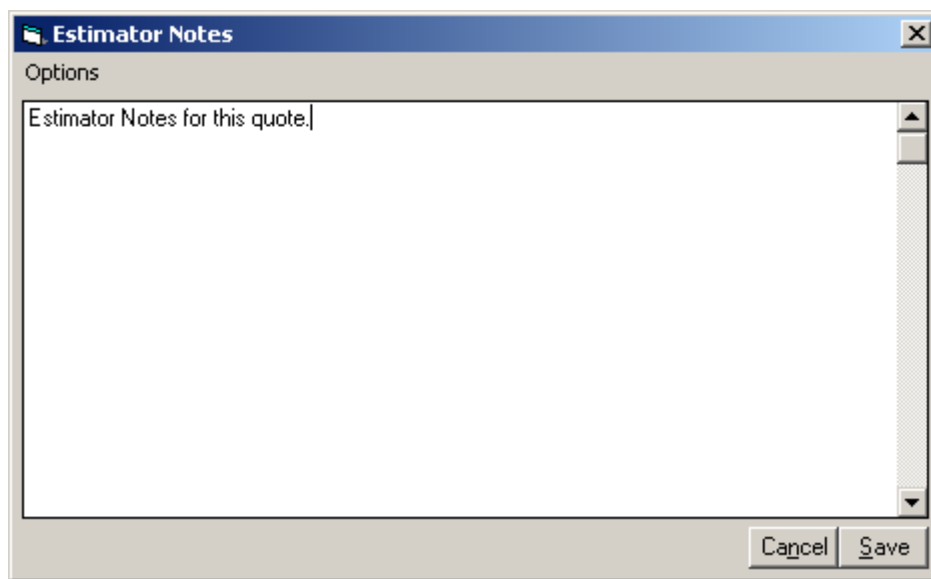
Job Templates

To work with templates

1. Select the **Show Templates** icon ("gray & blue 3-D stamp") to open the Templates screen.

2. Click the **File > Options > Misc.** tab to enable Job Templates.

3. Select the **Use Job Templates** check box and click **Save**.
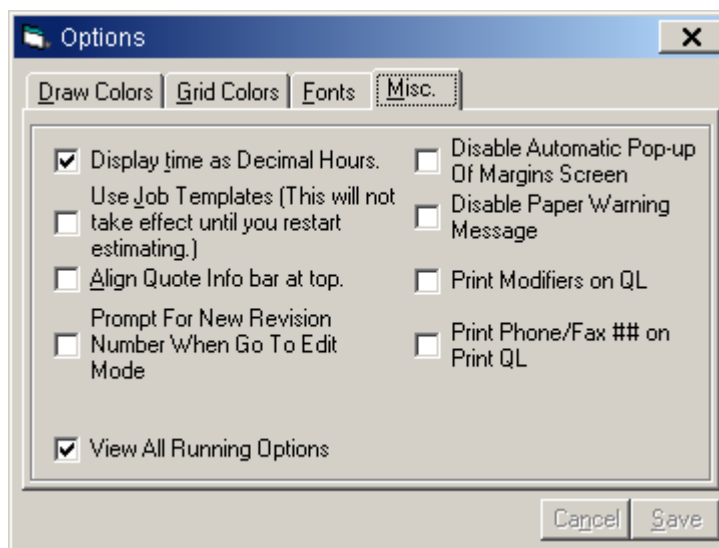
4. Right-click in the white area of the Job Templates window and select **Job Template** to create a Job Template.
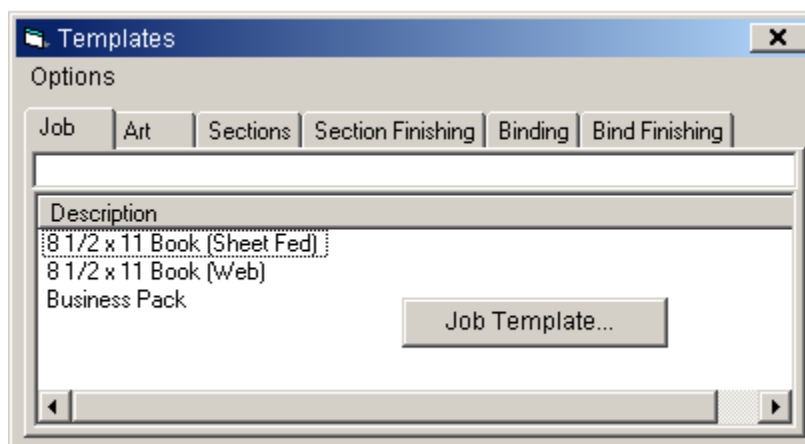
5. Enter a **Template Description** and double-click the **Available Sections** templates to add to the **Job Template Sections**. Double-click to remove Section Templates from Job Templates. Click the **Delete** button to remove the selected Job Template from the list.
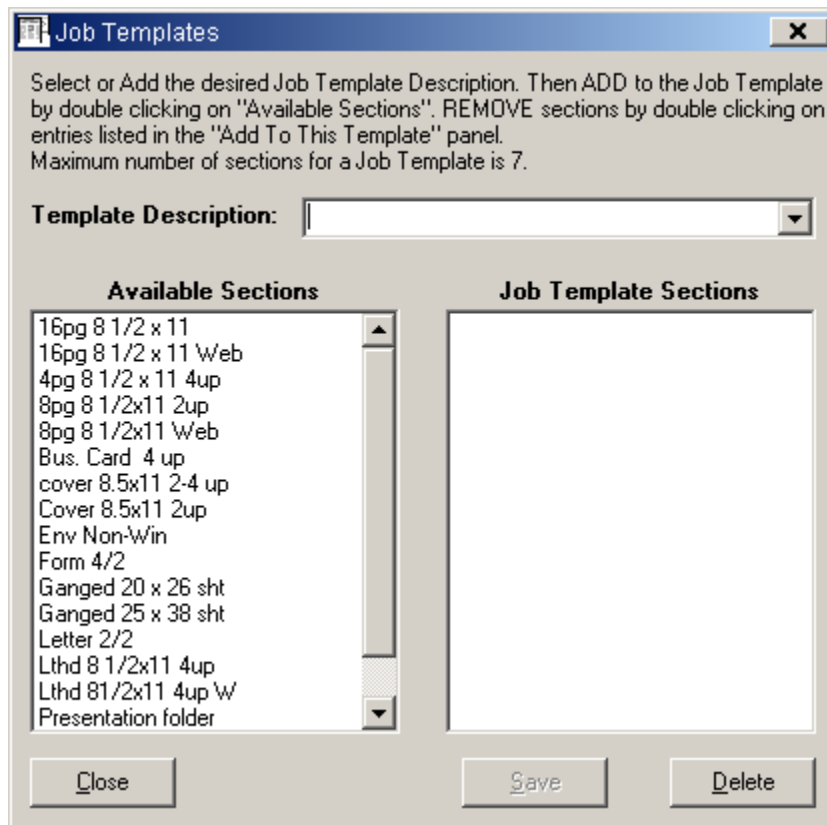
6. Under the **Job** tab are common jobs you estimate often which have paper, press, ink color, finishing, etc., already estimated and saved as a template. To select a job, double-click the job description. The description (e.g., 4 pgs. Cover 4/1 …16, 8 & 4 pg. signatures 2/2) appears on the left side of the screen. The paper, press, and bindery icons are displayed near the middle. To edit or review, double-click the icon(s).
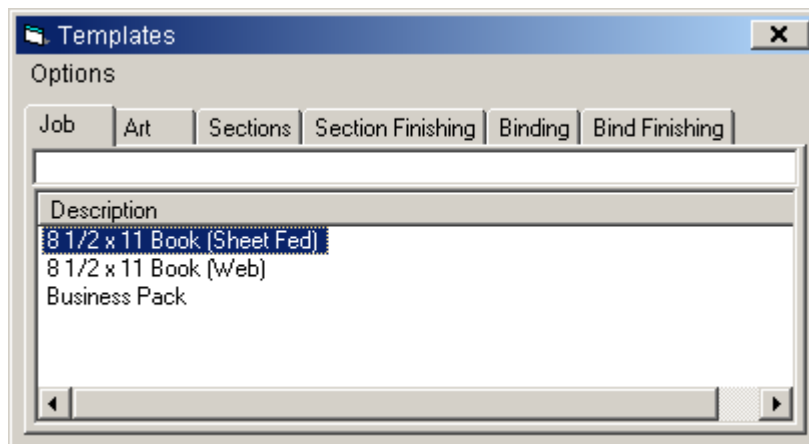
Art Templates

To open the Templates screen

1. Select the **Show Templates** icon ("gray & blue 3-D stamp").

2. Select the **Art** tab to display your list of Art processes.

3. To select an Art template, highlight and drag and drop the process on the left side of the screen or simply double-click the process.
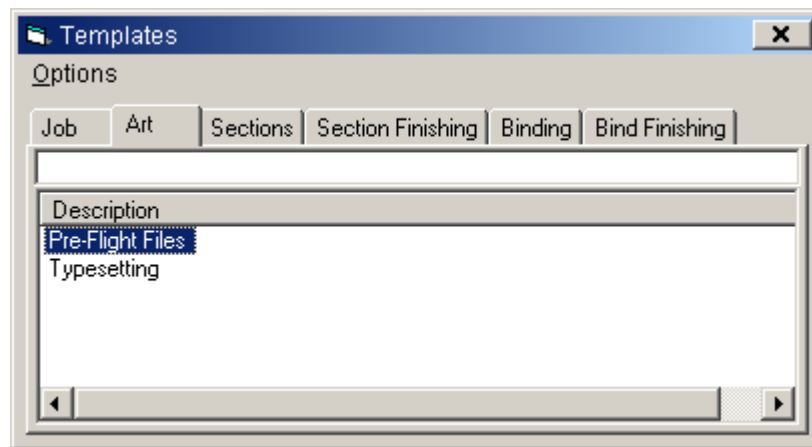
Art icons display on the Artwork bar near the top of the screen.

Note   Icons with a red **X** need further information entered before the job can be estimated. Icons with a green check have been entered.

Section Templates

To select a section template

1. Double-click the **Template Name** or the **Size** (blue area to the left of the template name) OR highlight and drag and drop on the left side of the screen.
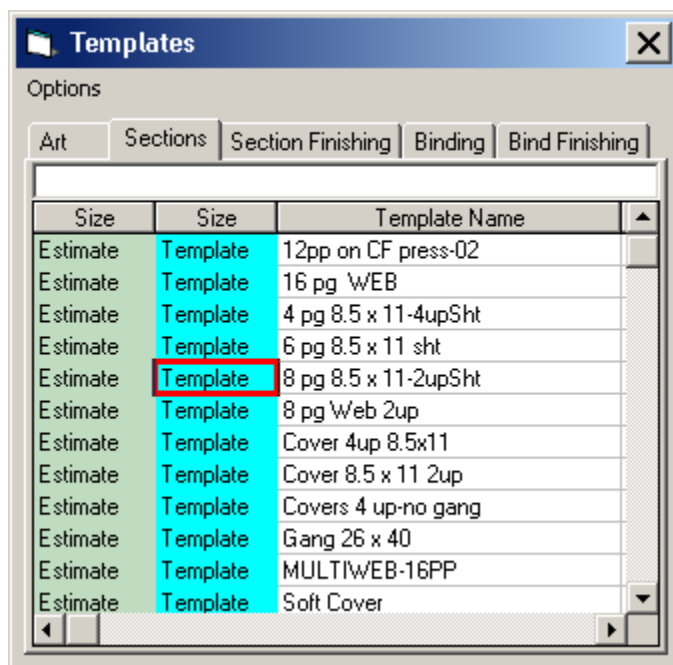
2. The section template is added to your estimate. The template name (Cover 4up 8.5 x 11) appears on the left side of the screen. The paper, press, and section finishing icons are displayed near the middle. To edit or review, double-click the icon(s).
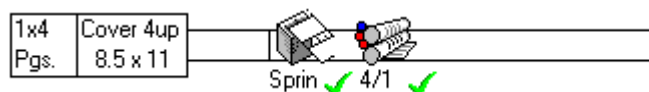
3. To choose a template based on the estimate size (i.e., estimate is 9" x 12" and may differ from the template size: 8.5" x 11"), double-click **Estimate Size** (green area to the far left of the template name).
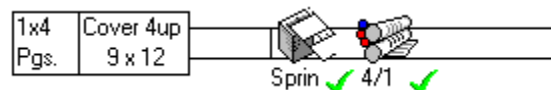
This selects all the template information, but changes the section size to the **Default Section Size** (Example: 9" x 12") entered in the Start a New Estimate screen.
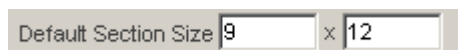
Review Template

To review a template

1. Right-click the template name.

2. Select **Review Template** to view a template.
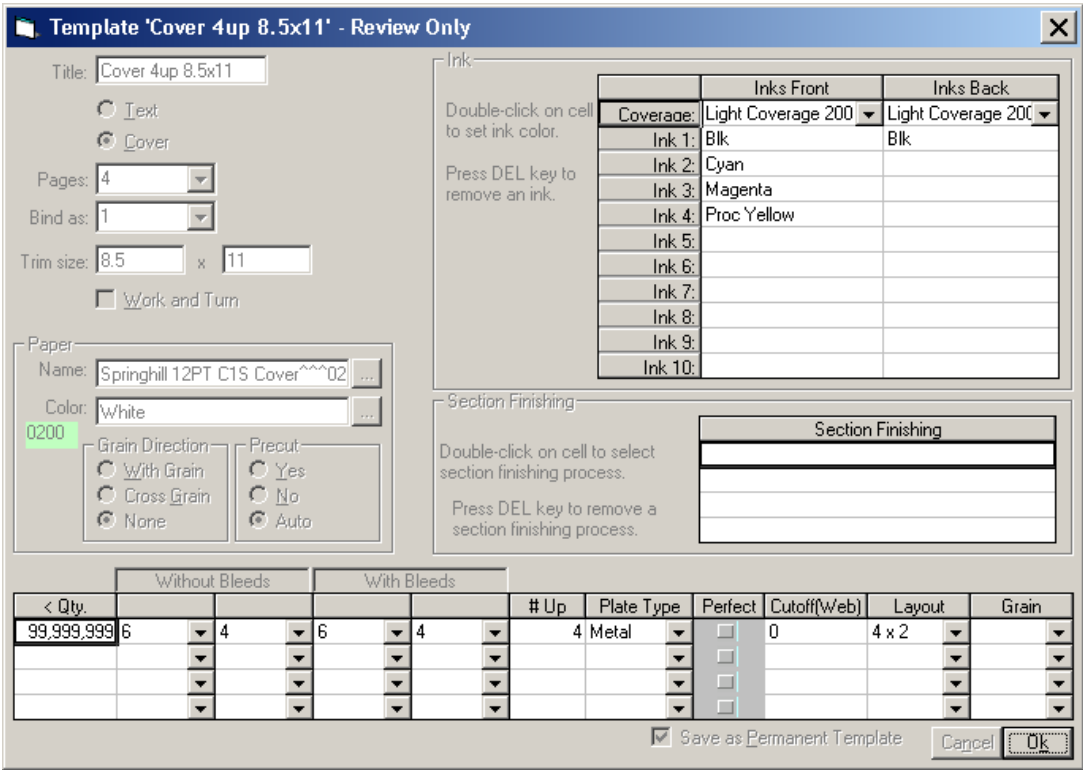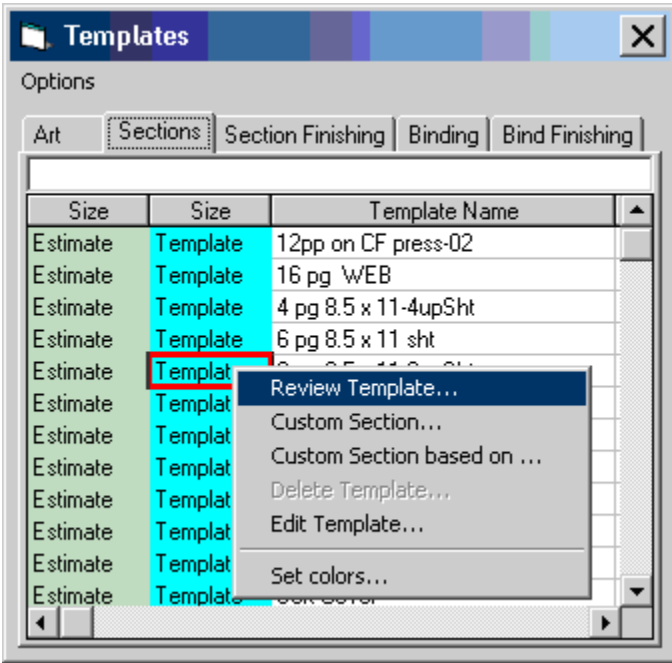
Edit Template

To edit a template

1. Right-click the template name.

2. Select **Edit Template** to enter, make, and save changes to the template.

3. Click **Yes** to make these changes permanent.

Custom Section

To create a new section

1. Right-click in the gray area under the Template Name.

2. Select **Custom Section**.

3. Enter the Section Template details as needed below and click **Save**.

Title: If you are creating a new template this field will display the estimate number followed by a number for each template created in the estimate. You should enter the title for this template in place of the current title. The title may include items such as a product description, a finished size for the product, the number of pages, or any other important information.

Text: Click text to indicate that the template is a text or run on a text based stock.

Cover: Click the Cover button to indicate that the template is a cover or run on a cover based stock.

Pages: Enter the number of pages for this template. The number of pages is determined by taking the trim size, or finished size of the product and counting the number of sides. The number of pages should always be based on the actual product even if the product is run multiple up on the press sheet. (For example, a cover would always be 4 pages even if it is run 2 up or 4 up on the press sheet). If a brochure does not fold in half the number of pages would be entered as 2 and the trim size would be 11" x 17". A brochure that measures 17" x 11" flat and folds to a finished size of 8.5" x 11" would be entered as 4 pages.

Bind as: This field tells the system how many sections this product will bind as when bindery processes like perfect binding or saddle stitching is used on the estimate. The default for all products that do not

have this type of binding is 1. Most products that perfect bind and saddle stitch will have a default of 1 also. The exception would be for products like a 32-page 5 ½" x 8 ½" signature. This may print as one 32-page signature but may bind as two 16-page signatures if the stock is so heavy that a 32-page signature would not fold and bind properly. In this case the number of sections to bind as would be entered as 2.

Trim Size: The trim size or finished size of the product is entered here. If the product binds the second dimension should always be the binding edge. (For example, the trim size for a 8 page brochure with a finished size of 8 ½" x 11" that binds on the 11" side would be entered as 8 ½ x 11 or 8.5 x 11) The system accepts decimal as well as fractions. **If the template is designed to run on a web press, the first dimension must be the dimension that is going across the web width. (This is an exception to the rule that the binding edge must always be entered as the second dimension.)**

Work/Turn: (Optional) Clicking this box indicates that this template is run work and turn. If you select this option this template will always be run work and turn. All of the layouts on this template must be able to run work and turn. **If the template could be run sheetwise or perfected on the press you should leave this blank.** In the estimating program you can select a template that is not flagged as a work and turn template and make that template run work and turn on the estimate.

Paper: (Optional) Leave this field blank if you do not want to assign a default paper. If you select a default paper it will automatically be linked to the template when it is selected on an estimate. The default paper can be changed on the estimate. To select a default paper, click the button to the right of the paper name field. The paper search screen will appear. Use the search filters to determine and then select the desired paper.

Grain Direction:

> **With Grain** - click this button if the binding edge or second dimension of the trim size needs to run with the grain of the paper on the press sheet.

> **Cross Grain** - click this button if the binding edge or second dimension of the trim size runs against the grain of the paper on the press sheet.

> **None** - click this button if the grain of the paper does not matter.

Note	If you select with grain or cross grain, the default for all of the layouts that you enter will be with the grain or across the grain. You can change the grain on an individual layout if you need to. You must also make sure that the papers you select for templates flagged as with grain and cross grain have the papers with the grain direction running the correct way for the layout that you have indicated. The system will not be able to layout the job if it can't find a paper with the correct grain for the layout.

Precut: Precut means that the press sheet is being cut out of a larger parent sheet.

> **Yes** - if the press sheet for any of the layouts entered below cuts out of a larger parent sheet, you must either select **Yes** or **Auto** for the precut. If you select **Yes** the press sheet will be the exact dimension of your layout with the trims and gripper added. (For example, if the layout was for a 16-page 8 ½" x 11" signature and the layout size needed was 22 3/4" x 34 ½", the system would take a parent sheet of 23" x 35" or larger and cut it down to a press sheet that measured 22 3/4" x 34 ½").

> **No** - If you select no it means that the layout fits on the parent sheet size and that no precutting is needed to run the layout. You should only select **No** if none of the layouts need precutting.

Note	Precut for web layouts is always flagged as **No**.

> **Auto** - If you select auto cutting the layouts that do not cut will not cut. If the layout requires cutting the system will determine the layout size and split the parent sheet size exactly for the number of press sheets that will come out of the parent sheet. (In the example, only 1 press sheet 22 3/4" x 34 ½" will come out of a 23" x 35" or larger sheet. If the template was auto cutting the press sheet would be 23" x 35". If you had an 8 page 8 ½" x 11" signature and the layout size was 17" x 22" and the only parent sheet size available was 23" x 35", the system would run a press sheet size of 17 ½" x 23" which is a 23" x 35" parent sheet split evenly in half).

Ink: (Optional) You may select a default ink coverage for the template. The ink coverage can be changed on individual estimates. Click the arrow to see a listing of ink coverage on your system. Click a coverage to select it. If the template prints on the backside as well, select a coverage for that side also. You may select some default inks for the template; these are defaults only. The inks used and the number of colors can be changed on an estimate-by-estimate basis. To select an ink, position the cursor in a blank ink field and double-click. A list of inks will appear on the screen, select the ink that you want by double-clicking it.

Section Finishing: (Optional) Section Finishing processes are bindery processes that apply to a specific section on the estimate but not to the whole estimate. An example of a section finish would be scoring. If you had an estimate for a book with a cover, you may need to score the cover but you would not need to score the text. Setting scoring up as a section finish would allow you to apply the score process to the cover only. Other examples of section finishes are folding, trimming, perforating and so forth. If the template that you are entering requires a section finish you can add the finish here. If you add the finish here it will automatically display as part of the run whenever you select this template on an estimate. If the section finish does not always apply when this template is used, you may not want to add it here. To add a section finish, double-click an empty cell and the section finish listing will display on your screen. Double-click the section finish to select it.

Quantity: The quantity feature (lower left) allows you to set different layouts for the template based on the estimate quantity. (For example, if you were creating a template for a letterhead you may decide that you want the letterhead to run as follows: 1 up if the estimate quantity is 1,000 or less, 2 up if the estimate quantity is 5,000 or less but more than 1,000, 4 up if the quantity is 25,000 or less but more than 5,000, and 8 up if the quantity is more than 25,001) In the example, the quantity breaks would be 1,000, 5,000, 25,000, and 99,999,999.

Note   It is important that the last layout always be **99,999,999**.

Without Bleeds: (Optional) The amount of trim needed for grippers, gutters, color bars and so forth is entered here. When the system calculates the press sheet size it takes the trim size and the layout, then adds the trim dimensions to arrive at a final press sheet size. The first column is for entering the number of inches to add to the width of the press sheet. This dimension is only added to one side of the width of the press sheet; it does not add to both width edges. The second column is for entering the number of inches to add to the length of the press sheet. (Example: 8-page 8 ½" x 11" - the press sheet size for this is 17" x 22". If you want the press sheet size to be 17 ½" x 22 ½" or bigger you should enter a ½" in both columns.)

With Bleeds: (Optional) The amount of trim needed for grippers, gutters, color bars and so forth is entered here. When the system calculates the press sheet size it takes the trim size, and the layout, and adds the trim dimensions to arrive at a final press sheet size. The first column is for entering the number of inches to add to the width of the press sheet, it does not add to both edges on the width of the press sheet. The second column is for entering the number of inches to add to the length of the press sheet. (See example above for sheet selection.)

 # Up: Number up indicates how many of the product items are on the press sheet. (Example, an 8 ½" x 11" letterhead that prints 4 images on the press sheet is 4 up.)

Plate Type: To select a plate type for this layout click the arrow that is pointing down and choose the appropriate plate type.

Perfect: If the layout is designed to perfect on the press, click this box.

Note   All web layouts should be flagged as perfecting layouts even if the default layout is not printing on both sides of the press sheet.

Cutoff (Web): If you are entering a web layout, type in the press cutoff for the layout. The layout will only run on presses that have a similar cutoff.

Layout: Look at the first dimension of the trim size. If you picture the press sheet in your mind or on paper, how many images of that first dimension go across or down the press sheet? Now look at the second dimension and do the same thing. (For example, if you were creating a layout: 8 ½" x 11" letterhead - printed 2 up; the layout would be "2 x 1" which is: two 8 ½" images across the press sheet and one 11" image going down the press sheet.)

Grain: (Optional) This option allows you to change the paper grain for the layout. The default for the template is the direction that you selected in the Grain Direction area. This allows you to change the paper grain for an individual layout. If this does not apply, just leave it blank. (Remember the grain direction is always determined by looking at the second dimension of the trim size and indicating whether it runs with the paper grain or against the paper grain on the press sheet.)

Note Select the **Save as Permanent Template** check box (bottom of screen) and click **OK** if you want to permanently add the template to the section list. Saved templates can only be edited, not deleted.

Custom Section Based On…

This option allows you to change or edit a similar template without having to re-create all the information from scratch. Select the **Sections** tab to display the section templates. Right-click the template and select **Custom Section Based on …**, **Change Title**. Enter specs and click **OK**.
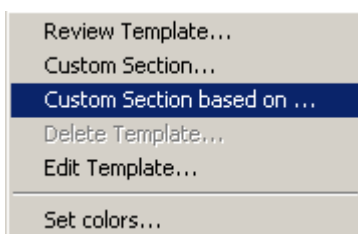
Note Select the **Save as Permanent Template** check box (bottom of screen) and click **OK** if you want to permanently add the template to the section list. Saved templates can only be edited, not deleted.

Artwork – Review, Enter or Delete Details

Icons with a red X need further information entered before the estimate can be calculated. To enter information, double-click the icon. (i.e., Pre-Flight Files) Select Level 1, 2, or 3 and enter the quantity and save. Once information is entered the red X below, the **Art** icon changes to a Green check.
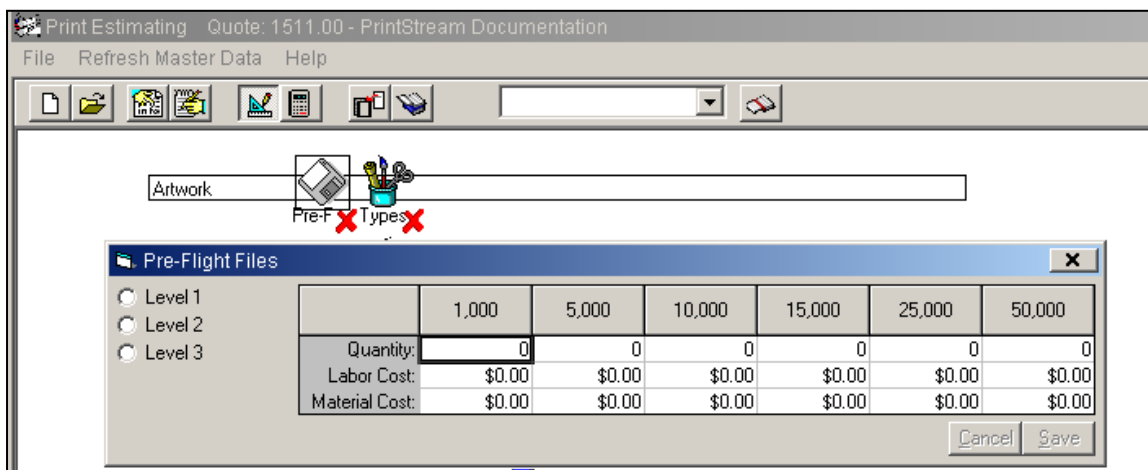
To delete, right-click the **Artwork** icon and select **Delete Process**.

Note Processes, Pricing, Labor Costs, etc., are set up in the **Master Files Print** Module.

Pre-Press – Review, Enter or Delete Details

To review or enter Pre-Press details, right-click the pre-press bar (the bar is approx. 1" in length and is to the right of the **form description** bar) and select **Pre-Press Manual**.
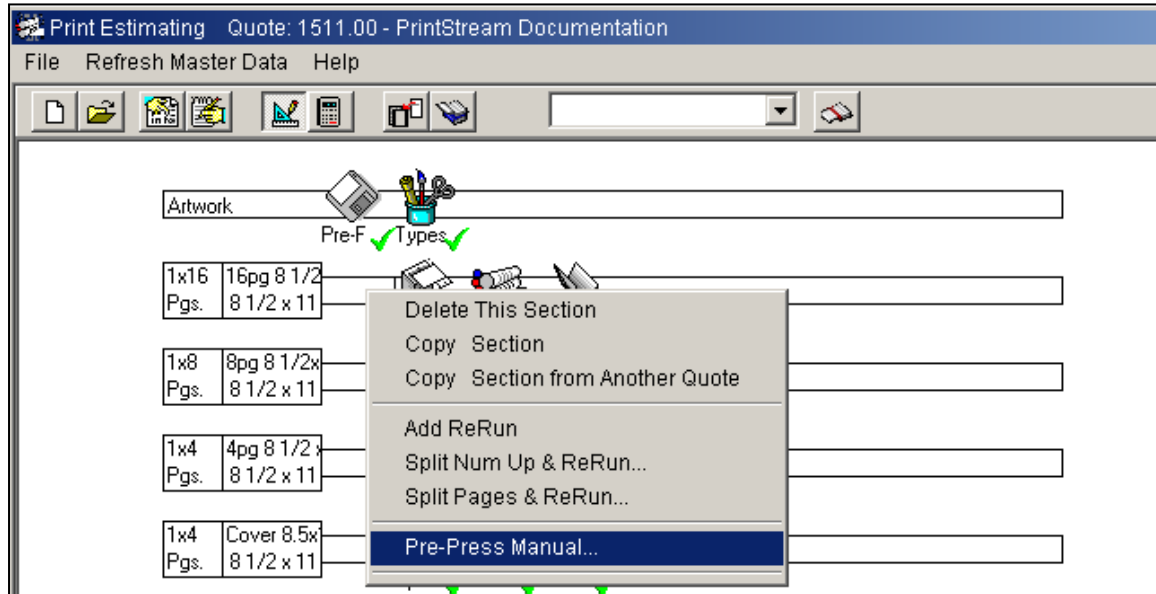
To Delete Pre-Press, right-click the **Pre-Press Manual** icon and select **Pre-Press Manual…**.
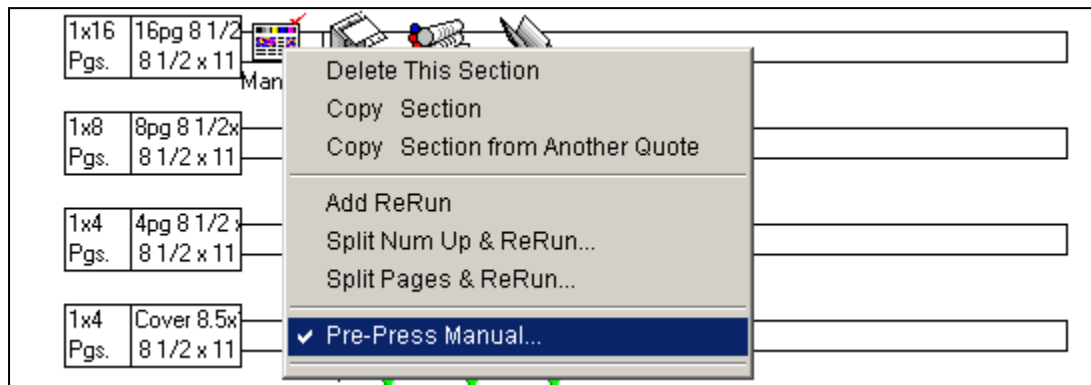
Entry Screen

To enter data

1. Click the size of the process and select the down arrow, or simply double-click the size.

2. Once the process has been displayed below, enter the quantity.

3. To return a process, click the operation/process and then the up arrow.

| Note | Processes, Pricing, Labor Costs, etc., are set up in the **Master Files Print** Module. |

Paper – Review or Enter Details

To review or change Paper selection(s), double-click the **Paper** icon.

To select a paper, click the **Search Paper** button. When the desired paper has been selected, click **Save**.

Use the search filters in the Paper Search screen to determine and then select the desired paper.

Charge paper on this section: The paper cost will be charged to this section. Clear the check box if paper cost should not be applied to this section.

Apply paper to other sections: Select this check box before adding the next section where you want the new section to have the same paper as the first section.

Create New Special Order (S/O) Paper: Use this selection to create a new special order paper for this estimate. Enter details and click **Save**.

Special Order Paper (New Paper) ✕

Paper

Description

Parameters

Category	▾	Ink Factor		
Subcategory	▾	Press Speed		%
Type	▾	Case Making Speed		%
Perfect	▾	Sheets Per Lift		
Work & Turn	▾	Core Waste		%
Charge By	▾	Pages Per Inch		
Min Buy Qty		Caliper		
In Packs Of		Use Caliper	☐	
		Coated	☐	

Weights

Basis Type	▾	Basis Weight	

OR

Pounds		Per		Sq. "

Job Cost Links

Supplier [   ] ▴▾

Activity Code [50000] ▴▾ M [PAPER]   [01] [0100]

Linked Markup
Template :

Cancel   Save

Copy to New Special Order (S/O) Paper: Use this selection to create a new special order paper based on the paper originally selected for the estimate. Enter changes and click **Save**.

Note   Once information is entered and saved, the red X below the **Paper** icon changes to a green check.

Print Details – Review, Enter or Delete

To review or change Press details, double-click the **Press** icon.

To add an ink or modifier, highlight and click the right arrow. To remove, highlight and click the left arrow.

Enter **Ink Coverage** and **Plate Type**.

Review the **Front** and/or **Back** and/or select other options (Bleeds, Work & Turn, etc.).

Close or click **Select Press** (bottom right).

To Delete a Press Section, right-click the **Press** icon and select **Delete This Section**.

Note	For the selected Ink Coverage **Light Coverage at 20%**, the coverage for each ink color defaults to 0%, which applies 10% for each color (% coverage 'divided by' total # of ink colors). If the ink % should differ between inks (+ or -), enter the exact % in the % Coverage field (see sample below) and the ink cost will calculate accordingly. Extra Plates adds Plate Material and M/R cost, it does NOT include additional Wash Up cost. Enter number of Extra Plates to add cost or enter a "–" (minus/negative) number to remove plate costs.

Select Press – Find Press

From the Print Details screen, click the **Select Press** button. This displays the Select a Press screen.

Click the **Find Press** button (bottom right). PrintStream selects a press based on the press size and number of cylinders/colors entered on the template. Other variables for press selection include: paper size, press and paper type (web, continuous, cut sheet, flexo…), ink coverage, perfecting, layout, etc.

You have the option to over-ride or manually choose a press, paper size, etc., from the various drop-down menus. Close screen when done and make sure there are green checks next to Press, Number Up, Number Out (represents the number of press size sheets cutting out of the stock size sheet) and Paper Size.

Note Enter your presses (in numerical order) from smallest to largest in terms of press size and number of cylinders/colors in **Master Files Print**.

Select Press - All Options

The **All Options** feature can be selected by double-clicking the **Press** icon and selecting the **All Options** button (bottom/center) or by double-clicking the **Press** icon, clicking the **Select Press** button, then clicking the **All Options** button and then **New Calculation**.

This feature allows you to view all press running options including: press name, stock size, stock grain, pages per form, # out, press sheet size, # up, and quantity/cost.

To select one of the press running options, double-click each cost row under each estimated quantity column and click **OK**.

Option to enter gripper and/or margins (in decimal or fraction) for the Stock Sheet and Press Sheet (bottom of screen). Then click the **New Calculation** button to view the updated layouts.

Select Press - View Layout Feature

The **View Layout** feature can be selected by double-clicking the press icon and selecting the **View Layout** button (bottom/center).
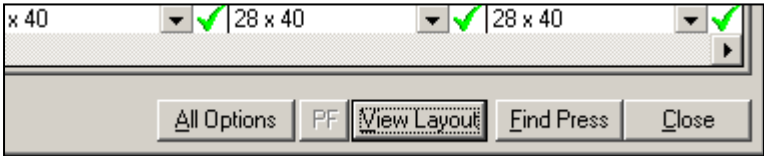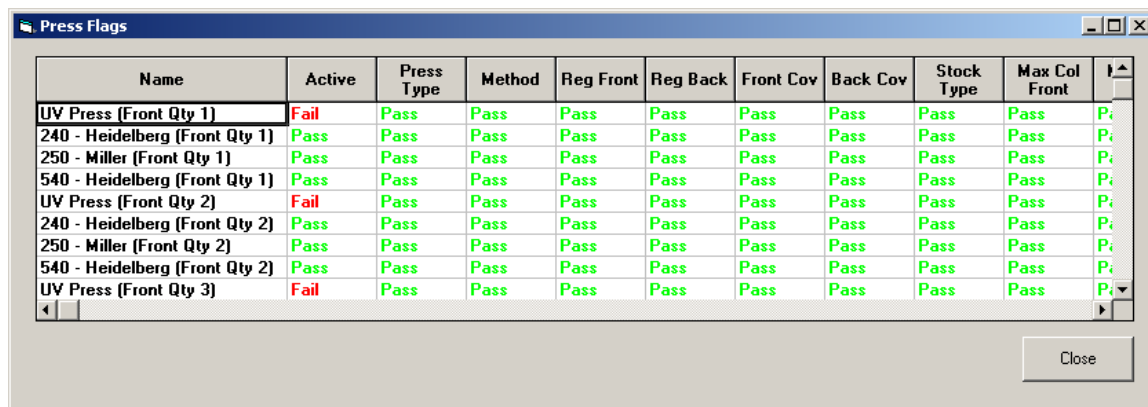
If installed, the Visio program will open and create a layout as per the template specs. Layout can then be re-sized, color bars added, etc., and saved.
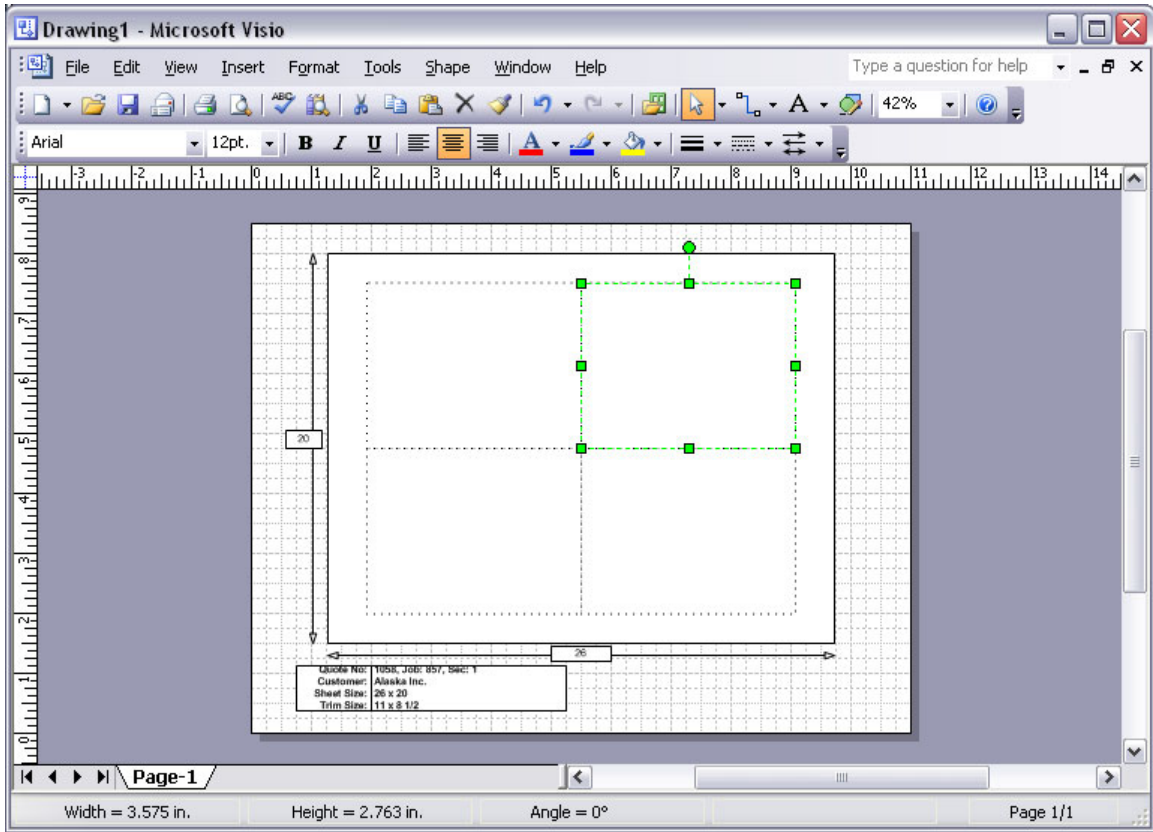
Select Press - Pass or Fail: Press Flags Feature
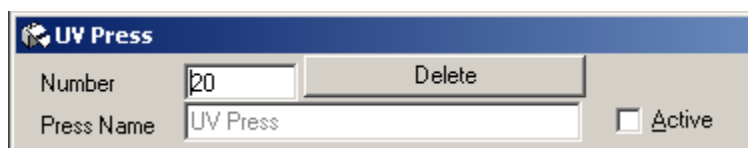
The **Press Flags** feature can be selected by double-clicking the **Press** icon and selecting the **PF** button (bottom/center).

These are the conditions where the press flag will show **Fail**:

Active: The **Active** check box for this press in MF Print is not selected.

(To save calculation time if a press is not active it is not evaluated and will not appear in the press flags list of presses.)

Press Type: Only the types of presses that match the section type are evaluated. If the press does not show up in list, it does not match the section type. If doing "Multi Web" work and the press do not have enough reels to accommodate the job.
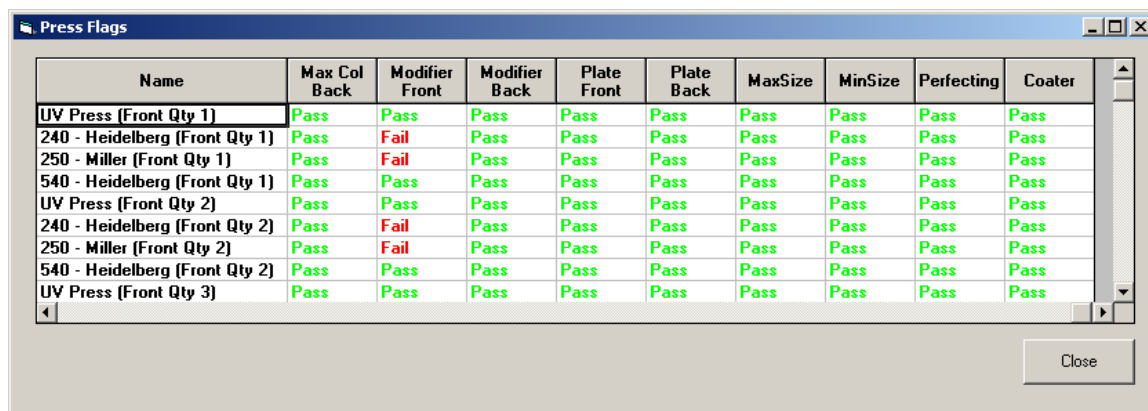
Method: If the section has an ink assigned with the type of "Foil" and the press is not set for Foil.

Reg Front: The inks used on the front require registration and the press is not set for registration.

Reg Back: The inks used on the back require registration and the press is not set for registration.

Front Cov.: The Ink Coverage is too high for the press on the front side.

Back Cov.: The Ink Coverage is too high for the press on the back side.

Stock Type: The paper type has not been checked for this press or the quantity is too high for this paper type on the press.

Max Col Front: Number of ink colors on front exceeds press capability or press quantity (Ink Factor tab).

Max Col Back: Number of ink colors on back exceeds press capability or press quantity (Ink Factor tab).

Modifier Front: No values for an assigned modifier has been set for this press for the front.

Modifier Back: No values for an assigned modifier has been set for this press for the back.

Plate Front: Selected plate type is not set up for this press for the front.

Plate Back: Selected plate type is not set up for this press for the back.

Max Size: Press size sheet too large for press. Roll width too wide for press. If a continuous press, there is not a match for cylinder size.

Min Size: Press sheet size too small for press. If a continuous press, there is not a match for cylinder size.

Perfecting: On a section that is defined for perfecting, one of the following does not match:

1. The paper is not set for perfecting.
2. The press is not set for perfecting.
3. Number of inks have been assigned to the front.
4. Number of inks on front is greater than the available front units.
5. Number of inks on back is greater than the available back units.

Coater: Press was not set up to use a coater unit.

Print Details - View Inventory

To create inventory for specific section

1. Click the **View Inventory** button to link to the inventory.

2. Click **List** to search/select inventory item or **New** to create a new item. To learn more about the **MFG Finished Goods** button, see the Manufactured Finished Goods section in the Estimate Information screen.

Print Details - Dutch Cut Option (Number Out Parent Sheet Size)

When the **Dutch Cut** check box in the Print Details screen of estimating is selected and you select a press in the Select Press screen, it allows the program to cut the press sheet out of the parent sheet going both directions with and without grain to get as many press sheets out of the parent sheet as possible. The example below shows a template for an 8 ½" x 14" letter printing 1up.

When the **Dutch Cut** check box is selected and you select press, you get the following results.

The press sheet cuts 6 out of the parent sheet size which is 4 out one direction and 2 out the other direction. When you clear the **Dutch Cut** check box, you get the following results.

The press sheet only cuts 4 out of the parent sheet size which is only the one direction.

In order for the **Dutch Cut** option to work correctly, you must set the **Grain Direction** to **None** and the **Precut** option set to **Yes**. The press sheet must also be able to cut out of the parent sheet size selected in both directions.

Print Details - Dutch Cut (Press Imposition)

To select a Dutch Cut press imposition

1. Select the **Dutch Cut** check box in the Print Details screen.

2. Click the **All Options** button.

3. Select the **New Calculation** button to view all running options.

4. Scroll to view the option that best fits your need. This example below shows an 8.5 x 14 trim size being printing 6 up Dutch Cut on a 23 x 35 press sheet size. Double-click the price under the estimate quantity to select (price is highlighted in pink). Then click **OK**.

Section Details - View & Edit

To view Section Details, click the **Section Description**.

Section Title - Defaults as the Permanent Template name of the Job number/section number if custom template. Edit Title as needed (20-characters max.).

No. Runs - Indicates how many signature (press forms) are being run. Example, if running a 48-page (booklet) enter **3** Runs to calculate running as three separate 16-page forms.

Bound as - This field tells the system how many sections this product will bind as when bindery processes like perfect binding or saddle stitching is used on the estimate. The default for all products that do not have this type of binding is 1. Most products that perfect bind and saddle stitch will have a default of 1 also. The exception would be for products like a 32-page 5 ½" x 8 ½" signature. This may print as one 32-page signature but may bind as two 16-page signatures if the stock is so heavy that a 32-page signature would not fold and bind properly. In this case the number of sections to bind as would be entered as 2.

Trim Size - Defaults to the template size. Edit Trim Size as needed.

Section Qty - Defaults to the Estimate Quantities. Edit Section Quantities as needed.

Unit of Measure & Description - These fields are not used.

View - To preview section template. Edit/change specifications if different from the original template in the section details screen or double-click the press or paper icons.

| Note | The original template should be setup as (1) 16-page signature and later **No. Runs** is entered here as **3** in the section details screen. |

Section Details - Copy Section, Add Rerun, Split & Rerun

Right-click the Pre-Press bar (the bar to the right of the **Section Details** box).
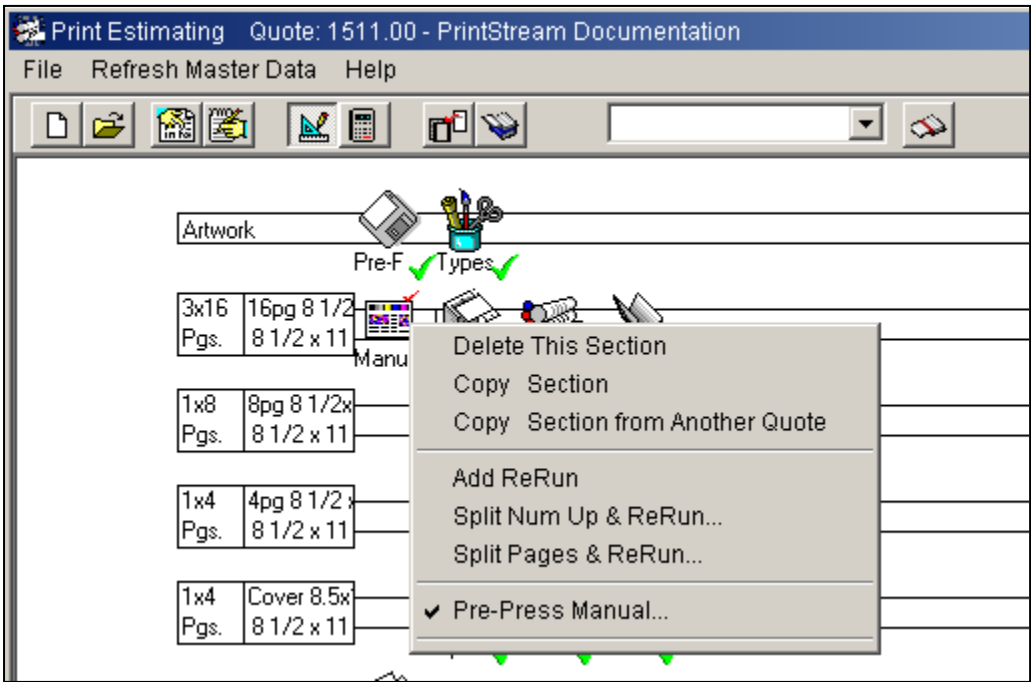
Copy a Section - Creates a copy of the selected section and adds it to the bottom. The copied section is titled **NEW SECTION**.

Copy Section from Another Quote - Enter a Quote or Job number, load component grid, and select component to be copied.
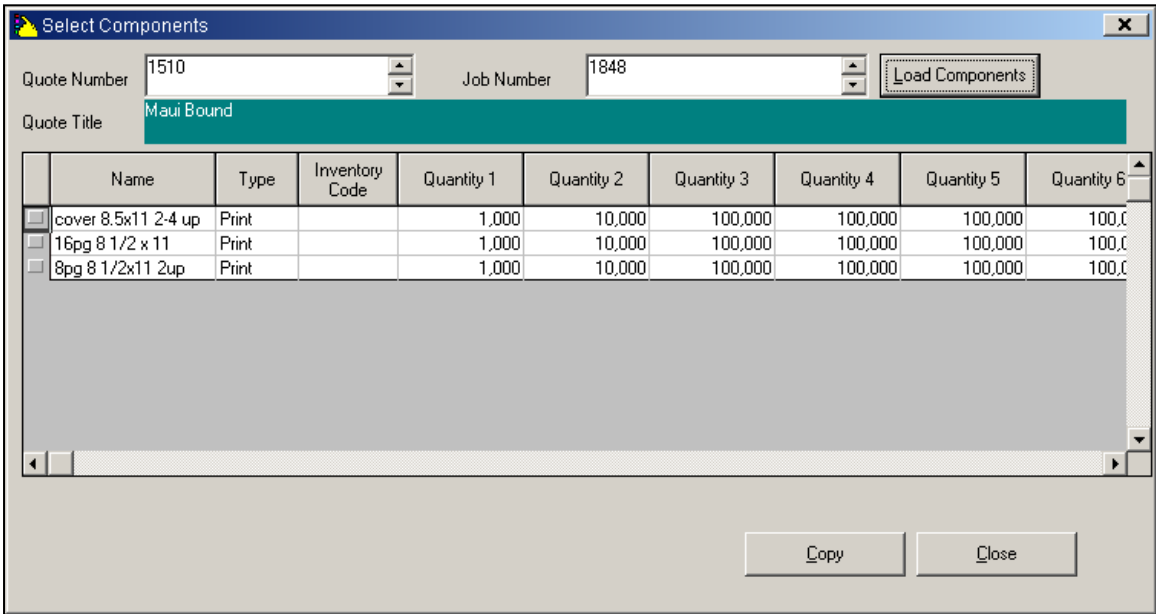
Add Rerun - Use this option if running a job on 2-*different* presses, using the *same* sheet size.

Example: Need to run a 5-color job on 2-presses.

- 1st press runs 4-colors (E.g., Template setup as 4/0).

- 2nd press runs a varnish or the 5th color – after selecting this feature, double-click the 2nd press icon to enter specs & to select the 2nd press.

Split Number Up & Rerun: Use this option if running a job on 2-different presses, using a different sheet size on each press.

Example: need to run a 5-color job on 2-presses.

- 1st 40" press = runs 4-colors (E.g., Template setup as 4/0 – 4up).

    Add Cutting process - need to cut press sheet down to 2-up to run on the smaller 2nd press.

- 2nd 29" press = runs a varnish or the 5th color – after selecting this feature, double-click the 2nd press icon to enter specs & to select the 2nd press.

This option will prompt user to enter:

Split Number Up

Section is currently 2 up.

Split into [   ] sections

of [   ] UP.

New section size: [   ]

Cancel   Save

Split Pages & Rerun: Use this option if running a section where you are splitting the sheet (web) into multiple sheets (streams) and rerunning.

This option will prompt user to enter:

Split Number Up

Section is currently 8 pages, 2 up.

Split into [   ] streams

of [   ] page(s).

New section size: [   ]

Cancel   Save

Section Finishing – Review, Enter, or Delete Details

To review or enter information, double-click the **Section Finishing** icon. Review and enter details as needed and click **Save**. Once information is entered, the red X below the **Section Finishing** icon changes to a green check.

To delete, right-click the **Section Finishing** icon and select **Delete Process**.

To add a section finishing process, select the process from the **Section Finishing** tab in the Templates screen. Click and drag the process to the section line.

Note   Section Finishing processes are set up in the **Master Files Print** Module.

Binding and Bind Finishing – Review, Enter or Delete Details

To review or enter information, double-click the **Binding** icon (i.e., Saddle Stitch). Review or enter the number of signatures, add or return modifiers, and click **Save**.

To delete, right-click the **Binding** icon and select **Delete Process**.

To add a Binding or Bind Finishing process, select the process from the **Binding** or **Bind Finishing** tab in the Templates screen and double-click the process; it will be added to the Binding line.

Note   Once information is entered and saved, the red X below the **Binding** icon changes to a green check.

Carton Packing – Review, Enter, or Delete Details

To review or enter information, double-click the **Carton Packing** icon. Select a carton number and PrintStream will calculate and enter the number of boxes required for each quantity. Click **Save**.

Carton Pack						
	1,000	5,000	10,000	15,000	25,000	50,000
Qty. To Pack:	1,000	5,000	10,000	15,000	25,000	50,000
Num. Boxes:	18	90	179	268	447	893

Lbs./Hour:

Product Number	Carton Number	Length	Width	Height	Wall	Books /Carton	Full Carton Weight (lbs)
100	100	11 1/4	8 3/4	12	S	56	60.10
200	200	17 1/4	11 1/4	12	S	113	121.28
300	300	12 1/4	9 1/4	10	S	47	50.44
400	400	18 1/4	12 1/4	10	S	93	99.81
Skid	Skid	48	40	48	S	3,681	3,950.61

Cancel   Save

Once information is entered and saved, the red X below the **Carton** icon changes to a green check.

To delete, right-click the **Carton Packing** icon and select **Delete Process**.

To add a Carton Packing or other Bind Finishing process, select the process from the **Bind Finishing** tab in the Templates screen. Double-click the process and it will be added to the Binding line.

Note   Carton Packing specs are set up in the **Master Files Print** Module.

Create Supplied Section

To create a Supplied Section, click the **Create Supplied Section** icon ("paper with red arrow").

To add an inventory item to this section, click **List** to search and select inventory item or **New** to a create new inventory item.

The selected item displays. Click **Save**.

New Supplied Section (Section 5) appears on quote screen.

Double-click the **Section Details** box and add **Date on Hand** and click **Save**.

Manufactured Finished Goods – Single or Multiple Items

Note This feature requires special setups in Production and Accounting. Please contact EFI PrintStream Support for assistance prior to using this feature.

To associate the job with finished goods inventory, open the Estimate Information screen by clicking the **Estimate Information** icon ("hand holding sheet of paper").
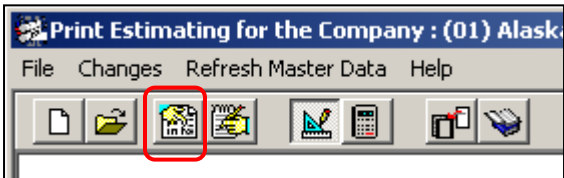
To create a single finished goods inventory for this job, click **List** to search and select inventory item or **New** to create new inventory item.

The item will be added to the quote/job. Click **Save**.
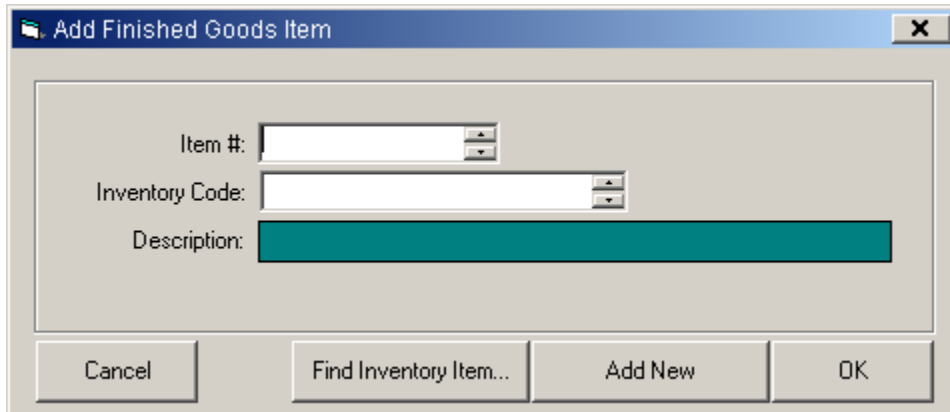
To create multiple finished goods inventory for this job, click the **Mfg Finished Goods** button.

The Multiple Manufactured Item screen opens. To add inventory items, click the **Add** button.

Click the **Find Inventory Item…** button to search and select an existing item, or the **Add New** button to create a new item. Click **OK**. Repeat the steps to add multiple items and click **Save** when done.

The inventory items will appear listed as shown below.

Review Mode

Calculate Estimate and Review Margins Screen

Select the **Review Mode** icon ("calculator" 6th icon from the left) to calculate the estimate.
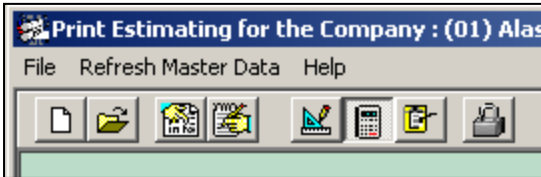
Once the calculation is complete, the Margins screen opens. You have the option to change markup % on paper, materials, buyouts, labor, variation, view price per 1,000, etc., and **Save**.

Margins Screen - Convert to Component Pricing

While the Margins screen is open, select the **Convert to Component Pricing** button (lower right) to view component pricing. You have the option to change markup % on paper, materials, buyouts, labor, variation, view price per 1,000, etc., and click **Save**.

Section Pricing

Tabs: 1,000 | 2,000 | 3,000

Component	Quantity	Cost	Markup % (Avg.)	Sell	Variation %	Quoted Rate/1000	Lock Rate	Quoted Price	Lock QP
Art	1	$720.00	34.40	$967.68	0.0000			$967.68	
Cover 8.5x11 2up	1,000	$1,552.13	38.87	$2,155.43	0.0000	$2,155.43	☐	$2,155.43	☐
16pg 8 1/2 x 11	1,000	$3,152.28	39.90	$4,410.09	0.0000	$4,410.09	☐	$4,410.09	☐
Bindery	1	$169.50	39.64	$236.69	0.0000			$236.69	
Total		**$5,593.91**	**38.90**	**$7,769.89**	**0.0000**			**$7,769.89**	

Item		Cost $	Markup (%)	Sell $
Prepress Labor	💵	720.0000	20.0000	$864.00
Press Labor	💵	00.0000	25.0000	$0.00
Post Press Labor	💵	00.0000	25.0000	$0.00
Prepress Materials	💵	00.0000	15.0000	$0.00
Paper	💵	00.0000	30.0000	$0.00
Ink	💵	00.0000	20.0000	$0.00
Bind/Mail/FF Materials	💵	00.0000	20.0000	$0.00
Outsourcing	💵	00.0000	20.0000	$0.00
	💵	00.0000	0.0000	$0.00
Flat Charges	💵	00.0000	0.0000	$0.00
Commission	💵		12.0000	$103.68

Quote Letter Description:
Art

Standard (Cost/Sell):	$720.00	$967.68
Variation (%/$)	0.0000	$0.00
Quoted Price		$967.68
Unit (Cost/Sell):	$0.7200	$0.9677
Value Added (%/$):	-0.46	-$444.23

Convert to Job Pricing

Per 1000 pricing ☐

Cancel | Save

Review Paper

To review paper or change the size, select the **Review Paper** icon ("curled paper"). Enter changes and click **Close**.
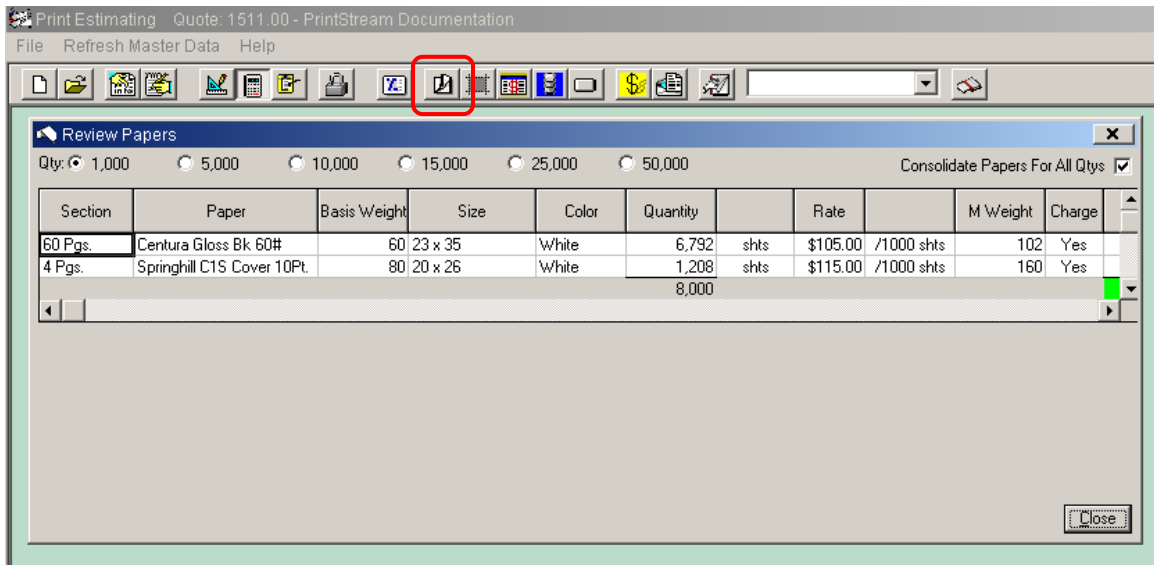
Review Pre-Press

To review Pre-Press, select the **Review Pre-Press** icon ("gray box") and click **Close**.
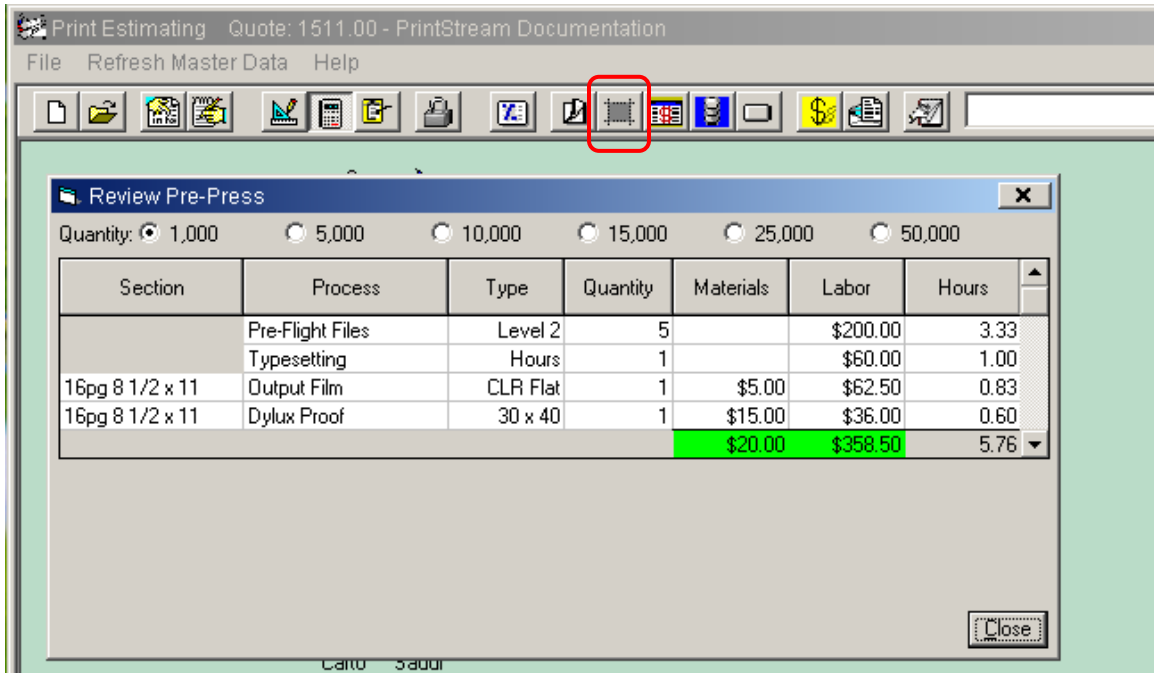
Review Print Hours

To review press, run size, quantity, make-ready hours, run hours, etc., select the **Review Press** icon ("red $ sign") and click **Close**.
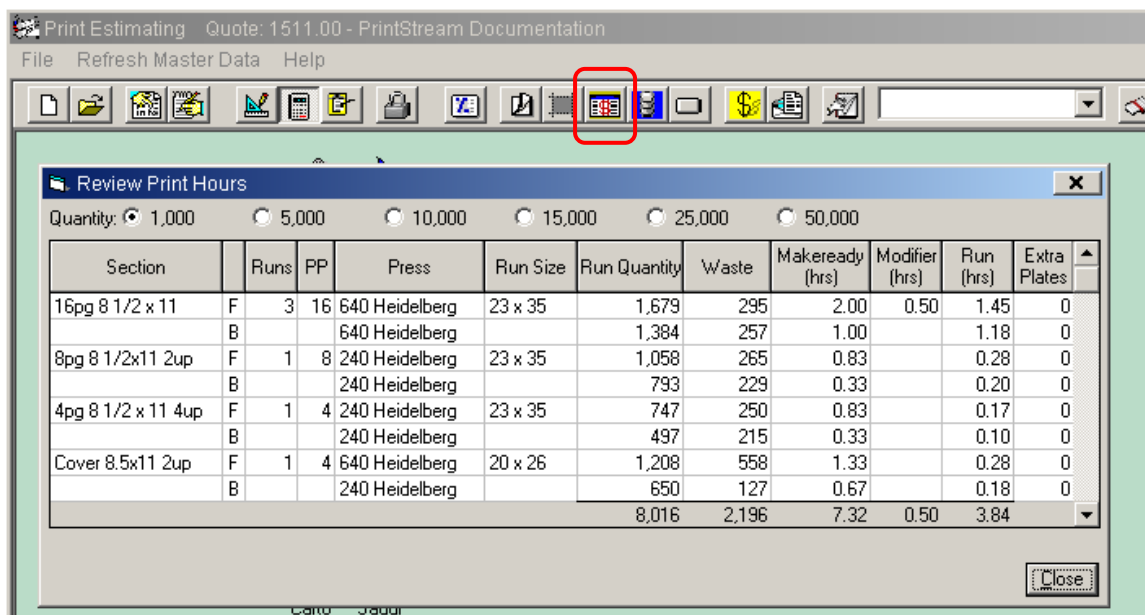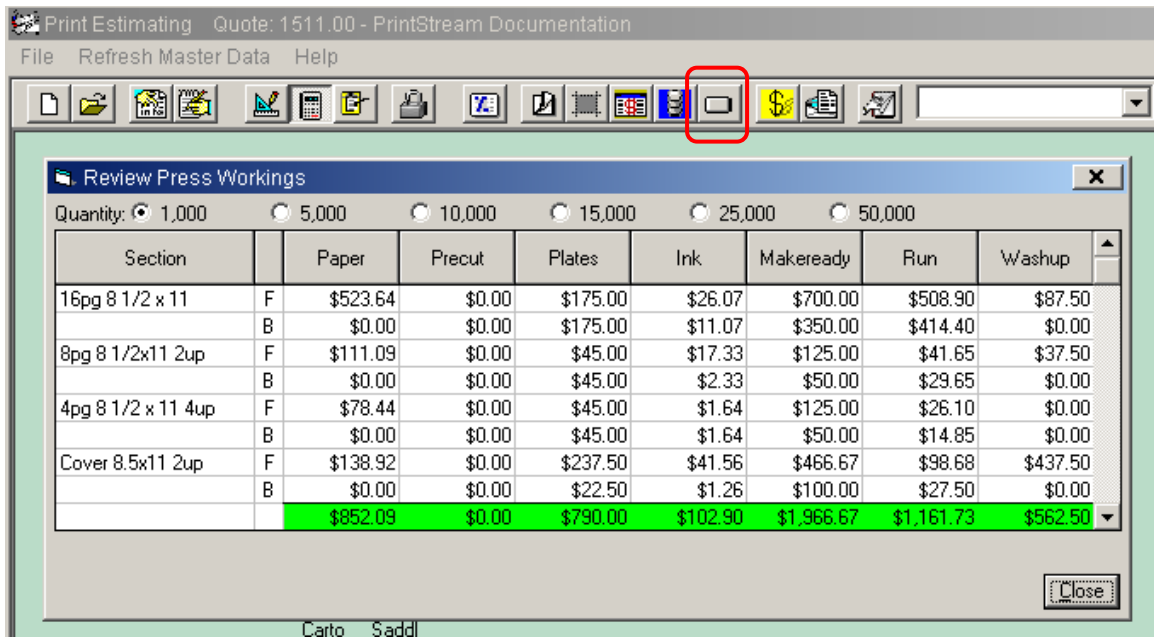
Review Finishing

To review finishing processes, quantity, labor hours, costs, etc., select the **Review Finishing** icon ("blue and gray unidentifiable shape") and click **Close**.
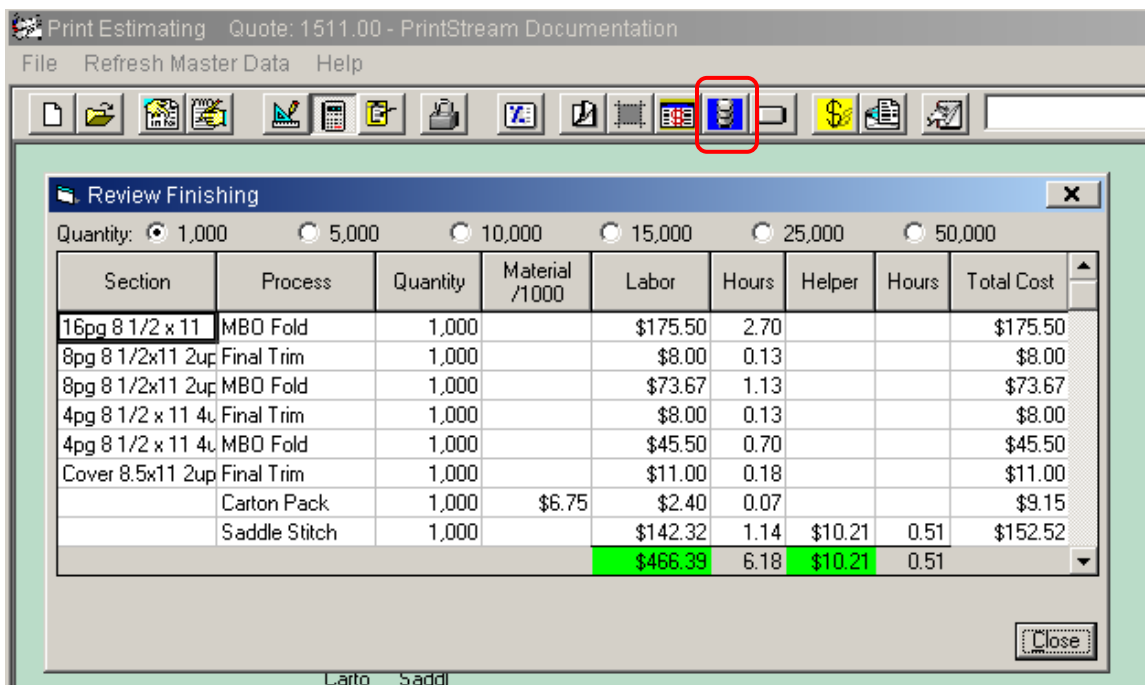
Review Press Workings

To review press workings, sections, paper, plates, ink, make-ready, run and wash-up costs, select the **Review Workings** icon ("3-D gray button") and click **Close**.

Section		Paper	Precut	Plates	Ink	Makeready	Run	Washup
16pg 8 1/2 x 11	F	$523.64	$0.00	$175.00	$26.07	$700.00	$508.90	$87.50
	B	$0.00	$0.00	$175.00	$11.07	$350.00	$414.40	$0.00
8pg 8 1/2x11 2up	F	$111.09	$0.00	$45.00	$17.33	$125.00	$41.65	$37.50
	B	$0.00	$0.00	$45.00	$2.33	$50.00	$29.65	$0.00
4pg 8 1/2 x 11 4up	F	$78.44	$0.00	$45.00	$1.64	$125.00	$26.10	$0.00
	B	$0.00	$0.00	$45.00	$1.64	$50.00	$14.85	$0.00
Cover 8.5x11 2up	F	$138.92	$0.00	$237.50	$41.56	$466.67	$98.68	$437.50
	B	$0.00	$0.00	$22.50	$1.26	$100.00	$27.50	$0.00
		$852.09	$0.00	$790.00	$102.90	$1,966.67	$1,161.73	$562.50

Print Override Screen

To view the print override screen

1. Double-click the **Press** icon.

2. Click the **Waste** button to view the Press Waste.

3. Click the **Run Speed** button to view the Press Run Speed.

View Layout - Refer to **Select a Press – View Layout Features** for details.

If installed, the Visio program opens and creates a layout as per the template specs. Layout can then be re-sized, color bars added, etc., and saved.
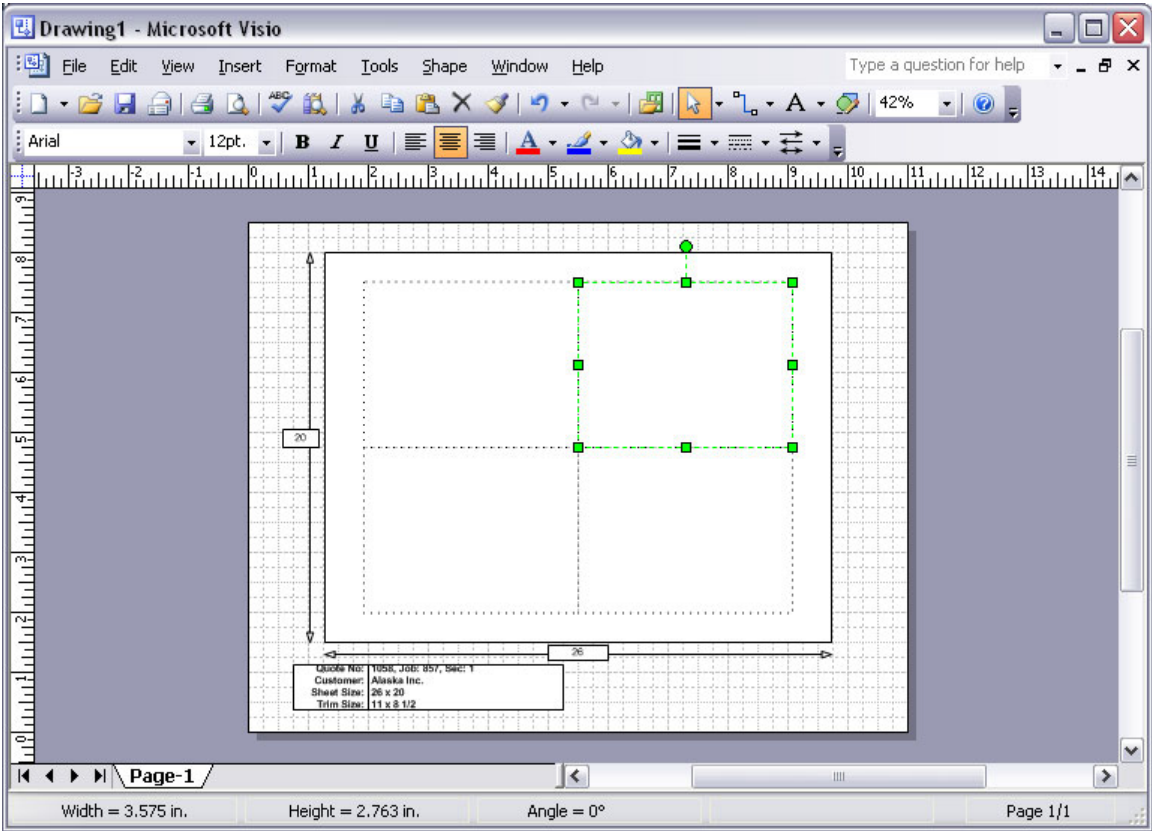
Recalc Section - This feature recalculates the section.

Quote Breakdown

Select the **Quote Breakdown** icon ("$" with yellow background) to review costing details, etc.
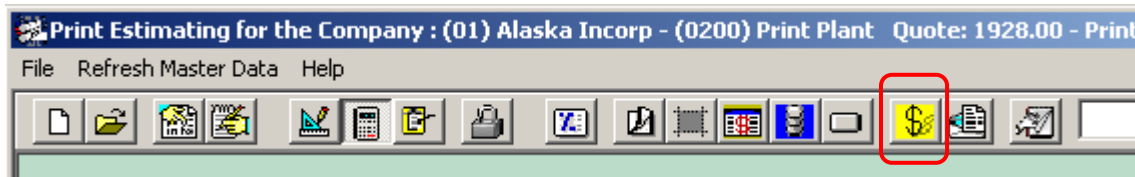
Choose options to display information on Quote Breakdown and select the **Print** button.
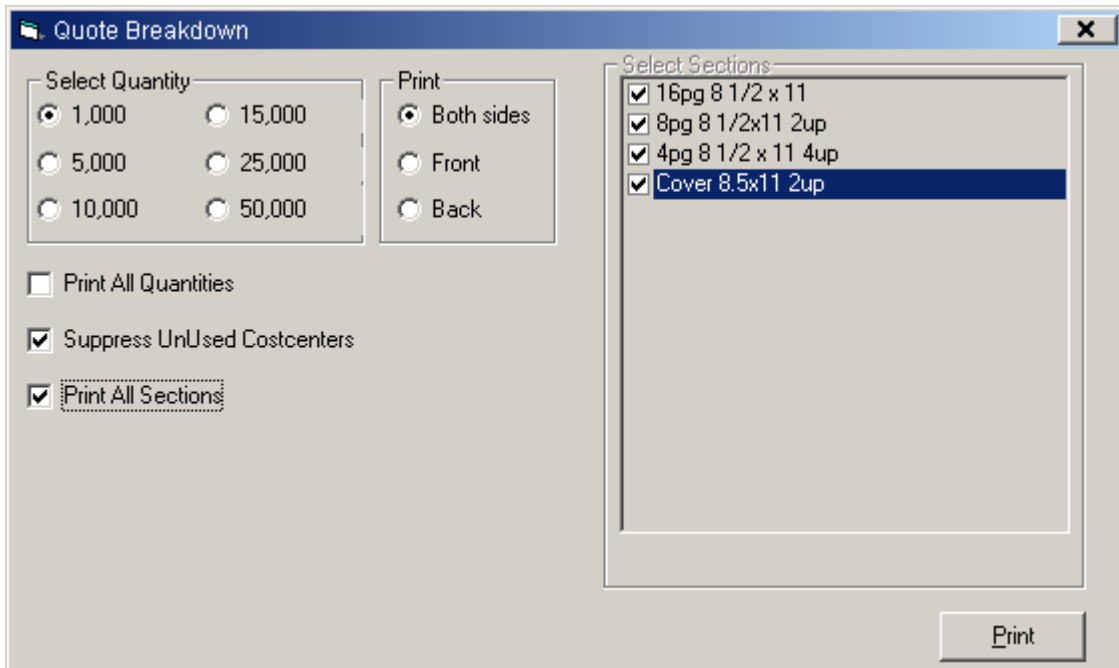
You have the option to Export to: MSWord, Excel, Crystal Reports, etc., (envelope w/red arrow icon).

Note   Report 3 (Estimating Recap Report) must be setup and Print Activity Codes must be linked in **Master Files Reports** for the Print Quote Breakdown to properly calculate pricing.

Quote Breakdown – Details

Variation %: If you change/over-ride the quoted price ($ or %), = % difference between suggested quoted price and marked-up quoted price.

Value Added %: Total marked-up price – (minus) material costs & buyout costs (%).

Value Added $: Total marked-up price – (minus) material costs & buyout costs ($).

Approval of Mark up: If you change/over-ride the quoted price ($ or %), marked-up $ difference between sell & cost.

Approval of Variation: If you change/over-ride the quoted price ($ or %), $ variation between sell & cost.

Quote: 1928   Quote Breakdown

Printed: 8/19/2008   2:06:55P

Customer:	Streamline Solutions 100 Smith Ranch Road Suite 124 San Rafael,CA 94903	Account No.: STREAM Quote Date: 6/16/2008
Contact:	Sam Fortune	Finished: 8 1/2 x 11
Phone/Fax:	415 462 7268/415 499 7677	Quantity: 1,000
Job Title:	Printstream Documentation Optional Description for Print Estimating/Order Entry	

Estimator: Susan Dabbs
SalesRep: Chris Kinkaidy
CSR: Monika Rynkiewicz

Estimator's Notes:

Material/Purchase	$Cost	$Markup	$Sell
Paper	212.20	42.44	254.64
Prepress Mat'l			
Plates	90.00	22.50	112.50
Ink	71.34	17.83	89.17
Press Mat'l			
Bind Mat'l			
Pack/Ship Mat'l	1.50	0.38	1.88
Buyouts			
Freight			
Sub Total	375.04	83.15	458.19

Cost Summary

Estimated Cost	2,653.53	Approval of Markup
Mat. Markup %	22.17%	$424.92
Lab. Markup %	15.00%	Approval of Variation
Marked Up Cost	3,078.45	$0.00
Variation %	0.00%	Approval of Quoted Price
Value Added %	87.82%	$3,078.45
Value Added	2,703.41	
Unit Price	3.08	

Labor Center	Hours	$Cost	$Sell
Art/Comp	9.22	947.06	1,089.14
Platemaking	1.50	90.00	103.50
240 Heid'lbrg	2.41	421.87	485.15
640 Heid'lbrg	1.81	543.44	624.96
Cutter	0.35	35.00	40.25
Folder	0.63	47.50	54.63
Stitcher	0.76	190.63	219.22
Packing	0.12	2.98	3.43
Sub Total	16.80	2,278.50	2,620.28

Cost Breakout

	$ Cost	$ Markup	$ Sell
Comp/Art	940.83	141.12	1,081.95
Prep	6.25	0.94	7.19
Print/Bind	1,706.45	282.86	1,989.31
Inventory	0.00	0.00	0.00
Total	2,653.53	424.92	3,078.45

Component Breakdown

	$ Cost	Gain %	$ Quoted	$ Per M
Cover 4up 8.5x11	932.24	16.56%	1,086.60	1,086.60
8 pg 8.5 x 11-2upSht	585.36	17.09%	685.38	685.38

Quote Letter/Proposal

Select the **Quote Letter** icon ("envelope & paper").
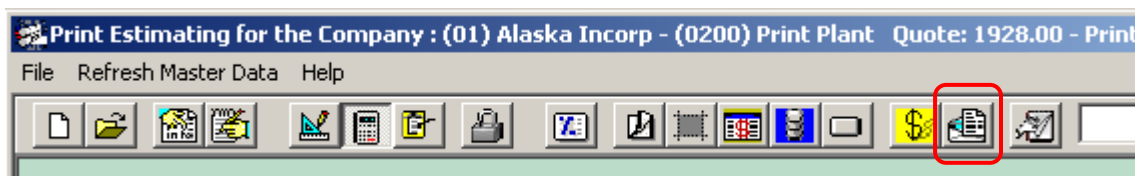
PrintStream opens Microsoft Word, drops in your company logo, address, and all of your estimated processes, pricing etc., into a proposal template.

Note   Editing or changes in MS Word will not save to the original estimate. They will be saved for the current **Quote Letter** only.

Open or Copy an Existing Quote

To Open or Copy an existing quote, click the **Print Estimating Order Entry** module. Select the **Open Existing Estimate** icon ("yellow folder").
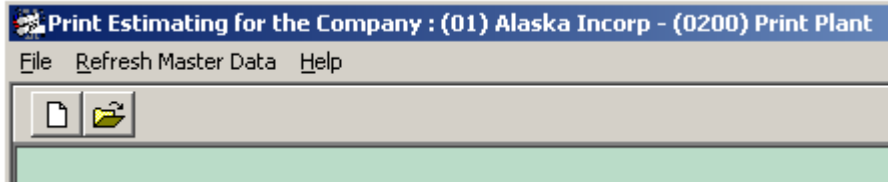
Select the **Recent** tab for a list of recent quotes; OR select the **Existing** tab and choose from the various search options (quote #, job #, customer, date…) and select **Find**. Quotes/Jobs will appear at the bottom of the screen.

To open, double-click the quote number.
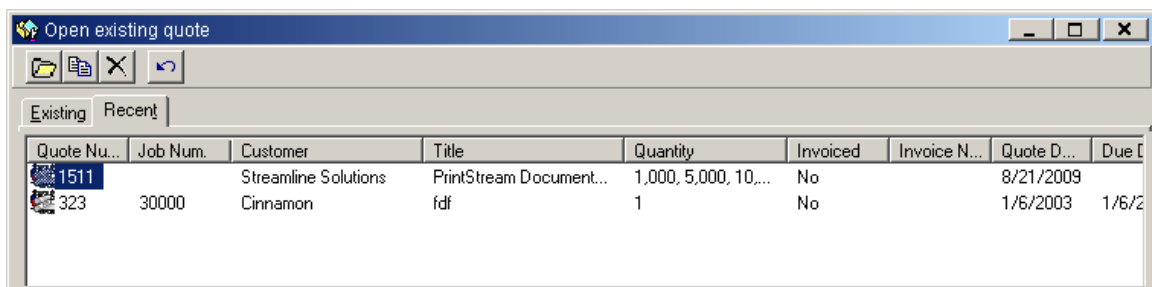
Or right-click the quote number to view Job description details.
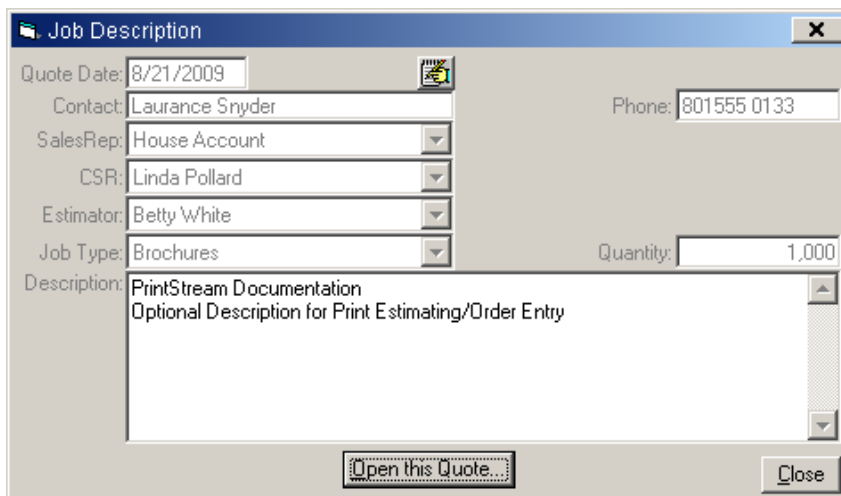
The Copy a quote/job feature allows you to copy a previous quote/job and turn the copied quote/job directly into a new job. This includes any notes or scripts that were on the previous job.

To Copy, click the Quote Number and select the **Copy Quote** icon ("two sheets of paper" 2nd icon from the left). Option to change quantities, Copy to: the same customer, a new customer, Add a customer, etc. The system will copy the estimate/job and place it directly into the **Recent** tab screen.

If copying to create a job, the **Special Job** box will appear in red. This is used to setup a recurring job for scheduling.
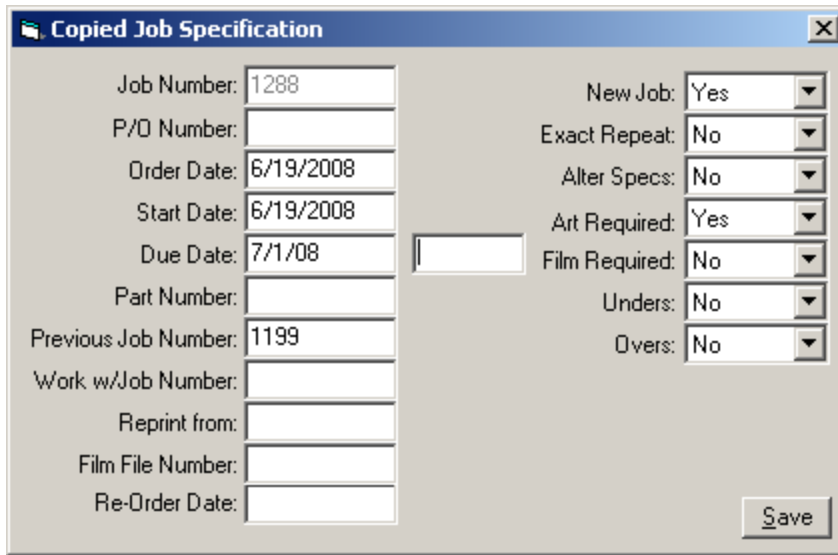
Choose a desired specification for the new job and click **Save**.

When you click **Save**, both the copied estimate and new job will display in the Recent quotes screen. The new job can then be opened (by double-clicking) and a ticket can be printed if desired.

Note   **Retain Speeds** option - If you select the **Retain Speeds** check box on the copied estimate when you open the copied estimate and calculate it and answer **Yes** to the question about **holding overrides**. The estimate will have the same run speeds as the original quote even if the copied quote is for different quantities. If you answer **No** to **holding overrides**, the estimate will recalculate using the default standards in estimating for the quantities selected on the copied estimate. If you copy a quote that has **Buyout** processes, you will get a warning message during copying that you need to check the buyout values on the copied estimate to confirm that they are correct.

If you copy a quote that uses a print template and/or processes you should click the **Select a Press** button on each copied template AND open each process (Art, Section Finishing, etc.) then **Save**. This will guarantee the new prices and standards when quote quantities change.

Order Entry

Credit Information & Job Specifications

Once the estimate has been approved, select the **Open Existing Estimate** icon ("yellow folder). Locate and open the estimate and select the **Order Entry** icon ("black & yellow clipboard").

Review credit information and select quantity for job and **Save**. System warning will be displayed (w/ red background) if a customer has 100 or more days of unpaid invoices.

Enter a **Start Date** and a **Due Date**. Then answer all mandatory questions along the right side of the screen using the drop-down menu (New Job - Overs). Enter (optional) job information or preview Order Entry notes (O.E. Notes) and click **Save**.

The Order Entry (O.E.) Notes screen is populated from **Master Files Customer** and appears in every job for the customer.

Reserve Paper

Paper Reservations are activated by selecting the **Reserve Paper** button (lower left corner) of the Order Entry - Job Specifications screen.

The Paper Reservation screen can also be activated by double-clicking the **Job S** (yellow notepad) icon located on the Order Entry screen.

Paper/Material Reservation Details

The top portion of the screen displays the paper information for each printed section on the estimate. This information includes the paper description, size, color, estimated paper quantity, inventory code, (if paper is in inventory), inventory paper size, and quantity to reserve. Each line item is color-coded.

		Reservation							Sheeting	
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Requir		Qty Require		Order	Qty Reserved	Inv.
Cover 4up 8.5x11	Springhill 12PT C1S Cover	28 x 40	28 x 40	White	4,559 shts	1,964 lbs.		☐		
	Springhill 12PT C1S Cover		28 x 40	White					4,559	554
8 pg 8.5 x 11-2up!	Book Makers 60# Opq She	25 x 38	25 x 38	White	8,453 shts	1,015 lbs.		☐		
	Book Makers 60# Opq She		25 x 38	White					8,453	204

- If the estimated paper is not in inventory, the paper line will appear with a white background.

- If the estimated paper is in inventory, the paper line will appear with a **green** background.

- If the paper has been reserved previously, the line will have a **tan** background.

Note Colors can be changed from the default setting by right-clicking the colored squares (located in the lower left corner of the screen).

Color Legend
- ☐ - Inventory Paper Doesn't Exist
- ☐ - Inventory Paper Exists
- ☐ - Inventory Paper Reserved
- ☐ - Inventory Non-Paper
- ☐ - Inventory Non-Paper Reserved
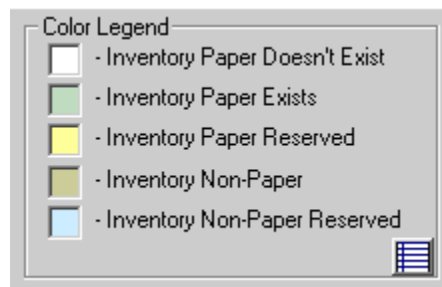
Section

When you click a paper for a section that is in inventory, sections with green background, you will see the following information listed at the bottom of the screen: inventory paper item number, inventory paper code, paper description, paper size, and quantity available in inventory.

For each inventoried paper you will see the quantity available, you can reserve the paper even if you do not have enough paper in inventory. The reservation will go negative and the item will show up on the **Inventory Reorder Report** so that it can be ordered.

To reserve paper on the sections that are inventoried, check that the **Qty Reserved** listed is the quantity that you want to actually reserve. If you want to change the quantity to reserve, click the column **Qty Reserved** and change the quantity. When you are ready to reserve the paper, click the **Reserve** button and you will see the paper line for that section turn to a **tan** color. This paper has been reserved.

Paper items that are not in inventory, and do not have a green background, will either need to be purchased for the job only or a new inventory item will need to be created for the paper before you can reserve it. See options below for creating new paper inventory items.

Paper Substitution Option

If the selected paper is in inventory and you choose to reserve a different paper than the one that matches the estimated paper, you can search for the paper by clicking the **Binocular** icon. Use the filters in the Search Inventory screen to locate the desired paper and click the **Select** button. The new paper information displays in the lower left corner.

Click the **Select** button and the new paper will be displayed with a **green** background in the Reservation area.

Click the **Reserve** button and the new paper will be reserved with a **tan** background.

In order to substitute, the paper must be of the same type. Cut sheet papers can only be substituted for other cut sheet papers and web papers can only be substituted for other web papers. You can substitute paper on a section that is not inventoried. The paper must be of a similar size as the estimated paper on the section. If you wish to put the old paper inventory item back on the section you can search for the old paper inventory item and select it. It will replace the new paper that you selected. Click the **Reserve** button to reserve the substituted paper you just created.

Split Paper Reservations

The reservation for paper on one section can be split onto multiple inventoried papers. To split the paper reservation, click the section to split, right-click, and select **Add New Line**. A blank, new line appears underneath the original paper.

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Requir		Qty Require		Order	Qty Reserved	Inv.
Cover 4up 8.5x11	Springhill 12PT C1S Cover	28 x 40	28 x 40	White	4,559	shts	1,964	lbs.	☐		
	Springhill 10PT C1S Cover		28 x 40	White						4,559	391
8 pg 8.5 x 11-2up!	Book Makers 60# Opq She	25 x 38	25 x 38	White	8,453	shts	1,015	lbs.	☐		
	Book Makers 60# Opq She		25 x 38	White							204

Paper/Material Reservation For Job 1289 — Reservation / Sheeting

Select the new blank line and click the **Binocular** icon and find the paper to split the reservation and click the **Select** button. The new paper information will now display in the lower left corner. Click the **Select** button and the new paper will be displayed with a green background in the Reservation area. Type the quantity to be reserved for the spilt papers in the **Qty Reserved** column. Click the **Reserve** button and the new split papers will be reserved with a tan background.

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Requir		Qty Require		Order	Qty Reserved	Inv.
Cover 4up 8.5x11	Springhill 12PT C1S Cover	28 x 40	28 x 40	White	4,559	shts	1,964	lbs.	☐		
	Springhill 10PT C1S Cover		28 x 40	White						4,559	391
8 pg 8.5 x 11-2up!	Book Makers 60# Opq She	25 x 38	25 x 38	White	8,453	shts	1,015	lbs.	☐		
	Book Makers 60# Opq She		25 x 38	White						4,300	204
	Book Makers 50# Opq She		25 x 38	White						4,300	198

Paper/Material Reservation For Job 1289 — Reservation / Sheeting

If you want to remove the additional reservation, right-click the new line and select **Undo Reservation**. The reservation will be removed on the new line. Click the **Clear Inventory** button and the inventory will be removed from the line. Undo the reservation, adjust the **Qty Reserved** and reserve again.

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Requir		Qty Require		Order	Qty Reserved	Inv.
Cover 4up 8.5x11	Springhill 12PT C1S Cover	28 x 40	28 x 40	White	4,559	shts	1,964	lbs.	☐		
	Springhill 10PT C1S Cover		28 x 40	White						4,559	391
8 pg 8.5 x 11-2up!	Book Makers 60# Opq She	25 x 38	25 x 38	White	8,453	shts	1,015	lbs.	☐		
	Book Makers 60# Opq She		25 x 38	White						8,453	204

Paper/Material Reservation For Job 1289 — Reservation / Sheeting

Create New Paper Inventory Item(s) Option

New Inventory can be created for paper on sections that are not currently inventoried.

To create a new paper inventory item for a section, click the section, and then click the **Blank Sheet** icon.

You will see a screen with information needed to create the new inventory item.

Type part of the paper name in the **Paper** field for the item that you are creating for inventory and use the up and down arrows to locate the correct item. When you locate the item make sure that the color and size listed match the color and size that is on the section you are creating for inventory. Put in a user defined inventory code (if desired), select the activity code for paper, and press the **Save** button.

The new paper inventory item is displayed in the lower left corner. Click the **Select** button to add it to the reservation and then click the **Reserve** button. The new paper is now reserved.

Purchase Paper - Special Order Paper

If the paper that has been selected for the estimate does not exist in Inventory then the paper line will appear white indicating that the Inventory Paper Doesn't Exist.

To special order this paper for the job select the **Order** box and this paper will be set to be ordered for this job in the Purchasing modules.

This paper can also be purchased directly from the screen by selecting the **Create PO** box. Then select the **Create PO** button at the bottom of the screen.

The Purchase Order will display with the Date, Vendor, and Ship To information populated. Select **Edit Line** to make any edits to the PO then save and close.

The PO information is added in the **Purchasing** tab.

Paper Specifications

To review paper specs or to change paper color, grain direction, etc., double-click the **Paper** icon and **Save**.
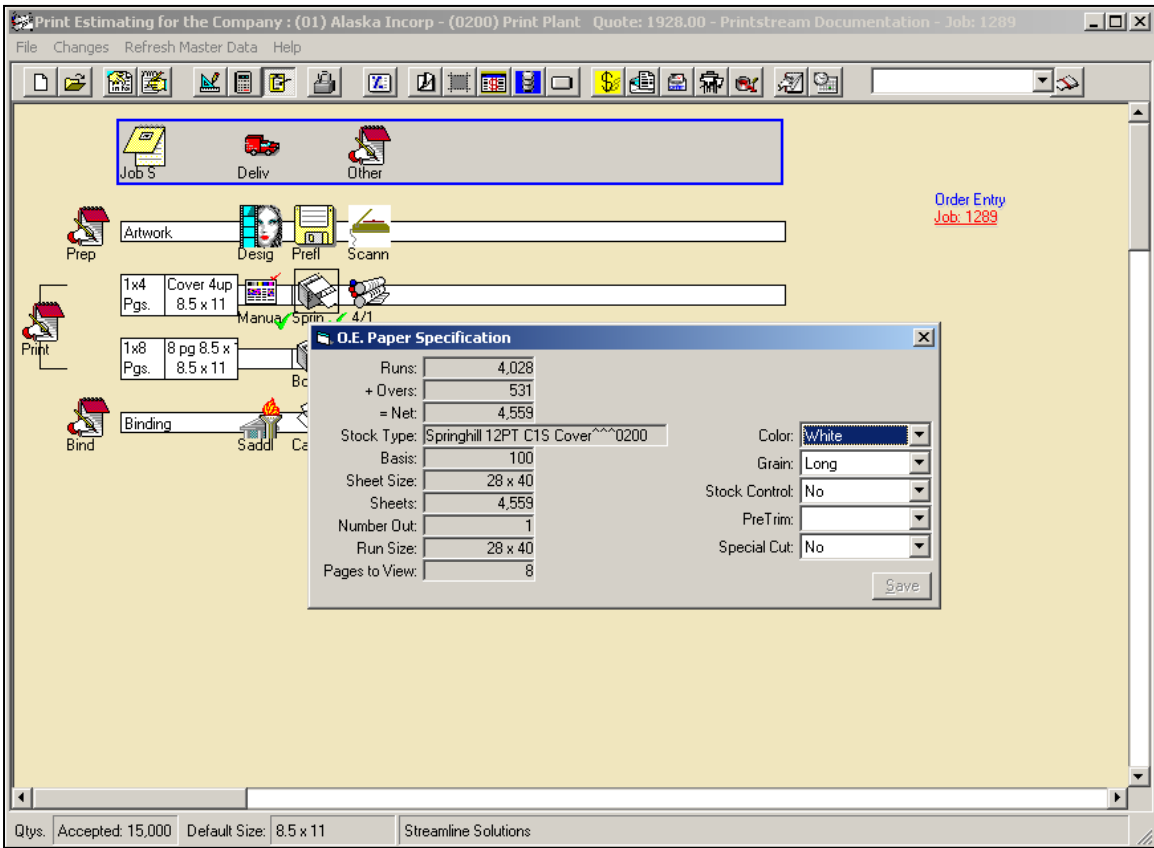
Note　To change Stock Type, select the **Edit Mode** icon ("pencil & triangle") and double-click the **Paper** icon. When finished select the **Review Mode** icon ("calculator") to re-calculate the estimate with the current changes.

Print Specifications

To review print specifications or to enter ink color(s), ink %, etc., double-click the **Print** icon. Enter the actual ink(s) for side 1 and/or side 2. Once information is entered the red **X** next to **Actual Ink** changes to a green check. Continue and click **Save**.

View Inventory: Refer to "Print Details – View Inventory" for details.

View Layout: Refer to "Select a Press – View Layout Features" for details.

Notes - Prep, Print, Bind and Other

To enter production notes, double-click the **Prep**, **Print**, **Bind**, or **Other** notes icon(s) ("red notepad") type note and **Save**. These notes will print on the Work Order.
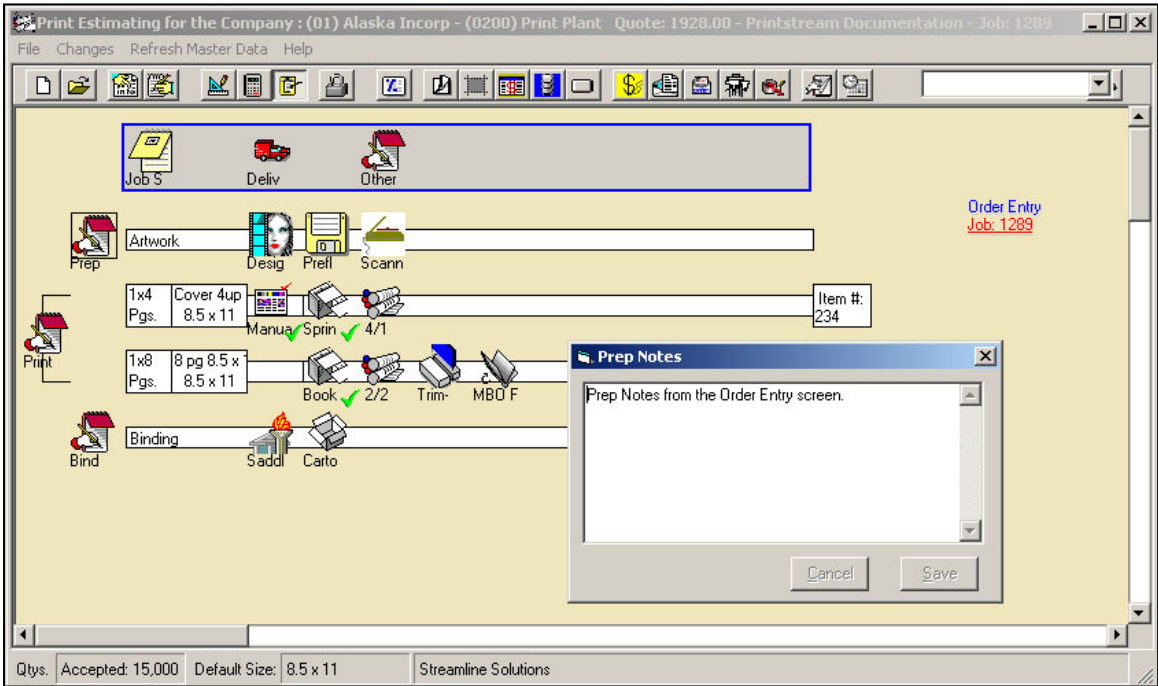
Shipping

The Shipping screen can be accessed by double-clicking the **Delivery** (red truck) icon located on the Order Entry screen.

The Job Shipment screen is displayed. Refer to **Shipping** module documentation for details.

Order Acknowledgment

To review or print an order acknowledgment, select the **Order Acknowledgment** icon ("smaller envelope and insert"). PrintStream will open Microsoft Word, drop in your company logo, address and all of your estimated processes, pricing etc., into the **Order Acknowledgment** template.

		Order Acknowledgment

Attention	*Sam Fortune* Streamline Solutions 100 Smith Ranch Road Suite 124 San Rafael, CA 94903 Tel : 415 462 7268, Fax: 415 499 7677	Date Your Order # Our Job #	June 20, 2008 1289
Acknowledgment	Thank you for the opportunity to produce your order. Pricing shown in this order acknowledgment is subject to the appropriate sales tax.		
Job Description	Printstream Documentation		
Quantity	15,000		
Content	8 pages + Cover		
Finished Size(s)	8 1/2 x 11		
Preparation of Copy Paper(s)	4 Pgs. - Springhill 12PT C1S Cover, White 8 Pgs. - Book Makers 60# Opq, White		
Ink Color(s)	Cover 4up 8.5x11 - - Blk, Cyan, Magenta, Yellow 1 color(s) reverse. - Blk 8 pg 8.5 x 11-2up Sht - Printed 2 color(s) throughout. - Blk, PMS-1		
Finishing	8 pg 8.5 x 11-2up Sht - Trim, Fold Saddle Stitch, Carton Pack		
Packaging			
Scheduled Delivery	Thursday, July 10, 2008 Sam Fortune 100 Smith Ranch Road Suite 124 San Rafael, CA 94903		
Pricing	$7,005.70		
Payment Terms	Net 15 days.		
Confirmation		Monika Rynkiewicz	

_____   _____   _____
Accepted By;   Date   Prepared By;

Note	Editing or changes in MS Word will not save to the original estimate. They will be saved for the current **Order Acknowledgment** only.

Scripts

Select the **Scripts** icon ("hand lifting paper") to view or answer any scripts. Click the specific scripts you need to answer (red **X**); either multiple choice or enter your answer directly into the field and save.

The red X's will change to green checks. Scripts will appear on the Work Order.

Note	Scripts are a set of questions that give production workers information or special instructions needed to complete an activity or process. (E.g., 11" Folding: letter or Z-Fold?, Text In or Text Out, etc.)

Printing Scripts are setup in **Master Files Print**.

Print Work Order

To review or print a work order, select the **Work Order** icon ("futuristic looking building").

Option to Print: Complete or for Individual Sections, include activities section (w/ run times), print activity barcodes for Shop Floor, designate ticket as a New Revision and/or Include a **Change Order Report**.

Note To correctly display Bar Codes two fonts (Bc128ab.ttf and Bc128abt.ttf) must be copied and pasted into each workstation's Fonts folder (Start > Settings > Control Panel > Fonts Folder). These fonts can be found in the Stream\Setups\Fonts folder.

Printed. 6/20/2008 11:12:39AM   Page 1 of 3

Job#: 1289   WORK ORDER   Rev. 0   Due: 7/10/2008

Client: **Streamline Solutions**	*Quote#:* **1928**
Ac. No: **STREAM**	*P/O#:*
Address: **100 Smith Ranch Road**	*Third Party P/O#:*
Suite 124	*P/N:*
San Rafael, CA 94903	*Finished Size:* **8.5" x 11";**
Contact: **Sam Fortune**	**(8 1/2" x 11")**
Phone: **415 462 7268** *Fax:* **415 499 7677**	
Quantity: **15,000 of Printstream Documentation**	

Job Description	Estimator Notes	Other Notes
Optional Description for Print Estimating/Order Entry	Susan Dabbs:	Other Notes from the Order Entry screen. Order Entry Notes : Must always enter customer P O # on every order.

Order Date	CSR	Salesrep	Wrk With	New	Exact Repeat	Prev.	PrePress	Film File	Unders	Overs
6/19/2008	Monika Rynkiewicz	Chris Kinkaidy		Yes	No		Art		0 %	5 %

Activity	Time	Activity	Time	Activity	Time	Activity	Time

Pre - Press

Prep Notes from the Order Entry screen.

Section	Process	Category	Quantity
	Design 02	Minutes	45
	Preflight 02	Images	12
	Scanning 02	Scan 6x9	10
Cover 4up 8.5x11	Scan Text 02	8 1/2 x 11	1

Papers

Section	Paper Qty	M Weight	Mill Size	Weight	Paper Type	Color	Out	Cut To	Vendor	Rate	Inventory #
Cover 4up 8.5x11	4,559	344.00	28 x 40	80.00	Springhill 10PT C1S Cover	White	1	28 x 40	REP01	125.00/1000 sheets	Item# 391 Inv.Code Springhill 10PT C1S C
8 pg 8.5 x 11-2up Sht	8,453	100.00	25 x 38	50.00	Book Makers 50# Opq Sheet	White	1	25 x 38		100.00/1000 sheets	Item# 593 Inv.Code Book Makers 50# 25x38

Ink Colors

Section	Side	Ink Colors

Option to export to: MSWord, MS Excel, Crystal Reports, etc., (envelope w/ red arrow icon). Click lower red **X** to close.

A setting has been added to the Print/Preview Work Ticket options which will allow the suppression of Order Entry Notes on the Work Ticket. This works for both the Complete and Individual Sub jobs Work Ticket formats.

If the **Suppress Order Entry Notes** check box is cleared, Order Entry Notes will print on the Work Ticket. If the check box is selected, Order Entry Notes will not print on the WT.

Complete WT- **Suppress Order Entry Notes** check box cleared.

Order Entry Notes appear on the Work Ticket.

Complete WT- Suppress Order Entry Notes check box is selected.

Order Entry Notes will not appear on the Work Ticket.

Individual Sub jobs WT - **Suppress Order Entry Notes** check box cleared.

Order Entry Notes appear on the Work Ticket.

Individual Sub Jobs- **Suppress Order Entry Notes** check box is selected.

Order Entry Notes do not appear on the Work Ticket.

Ink Report

To print an optional Ink Report select the **Ink Report** icon ("can oozing red ink"). Select the type of ink(s) you would like to display on the report and select **Print**.

Due: 9/1/2009	Ink Specification (8/25/2009)	Job: 977

```
       Job Title:GGI Test                                    [X] Gloss
      Press(es):640 Heidelberg                               [X] Matte
         Stocks:Husky Offset 50# SF                          [X] Transparent
                Springhill C1s Cover 10Pt
   Drawdown Required:
Color Sample Supplied:
     Ink Required:
  Less than 24 hours[  ]
       Match Color[  ]
     Let Color Fall[  ]
```

Formula #	Section	PMS No./Name	Total Pieces	Sq. Inches	Factor	% Coverage	Lbs. Required
	#1 32pg 8.5 x11	Black	103,887	748	00.2500	0.00%	0.00
		PMS 1	103,887	748	00.3300	0.00%	0.00
		Black	103,887	748	00.2500	0.00%	0.00
		PMS 1	103,887	748	00.3300	0.00%	0.00
	#2 16pg 8.5 x11	Black	51,943	748	00.2500	0.00%	0.00
		PMS 1	51,943	748	00.3300	0.00%	0.00
		Black	51,943	748	00.2500	0.00%	0.00
		PMS 1	51,943	748	00.3300	0.00%	0.00
	#3 Cover 8.5x11	Proc Black	51,943	187	00.2320	0.00%	0.00
		Proc Cyan	51,943	187	00.2320	0.00%	0.00
		Proc Mag	51,943	187	00.2320	0.00%	0.00
		Proc Yellow	51,943	187	00.2320	0.00%	0.00
		PMS 1	51,943	187	00.2640	0.00%	0.00
		Black	51,943	187	00.2000	0.00%	0.00

Note   The Ink Report will only display Lbs Required when the Actual Ink % is populated.

Open Schedule

The Scheduling screen can be accessed by clicking the **Open Schedule** ("clock & calendar") icon located on the Order Entry screen. Click lower black **X** to close.


To use the Scheduler, refer to the **Milestone Scheduler** module documentation for details.

Setup Options

Select **File** and **Options** to change the colors of your Art, Pre-Press, Form (Section), and Binding Bars or change the color of your background to help distinguish between the Design (Edit), Review and Order Entry Modes.
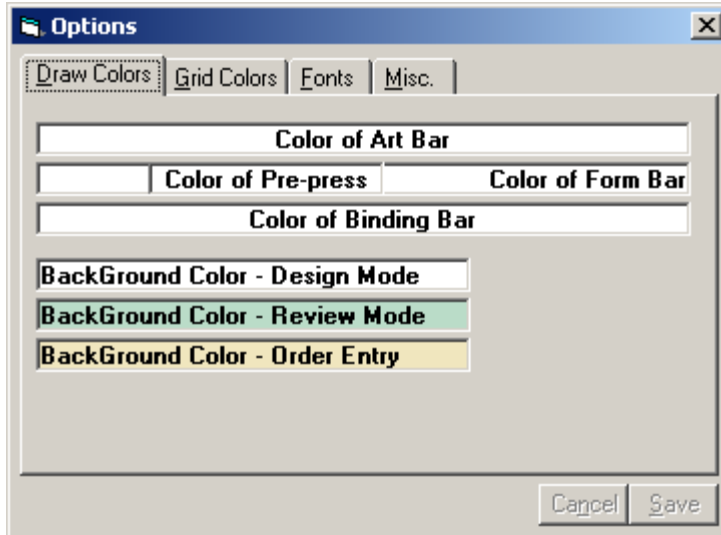
Select the **Misc.** tab to select: Display time as Decimal Hours, Use Job Templates, Align Quote information bar along the top of the screen, use Wizard and View All Running Options, etc. Option to change **Grid Colors** or **Fonts**. Click **Save**.
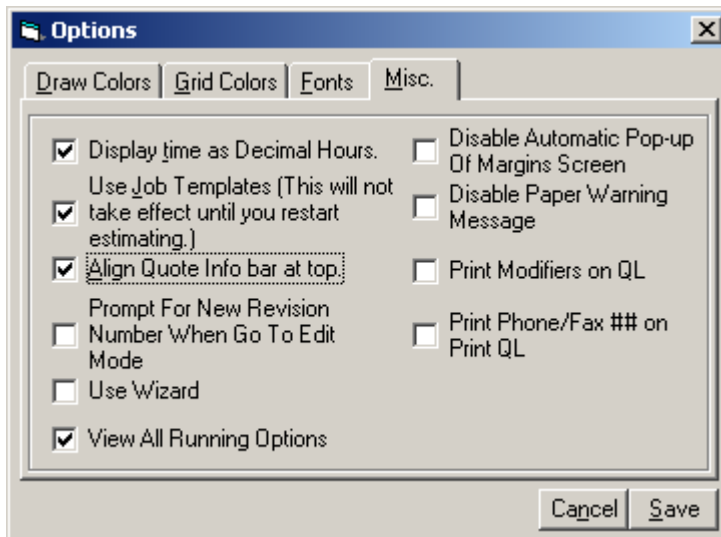
Note   Settings are saved per Workstation only.

Other Information Relating to Print Estimating

Data Guide O.E. Job Specification Fields

Previous Job Number

The field in the O. E. Job Specification screen in Print Estimating **Previous Job Number** is stored in the **TICKET1 table, LAST_JOB** field.

Film File Number

The field in the O. E. Job Specification screen in Print Estimating **Film File Number** is stored in the **TICKET1 table, PLATE_FILE_NO** field.