



## User Guide

Print and Mail Estimating / Order Entry  
V21.1.0200

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EFI PrintStream | V21.1.0200 *Print and Mail Estimating / Order Entry User Guide*

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# Introduction

## Overview

This user guide explains Print and Mail Estimating and Order Entry.

## Contact Information

### EFI Support

<b>US Phone:</b>	855.334.4457 (first select option 3, then press option 8, then press option 1)
<b>US Fax:</b>	415.233.4157
<b>US E-mail:</b>	<a href="mailto:printstream.support@efi.com">printstream.support@efi.com</a>

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

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

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

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



# Estimating

## Opening Screen Wizard

### To open

1. Click the **Print and Mail Estimating** icon located under the Estimating/Order Entry menu bar.

2. Click the **New Estimate** icon ("blank paper" upper left) and enter:
  - a. **Customer #** or **Customer** name (case sensitive fields) or add a **New** customer\*.
  - b. Select a **Customer Price List**, the **Standard Price List**, or a **Corporate Price List**\*.
  - c. Click the Contact ... button and select from a list of additional contact names\*.
  - d. You have the option to change **Sales Rep.**, **CSR**, **Estimator**, and **Planner**\*.
  - e. Select a **Job Type** (drop-down menu)\*.
  - f. Enter a **Job Title** (49-character limit) and (optional) **Description** (500-character limit - description currently prints on: Invoice, Quote Letter, Quote Breakdown and Work Ticket).
  - g. Select the **Print And Mail** check box and enter the **Default Section Size**. (**Print and Mail Customers ONLY**)
  - h. Record up to six **Quantities**.
 

**Tip** Type **k** (for thousand) after the number; **000** will automatically populate the **Quantity** field.
  - i. Select the **Plant(s)** and **Postage Plant** for which this job will be available (only for those companies with multi-plant or multi-company applications).
  - j. Enter **First Mail Date** (if known).
  - k. Select the **Create Default Package** check box (lower right) to automatically create one package with the quantity entered for each component. We recommend leaving this check box selected.
  - l. Optional FSC related quote - Forestry Stewardship Council - data flag in table, no reporting.

m. Click **Next** to enter postage information (you can find this information on page 21).

**Note** Customers, Additional Addresses, Sales Reps., CSR's, Estimators, and Planners are setup in **Master Files Customer**. If you add a new customer, a credit limit will need to be established and the Account Status - (Prospect) needs to be changed in **Master Files Customer** before the estimate can be converted to a job. Job Types, Customer Price Lists, etc., are set up in **Master Files Mail Process**.

## Create a New Customer - In the Estimating Screen

### To create a new customer while in Estimating

1. Click the **New** button, enter all relevant information, and click **Save**.
2. Enter the new/prospect customer #, customer name, or search using the up/down arrow keys.

**Note** Adding a New or Prospect Customer in Estimating adds the customer to **Master Files Customer** - and allows you to print a quote letter. The system will not allow you to convert the estimate to a job until a credit limit is established for the new/prospect customer by your Credit Department.


The screenshot shows the 'Mail Estimating (Print & Mail)' application window. On the left is a navigation pane with options: Quote Header, Estimating, Credit Checks and Pricing, and Job Scheduling and Ship. The main area is titled 'New Quote Header' and contains various input fields for customer information. An 'Add New Customer' dialog box is overlaid on the right side of the main window. This dialog box has a title bar with a close button (X). It contains the following fields: GL Company (dropdown menu showing '01: Streamline Solutions'), Customer (text field with 'McDonalds'), AC/NO (text field with '50314'), Address (text field with '123 Big Mac Lane'), City (text field with 'Hungry City'), State (dropdown menu with 'UT'), Zip code (text field with '84653'), Country (dropdown menu with 'USA, United States'), Phone (text field with '123-456-7890'), Fax (text field), Contact (text field with 'Ray Kroc'), Since (text field with '9/23/2014'), Email (text field with 'ray@mcd.com'), and Salesrep (dropdown menu with 'Andrea Cox'). There are 'Cancel' and 'Save' buttons at the bottom right of the dialog box. The main window also has 'Help', 'Cancel', 'Next >', and 'Finish' buttons at the bottom.


The Add New Customer screen has been enhanced to move directly from the **Zip code** field to the **Country** field when using the tab key on the keyboard to create a better data entry flow when entering a new customer in Print and Mail Estimating New Quote Header screen.

In previous PrintStream versions, when creating a new job in a multi-plant environment, all plants would be defaulted to be checked for participation. This is now changed to only, by default, check the plant the


user is logged into. Any additional plants participating will require the user to check each participating plant.


**New Quote Header**




Customer #:  

Customer:


Contact:  


Customer Price List:  


Standard Price List: ☐  


Contact Phone/FAX:


Re-Contact Date:

SalesRep:  


CSR:  

Estimator:  

Planner:  

Job Type:  

Job Title:

Description:  

Plants:

- ☐ 01:0000-Corporate/Control
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

Postage Plant:

- 01:0000-Corporate/Control PI
- 01:0100-Mail & Print Plant
- 01:0200-Print Plant

Quantity 1:  4:  Print And Mail: ☒ FSC related quote ☐

2:  5:  Default Section Size:  x


3:  6:

First Mail Date:  Create Default Package ☒

## Change or Add Quantities with Back Button After Main Screen

During the creation of an estimate while still in the wizard, the user can click the **Back** button to return to the main quote header screen and add or change the quantities on the estimate.

If the user enters the wrong quantities or incomplete quantities and proceeds to the next screen in the wizard before realizing his/her mistake, in earlier versions of PrintStream, the option was not available to return to the main screen and make changes to or add quantities.

New Quote Header			
	Customer #:	LEAH	01: Streamline
	Customer:	Leah's Account	
	Contact:	Leah	
	Customer Price List:	5/14/2009 - Leah's Pricelist	
	Standard Price List:		
	Contact Phone/FAX:		
	Re-Contact Date:	7/7/2009	
	SalesRep:	Gabrielle Allen	
	CSR:	Opal Richey	
	Estimator:		
Planner:			
Job Type:	#10 Mailing		
Job Title:	Test 21472		<input type="checkbox"/> Stmt Job Master Template
Description:			
Quantity 1:	10,000	4:	
2:		5:	
3:		6:	
First Mail Date:		Print And Mail:	<input type="checkbox"/> FSC related quote <input type="checkbox"/>
		Create Default Package	<input checked="" type="checkbox"/>
<div> <div>Help</div> <div>Cancel</div> <div>Next &gt;</div> <div>Finish</div> </div>			

In the screen above, the user entered a single quantity on the new quote header screen for 10,000 and then clicked **Next**, which takes the user to the components screen.

[illegible]



Now, by clicking the **Back** button, the user can return to the previous screen to adjust the quantities as needed.

**New Quote Header**

Customer #: LEAH 01: Streamline 9

Customer: Leah's Account

Contact: Leah ...

Customer Price List: 5/14/2009 - Leah's Pricelist

Standard Price List: ☐

Contact Phone/FAX:

Re-Contact Date: 7/7/2009

SalesRep: Gabrielle Allen

CSR: Opal Richey

Estimator:

Planner:

Job Type: #10 Mailing

Job Title: Test 21472

Description:

☐ Stmt Job Master Template

Quantity 1: 11,500 4:

2: 12,500 5:

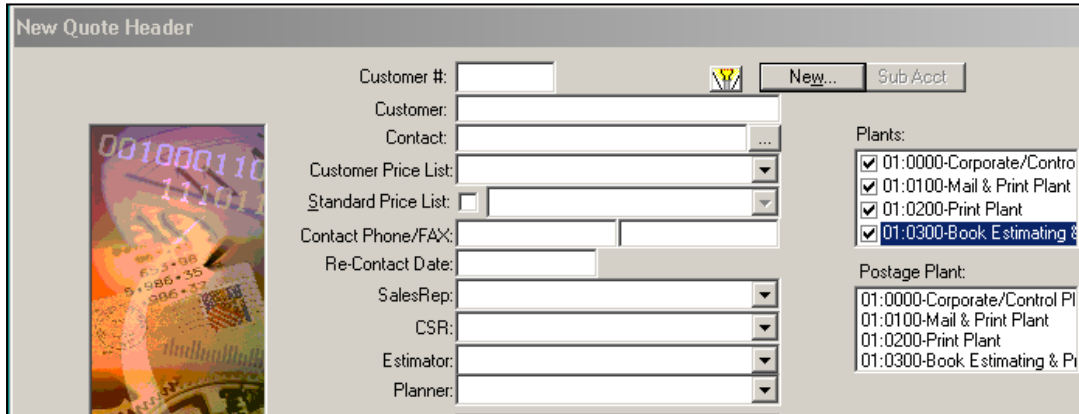
3:  6:

Print And Mail: ☐ FSC related quote ☐



First Mail Date:  Create Default Package ☒

## Multi Plant Job Participation

In prior PrintStream versions, creating a new job in a multi-plant environment would default to all plants being checked for participation.



**New Quote Header**

Customer #:   

Customer:

Contact:

Customer Price List:

Standard Price List: ☐

Contact Phone/FAX:

Re-Contact Date:

SalesRep:

CSR:

Estimator:

Planner:

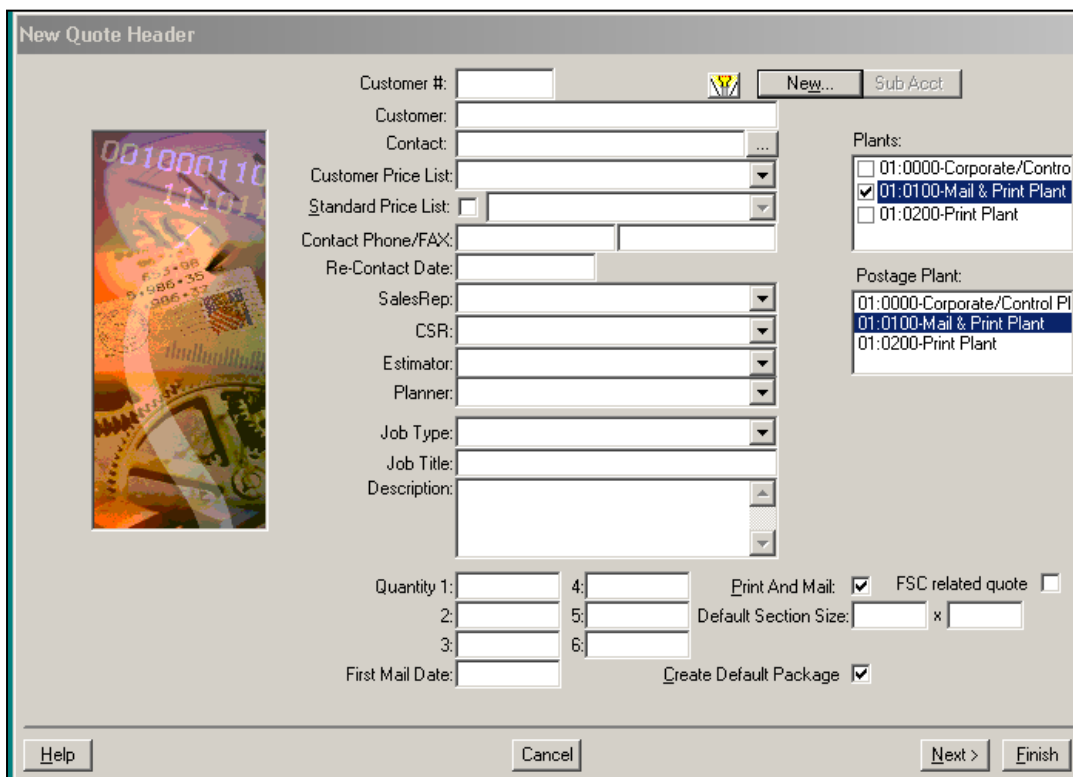
**Plants:**

- ☒ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☒ 01:0200-Print Plant
- ☒ 01:0300-Book Estimating &



**Postage Plant:**

01:0000-Corporate/Control Pl  
01:0100-Mail & Print Plant  
01:0200-Print Plant  
01:0300-Book Estimating & Pi

This is now programmed to only by default check the plant the user is logged into. Any additional plant participation will require the user to check each participating plant.



**New Quote Header**

Customer #:   

Customer:

Contact:

Customer Price List:

Standard Price List: ☐

Contact Phone/FAX:

Re-Contact Date:

SalesRep:

CSR:

Estimator:

Planner:

Job Type:

Job Title:

Description:

**Plants:**

- ☐ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

**Postage Plant:**





01:0000-Corporate/Control Pl  
01:0100-Mail & Print Plant  
01:0200-Print Plant

Quantity 1:  4:  Print And Mail: ☒ FSC related quote ☐

2:  5:  Default Section Size:  x

3:  6:

First Mail Date:  Create Default Package ☒

## Multi-Plant Job Sharing – Changing the Postage Plant

Programming now allows the Postage Plant in a multi-plant environment to be changed after leaving the initial screen. The following rules must be met to allow the change:

- No earmarked postage against the job
- No postage usage recorded against the job
- No postage statement has been created against the job

Once PrintStream determines that these rules have been met, changing the Postage Plant is done in Mail Estimating while in the update mode (note paper icon):

1. Click the menu item **Plant(s) for the Quote**.
2. Clear the check box for the existing postage plant and select the check box for the new postage plant.
3. Click **Save**.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left is a navigation pane with a tree view containing 'Quote Header', 'Estimating', 'Review Pricing', and 'Order Entry'. The 'Plants Participation' table is displayed on the right. The table has columns for Plant Code, Plant Name, Plant For Quote, Activities Estimated, Actual Data Collected, Invoicing is Processed, Prepayment is Allocated, Purchasing is in process, and Is a Postage Plant. Three rows are shown: 0000 Corporate/Control Plant, 0100 Mail & Print Plant, and 0200 Print Plant. The 'Is a Postage Plant' checkbox is checked for the 0200 Print Plant row.

	Plant Code	Plant Name	Plant For Quote	Activities Estimated	Actual Data Collected	Invoicing is Processed	Prepayment is Allocated	Purchasing is in process	Is a Postage Plant
1	0000	Corporate/Control Plant							
2	0100	Mail & Print Plant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
3	0200	Print Plant	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>

## Allowed Web and Place Customer on Credit Hold

Please note the Allowed WEB and Place Customer on Credit Hold features which are available. The **Allowed WEB** check box, when selected, allows the customer to check inventory levels, review order histories, invoices and payment status as they prepare further work. If the **Place Customer on Credit Hold** check box is selected, no additional orders can be processed for this customer until the customer is taken off credit hold.

## Sub Acct - aka: Postage Sub Account Feature

The Sub Acct is found next to the **New** button in the new quote header screen.

The Postage Sub Account (PSA) feature was designed for jobs where the customer referenced on the job is acting as an Agency between the House and the Agency's customer (sub customer), and the sub customer is responsible for the postage portion of the job.

Minimal setup is required to effectively use the PSA feature. The customer acting as the Agency must be defined in **Master File Customer**. The sub customer must also be defined in **Master File Customer** with the **Customer is the Postage Customer for the Customer** check box selected, referencing the Agency in the **Customer #** and **Customer** fields.

Agency Customer in Master File Customer.

## Postage Sub Account (PSA) customer defined in Master Files Customer

The PSA's Customer Master File record must reference the Agency. Create a new job in Mail Estimating with the Agency as the customer. After selecting the Agency as the Customer, select the **Sub Acct** button to the right of the **Customer #** field, then select the **Postage Sub Account** to be associated with the job by selecting the check box provided to the left of the **Acct #**. Select **Save** when done and complete the balance of the job by selecting processes, components, etc.

This job will be processed as normal by logging time, materials, etc., to it. When the postage is logged to the job, the sub customer's company name will appear as the owner of the job in PrintStream because it has been selected as the Postage Sub Account for the job.

The screenshot displays the '01 Master Files' window with the 'Customer' form open. The form is titled 'Customer' and contains the following fields and options:

- Account No:** ABBAPOST **Accto** **Name:** Abba Sub Customer
- Address:** 4545 Windover Road
- City:** 94903
- State:** CA **Country:** USA
- Zip:** 94903
- County:** San Rafael
- Salesrep:** Jon Doe
- CSR:** Sue Smith
- Manager:**
- Search:** ☒ By Code ☐ By Group ☐ By Industry
- SIC Code:**
- Group:**
- Industry:**
- D/B Ref:**
- Tax Number:**
- Postage Type:**
- Allowed WEB:** ☐
- Place Customer on Credit Hold:** ☐
- Contact:**
- Phone:**
- Fax:**
- Monthly sale:** \$0.00
- Acct Status:** C - C.O.D.
- Payment Days:** 30 **Since:**
- Terms:** Net 30
- Remarks:**
- Tax Code:** 00 0% non taxable
- Cred Limit:** \$9,999,999.00 **Currency:** USA
- Cred Ref:**
- Internal Customer:** ☐ **Suppress Statements:** ☐
- Service Charge:** ☒ **Active Access:** ☒
- Tax enforced GST:** ☐ **GST:** ☐ **Bypass Credit Check:** ☐
- Short Remarks:**  **Store/Franchise:**
- Reporting Grouping:**
- Marketing Source Code:**
- ☒ Customer is the Postage Customer for the Customer....
- Customer #:** ABBA1
- Customer:** Abba Inc.

Buttons at the bottom of the form include: Order Entry Notes, Packing Slip Address, Billing (Customer Credits) Notes, Shipping Notes, Addresses, Packing Profile, and Customer Standard Specifications.

PSA Customer

Postage Entry -- User : NORMA -- Company Code: 01 - Plant: 0100

File Request/Edit Postage Check Postage Refund Record Postage Usage Inventory Adjustment Help

Postage

Postage Checks

Customer Postage Refund

Record Postage Usage

Postage Usage Entry

Transfer Postage Usage

Postage Inventory Usage

Inventory

Inventory#:

Type:

Enter Job Postage Usage

Miscellaneous Usage

Job

Job#: 1299 

PrintStream 12.2 Doc Update

Customer: ABBAPOST 

Abba Sub Customer

Job Postage Usage And Deposit Details

Date: 6 /23/2008 

Employee: 101 

Last Name:

First Name:

Rate: 0.000 

Apply Rate

 Note:

	Used	Spoiled	Total
Quantity			
Amount			

Inventory Balance:

\$0.000

Usage:

\$0.000

New Inventory Balance:

\$0.000

Close

Clear

OK

If prepaid postage money is received prior to the job being AR invoiced, the cash receipt **MUST** be entered against the Postage Sub Account. The postage advance money can either be earmarked to the job or left in postage suspense.

**A/R Cash Receipts** --- Company: 01 Alaska Incomp - Plant: 0100

File Batch Allocations Search Options Help

**Cash Receipts**

Unpaid Invoices | Paid Invoices | Postage Allocation | Prepayment Allocations

Active Batches | Posted Batches

3646 - test paid invoices  
3663  
3686 - mid transfers  
3689 - Susan Batch  
3717  
50631  
50634

Job #	Description	Amount
1299	PrintStream 12.2 Doc Update	0.00

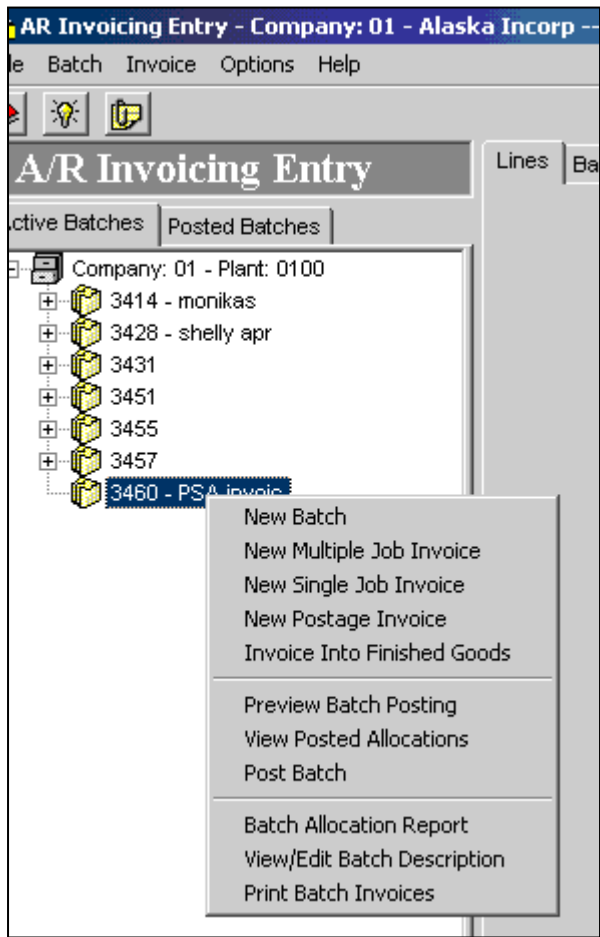
Description	Total	AR App	AR Unapp	Pstg App	Pstg Unapp	Prepay App	Prepay Unapp
Receipt#: 50634	500.00	0.00	0.00	0.00	500.00	0.00	0.00
Plant#: 0100				0.00	500.00		

ABBAPOST-Abba Sub Customer    Cl#: 04061960    AR Alloc: \$0.00    Pstg Alloc: \$500.00    Prepayment: \$0.00

Bank: ar cash453453 - ACCT REV    Batch: 3717    (2 receipts: \$200,500.00)    6/21/2008    Total AR: \$200,000.00    Total Pstg: \$500.00

**Note** If postage payment is received after the postage invoice is generated to the postage sub account customer, the cash receipt will be entered as normal to the PSA customer account as a receipt to Accounts Receivable, and applied to the invoice PrintStream will generate for the postage.

When the job is ready to be AR invoiced, right-click the batch number and select **New Postage Invoice**. This will allow you to bill the postage to the Sub Account rather than to the Agency.





Enter the postage sub account's account number in the **Select Customer** field and then select the **Load Jobs** button. All the jobs the postage sub account is associated to will display in the grid. Select the check box provided to the left of the **Job #** to select the jobs for which to generate a postage invoice, and then select whether a partial or a final invoice is to be created. Select **Finish**.

AR Invoicing Entry - Company: 01 - Alaska Incorp --- Plant Code: 0100

File Batch Invoice Options Help

**A/R Invoicing Entry**

Active Batches Posted Batches

Company: 01 - Plant: 0100

- 3414 - monikas
- 3428 - shelly apr
- 3431
- 3451
- 3455
- 3457
- 3460 - PSA Invoice

**Create Postage Invoice**

Select Customer:

PRS01 Printing Supply

Load Jobs

Job#	Description	Status	Postage Usage	Unbilled Postage
<input checked="" type="checkbox"/> 893	test		0	0

Cancel

☒ Partial Invoice  
☐ Final Invoice

Finish

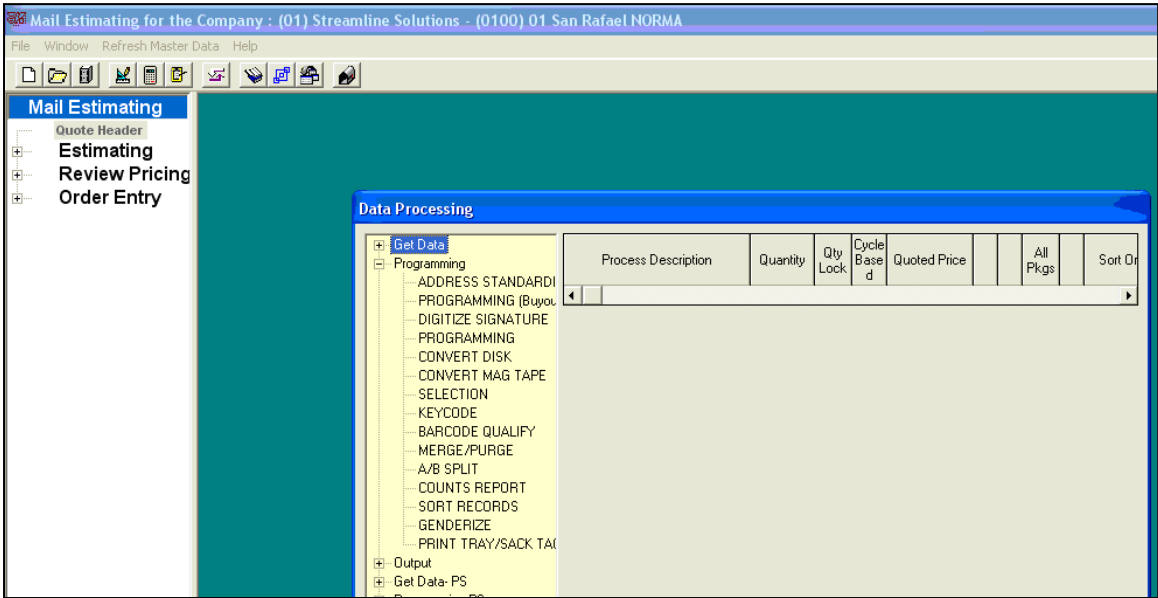
Balance the postage as you would with a standard job-related invoice. This invoice will be addressed to the Postage Sub Account Customer. A separate job invoice for the services will be generated for the Agency.

You can generate the services invoice prior to the postage invoice and vice-versa.

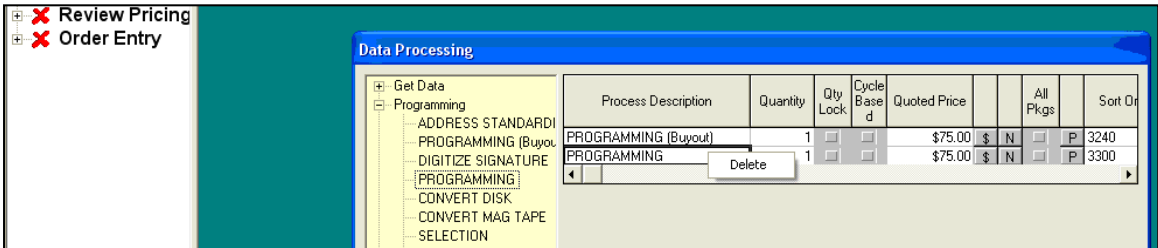
## Add or Delete Data Processing Activities

The system will now prompt you to select Data Processing Activities. Click the + sign to expand each heading to view all processes under each heading.

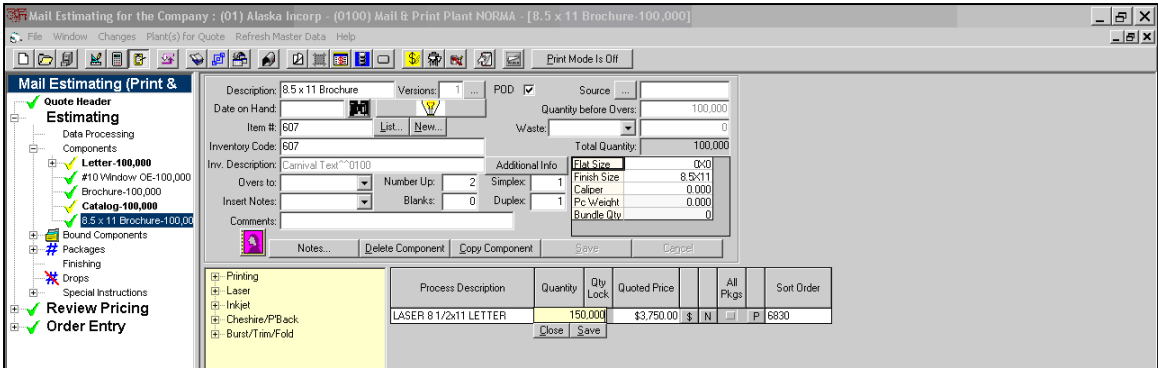
To **Select** a process, double-click each process. The process description will copy to the gray box.



To **Delete** a process, click the process name (e.g., Output to Laser Tape/Disk) under the **Process Description** column, right-click, and select **Delete**.



To **override process quantity**, click in the qty. field, enter a new quantity, and click the gray box (red check will display) under the **Qty Lock** column. Clicking the gray box locks the changed quantity so that updates to overall job quantities will not adjust this change.



To use **Lot Based Pricing**, click the gray box under **Lot Based**. With this option, the quantity used to determine the unit price is the lot quantity, not the whole job quantity. Setups are added per lot.

Click **Next** to continue the Mail Estimating Wizard.

The headings (e.g., Get Data, Programming, Output, etc.) and activities (e.g., Purchase List: Programming, Barcode Qualify, etc.) are terms defined and used by your company to describe your processes.

Clicking **Finish** (bottom right) will take you out of the Estimating Wizard and directly to the Mail Estimating Tree.

Process Description	Quantity	Qty Lock	Quoted Price	All Pkgs	Sort Order
PROGRAMMING	1		\$75.00	N	P 3300
MERGE/PURGE	100,000		\$600.00	N	P 3480
GENDERIZE	100,000		\$600.00	N	P 3580
OUTPUT TO EKTAJET	100,000		\$300.00	N	P 3723

## Quote Header – Additional Information

When the **Finish** button in the Wizard is selected, and the Estimating Tree is again visible. Additional information can be added to the Quote Header screen:

The **Multi Inventory** button is to set up a job for Manufactured Finished Goods. To utilize the Manufactured Finished Goods feature, extensive setup is required. Contact EFI PrintStream Support for assistance.

The **Additional Info** button relates to jobs that are created using the **XML Job Creator** program, an add-on that is covered in the documentation for **XML**.

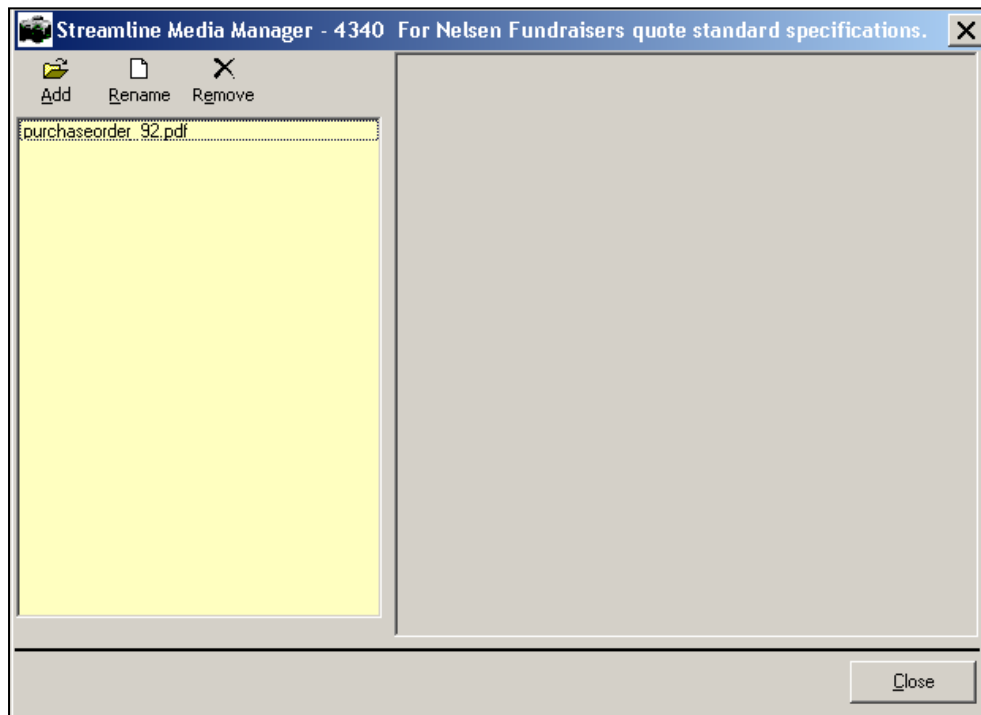
## Quote Standard Specifications

In addition, the **Quote Standard Specifications** button was also created for use in the XML Job Creator program. To allow attachment of an Excel document showing the User Defined Parameters setup in the Spec Manager program that work with XML job creator for the specific master template. For more information about how this button relates to XML, see documentation for that program.

However, the **Quote Standard Specifications** button is also used by jobs that are non XML jobs by some customers to attach quote-specific files that provide information relevant to the quote.

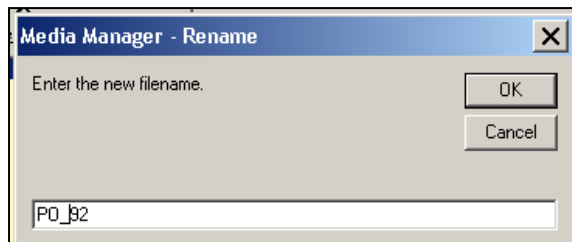
To add a standard specifications file to the quote, click the **Quote Standard Specifications** button. This screen opens:

Click **Add File** to add file(s). Find the file in the directory and click **Close**.

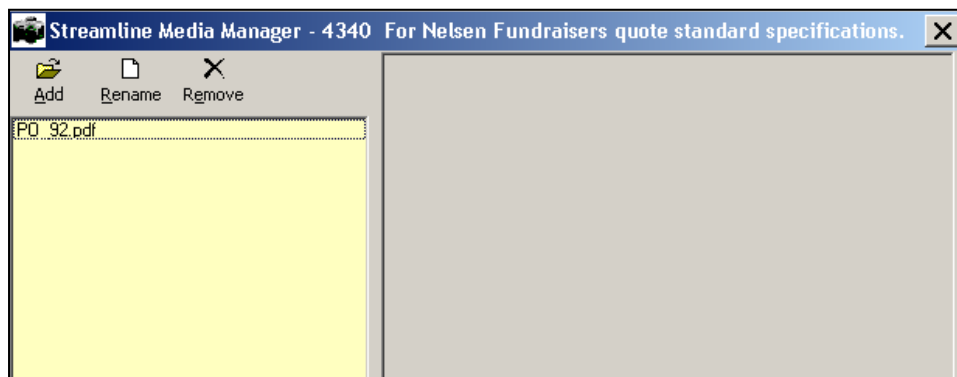


This example shows a pdf of the customer's purchase order for this quote/job. Several File Type extensions are available to which the 'msg' file extension was added to the list of acceptable file types in PrintStream.

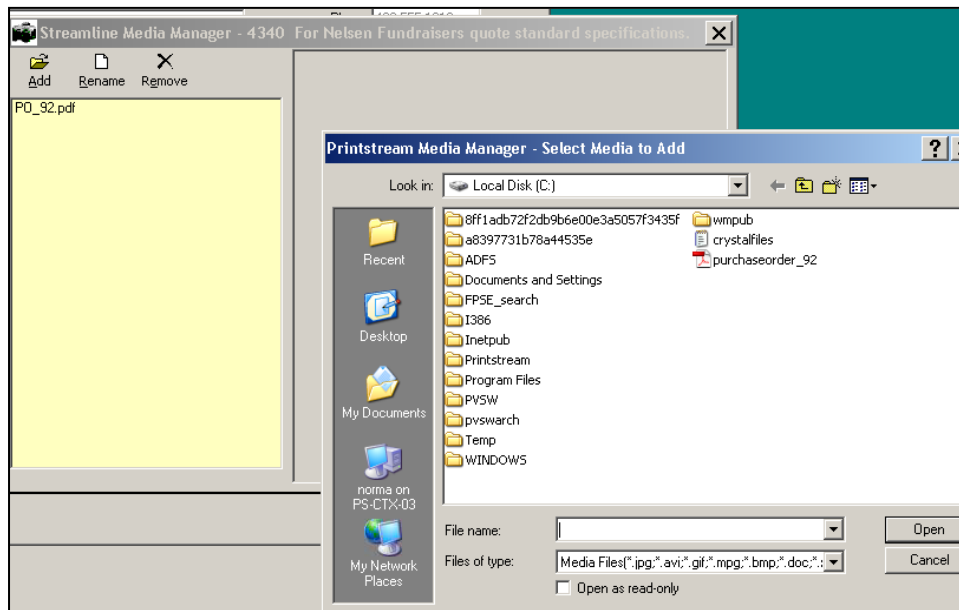
To Rename the file, highlight the file, click **Rename**, and enter the new file name. Click **OK**.



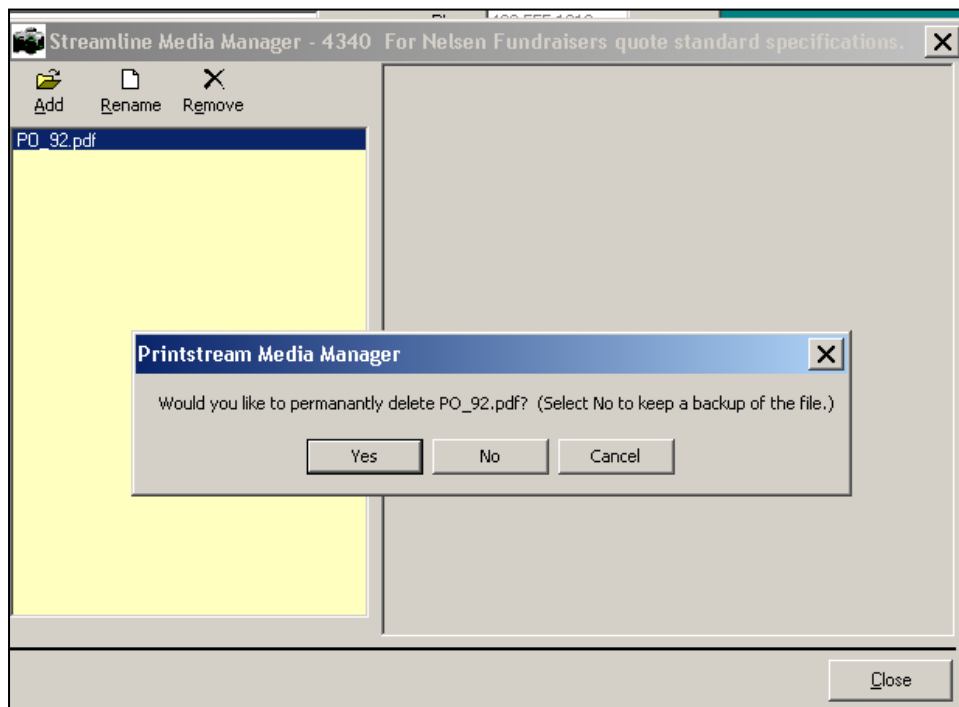
The file is renamed.



This does NOT change the name of the original file.



To remove a file, highlight the file name and click **Remove**.



You will be prompted that the file will be permanently deleted and asking for confirmation. Selecting **Yes** will permanently delete the file; selecting **No** will remove the file from the standard specifications files, but will keep a backup of the file.

## Add Components and 'Print in House' - Select a Template

To add components, enter the description and press the Enter key. Standard Windows procedures for copying, editing and deleting.

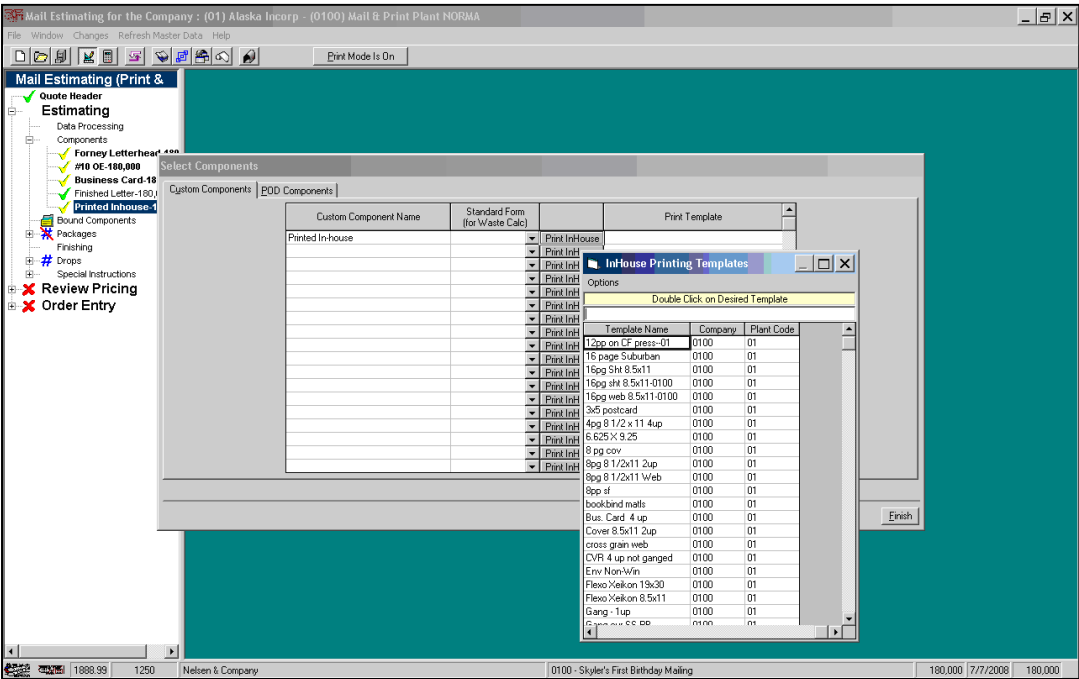
The Standard Form for Waste Calculation field is optional on is used for Mail Components. This Standard Form will automatically calculate the process waste % you assigned for each component based on package counts. Before the waste table will calculate, you need to enter a package (or select the **Create default package** check box at the beginning of the estimate), then select the **Adjust Quantities by Package Counts** icon (purple and white arrow icon).

Custom Component Name	Standard Form (for Waste Calc)	Print Template
New Component	ENVELOPE	Print InHouse
	FORM	Print InHouse
	LETTER	Print InHouse
	INSERT	Print InHouse
	CARD	Print InHouse
		Print InHouse
		Print InHouse
		Print InHouse
		Print InHouse

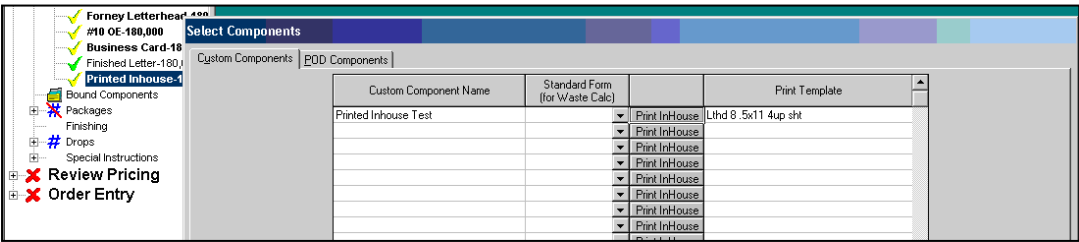
### To add a Printed Inhouse component

1. Click the **Add Components** button in the menu bar.

2. Select the **Print In House** button for each component that will be printed in house.



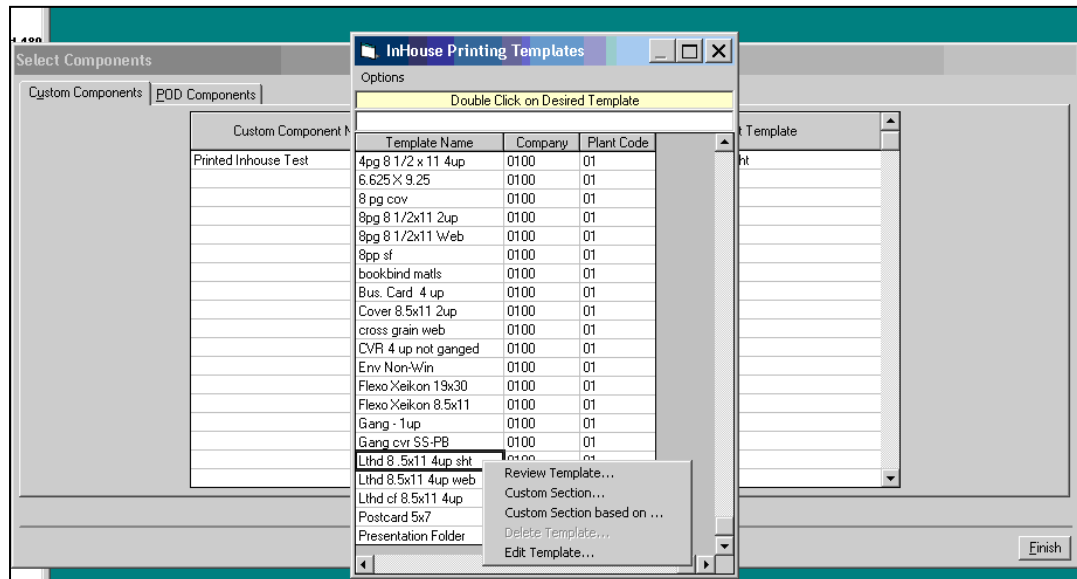
3. Double-click the **Template Name** to add it to the new printed-inhouse component.





4. Right-click the **Template Name** in the template selection box to:

- Review a Template
- Create a Custom Section
- Create a Custom Section Based on...
- Edit a Template



5. Click **Finish** when selected component template is edited as required for the printed-inhouse component.

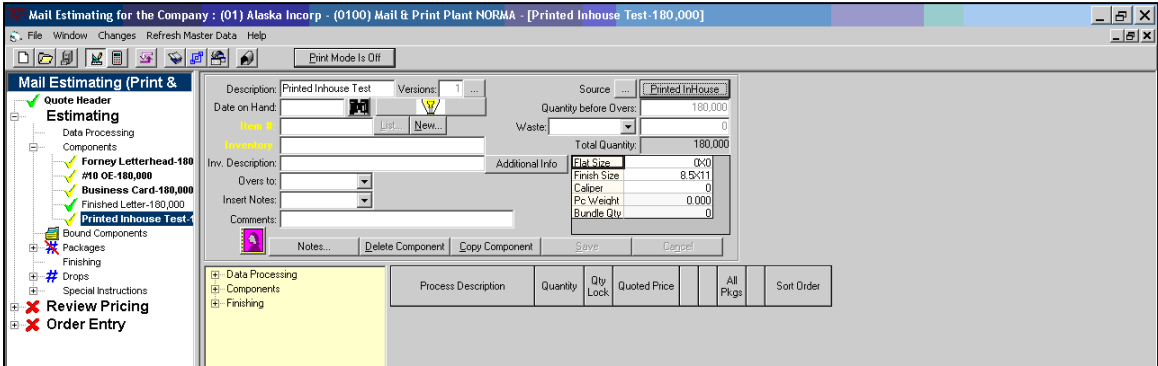
6. Click **Next** to continue the Estimating Wizard. Selecting **Finish** (bottom right) will take you out of the Estimating Wizard and directly to the Estimating Tree.


**Note** To choose a template based on the estimate size (e.g., estimate is 4" x 9" 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 will select all the template information, but will change the section size to the **Default Section Size** entered in the Start a New Estimate screen.

If you have a different inventory item # and / or different processes for a version (e.g., Letter A and Letter B), create a different component for each version.

# The Print Details Screen

To get to the Print Details screen, in Edit Mode with the printed-inhouse component selected in the Estimating tree and the Print Mode Off, click the **Printed Inhouse** button in the upper right corner of the component description screen.



The box that appears will be the **Print Section** box. Double-click the press icon  to select the press.

## Dutch Cut Option/Functionality

To enable the dutch-cut option, click the box in the bottom right corner while in the Print Details screen. This option enables the user 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 1/2" x 14" letter printing 1 up.

**Print Details**

Section Title: 1590-1 Trim Size: 8 1/2 x 14 No. Pages: 2

**Ink List**

- Black
- Buyout Ink
- Dull AQ
- Gold Foil
- PMS 1
- PMS 2
- PMS 3
- PMS 4
- Proc Black
- Proc Cyan
- Proc Mag

**Modifiers**

- 1% additional waste
- 1% slow down
- Backer setup
- Bundling
- Customer Press Check
- Fold - Fanfold
- Fold - Inline Parallel Fold
- Fold - Plowfold

**Front Back Colors: 2/0**

Coverage: Light Coverage % Cov.:

No. Colors: 2 Metal Grac Extra Plates: 0

**Selected Colors:**

Ink Color	% Coverage
Black	0.00%
PMS 1	0.00%

**Modifiers**

Modifiers	Qty.	P/L

**Add Bleeds Cross-grain** ☐

**Add bleeds w/grain** ☐

**Work and Turn** ☐

**Work and Tumble** ☐

**Work and Twist** ☐

**Dutch Cut** ☒

Num. First M/Rs: 1

**View Inventory** **Select Press** **Close**

When the **Dutch Cut** check box is selected and you click **Select Press**, you get the following results:

**(SS) Select a Press**

	10,000	15,000	20,000
Section Qty.:	10,000	15,000	20,000
Press: Itek	✓	✓	✓
Perfect	✓	✓	✓
Trim Size: 8 1/2 x 14			
Number Up: 1	✓	✓	✓
Press Size: 8 1/2 x 14	✓	✓	✓
Number Out: 6	✓	✓	✓
Paper Size: 23 x 35	✓	✓	✓

**Press Type:** Sheet

**PF View Layout Find Press Close**

The press sheet cuts 6 out of the parent sheet size -- four from one direction and two from the other direction.

Print Details

Section Title: 1590-2

Trim Size: 8 1/2 x 14

No. Pages: 2

Ink List

Black

Buyout Ink

Dull AQ

Gold Foil

PMS 1

PMS 2

PMS 3

PMS 4

Proc Black

Proc Cyan

Proc Mag

Front

Back

Colors: 2/0

Coverage: Light Coverage

% Cov.:

No. Colors: 2

Metal Grac

Extra Plates: 0

Selected Colors:

Ink Color	% Coverage
Black	0.00%
PMS 1	0.00%

Modifiers

1% additional waste

1% slow down

Backer setup

Bundling

Customer Press Check

Fold - Fanfold

Fold - Inline Parallel Fold

Fold - Plowfold

Modifiers

Qty.

P/L

Add Bleeds Cross-grain

Add bleeds w/grain

Work and Turn

Work and Tumble

Work and Twist

Dutch Cut

Num. First M/Rs: 1

View Inventory

Select Press

Close

If the **Dutch Cut** check box is *cleared*, you get the following results:

(SS) Select a Press

Front

Back

	10,000	15,000	20,000
Section Qty.:	10,000	15,000	20,000
Press: Itek	Ittek	Ittek	Ittek
Perfect			
Trim Size:	8 1/2 x 14	8 1/2 x 14	8 1/2 x 14
Number Up:	1	1	1
Press Size:	8 1/2 x 14	8 1/2 x 14	8 1/2 x 14
Number Out:	4	4	4
Paper Size:	23 x 35	23 x 35	23 x 35

Press Type: Sheet

PF

View Layout

Find Press

Close

The press sheet only cuts 4 out of the parent sheet size, all from one direction.

In order for the dutch-cut option to work correctly, you must have the **Grain Direction** set 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.

**Custom Section**

Title: 8.5 x 14 1up

☒ Text  
☐ Cover

Pages: 2  
Bind as: 1

Trim size: 8.5 x 11

☐ Work and Turn

Paper  
Name:   
Color:

Grain Direction:  
☐ With Grain  
☐ Cross Grain  
☒ None

Precut:  
☒ Yes  
☐ No  
☐ Auto

**Ink**

Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:		
Ink 1:		
Ink 2:		
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

**Section Finishing**

Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing	

Without Bleeds				With Bleeds				# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.								1	Metal	<input type="checkbox"/>		1 x 1	
99,999,999										<input type="checkbox"/>			
										<input type="checkbox"/>			
										<input type="checkbox"/>			

☐ Save as Permanent Template

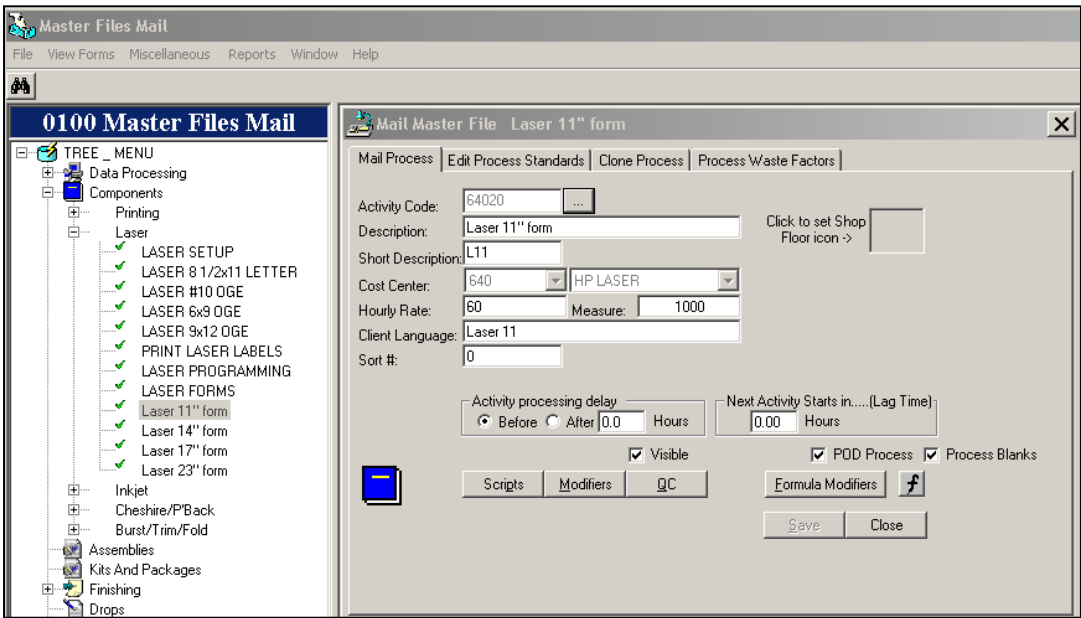
Cancel Ok

## POD Components (Print On Demand)

Print on Demand processes can be created in Master Files Mail Processes.

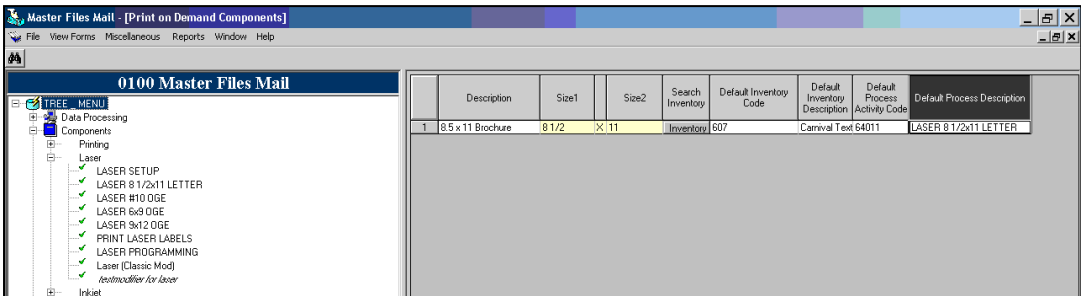
### To create a POD process

1. 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.



The screenshot shows the 'Master Files Mail' application window. On the left is a 'TREE \_ MENU' with a 'Components' folder expanded, showing a list of printing processes including 'LASER 11" form'. The main window is titled 'Mail Master File Laser 11" form' and contains several tabs: 'Mail Process', 'Edit Process Standards', 'Clone Process', and 'Process Waste Factors'. The 'Mail Process' tab is active, displaying fields for 'Activity Code' (64020), 'Description' (Laser 11" form), 'Short Description' (L11), 'Cost Center' (640), 'Hourly Rate' (60), 'Client Language' (Laser 11), and 'Sort #' (0). There are also fields for 'Activity processing delay' and 'Next Activity Starts in....(Lag Time)'. At the bottom, there are checkboxes for 'Visible', 'POD Process', and 'Process Blanks', along with buttons for 'Scripts', 'Modifiers', 'QC', 'Formula Modifiers', 'Save', and 'Close'.

2. 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**.



The screenshot shows the 'Master Files Mail - [Print on Demand Components]' window. The 'Miscellaneous' tab is selected at the top. The left pane shows the 'TREE \_ MENU' with 'Components' expanded. The main area displays a table with the following columns: Description, Size1, Size2, Search Inventory, Default Inventory Code, Default Inventory Description, Default Process Activity Code, and Default Process Description. The table contains one row with the following data:

Description	Size1	Size2	Search Inventory	Default Inventory Code	Default Inventory Description	Default Process Activity Code	Default Process Description
8.5 x 11 Brochure	8 1/2	X: 11	Inventory	607	Carnival Text 64011		LASER 8 1/2x11 LETTER

3. 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.

4. Print-on-Demand processes have optional entry fields to define the number of simplex, duplex and blank pages. Print quantities are calculated automatically using the job quantity, number of simplexed, duplexed and blank pages, then divided by the number-up to arrive at the actual processing quantity and price for the paper.

A change was made in recent PrintStream versions to include **Blanks** for POD processing in the processing quantity in MasterFiles Mail Processes.

With the **POD Process Blanks** check box selected, the quantity calculation for the blanks will be included in the process quantity and run speed calculation.

Description: New Component Versions: 1 ... POD ☒ Source: Quantity before Overs: 1,000 Waste: 0 Total Quantity: 1,000

Item #: Inventory Inv. Description: Overs to: Number Up: 2 Simplex: 1 Blanks: 2 Duplex: 0

Additional Info: Flat Size: 0x0 Finish Size: 0x0 Caliper: 0.000 Pw Weight: 0.000 Bundle Qty: 0

Notes...

**Pricing Details - Laser 11" form (Selection Only)**

Calculation Base Quantity: 1,500

**Standard Run Speed**

	<=25,000	<=99,999,999
	1,800	1,500

	Standard	Override	Lock
Make Ready (Hours)	0.00	0.00	
Run Speed (per Hour)	1,800	1,800	<input type="checkbox"/>
Run Time (Hours)	0.83	0.83	
Number of Workers		0.00	

**Standard Pricing**

	<=99,999,999
	\$15.0000

	Book Price/Rate	Lock Rate	Markup (%)	Lock Quoted Rate MU	Extended Price	Lock QP
Setup:	\$0.00				\$0.00	<input type="checkbox"/>
Minimum charge:	\$0.00				\$0.00	<input type="checkbox"/>
Rate per 1000:	\$15.0000	<input type="checkbox"/>	0.00	<input type="checkbox"/>	\$15.0000	\$22.50 <input type="checkbox"/>
Total:	\$22.50				Total:	\$22.50

Cancel Save

With the **POD Process Blanks** check box cleared, the Blanks quantity will NOT be picked up in the process quantity and run speed calculation.

Description: New Component Versions: 1 ... POD ☐ Source: Quantity before Overs: 1,000 Waste: 0 Total Quantity: 1,000

Item #: Inventory Inv. Description: Overs to: Number Up: 2 Simplex: 1 Blanks: 2 Duplex: 0

Additional Info: Flat Size: 0x0 Finish Size: 0x0 Caliper: 0.000 Pw Weight: 0.000 Bundle Qty: 0

Notes...

**Pricing Details - Laser 11" form (Selection Only)**

Calculation Base Quantity: 500

**Standard Run Speed**

	<=25,000	<=99,999,999
	1,800	1,500

	Standard	Override	Lock
Make Ready (Hours)	0.00	0.00	
Run Speed (per Hour)	1,800	1,800	<input type="checkbox"/>
Run Time (Hours)	0.28	0.28	
Number of Workers		0.00	

**Standard Pricing**

	<=99,999,999
	\$15.0000

	Book Price/Rate	Lock Rate	Markup (%)	Lock Quoted Rate MU	Extended Price	Lock QP
Setup:	\$0.00				\$0.00	<input type="checkbox"/>
Minimum charge:	\$0.00				\$0.00	<input type="checkbox"/>
Rate per 1000:	\$15.0000	<input type="checkbox"/>	0.00	<input type="checkbox"/>	\$15.0000	\$7.50 <input type="checkbox"/>
Total:	\$7.50				Total:	\$7.50

Cancel Save



## Add or Delete Finishing Processes

Click the + sign to view all processes under each heading under the Finishing section of the estimate tree. To select, double-click each process.

To **Delete**, click the process (e.g., Deliver to your Office) under the Process Description; right-click and select **Delete**.

To **override process quantity** just click in the **Quantity** field, enter new quantity, and click the gray box (red check will display) under the **Qty Lock** column. Clicking the gray box locks the changed quantity so that updates to overall job quantities will not adjust this change.

To use **Cycle Based Pricing**, click the gray box under **Cycle Based**. 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. Identify the number of cycles in the Quote Header.

Click **Next** to continue OR select **Finish** which will take you out of the Estimating Wizard and directly to the Mail Estimating Tree.

To assign **Finishing** processes to different packages, select the **P** button to the far right of the process description. Clear the packages that do not apply to the selected process and **Save**.

**Note** When selecting a finishing process, the system automatically flags the **All Packages** option, to indicate that all packages receive the selected process. To deselect any of the packages from using the **Finishing** processes, select the **P** button to the far right and clear the packages that do not apply to this process.

	Process Description	Quantity	Qty Lock	Cycle Based	Quoted Price		All Pkgs		Sort Order
+	Inserting								
+	Materials								
+	Sort/Tab/Affix								
+	Transport/W'House								
+	Fulfillment								
+	Inserting-PS								
+	Hand Insert To 6x9-PS								
+	Insert, Seal, Meter, Sort #10-PS								
	Insert, Meter, Sort #10 1 pc-PS								
	Insert, Meter, Sort #10 2pcs-PS								
	Insert, Meter, Sort #10 3pcs-PS								
	Insert, Meter, Sort #10 4pcs-PS								
	Insert, Meter, Sort #10 5pcs-PS								
	Insert, Meter, Sort #10 6pcs-PS								
+	Materials-PS								
+	Sort/Tab/Affix								
+	Transport/Warehouse-PS								
+	Fulfillment-PS								

## Component Information and Component Processes

To select processes for a component, click the + sign next to the Components Heading in the **Mail Estimating Tree** and click the component name. The headings and activities (e.g., InkJet: Envelope; Printing: Buyout, etc.) are user-defined terms to describe your processes.

**Mail Estimating (Print & Mail)**

Description: Letter A Versions: 1 ... POD ☐ Source:

Date on Hand:  Quantity before Overs: 6,000

Item #:  List... New... Waste: LETTER 420

Inventory:  Total Quantity: 6,420

Inv. Description:  Delete Component

Overs to: W'House Copy Component

Insert Notes: FF Notes... Cancel Save

Comments:

Process Description	Quantity	Qty Lock	Lot Based	Quoted Price		
LASER SETUP	1	<input type="checkbox"/>	<input type="checkbox"/>	\$50.00	\$	N
LASER 8 1/2x11 LETTER, 11	6,000	<input type="checkbox"/>	<input type="checkbox"/>	\$1,650.00	\$	N
FOLD 8.5x11/14 SIZE	6,000	<input type="checkbox"/>	<input type="checkbox"/>	\$42.00	\$	N
CUT 8.5 x 11 IN HALF	6,000	<input type="checkbox"/>	<input type="checkbox"/>	\$60.00	\$	N

**Assign 'LASER 8 1/2x11 LETTER' To Packages**

☒ Synchronize process quantity with quantity of all packages this process is assigned to

☐ Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty	Process Qty
1	PKG 1	6,000	6,000
2	PKG 2	3,000	0

Expand the list of available processes under each heading by clicking the + sign to the left of each heading. To select the process for that component, double-click the process description.

To **Delete**, click the process (e.g., Cut 8.5x11 in Half) under the Process Description; right-click and select **Delete**.

To **override process quantity** just click in the **Quantity** field, enter new quantity and click the gray box (red check will display) under the **Qty Lock** column. Clicking the gray box locks the changed quantity so that updates to overall job quantities will not adjust this change.

To assign **Component** processes to different packages, select the **P** button to the far right of the process description. Clear the packages that do not apply to the selected process and **Save**.

**Note** When selecting a **Component** process the system automatically flags the 'All Packages' option, which chooses all packages to receive the selected process. Clear packages that do not apply.

Point the mouse over a process description to preview which packages have been selected for that process.

A plus sign [+] next to a heading (e.g., **Estimating**, DP, Components, Packages, Drops, **Review Pricing**, **Order Entry**, etc.) means there is information under that heading. A minus sign [-] means all information under the heading is currently displayed.

A red **X** or red \ next to certain **Mail Estimating Tree Headings** means:

1. An area is missing information (e.g., Components: Inventory Item(s) not selected)
2. The numbers entered are out of balance (e.g., Packages and Drops screens) or
3. A system warning (e.g., Credit Status: Over Credit Limit)

A green 'check' next to **Mail Estimating Tree Headings** means required information is complete.

**Note** If you have a different inventory item # or different processes for a 'version,' create a different component for each 'version.' To change qty. for a component, select the [...] button, enter quantity and **Save**.

## Changing the Standard Run Speed on a Process

To change the standard run-speed-per-hour on a process, click the **\$** to the right of the **Quoted Price** in the Process Description box. This will bring up a screen that displays the default run speeds and pricing from Master Files Mail Processes on which the price and run-time hours were calculated when the process was added to the estimate.

To lock in the default run speed for the process, select the **Lock** check box. A red check will appear.

To change a locked run speed, clear the **Lock** check box, change the speed in the **Override** column to the new speed and click the box to lock in the new run speed. A red check will indicate that the new run speed is now locked. **Save** the change. The run speed prints on the work order to let production know the expected speed for that process.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael NORMA - [Finishing]

File Windows Changes Refresh Master Data Help

Print Mode Is Off

Mail Estimating

Quote Header

Estimating

Data Processing

Components

Box-0

Letter-17,500

#10 OE-17,500

Test for Link-11

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Inserting

Materials

Sort/Tab/Alfix

Transport/Warehouse

Fulfillment

Inserting-PS

Materials-PS

Sort/Tab/Alfix

Transport/Warehouse-PS

Fulfillment-PS

Process Description	Quantity	Qty Lock	Cycle Base d	Quoted Price	All Pkgs	Sort Order
INSERT, METER, SORT #10 2p	17,500			\$774.38	N	P 8375

Pricing Details - INSERT, METER, SORT #10 2pc (Selection Only)

Calculation Base Quantity: 17,500

Standard Run Speed

Standard	Override	Lock
Make Ready (Hours)	0.42	0.42
Run Speed (per Hour)	3,000	3,000
Run Time (Hours)	5.83	5.83
Number of Workers		0.00

Standard Pricing

Book Price/Rate	Lock Rate	Markup (%)	Lock Quoted Rate MU	Extended Price	Lock QP
Setup:	\$0.00			\$0.00	
Minimum charge:	\$0.00			\$0.00	
Rate per 1000:	\$44.2500	0.00		\$44.2500	
Total:	\$774.38			\$774.38	

Cancel Save

## Changing the Process Quantity – Confirm Auto Split Message

In PrintStream 2008, we added a warning message to Confirm Auto Split which displayed anytime the process quantity was changed. When the message “Would you like to divide Process qty between linked packages?” was answered **Yes**, the package quantities for the process were proportionately divided across the packages as shown below.

Process Description	Quantity	Qty Lock	Cycle Base d	Quoted Price			All Pkgs		Sort Or
LASER 8 1/2x11 LETTER	11,000	<input type="checkbox"/>	<input type="checkbox"/>	\$275.00	\$	N	<input checked="" type="checkbox"/>	P	6830
NKJET UP TO 6x9 & SORT	10,000	<input type="checkbox"/>	<input type="checkbox"/>	\$395.00	\$	N	<input checked="" type="checkbox"/>	P	8200

☒ Assign 'LASER 8 1/2x11 LETTER' To Packages

☒ Synchronize process quantity with quantity of all packages this process is assigned to

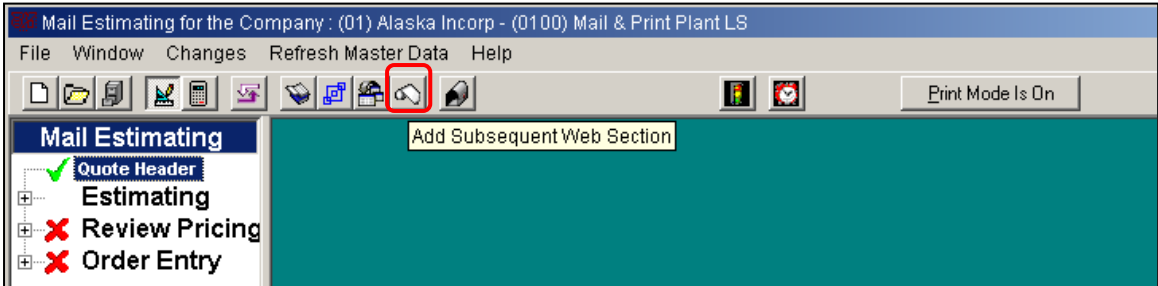
Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty		Process Qty
1	PK1	6,500	<input checked="" type="checkbox"/>	7,150
2	PK2	3,500	<input checked="" type="checkbox"/>	3,850

The Confirm Auto Split warning message only displays when more than one package exists between which to divide the process quantity increase or decrease. In cases of single packages on an estimate, the Confirm Auto Split warning message is suppressed.

## Add Subsequent Web Section

Another added feature that appears on the main tool bar is the **Add Subsequent Web Section** (circled in the example below). This new feature was created for users who can run multiple webs on a press at the same time.

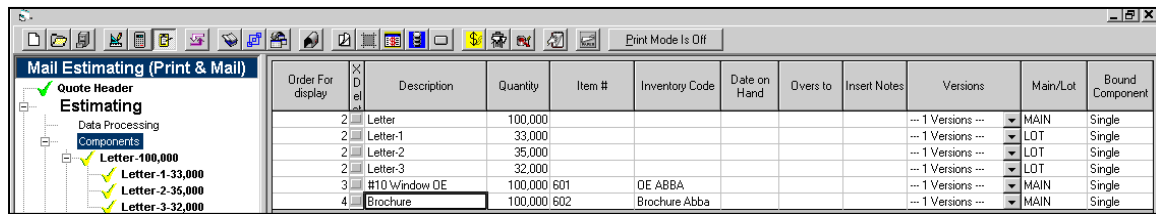


## Viewing List of All Components

To view a list of all components, click **Components** in the **Mail Estimating Tree**. To assign inventory, component processes, etc., double-click the description name OR click the component name in the Mail Estimating Tree.

**Note** Regular Text with red **X** - Component Name = Mail supplied component without Inventory assigned.  
 Regular Text with green check - Component Name = Mail supplied component w/ inventory assigned.  
 Bold text with Yellow check – Component Name = Printed Inhouse component with no inventory assigned. Bold text with Yellow check – Sub Component = Printed Inhouse component has Lots, the quantity sum of which equals the total quantity for the Main Component.

The **Main/Lot** column to the right of the Component screen shows the Main or Lot indicator for each specific component and subcomponent.



Order For display	Description	Quantity	Item #	Inventory Code	Date on Hand	Overs to	Insert Notes	Versions	Main/Lot	Bound Component
2	Letter	100,000						--- 1 Versions ---	MAIN	Single
2	Letter-1	33,000						--- 1 Versions ---	LOT	Single
2	Letter-2	35,000						--- 1 Versions ---	LOT	Single
2	Letter-3	32,000						--- 1 Versions ---	LOT	Single
3	#10 Window OE	100,000	601	OE ABBA				--- 1 Versions ---	MAIN	Single
4	Brochure	100,000	602	Brochure Abba				--- 1 Versions ---	MAIN	Single

## Deleting Selected Components

To delete one or several components from this screen, left-click the box in the **X Delete** column to select that component for deletion.

To provide a quicker method of deleting multiple components, we have added the feature where by highlighting a range of components and then right-clicking, two options are available: a) Mark Selected Components for **Delete**; or b) Delete Selected Components. It is also possible to select an individual component first and then highlight the range of components and choose one of the options whereby all the selected components will be deleted.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant CHRIS - [Component Summary]

Print Mode Is Off

Mail Estimating (Print & Mail)

Quote Header

Admin

Data Processing

Components

booklet-10,000

Text-sheetfed-10,000

Text-web-10,000

Ganged Postcard Run-5,750

Outer Envelope-10,000

Letter-10,000

#10 Env-10,000

Binding

Order For display	X Delete	Production Job #	Customer's Job #	Description	Quantity	Item #	Inventory Code	Date on Hand
2	<input checked="" type="checkbox"/>	0	0	booklet	10,000			
2	<input checked="" type="checkbox"/>	0	0	Text-sheetfed	10,000			
2	<input checked="" type="checkbox"/>	0	0	Jan-Mar	2,500			
2	<input checked="" type="checkbox"/>	0	0	Apr-June	2,500			
2	<input checked="" type="checkbox"/>	0	0	Jul-Sep	2,500			
2	<input checked="" type="checkbox"/>	0	0	Oct-Dec	2,500			
3	<input checked="" type="checkbox"/>	0	0	SS Book	10,000	718	RR SS Books	
3	<input checked="" type="checkbox"/>	0	0	Text-web	10,000			
				stcard Run	5,750			
					10,000			
4	<input checked="" type="checkbox"/>	0	0	London	10,000			

Delete Selected Componenets

Mark Selected Components for 'Delete'

Mail Estimating (Print & Mail)

Quote Header

Admin

Data Processing

Components

booklet-10,000

Text-sheetfed-10,000

Text-web-10,000

Ganged Postcard Run-5,750

Outer Envelope-10,000

Letter-10,000

#10 Env-10,000

Binding

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Order For display	X Delete	Production Job #	Customer's Job #	Description	Quantity	Item #	Inventory Code	Date on Hand	Overs to	Insert Notes	QL Number of Pages	QL Number Of Sheets
2	<input checked="" type="checkbox"/>	0	0	booklet	10,000						0	0
2	<input checked="" type="checkbox"/>	0	0	Text-sheetfed	10,000						0	0
2	<input checked="" type="checkbox"/>	0	0	Jan-Mar	2,500						0	0
2	<input checked="" type="checkbox"/>	0	0	Apr-June	2,500						0	0
2	<input checked="" type="checkbox"/>	0	0	Jul-Sep	2,500						0	0
2	<input checked="" type="checkbox"/>	0	0	Oct-Dec	2,500						0	0
3	<input checked="" type="checkbox"/>	0	0	SS Book	10,000	718	RR SS Books				0	0
3	<input checked="" type="checkbox"/>	0	0	Text-web	10,000						0	0
4	<input checked="" type="checkbox"/>	0	0	Ganged Postcard Run	5,750						0	0
4	<input checked="" type="checkbox"/>	0	0	London	10,000						0	0
4	<input checked="" type="checkbox"/>	0	0	London	10,000						0	0

DELETE COMPONENT

Are you sure that you want to delete components ' booklet Text-sheetfed Jan-Mar Apr-June Jul-Sep Oct-Dec SS Book Text-web Ganged Postcard Run London' and related processes, vers

Yes No

## Print in House button - View Section Details

To view Section Details of the **Printed Inhouse** component: With the Print Mode Off, and the component of the details to view highlighted, click the **Printed Inhouse** button located in the right, top corner of the component description window.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left is a tree view with 'Estimating' expanded, showing components like 'Brochure-20,000', 'Brochure-1-10,000', 'Brochure-2-4,500', and 'Brochure-3-5,500'. The main area displays details for 'Brochure-1' with fields for 'Date on Hand', 'Item #', 'Inventory Code', 'Inv. Description', 'Overs to', 'Insert Notes', and 'Comments'. A table on the right shows 'Additional Info' with fields for 'Flat Size', 'Finish Size', 'Caliper', 'Pc Weight', and 'Bundle Qty'. At the bottom, there is a 'Print Mode Is Off' button and a 'Printed InHouse' button in the top right corner of the component description window.

Double-click the descriptive box in the Print Section to edit section details. Option to Edit: **Section Title** (20-characters max.), **No. Runs**, **Bound as**, **Trim Size**, **Section Qty**.

The screenshot shows the 'Mail Estimating (Print & Mail)' window with the 'Print Section' dialog box open. The dialog box has tabs for 'Options' and 'Processes'. The 'Options' tab is active, showing fields for 'Enter/Modify Estimate', '1x4 Brochure-1', '8 1/2 x 11', 'Manual Sprin', '5/1', and 'Final'. The 'Processes' tab is also visible, showing a list of processes like 'Laser', 'Inkjet', 'Cheshire/PBack', 'Burst/Trim/Fold', 'Printing-PS', and 'Laser-PS'.

Select **View** to preview section template.

The screenshot shows the 'Section Details' dialog box. It contains the following fields and controls:

- Section Title:** Brochure
- Template:** Cover 8.5x11 2up
- No. Runs:** 1
- Bound as:** 1
- Trim Size:** 8 1/2 x 11
- Section Qty.:** 20,000
- Lock Quantity:** ☒
- Buttons:** View, Save

Template 'Cover 8.5x11 2up' - Review Only

Title: Cover 8.5x11 2up

Text

Cover

Pages: 4

Bind as: 1

Trim size: 8 1/2 x 11

Work and Turn

Work and Tumble

Work and Twist

Grain Direction

With Grain

Cross Grain

None

Pre-cut

Yes

No

Auto

Inks

Double-click on cell to set ink color.

Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Heavy Coverage	Light Coverage
Ink 1:	Proc Black	Black
Ink 2:	Proc Cyan	
Ink 3:	Proc Mag	
Ink 4:	Proc Yellow	
Ink 5:	PMS 1	
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing

Double-click on cell to select section finishing process.

Press DEL key to remove a section finishing process.

Section Finishing
Final Trim

	Without Bleeds		With Bleeds								
< Qty.	1st dim.	2nd dim.	1st dim.	2nd dim.	# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain	
99,999,999	2	3	2	3	2	Metal	<input type="checkbox"/>	0	2 x 2		
							<input type="checkbox"/>				
							<input type="checkbox"/>				
							<input type="checkbox"/>				

☒ Save as Permanent Template

CancelOk

Section Details

Section Title: Brochure

Template: Cover 8.5x11 2up

No. Runs: 1

Bound as: 1

sigs.

Trim Size: 8 1/2 x 11

20,000

Section Qty.: 20,000

☒ Lock Quantity

View

Save

**No. Runs:** Use this option if running, for example, a 48-page signature (booklet) that is running as three separate 16-page forms.

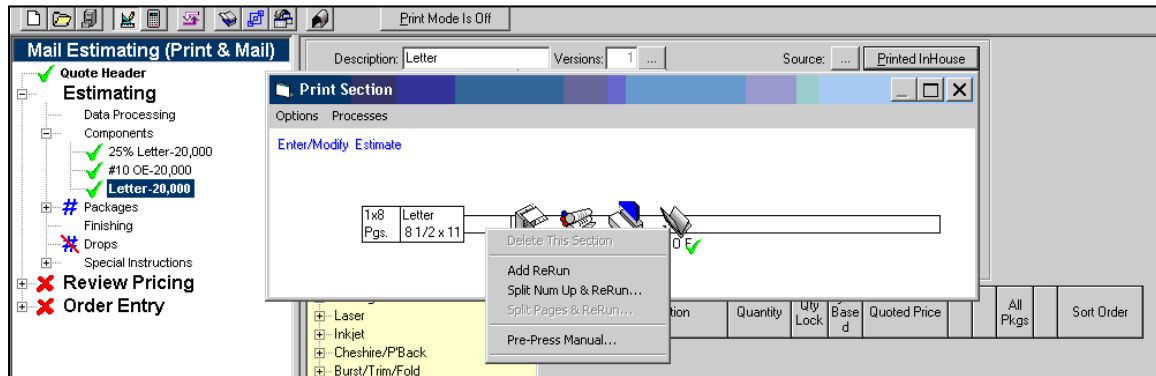
**Note** Original template should be setup as a 16-page signature and 'No. Runs' is entered here as "3" in the section details screen to make the 48-page finished booklet.

**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 1/2" x 8 1/2" 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.



## Optional: Add ReRun or Split Number up and ReRun

To add optional reruns and splits to the section, right-click the pre-press bar (the empty space approx. one inch in length located to the right of the 'form description' bar) and choose an option.



From the pop-up options, select:

**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 and to select the 2nd press.

**Split Number Up and 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 and 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:

CancelSave

**Split Pages and 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.

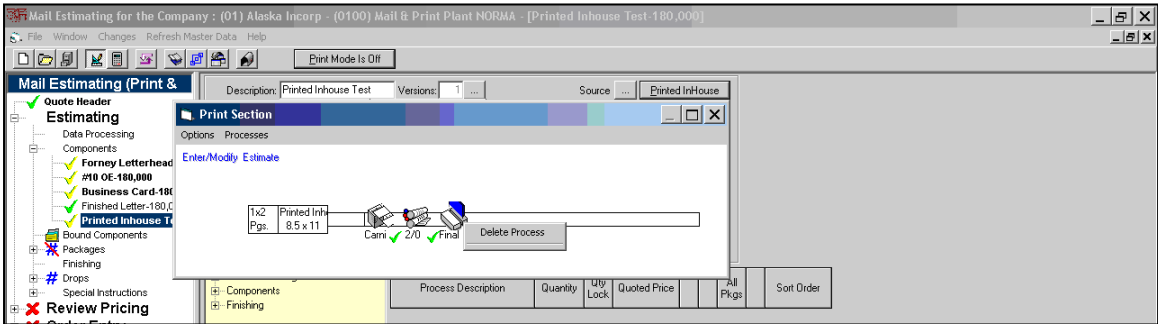
Split into  streams

of  page(s).

New section size:

CancelSave

To delete any of the section processes attached to the Printed-Inhouse component, while in the Edit mode and the **Print Mode Is Off** button is active, highlight the printed-inhouse component and right-click the process. Select **Delete Process** or **Delete Rerun**.



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

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael NORMA

Print Mode Is On

**Mail Estimating (Print & Mail)**

**Letter**

Header | PrePress | Paper | Modifiers | Inks | Select Press | **Section Finishing**

Available SF Processes:

Description	Selected Section Finishing Process	Delete	Scripts	Modifier
5% Overs Test	Final Trim			
Die Cut (Buyout)	MBO FOLD			
Diecutting (Buyout)				
Final Trim				
MBO FOLD				
Post Press Trim				

Final Trim 20,000

Run Quantity: 20,000

Start # Up: 2

End # Up: 2

Quote Header

Estimating

Data Processing

Components

25% Letter-20,000

#10 OE-20,000

**Letter-20,000**

# Packages

Finishing

Drops

Special Instructions


**Review Pricing**

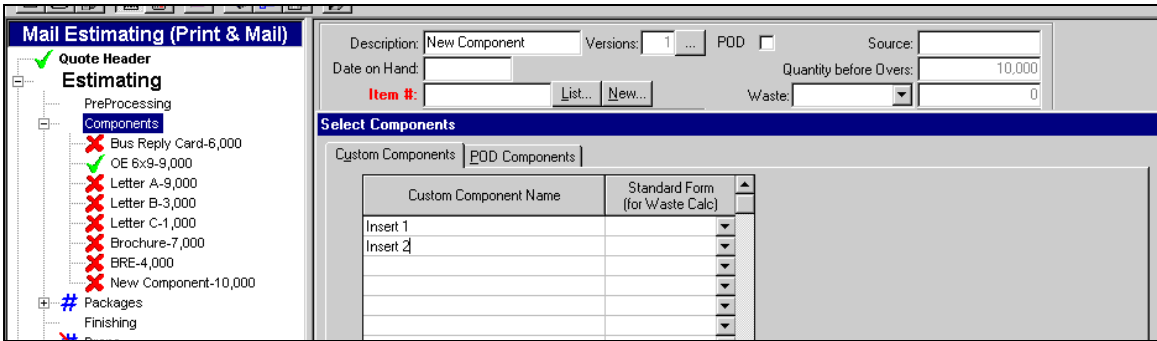
**Order Entry**

**Note** Finishing processes are set up in the **Master Files Print** module (see Print Estimating: Setup and Maintenance of Master Files).

## Adding Extra Components

To add one component click the **Add One Mail Component** icon  in the menu bar.

To add multiple components click the **Add Components** icon  in the menu bar. To close, click the **Finish** button on bottom of the screen.



**Mail Estimating (Print & Mail)**

**Quote Header**

**Estimating**

PreProcessing

**Components**

- Bus Reply Card-6,000
- OE 6x9-9,000
- Letter A-9,000
- Letter B-3,000
- Letter C-1,000
- Brochure-7,000
- BRE-4,000
- New Component-10,000
- Packages
- Finishing

Description: New Component Versions: 1 ... POD ☐ Source:

Date on Hand:  Quantity before Overs: 10,000

Item #:  List... New... Waste:  0

**Select Components**

Custom Components | POD Components

Custom Component Name	Standard Form (for Waste Calc)
Insert 1	
Insert 2	

**Note** If you have a different inventory item # or different processes for a **version**, create a different component for each **version**. To change qty. for a component, select the [...] button, enter quantity and **Save**.

# Print Templates

## Review or Edit Template Screen

Right-click the **Template Name** and select **Review Template** (view only mode) or **Edit Template** to enter any desired changes and **OK**.

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

**Template '16pg 8 1/2 x 11' - Review Only**

Title: 16pg 8 1/2 x 11 0100\*01 San Rafael

☒ Text  
☐ Cover

Pages: 16 Number Of Pages for QL: 16  
Bind as: 1 Number Of Sheets for QL: 8

Finish(Trim) Size: 8 1/2 x 11

☐ Work and Turn  
☐ Work and Tumble  
☐ Work and Twist

Paper Name: Centura Gloss Bk 60# Color: White

Grain Direction: ☐ With Grain ☐ Cross Grain ☒ None  
Precut: ☐ Yes ☐ No ☒ Auto

Ink: Double-click on cell to set ink color. Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light Coverage	Light Coverage
Ink 1:	Black	Black
Ink 2:	PMS 1	PMS 1
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing: Double-click on cell to select section finishing process. Press DEL key to remove a section finishing process.

Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.	1st dim.	2nd dim.	1st dim.						
99,999,999	1	1	2	2	1 Metal	<input type="checkbox"/>	0	4 x 2	
						<input type="checkbox"/>			
						<input type="checkbox"/>			

Gripper: 1 Top Margin: 2 Bottom Margin: 3 Left Margin: 4 Right Margin: 5 Vertical Gutters: 6 Horizontal Gutters: 7 Press Format: All

☒ Save as Permanent Template **OK** Cancel

Two additional fields have been added to the Print Template for the Number of Pages and Number of Sheets.

**Template '16pg 8 1/2 x 11'**

Title: 16pg 8 1/2 x 11 0100\*01 San Rafael

☒ Text  
☐ Cover

Pages: 16 Number Of Pages for QL: 16  
Bind as: 1 Number Of Sheets for QL: 8

Finish(Trim) Size: 8 1/2 x 11

These additional fields are also available in the printed in house component screen, edit mode **Header** tab:

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael NORMA

Mail Estimating (Print & Mail)

Quote Header  
Estimating  
Data Processing  
Components  
Form# 1 PIH-10000  
Assemblies/Bindery  
Create Inventory  
Packages Advanced  
Kits And Packages  
Finishing  
Drops  
Special Instructions  
Review Pricing  
Order Entry

PIH

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: PIH

Template: 16pg 8 1/2 x 11

No. Runs: 1 Bound as: 1 sigs.

Finish(Trim)Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Section Qty.: 10,000

View Change Template Notes

Number Of Pages: 16

Number Of Sheets: 8

Form Number: 1

And in the printed in house component screen, calculate mode, all tabs:

**Mail Estimating for the Company : [01] Streamline Solutions - [0100] 01 San Rafael NORMA**

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

---

**Mail Estimating (Print & Mail)**

- ✓ **Quote Header**
  - Estimating
    - Data Processing
    - Components
      - ✓ **Form# 1 PIH-10,000**
      - Assemblies/Bindery
      - Create Inventory
      - Packages Advanced
      - # Kits And Packages
      - Finishing
      - \* Drops
      - + Special Instructions
  - ✓ **Review Pricing**
  - ✗ **Order Entry**

**PIH - Print Override**

	10,000	
Press:	240 Heidelberg	✓
Precut:		
Finish (Trim) Size:	8 1/2 x 11	
Num. Up:	1	✓
Press Size:	23 x 35	✓
Num. Out:	1	✓
Paper Size:	23 x 35	✓
Waste	446	
Job M/R (Hrs.):	0:30	
Plate M/R (Hrs.):	0:20	
Plates:	Metal	
Extra Plates:	0	
Section Qty.:	11,465	✓
Run Speed	5,000	✓
Washups (Hrs.):	0:15	
Passes:	1	
Number shts	11,465	
Run Hours:	2:15	

Recalc Section

Notes... Paper Notes

Number Of Pages: 16  
Number Of Sheets: 8

And in the printed in house component screen with Print Mode Is Off in the details box:

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael NORMA - [Form# 1 PIH-10,000]

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

Print Mode Is Off

**Mail Estimating (Print & Mail)**

Quote Header

Estimating

- Data Processing
- Components
  - Form#1 PIH-10,000
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
- Order Entry

Description: PIH Versions: 1 ... Source: Printed InHouse

Date on Hand: Quantity before Overs: 10,000

Waste: 0

Total Quantity: 10,000

Inv. Description: Additional Info

Overs to:

Insert Notes:

Comments:

WIP .....

Form # 1

Finish/Trim Size 8 1/2x11

Flat Size 8 1/2x11

Caliper 0

Pc Weight 0.000

Bundle Wt 0

Num Of Pages 16

Num Of Sheets 8

Verified

Notes... Notes... Delete Component Copy Component Save Cancel

### 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. Right-click the template and select **Custom Section Based on...** Change Title, enter specs. and **OK**.

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

**Custom Section based upon '(ENV) 4 1/4 x 8 5/8'.**

Title:

☒ Text  
☐ Cover

Pages:   
Bind as:

Trim size:  x

☐ Work and Turn

Paper Name:   
Color:

Grain Direction:  
☐ With Grain  
☐ Cross Grain  
☒ None

Precut:  
☐ Yes  
☐ No  
☒ Auto

**Ink**

Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light	
Ink 1:	PMS#1	
Ink 2:	Black	
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

**Section Finishing**

Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing

	Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.	1st dim.	2nd dim.	1st dim.	2nd dim.						
99,999,999	0	0	0	0	1	Metal	<input checked="" type="checkbox"/>	0	1 x 1	
							<input type="checkbox"/>			
							<input type="checkbox"/>			
							<input type="checkbox"/>			

☐ Save as Permanent Template

Cancel Ok



## Custom Section - Steps 1-4: Title, Text, Cover and Pages

To create a new section right-click in the "gray area" under the Template Name, then select **Custom Section**. Enter steps (1-21) below and Save:

**Custom Section based upon '(ENV) 4 1/4 x 8 5/8'**

Title: 3094

☒ Text  
☐ Cover

Pages: 2  
Bind as: 1

Trim size: 4 1/4 x 8 5/8

☐ Work and Turn

Paper  
Name:  ...  
Color:  ...

Grain Direction: ☒ With Grain ☐ Cross Grain ☐ None  
Precut: ☐ Yes ☒ No ☐ Auto

**Ink**  
Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light	
Ink 1:	PMS#1	
Ink 2:	Black	
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

**Section Finishing**  
Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing

**1. 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.

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

**3. Cover:** Click this button to indicate that the template is a cover.

**4. 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 11" x 17" flat and folds to a finished size of 8.5" x 11" would be entered as 4 pages.

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

## Custom Section - Step 5 and 6: Bind as and Trim Size

To create a new section select the **Sections** tab, right-click under template name, then select **Custom Section**.

**Template '16 1/2 x 13 7/8 (2up'**

Title: 16 1/2 x 13 7/8 (2up)

☒ Text  
☐ Cover

Pages: 2

Bind as: 1

Trim size: 16 1/2 x 13 7/8

☐ Work and Turn

Paper:  
Name:   
Color:

Grain Direction:  
☒ With Grain  
☐ Cross Grain  
☐ None

Precut:  
☒ Yes  
☐ No  
☐ Auto

**Ink**

Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:		
Ink 1:		
Ink 2:		
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

**Section Finishing**

Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing

**5. Bind as:** This field tells the system how many sections this product will bind as when bindery processes like perfect binding and saddle stitching are 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 1/2" x 8 1/2" signature. This may print as 1-32 page signature but may bind as 2-16 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.

**6. 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 1/2" x 11" that binds on the 11" side would be entered as 8 1/2 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.)**

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

## Custom Section - Step 7 and 8: Work and Turn and Paper

**7. Work/Turn, Work/Tumble, Work/Twist:** Clicking this button indicates that this template is run work and turn, etc. 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 activate the estimate.

**8. Paper:** 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. (See Sample screen below.) The Paper Search screen opens. Use the filters to find the paper and double-click to select. Enter paper color.

The screenshot shows two overlapping windows from a software application. The 'Custom Section' window is in the background, and the 'Paper Search' window is in the foreground.

**Custom Section Window:**

- Title: 5953.99-3 0100 Mail & Print
- Pages: 1 Number Of Pages for C
- Bind as: 1 Number Of Sheets for C
- Finish(Trim) Size: 8 1/2 x 11
- Work and Turn, Work and Tumble, Work and Twist: ☐ (all unchecked)
- Paper Name: [Blank] Color: [Blank]
- Grain Direction: ☐ With Grain ☐ Cross Grain ☒ None
- Precut: ☐ Yes ☒ No ☐ Auto
- Without Bleeds: 1st dim. 2nd dim. 1st dim.
- With E: 1st dim. 2nd dim. 1st dim.
- Grripper, Top Margin, Bottom Margin, Left Margin, Right Margin, Vertical Gutters, Horizontal Gutters: [Blank]
- Press Format: All
- Save as Permanent Template: ☐

**Paper Search Window:**

- Floor Stock: Yes
- Type: Sheet
- Category: [Blank]
- Sub Category: [Blank]
- Basis Type: [Blank]
- Basis Weight: [Blank]
- PPI: [Blank]
- Caliper: [Blank]
- Name Like: [Blank]
- Descr Like: [Blank]
- Vendor: [Blank]
- Show Inactive: ☐
- Buttons: Clear All, Select, Stop

Plant Code	Name	Description	Sizes	Colors	Floor Stock	Category	Subcat
1 0100	* Kromekote C1s 10Pt Cover**0100	Kromekote C1	19 x 25	white	Yes	D-Coated Cor	
2 0200	10 pt cis special order paper**0200	10 pt cis spe			Yes	D-Coated Cor	
3 0100	65# Productolith Dull Cover**0100	65# Productol			Yes	D-Coated Cor	
4 0100	70# Dometar Offset SO**0100	70# Dometar C			Yes	A-Offset/Bor	
5 0200	80# Centura Gloss Text	80# Centura			Yes	B-Coated Tes	
6 0200	80# Centura Gloss Text **0200	80# Centura	23 x 35	White	Yes	B-Coated Tes	
7 0200	80# Galerie Art Gloss Text**0200	80# Galerie A	19 x 25	White	Yes	B-Coated Tes	
8 0100	Accent Opaque Cover**0100	Accent Opac	23 x 35	Bright Whit	Yes	C-Uncoated C	
9 0100	Alpine Opaque Offset Book 60**0100	Alpine Opac	23 x 35	Avalanch	Yes	A-Offset/Bor	
10 0200	Anthem Gloss Text 80#	Anthem Glos			Yes	B-Coated Tes	
11 0100	Art Gloss Book**0100	Art Gloss Bo			Yes	B-Coated Tes	

Loaded 114 records. Click 'Continue' to

Buttons: Print Out, Continue, Search, Close

Buttons: OK, Cancel

Page Number: 1,000 12/1/2011 2,000

## Custom Section - Steps 9-11: Grain Direction, Precut and Ink Coverage

**Custom Section**

Title: 5953.99-3 0100\*Mail & Print Plant

☒ Text  
☐ Cover

Pages: 2 Number Of Pages for QL  
Bind as: 1 Number Of Sheets for QL

Finish(Trim) 16 1/2 x 13 7/8  
Size:

☐ Work and Turn  
☐ Work and Tumble  
☐ Work and Twist

Paper  
Name: 65# Productolith Dull Cover~01  
Color: White

Grain Direction  
☐ With Grain  
☐ Cross Grain  
☒ None

Precut  
☐ Yes  
☐ No  
☒ Auto

Ink  
Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light Coverage	Light Coverage
Ink 1:	PMS 1	Black
Ink 2:	Black	
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing  
Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing

**9. Grain:** None - click this button if the grain of the paper does not matter.

**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.

**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)

**10. 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 dimensions of your layout with the trims and gripper added. (For example, if the layout was for a 16-page 8 1/2" x 11 signature and the layout size needed was 22 3/4" x 34 1/2", 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 1/2"). For another precut option see Auto below.

**No** - If you select "No," the layout will fit on the parent sheet size and no precutting is needed to run the layout. You should only select "No" if none of the layouts needs 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 above only 1 press sheet 22 3/4" x 34 1/2" 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 1/2" 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 1/2" x 23" which is a 23" x 35" parent sheet split exactly in half)

**11. Ink Cover:** You must select a default ink coverage for the template. The ink coverage can be changed on individual estimates. This is just a default coverage for the template. Click the arrow to see a listing of ink coverage on your system. Click a coverage to select. If the default template prints on the backside as well, select a coverage for that side also. You will need to 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.

**Custom Section**

Title: 5953.99-3 0100\*Mail & Print Plant

☒ Text  
☐ Cover

Pages: 2 Number Of Pages for QL:   
Bind as: 1 Number Of Sheets for QL:

Finish(Trim) Size: 16 1/2" x 13 7/8"

☐ Work and Turn  
☐ Work and Tumble  
☐ Work and Twist

Paper  
Name: 65# Productolith Dull Cover^^01  
Color: White

Grain Direction: ☐ With Grain ☐ Cross Grain ☒ None  
Precut: ☐ Yes ☐ No ☒ Auto

**Ink**  
Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light Coverage	Light Coverage
Ink 1:	PMS 1	Black
Ink 2:	Black	
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

**Section Finishing**  
Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.	1st dim.	2nd dim.	1st dim.						
99,999,999									

Gripper Top Margin Bottom Margin Left Margin Right Margin Vertical Gutters Horizontal Gutters

Press Format: All

☐ Save as Permanent Template

OK Cancel

## Custom Section - Step 12 and 13: Section Finishing and Quantity

**12. Section Finishing:** 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 and perfin. 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.

Color: White

Grain Direction: ☐ With Grain ☐ Cross Grain ☒ None

Precut: ☐ Yes ☐ No ☒ Auto

Section Finishing

Double-click on cell to select section finishing process.

Press DEL key to remove a section finishing process.

Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty	1st dim.	2nd dim.	1st dim.						
1,000					1				
5,000					2				
25,000					4				
99,999,999					8				

Gripper:

Top Margin:

Bottom Margin:

Left Margin:

Right Margin:

Vertical Gutters:

Horizontal Gutters:

Press Format: All

☐ Save as Permanent Template

OK Cancel

**13. 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 1000 or less, 2-up if the estimate quantity is between 1001 and 5000, 4-up if the quantity is between 5001 and 25000, and 8-up if the quantity is more than 25001). In the example, the quantity breaks would be 1000, 5000, 25000, and 99999999. **It is important that** the last layout always be 99,999,999's.

## Custom Section - Steps 14-17: With and Without Bleeds, # Up, Plate Type

**14. W/O Bleed:** The amount of trim needed for grippers, gutters, color bars, etc., 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-pg. 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.)

< Qty.	Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
	1st dim.	2nd dim.	1st dim.	2nd dim.						
1,000	1/2	1/2	1	1	1	Metal	<input type="checkbox"/>			
5,000	1/2	1/2	1	1	2	Metal	<input type="checkbox"/>			
25,000	1/2	1/2	1	1	4	Metal	<input type="checkbox"/>			
99,999,999	1/2	1/2	1	1	8	Metal	<input type="checkbox"/>			

Gripper	Top Margin	Bottom Margin	Left Margin	Right Margin	Vertical Gutter	Horizontal Gutter	Press Format	All

☐ Save as Permanent Template OK Cancel

**15. W/ Bleeds:** The amount of trim needed for grippers, gutters, color bars, etc., 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. This dimension is only added to one side of 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.)

**16. # 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.)

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

## Custom Section - Steps 18-21: Perfect, Cutoff Web, Layout and Grain

**18. Perfect:** If the layout is designed to perfect on the press click the 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.

**19. Cut/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.

**20. 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 1/2" x 11" letterhead - printed 2-up; the layout would be 2 x 1, or two - 8 1/2" images across the width of the press sheet and 1-11" image going down the length of the press sheet).

Without Bleeds			With Bleeds			# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.	1st dim.	2nd dim.	1st dim.	2nd dim.							
1,000	1/2	1/2	1	1	1	Metal	<input type="checkbox"/>		1 x 1		
5,000	1/2	1/2	1	1	2	Metal	<input type="checkbox"/>		2 x 1		
25,000	1/2	1/2	1	1	4	Metal	<input type="checkbox"/>		2 x 2		
99,999,999	1/2	1/2	1	1	8	Metal	<input type="checkbox"/>		4 x 2		

Gripper	Top Margin	Bottom Margin	Left Margin	Right Margin	Vertical Gutters	Horizontal Gutters	Press Format
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All

☐ Save as Permanent Template OK Cancel

**21. Grain:** 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** Check 'Save as Permanent Template' option (bottom of screen) and **OK** if you want to permanently add the template to the section list. **Saved** templates can only be edited not deleted.



## Additional fields added for Pages and Sheets

Two additional fields were added to the Print Template for the Number of Pages and Number of Sheets.

Template '16pg 8 1/2 x 11'

Title: 16pg 8 1/2 x 11 | 0100\*01 San Rafael

☒ Text  
☐ Cover

Pages: 16 | Number Of Pages for QL: 16

Bind as: 1 | Number Of Sheets for QL: 8

Finish(Trim) Size: 8 1/2 x 11

These fields can additionally be seen in the Component screen.

Description: Brochure | Versions: 1

Date on Hand: | Source: Printed InHouse

Quantity before Overs: 10,000

Waste: 0

Total Quantity: 10,000

Additional Info

Finish(Trim) Size	8 1/2x11
Flat Size	8 1/2x11
Caliper	0.000
Pc Weight	0.000
Bundle Qty	0
Num Of Pages	16
Num Of Sheets	8
Verified	<input type="checkbox"/>

As well as the when the component is shown with Print Mode is On.

Brochure

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Section Title: Brochure

Template: 16pg 8 1/2 x 11 | View | Change Template | Notes

No. Runs: 1 | Bound as: 1 | sigs.

Finish(Trim)Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Number Of Pages: 16

Number Of Sheets: 8

Section Qty.: 10000

## Change Print Template to Update Trim and Flat Size

Changes were made that when user changes the print template to another template the trim size and flat size will be updated.

Estimate is created with business card template.

Section Title: Bus. Card 4 up

Template: Bus. Card 4 up View Change Template Notes

No. Runs: 1 Bound as 1 sigs.

Trim Size: 2 x 3 1/2

Flat Size: 2 x 3 1/2

Number Of Pages: 0

Number Of Sheets: 0

Section Qty.: 10,000

Using the Change template option and selected the 16 pg 8 1/2 x 11.

Section Title: Bus. Card 4 up

Template: Bus. Card 4 up View Change Template Notes

No. Runs: 1 Bound as 1 sigs.

Trim Size: 2 x 3 1/2

Flat Size: 2 x 3 1/2

Number Of Pages: 0

Number Of Sheets: 0

Section Qty.: 10,000

☐ Lock Quantity

☐ This is a Combo Run (C

**Change Template**

Options

Sections

Template Name	Plant Code	Company
16pg 8 1/2 x 11	0100	01
16pg 8 1/2 x 11 Web	0100	01
16pg no margins	0100	01
2888-1	0100	01

The trim size and flat size will now reflect the new templates info.

PIH

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: 16pg 8 1/2 x 11

Template: 16pg 8 1/2 x 11 View Change Template Notes

No. Runs: 1 Bound as 1 sigs.

Trim Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Number Of Pages: 0

Number Of Sheets: 0

10,000

Section Qty.: 10000


PIH


Header PrePress Paper Modifiers Inks Select Press Section Finishing

☒ Front ☐ Back Press Type: Sheet


10,000


Section Qty.: 10000


Press: 


Perfect 

Trim Size: 8 1/2 x 11

Number Up: 0 

Press Size: 0 x 0 

Number Out: 0 

Paper Size: 0 x 0 

PF All Options End Press

## All Option Parameters to be Pre-saved for Re-use

In the Print Template when you define Gripper, Top Margin, Bottom Margin, Left Margin, Right Margin, Vertical Gutters, and Horizontal Gutters, these values will be carried over to the **All Options** button under the **Select Press** tab.

Template '16pg 8 1/2 x 11' - Review Only

Title: 16pg 8 1/2 x 11 0100\*01 San Rafael

Text

Cover

Pages: 16 Number Of Pages for QL: 16

Bind as: 1 Number Of Sheets for QL: 8

Finish(Trim) Size: 8 1/2 x 11

Work and Turn

Work and Tumble

Work and Twist

Grain Direction

With Grain

Cross Grain

None

Precut

Yes

No

Auto

Paper

Name: Centura Gloss Bk 60#

Color: White

Ink

Double-click on cell to set ink color.

Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light Coverage	Light Coverage
Ink 1:	Black	Black
Ink 2:	PMS 1	PMS 1
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing

Double-click on cell to select section finishing process.

Press DEL key to remove a section finishing process.

Section Finishing

	Without Bleeds		With Bleeds								
< Qty.	1st dim.	2nd dim.	1st dim.	2nd dim.	# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain	
99,999,999	1	1	2	2	1	Metal	<input type="checkbox"/>	0	4 x 2		
							<input type="checkbox"/>				
							<input type="checkbox"/>				
							<input type="checkbox"/>				

Gripper

Top Margin

Bottom Margin

Left Margin

Right Margin

Vertical Gutters

Horizontal Gutters

Press Format

All

Save as Permanent Template

OK

Cancel

It will use these values when you click New Calculation when figuring the sheet sizes

**All Running Options**

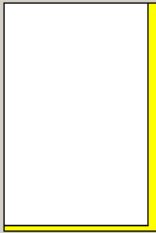
Trim Size: 8 1/2 X 11      Cost to Display: Front and Back

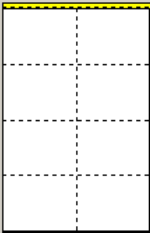
☐ Use Template Pages ( 16 )      Pages in Section: 16      Minimum Number of Pages: 16

Press Name	Stock Size	Stock Grain	Pages / Form	# Out	Press Sheet	# Up	10000	0	0	0	0
240 Heidelberg	24 x 36	Long	16	1	35 1/4 x 22 1/4	1	2217.05				
240 Heidelberg	25 x 38	Long	16	1	35 1/4 x 22 1/4	1	2425.55				
640 Heidelberg	24 x 36	Long	16	1	35 1/4 x 22 1/4	1	2691.25				
640 Heidelberg	25 x 38	Long	16	1	35 1/4 x 22 1/4	1	2899.75				

Stock Sheet → Press Sheet → Selection Count: 4





Gripper: 3/4

Top Margin: 1/4

Bottom Margin: 1/4

Left Margin: 1/8

Right Margin: 1/8

Vertical Gutters: 1/4

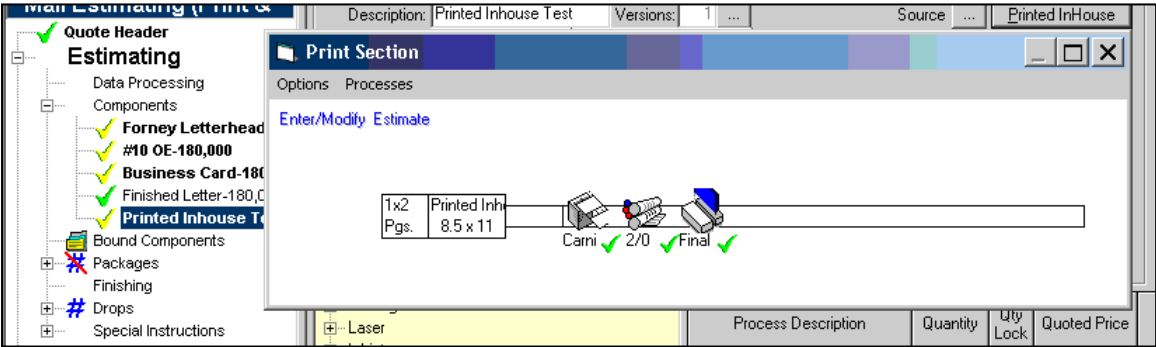
Horizontal Gutters: 1/4

☒ Show All Options  
 Press Flags  
 New Calculation  
 Close  
 OK

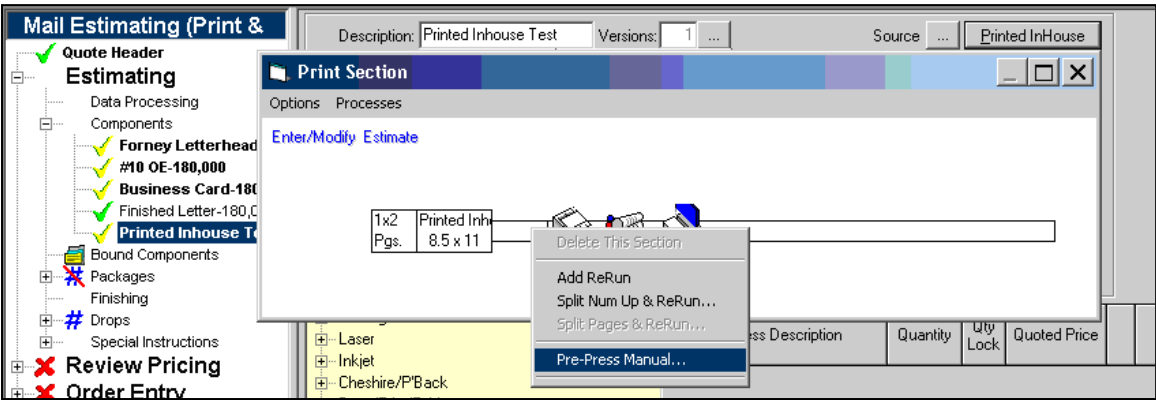
What it does is calculate the press sheet based on the pages, page size and the parameters at the bottom then looks at the paper sizes for the paper that was selected and displays both the paper sheet sizes and press sheet sizes for the different layouts that can run on the paper sizes available.

## Enter or Delete Pre-Press Information

To 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 (circled in screenshot below).



Select Pre-Press Manual.



## Pre-Press Entry Screen

To enter data, click the size of the process (e.g., Camera/Stripping, under Type 6: 24x36) and select the down arrow or double-click the size. Once the process has been displayed below, enter quantity. To return a process, click the operation/process and click the up arrow to remove it.

To delete, right-click the **Pre-Press Manual** icon and select **Delete This Section**.

**Note** Processes, pricing, sizes, etc., are set up in the **Master Files - Print** module (see Print Estimating: Setup and Maintenance of Master Files).

Manual Pre-Press Entry

Operation	Type 1	Type 2	Type 3	Type 4	Type 5	Type 6	Type 7	Type 8	Type 9
Output Film 01	BW Flat	CLR Flat							
Dylux Proof 01	12 x 19	16 x 21	30 x 40	8.5 x 11	23 x 29	23 x 35	26 x 40	28 x 40	
Scan Images 02	# Images								
Scan Text 02	6 x 9	8 1/2 x 11							
Scan Halftones 02	2 x 3	4 x 5	6 x 9	8 x 10					
Scan Color 02	# Images								
Clone of Output Film 01	BW Flat	CLR Flat							
Blueline Proof	12 x 19	16 x 21	30 x 40	8.5 x 11	23 x 29	23 x 35	26 x 40	28 x 40	
Film Process with UDF	1 Color	2 Color							
Film Process-NO UDF	1 Color	2 Color							
TESTPREPRESS	FIRST	SECOND							

↓ ↑

Operation	Type	Qty. 1	Labor Cost	Mat'l Cost	Qty. 2	Labor Cost	Mat'l Cost	Qty. 3	Labor Cost	Mat'l Cost
Dylux Proof 01	12 x 19	1	\$43.33	\$3.00	1	\$43.33	\$3.00	1	\$43.33	\$3.00
Scan Text 02	8 1/2 x 11	1	\$6.25	\$0.00	1	\$6.25	\$0.00	1	\$6.25	\$0.00
Blueline Proof	12 x 19	1	\$41.33	\$3.00	1	\$41.33	\$3.00	1	\$41.33	\$3.00
Film Process with UDF	2 Color	1	\$3.09	\$0.00	1	\$3.09	\$0.00	1	\$3.09	\$0.00
TESTPREPRESS	FIRST	1	\$75.00	\$0.00	1	\$75.00	\$0.00	1	\$75.00	\$0.00

**Highlighted Changes in Prep and Section Finishing** - Added a visual (Yellow Highlight) when changes have been accepted. When you change the quantity and tab out of the field, the color of that field will turn to yellow. This will eliminate confusion with users not knowing if edits were made and saved.

Operation	Type 1	Type 2	Type 3	Type 4	Type 5	Type 6	Type 7
Output Film	BW Flat	CLR Flat					
Dylux Proof	12 x 19	16 x 21	30 x 40				
Buy something							

Operation	Type	Qty. 1	Labor Cost	Mat'l Cost
Output Film	BW Flat	2	\$56.25	\$10.00

**Pre-press pricing to update when Quote is copied** - A top issue for the PSUG Print and Mail Estimating user group was the issue of the Pre-press pricing not updating when the prepress process standards were changed in Master Files Print and a quote with those prepress activities was copied to create a new quote. The prepress activities were not being updated. This was actually a bug which has been fixed in the current version so now the pricing does update.

Pricing before changes:

Operation	Type 1	Type 2	Type 3	Type 4
Pre Flight	BW Flat	CLR Flat		
Doc File Setup	BW Flat	CLR Flat		
File Edit/File Prep	BW Flat	CLR Flat		
File Retrieval Section	BW Flat	CLR Flat		
Perf/Score Setup	BW Flat	CLR Flat		
Proof Soft PDF	BW Flat	CLR Flat		
Output Film	BW Flat	CLR Flat		
Dylux Proof	12 x 19	16 x 21	30 x 40	
Buy something				
Clone of Buy something				

Operation	Type	Qty. 1	Labor Cost	Mat'l Cost
Dylux Proof	12 x 19	1	\$72.00	\$3.00
Output Film	BW Flat	1	\$31.25	\$5.00
File Edit/File Prep	BW Flat	1	\$31.25	\$5.00
Pre Flight	CLR Flat	1	\$62.50	\$5.00
Pre Flight	BW Flat	1	\$31.25	\$5.00



Pricing after changes and quote is copied:

Form A

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Operation	Type 1	Type 2	Type 3	Type 4
Pre Flight	BW Flat	CLR Flat		
Doc File Setup	BW Flat	CLR Flat		
File Edit/File Prep	BW Flat	CLR Flat		
File Retrieval Section	BW Flat	CLR Flat		
Perf/Score Setup	BW Flat	CLR Flat		
Proof Soft PDF	BW Flat	CLR Flat		
Output Film	BW Flat	CLR Flat		
Dylux Proof	12 x 19	16 x 21	30 x 40	
Buy something				
Clone of Buy something				

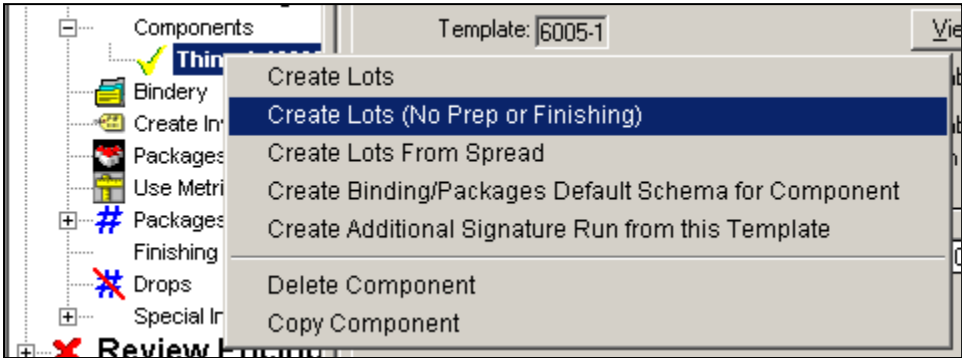
↓ ↑

Operation	Type	Qty. 1	Labor Cost	Mat'l Cost
Dylux Proof	12 x 19	1	\$72.00	\$3.00
Output Film	BW Flat	1	\$31.25	\$5.00
File Edit/File Prep	BW Flat	1	\$31.25	\$5.00
Pre Flight	CLR Flat	1	\$343.75	\$25.00
Pre Flight	BW Flat	1	\$229.17	\$25.00

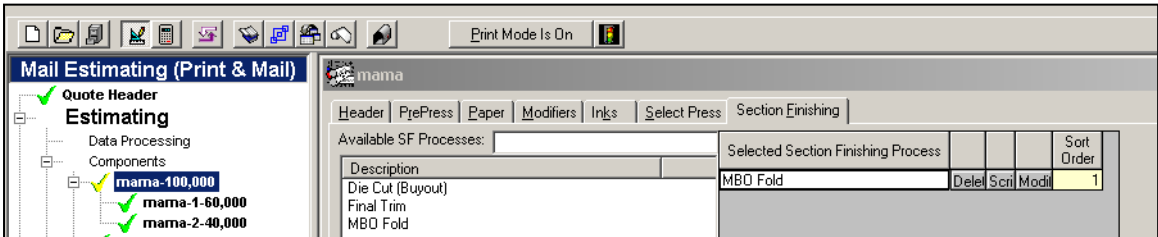
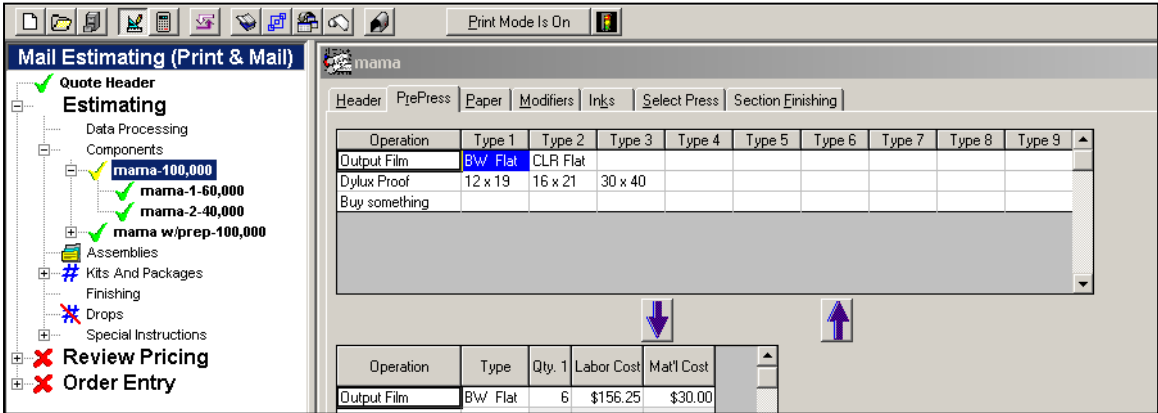
## Optional Lot Creation without Prepress and Section Finishing

An option was added in Print and Mail Estimating to create lots with no prepress and section finishing.

Right-click the component on which you wish to create lots, select the Create Lots (No Prep or Finishing) if you wish to not carry over the parent component prepress and section finishing activities.



Main component – prepress and section finishing:



Lots created will not carry over the prepress and section finishing activities.

Mail Estimating (Print & Mail) LOT mama-1

Print Mode Is On

Quote Header  
Estimating

Data Processing  
Components

- mama-100,000
- mama-1-60,000
- mama-2-40,000
- mama w/prep-100,000

Assemblies

Kits And Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Operation	Type 1	Type 2	Type 3	Type 4	Type 5	Type 6	Type 7	Type 8	Type 9
Output Film	BW Flat	CLR Flat							
Dylux Proof	12 x 19	16 x 21	30 x 40						
Buy something									

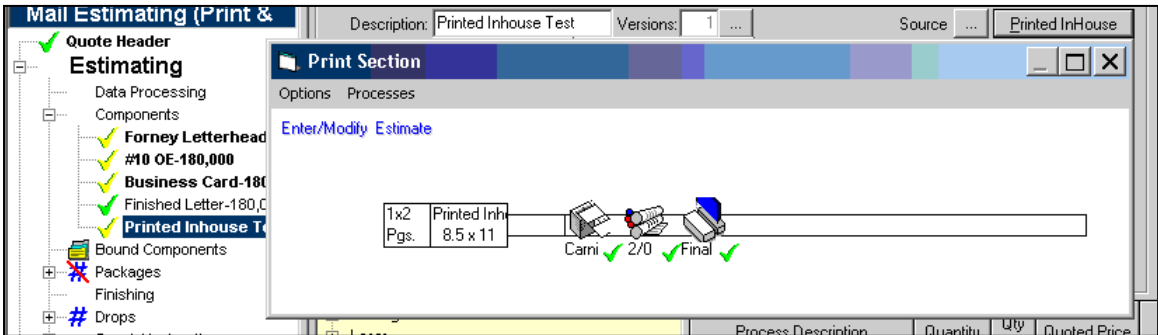
Operation Type Qty. 1 Labor Cost Mat'l Cost

Available SF Processes:

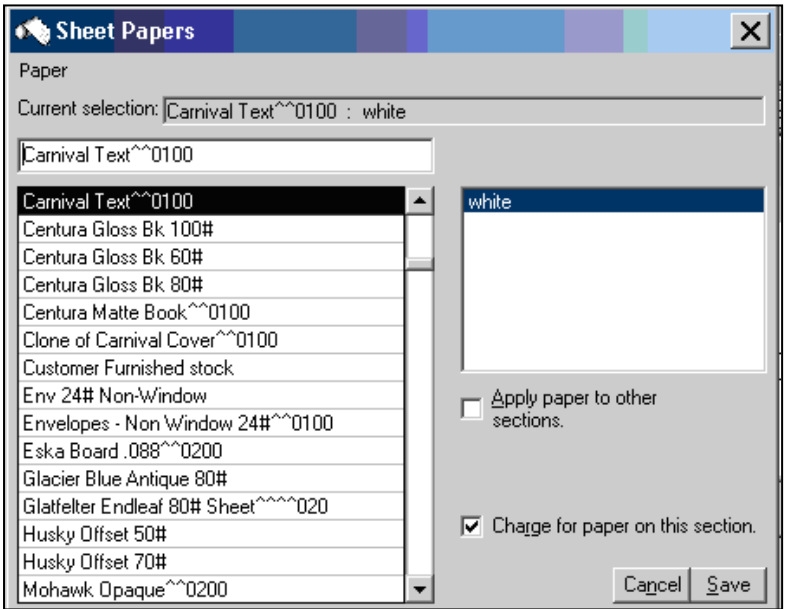
Description	Selected Section Finishing Process	Sort Order
Die Cut (Buyout)		
Final Trim		
MBO Fold		

## Review or Enter Paper Details

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



Highlight the paper and color and **Save**.



You can search the paper descriptions by clicking the blank box above the paper descriptions and entering part of the paper description.

If the paper(s) entered in 'Master File – Print' do not show up on the list, select Paper from the menu and check that the paper default is correct. (Sheet, Web, Continuous, Flexo Stock...)

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

## Modifiers Tab - Impositions

Added Work & Flop to the estimating module and the following areas have been modified to display:

When Print Mode is On, option to Select the Work and Flop

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH

Print Mode Is On

**Mail Estimating**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Form# 1 WF-1
    - Assemblies/Bindery
    - Create Inventory
    - Packages Advance
    - Kits And Packages
    - Finishing
    - Drops
    - Special Instructions
  - Credit Checks
  - Job Scheduling

**WF**

Header | PrePress | Paper | **Modifiers** | Inks | Select Press | Section Finishing

Front Back

Modifiers

Modifiers	Qty.	Orig. Mins	Orig MR Waste	Rep Mins	Rep MR Waste	Run Spe Reductio
1/2 Fold HT-1W						
1/2 Fold HT-2W						
Customer Press Check						
Fold - Fanfold						
Fold - Inline Parallel Fold						
Fold - Plowfold						
Inline Glue						
Press Perf/Score						
Re-Run Coater Waste						
Roll to Sheet						
Run off						

Add Bleeds Cross-grain ☐ Work and Turn ☐ Dutch Cut ☐  
 Add bleeds w/grain ☐ Work and Tumble ☐ Num. First M/Rs: 1  
 Work and Twist ☐  
 Work and Flop ☒

In the Print Specs when Print Mode is On once converted to a job

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH

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

Print Mode Is On

**Mail Estimating**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Form# 1 WF-1
    - Assemblies/Bindery
    - Create Inventory
    - Packages Advance
    - Kits And Packages
    - Finishing
    - Drops
    - Special Instructions
  - Credit Checks
  - Job Scheduling

**WF**

PrePress | Paper | **Print Specs** | Ink Cost

Method: Flop

Estimated Inks - Side 1	Estimated Ink %	Actual Inks - Side 1	Actual Ink %	Estimated Inks - Side 2	Estimated Ink %	Actual Inks - Side 2	Actual Ink %
Proc Black	0.00%	Proc Black	0.00%	Proc Black	0.00%	Proc Black	0.00%
Proc Cyan	0.00%	Proc Cyan	0.00%	Proc Cyan	0.00%	Proc Cyan	0.00%
Proc Mag	0.00%	Proc Mag	0.00%	Proc Mag	0.00%	Proc Mag	0.00%
Proc Yellow	0.00%	Proc Yellow	0.00%	Proc Yellow	0.00%	Proc Yellow	0.00%
PMS 1	0.00%	PMS 1	0.00%	PMS 1	0.00%	PMS 1	0.00%

Side 1 Coverage: Heavy Ink Coverage % Cov.: 70.00%

In the Detail version of the Quote Breakdown



Print									
WF - 1 Forms x 4 Pages (4pgs), 8.5 X 11 - Printed 5/5									
Printed Component		10,000							
		Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost
Plates	Plates	1:15	\$112.50		\$0.00		\$0.00		\$0.00
	Plates..(Side 1/Side 2)	5/0							
	Plate Names:	Metal							
Paper	Springhill C1s Cover 10Pt		\$655.73		\$0.00		\$0.00		\$0.00
Paper	Pre-cut cost	0:00	\$0.00		\$0.00		\$0.00		\$0.00
	White	5702							
	Paper Size	20.00 x 26.00							
	Number Out	1							
	Press Sheet Size	20.00 x 26.00							
	Paper Rate/1000 sheets	\$115.00							
Inks Front	Proc Black,Proc Cyan,Proc Mag,Proc Yellow,PMS 1		\$81.38		\$0.00		\$0.00		\$0.00
Press - Side 1	Press Costs - Side 1	5:47	\$1823.51		\$0.00		\$0.00		\$0.00
	Press	640 Heidelberg							
	Number of Passes	1							
	Number Up	2							
	Working Method	Work And Flop							
	Nett Press Sheets off Press	5,000							
	Waste	627							
Process	Final Trim	0:50	\$50.00		\$0.00		\$0.00		\$0.00
	Make Ready Waste / Run Waste	25/50		0:0		0:0		0:0	
SUB TOTAL	WF	7:52	\$2723.12	0:00	\$0.00	0:00	\$0.00	0:00	\$0.00

In the Job Details section of the Combo Work Ticket

Job Details

Print Components

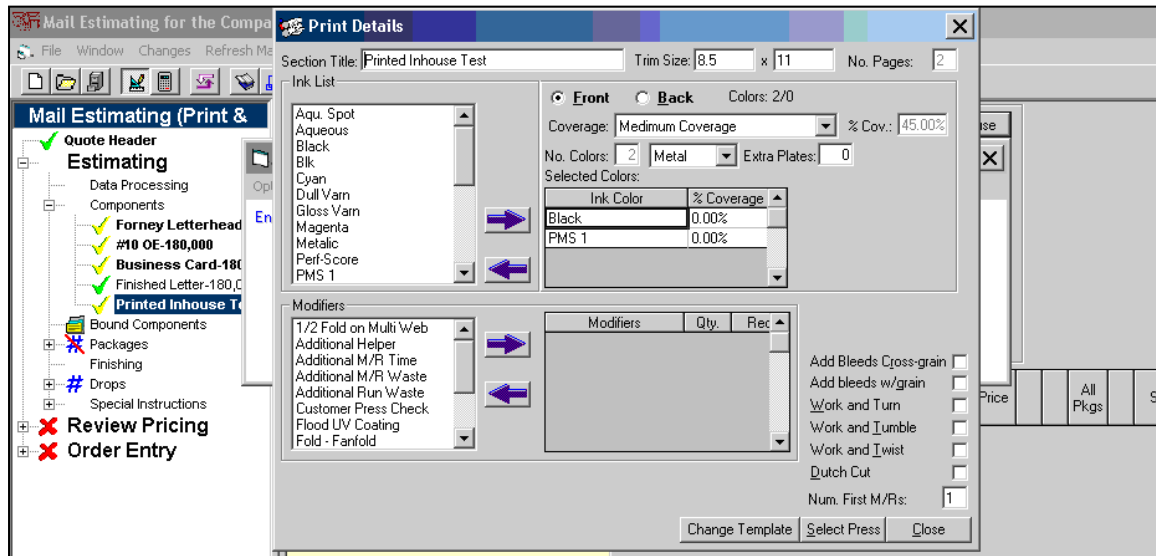
Press Notes

#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size										
1	WF		10,000	Printed	8.5 x 11	8.5 x 11										
1 forms x 4pgs, 2up W/Flop, 5/5, 640 Heidelberg, Final Trim																
Paper/ Material Description - (Vendor Product Code)		Inventory ID	Material Qty	Parent Size	Cut To	#Out	Source									
Springhill C1s Cover 10Pt			5,702	20 x 26	20 x 26	1	DPHOUSE									
Press		Imposition	#Up													
640 Heidelberg		W/Flop	2													
Front: Proc Black, Proc Cyan, Proc Mag, Proc Yellow, PMS 1																
Back: Proc Black, Proc Cyan, Proc Mag, Proc Yellow, PMS 1																
Side	Forms	Pages	#Up	Plates	Gross Qty	MR Waste	Run Waste	Net Qty	MR Hrs	Run Hrs	W/U Hrs	P/M Hrs	Plate Making		Printing	
Front	1	4	2	5	5,702	525	102	5,075	1:20	3:13	1:15	1:15				

## Review, Enter or Delete Press Details

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

To add an ink or modifier, highlight and click the arrow pointing right. To return an ink or modifier, highlight and click the arrow pointing to the left. Enter: ink coverage, plate type, review the 'front' and/or 'back' page and/or other options (bleeds, work and turn, etc.) and **Close** or **Select a Press** (bottom right).



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

**Note** For the selected Ink Coverage: 'Light 20%' - the coverage for each color defaults to 0%, which (in this example) applies 10% for each color. If the % should differ between inks (+ or -), enter the exact % in the % Coverage field (see sample below: PMS 1: 5%, REG. BLACK 15%), and the system will calculate the ink costs accordingly.

**Extra Plates:** adds Make Ready cost and Plate cost, but does NOT include additional Wash Up cost.

Print Details

Section Title: #10 ENV Standard-PIHTrim Size: 4 1/4 x 9 1/2No. Pages: 1

Ink List

PMS 1

PMS 2

Proc Black

Proc Magnta

Proc Yellow

Proc. Cyan

REG. BLACK

➡

⬅

FrontBackColors: 2/0

Coverage: Light% Cov.: 20.00%

No. Colors: 2PaperExtra Plates: 0

Selected Colors:

Ink Color	% Coverage
PMS 1	5.00%
REG. BLACK	15.00%

Modifiers

Glue

Perf

Press Check

Score

Solid Coverage

Special Make Ready

➡

⬅

Modifiers	Qty.	P/L
Special Make Ready	1	<input checked="" type="checkbox"/>

Add Bleeds Cross-grain☐

Add bleeds w/grain☐

Work and Turn☐

Dutch Cut☐

Num. First M/Rs: 1

Select Press

Close

Select a Press

To select a press, 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 override or manually choose a press, paper size, etc., from the various drop-down menus. Close screens 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.

(SS) Select a Press

FrontBack

	10,000	20,000	30,000	40,000
Section Qty.:	10,000	20,000	30,000	40,000
Press:	240 Heidelberg <input checked="" type="checkbox"/>	240 Heidelberg <input checked="" type="checkbox"/>	240 Heidelberg <input checked="" type="checkbox"/>	240 Heidelberg <input checked="" type="checkbox"/>
Perfect	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trim Size:	23 x 35	23 x 35	23 x 35	23 x 35
Number Up:	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>
Press Size:	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>
Number Out:	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>	1 <input checked="" type="checkbox"/>
Paper Size:	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>	23 x 35 <input checked="" type="checkbox"/>

Press Type: Sheet

All OptionsPFFind PressClose

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

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



## Select a 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). You will get this screen when the **PF** button is selected:

Name	Press Type	Method	Reg Front	Reg Back	Front Cov	Back Cov	Stock Type	Max Col Front	Max Col Back	Modifier Front	Modifier Back	Plate Front	Plate Back	Max Size	h	S
Xerox DocuColor 40 (Front Qty 1)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	Pass	Pass	P	P
Xerox DocuTech (Front Qty 1)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	Pass	Pass	P	P
Heidelberg GT0 (Front Qty 1)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	P	P
Heidelberg 6c-25 (Front Qty 1)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	P	P
Xerox DocuColor 40 (Front Qty 2)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	Pass	Pass	P	P
Xerox DocuTech (Front Qty 2)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	Pass	Pass	P	P
Heidelberg GT0 (Front Qty 2)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	P	P
Heidelberg 6c-25 (Front Qty 2)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	P	P
Xerox DocuColor 40 (Front Qty 3)	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Pass	Fail	Pass	Pass	P	P

Press: Heidelberg 6c-25 ✓ Heidelberg 6c-25 ✓ Heidelberg 6c-25 ✓

Perfect ☒

Trim Size: 8 1/2 x 11 8 1/2 x 11 8 1/2 x 11

Number Up: 4 ✓ 4 ✓ 4 ✓

Press Size: 17 1/2 x 22 1/2 17 1/2 x 22 1/2 17 1/2 x 22 1/2

Number Out: 1 ✓ 1 ✓ 1 ✓

Paper Size: 17 1/2 x 22 1/2 17 1/2 x 22 1/2 17 1/2 x 22 1/2

Add Bleeds Cross-grain ☐

Add bleeds w/grain ☐

Work and Turn ☐

Dutch Cut ☐

Num. First M/Rs: 1

PF View Layout Find Press Close

Select Press Close

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

### Conditions where the press flag shows Fail

<b>Active</b>	The <b>Active</b> check box is cleared. (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.)
<b>Press Type</b>	In the new engine, only the types of presses that match the section type are evaluated. If the press does not show up in the list, it does not match the section type. If doing "Multi Web" work and the press does not have enough reels to accommodate the job.
<b>Method</b>	The Ink Coverage is too high for the press or an ink coverage is used that requires registration and the press inks are not set for registration.
<b>Reg Front</b>	The Ink Coverage is too high for the press or an ink coverage is used that requires registration and the press inks are not set for registration.
<b>Reg Back</b>	
<b>Front Cov.</b>	
<b>Back Cov.</b>	
<b>Stock Type</b>	The paper type has not been checked for this press or the quantity is too high for this paper type on the press.
<b>Max. Col Front</b>	Too many colors or too high of quantity for the number of colors.
<b>Max. Col Back</b>	
<b>Modifier Front</b>	No values for an assigned modifier have been set for this press.
<b>Modifier Back</b>	
<b>Plate Front</b>	Selected Plate is not set up for this press.
<b>Plate Back</b>	
<b>Max Size</b>	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.
<b>Min. Size</b>	Press sheet size too small for press. If a continuous press, there is not a match for cylinder size.

Conditions where the press flag shows Fail

- 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

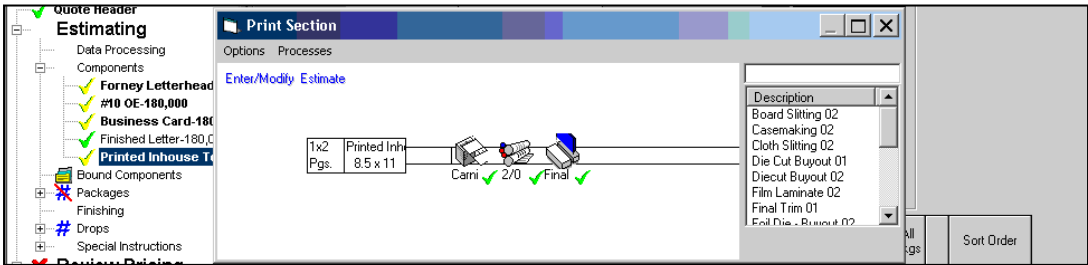
3. # of inks have been assigned to the Front

4. Number of inks on Front is greater than the available front units

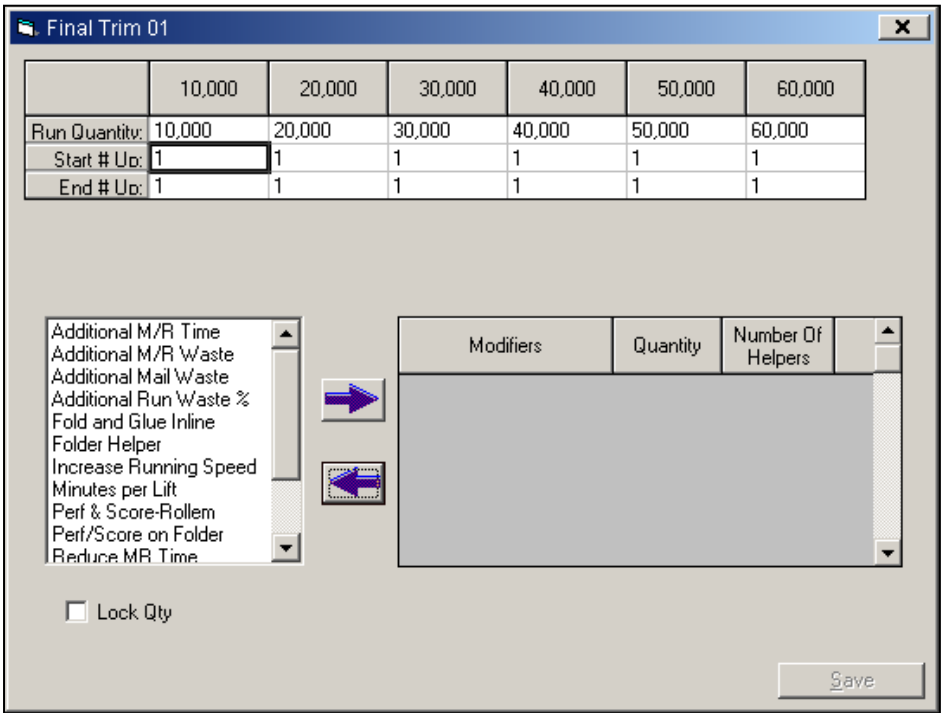
5. Number of inks on Back is greater than the available back units

Select, Review or Enter Section Finishing Details

To select Section Finishing click **Processes** on the Print Section tool bar.



Select the process and highlight, drag and drop the icon onto the Press bar. To Review or Enter details double-click each finishing icon (e.g., Final Trim).




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

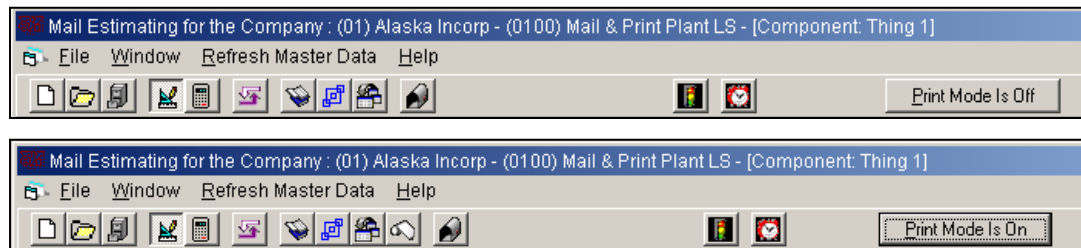
**Note** Finishing processes are set up in the **Master Files - Print** module (see Print Estimating: Setup and Maintenance of Master Files).

There is an option to attach **Section Finishing** to each Template, if you wish to avoid this step.

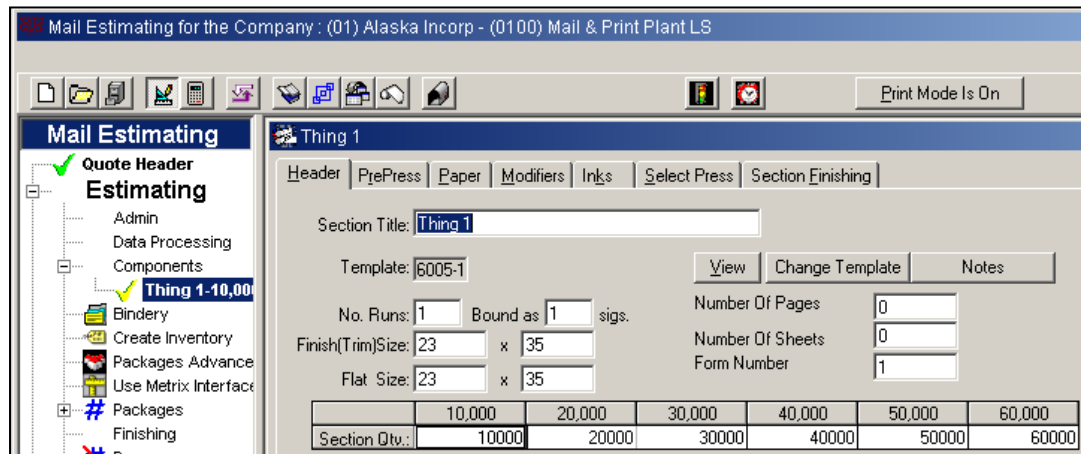
## Activate Print Mode (Option)

Estimators have a second option to select all print component specs from a different screen, without the need to double-click each individual icon as in the **Printed in House** option written in previous pages of this document.

1. While in EDIT mode (triangle w/pencil icon) , highlight your print component.
2. Select the **Print Mode Is Off** button (last button on gray tool bar) to toggle it to become **Print Mode Is On**.



3. Re-select the component name from the tree structure on the left (e.g., Form).
4. A screen with the following 7-tabs will display: Header, PrePress, Paper, Modifiers, Ink, Select Press, Section Finishing. Select each tab and enter your specs.



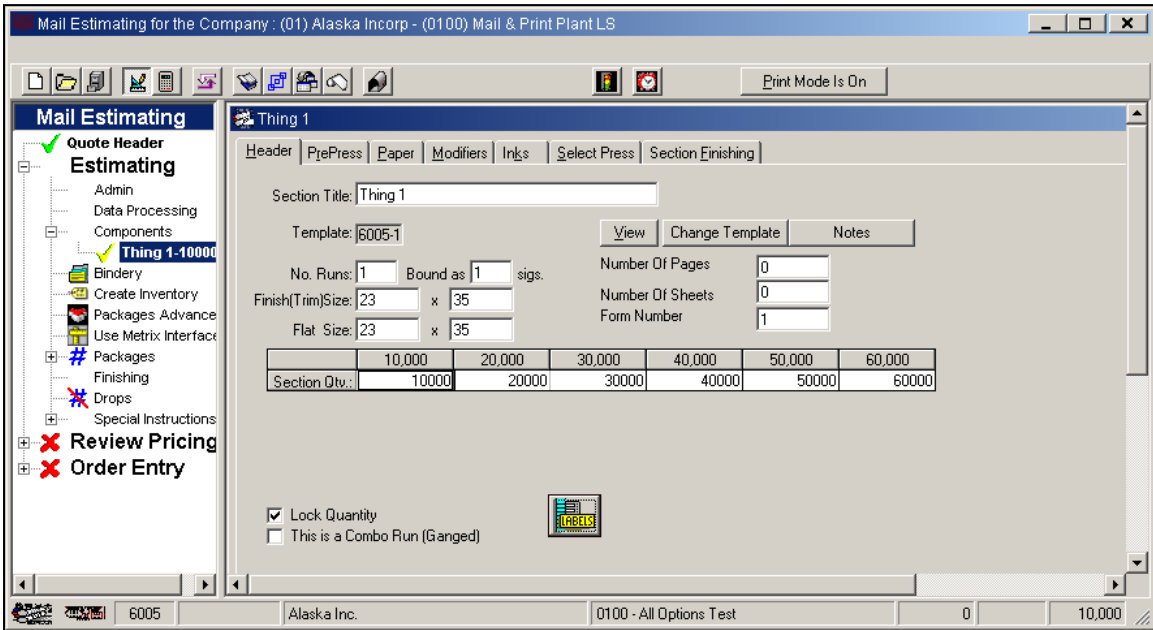
The screenshot shows the 'Mail Estimating' software window. On the left, a tree structure under 'Quote Header Estimating' has 'Thing 1-10,000' selected. The main window displays the 'Header' tab of the 'Thing 1' component. The 'Section Title' is 'Thing 1'. The 'Template' is '6005-1'. The 'No. Runs' is '1' and 'Bound as' is '1' sigs. The 'Finish(Trim)Size' is '23 x 35' and 'Flat Size' is '23 x 35'. The 'Number Of Pages' is '0', 'Number Of Sheets' is '0', and 'Form Number' is '1'. At the bottom, there is a table for 'Section Qty.' with columns for 10,000, 20,000, 30,000, 40,000, 50,000, and 60,000.

	10,000	20,000	30,000	40,000	50,000	60,000
Section Qty.:	10000	20000	30000	40000	50000	60000

5. To turn OFF this Print mode and return to the default Mail Component screen (the one with the **Printed in House** button) select the **Print Mode Is On** button (last button on gray tool bar) to toggle it to become **Print Mode Is On**.

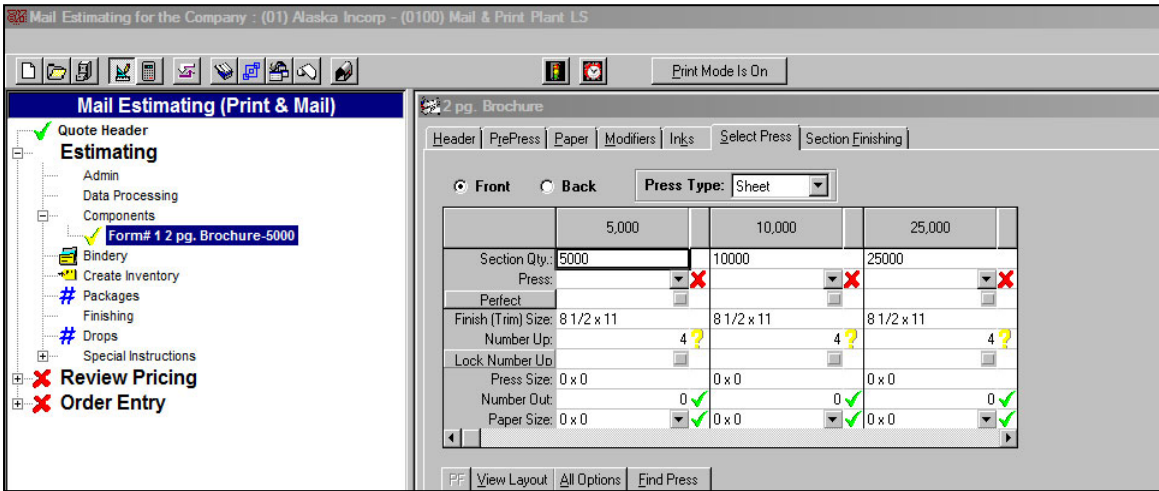
## Lock Quantity of Printed Components

Printed in house components can be created with locked quantities. When locked, component quantities will not change when the package recalculation tool is used. To set this lock, select the **Print Mode** button to return it to **Print Mode Is On**, then select the **Lock Quantity** check box in the Header screen for the component.



## Lock Number Up for Layouts

There is a new feature in Print and Mail that now allows you to lock the number up for each quantity in an estimate.



## Viewing List of All Components

To view a list of all components, click 'Components' in the **Mail Estimating Tree**. To assign inventory, component processes, etc., double-click the description name OR click the component name in the Mail Estimating Tree.

Click (the lower) **X** to close or select a different area on the Mail Estimating Tree.

**Note** Component fonts in **bold** or regular, yellow checks, green checks or red **X**'s:

**Bold Text** w/ Yellow check = **Print in House** Component **without** inventory assigned.

Regular Text with red **X** = Mail supplied component without inventory assigned.

Regular Text with green check = Mail supplied component with inventory assigned.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS - [Component Summary]

Print Mode Is On

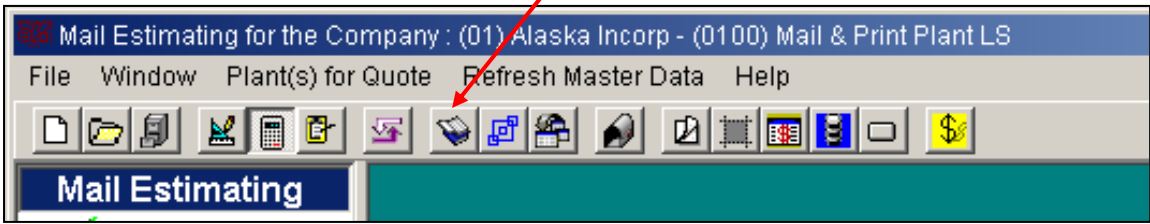
Qty is Locked	Form : Sequential Binding Number	Order For display	X Del ete	Description	Quantity	Item # From Inventory	Inventory Code	Revision Code	Date on Hand	Overs to	Insert Notes	Schedule On Lot Level	Versions	Main/Lot
Lock Qty	1	2		Poster	10,000								... 1 v	MAIN
Lock Qty	2	3		Letter	10,000	1416	Sears Sell		2/20/201	Destroy	FF		... 1 v	MAIN
Lock Qty	3	4		Form	10,000								... 1 v	MAIN

Mail Estimating Tree:

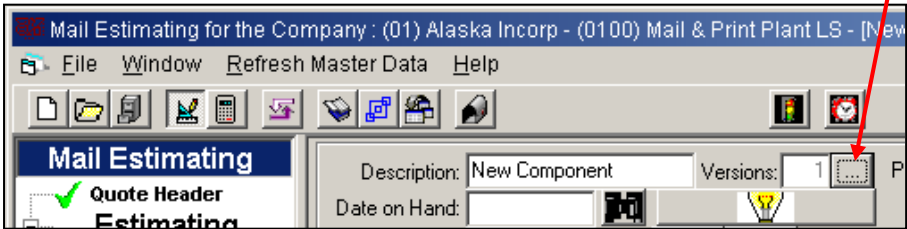
- Quote Header
- Estimating
  - Admin
  - Data Processing
  - Components**
  - Poster-10,000
  - Letter-10,000
  - Form-10,000
  - Bindery

## Adding Mail and Print Components

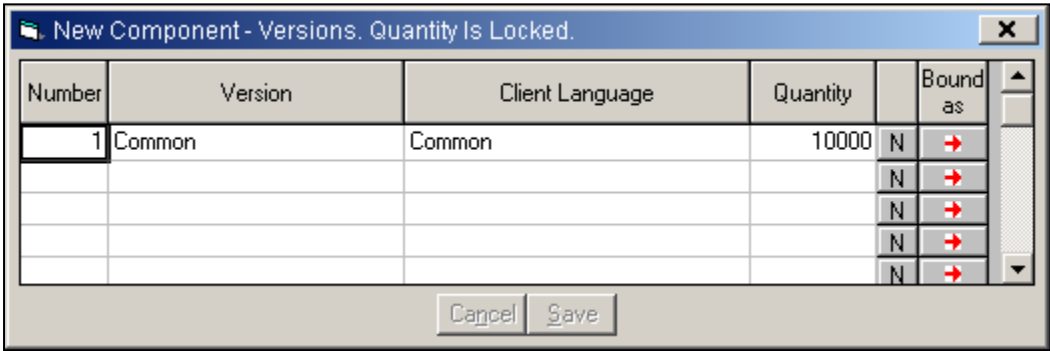
To add one Mail component, click the **Add One Mail Component** icon in the menu bar.



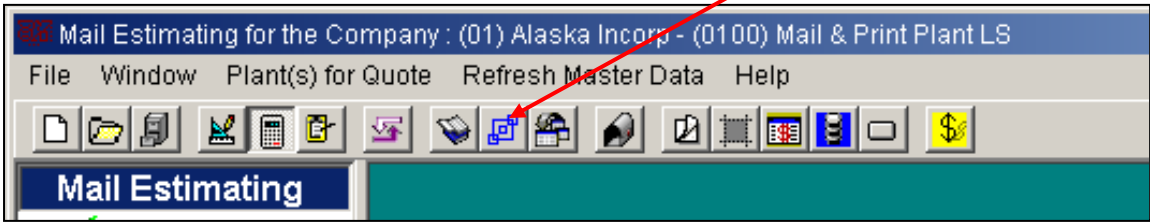
**Note** If you have a different inventory item # or different processes for a 'version,' create a different component for each 'version.' To change qty for a component, select the [...] button,



enter quantity and **Save**.



To add multiple components (both Print and Mail), click the **Add Components** icon in the menu bar.



Enter component names. If you are creating a Print component, select the **Print InHouse** button and select a Print Template for that component. If you are creating a Mail component do not select a print template for that component. To close, click the **Finish** button on bottom of the screen.

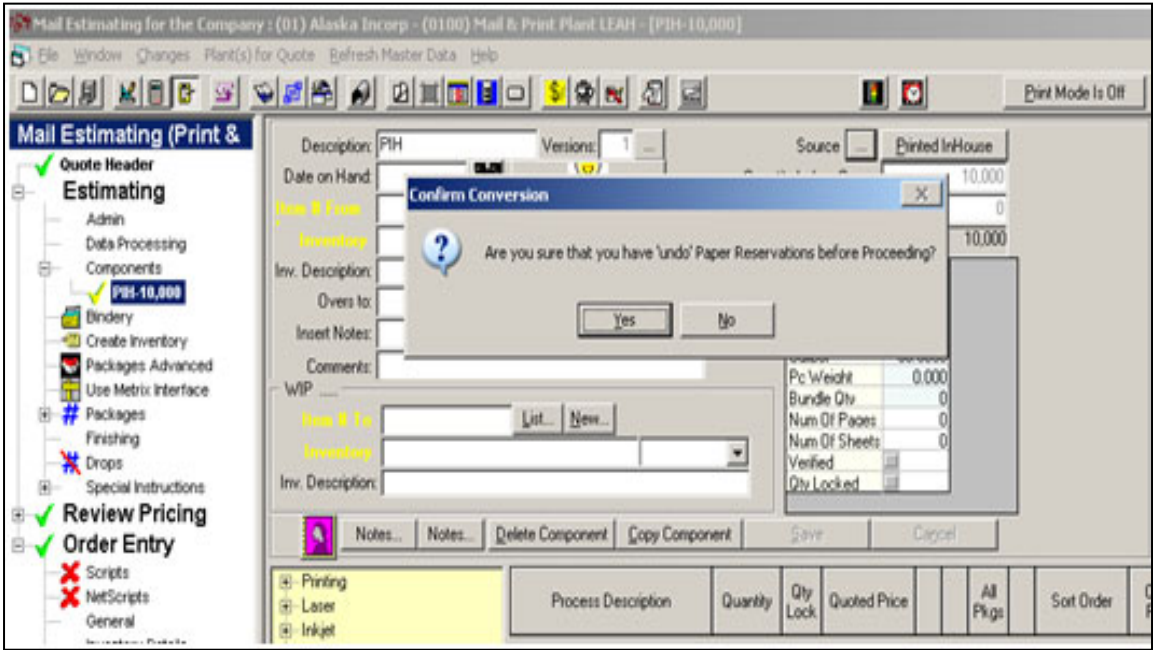
Custom Component Name	Standard Form (for Waste Calc)		Print Template
Print Component		Print InHouse	16pg Sht 8.5x11
Mail Component		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	
		Print InHouse	

The newly created components have been added to the quote.

Qty is Locked	Can be Ganged	Ready For Ganging	Form ; Sequential Binding Number	Order For display	X Del ete	Production Job #	Customer's Job #	Description	Quantity	Item # From Inventory
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	2	0	0	Poster	10,000	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	3	0	0	Letter	10,000	1416
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	4	0	0	Form	10,000	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		4	5	0	0	Print Component	10,000	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5	6	0	0	Mail Component	10,000	

## Changing Print Components to Mail Components

A warning is provided when changing a Print in House component to a Mail component when a paper reservation commitment is made against that component. If you answer no, then no changes are made. If you answer yes and you did not remove the paper reservation, the commitment is not removed from the paper that was reserved.







## Changing Quote Information and Overall Quantity

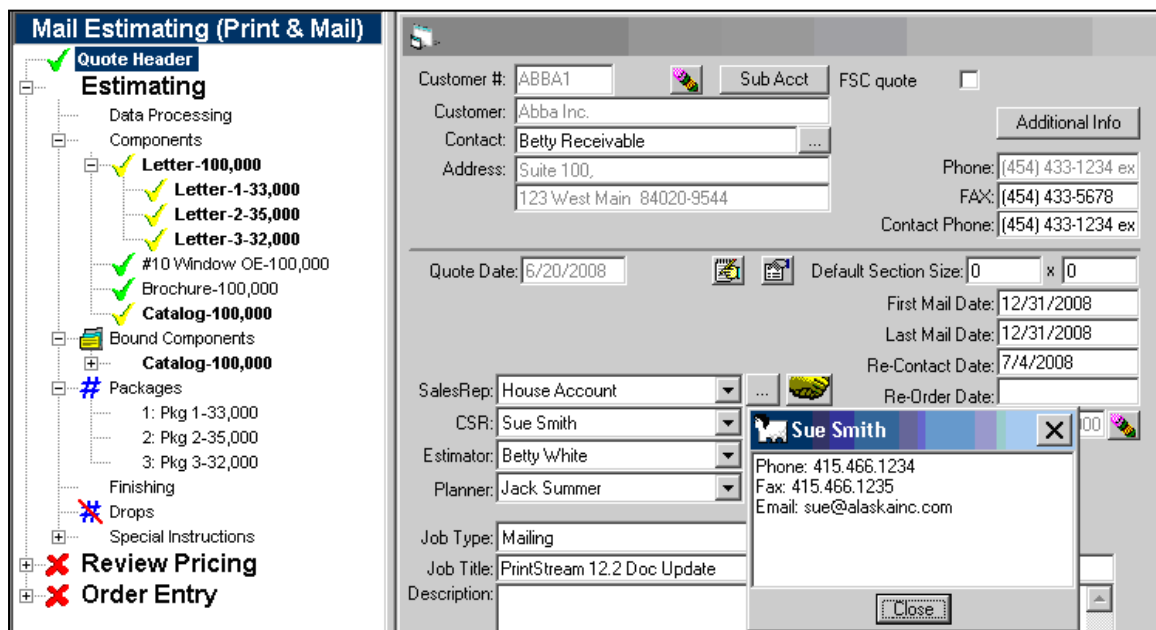
To review general quote information or to change quantity, click 'Quote Header' in the **Mail Estimating Tree**. To change any of the fields, use the drop-down menus or enter a different job title or description.

To **change a customer**, click the pencil eraser icon (next to Customer #) and select a new customer. This option applies to the quote only; it is not recommended to use this option once the quote has been converted to a job.

Select the **Estimator Notes Mail** or **Estimator Notes Print**   in the center of the screen to add notes to the Mail Work Order or Ticket or the Print Work Ticket.

The ellipsis button  next to the Sales Rep, CSR, Estimator and Planner fields will give contact information

for that person. Click the hand-shake icon  on any of the company's internal contacts to select additional personnel for the SalesRep, CSR or Estimator. Contact Information must be defined in Master File – Customer for the SalesRep/CSR/Estimator/Planner.





**Mail Estimating (Print & Mail)**


**Quote Header**

**Estimating**



- Data Processing
- Components
  - Letter-100,000
  - Letter-1-33,000
  - Letter-2-35,000
  - Letter-3-32,000
  - #10 Window OE-100,000
  - Brochure-100,000
  - Catalog-100,000
- Bound Components
  - Catalog-100,000
- Packages
  - 1: Pkg 1-33,000
  - 2: Pkg 2-35,000
  - 3: Pkg 3-32,000
- Finishing
- Drops
- Special Instructions
- Review Pricing
- Order Entry



Customer #: ABBA1  Sub Acct FSC quote ☐




Customer: Abba Inc. 

Contact: Betty Receivable 

Address: Suite 100, Phone: (454) 433-1234 ex  
123 West Main 84020-9544 FAX: (454) 433-5678  
Contact Phone: (454) 433-1234 ex

Quote Date: 6/20/2008   Default Section Size: 0 x 0

SalesRep: House Account  

CSR: Sue Smith   

Estimator: Betty White

Planner: Jack Summer

First Mail Date: 12/31/2008  
Last Mail Date: 12/31/2008  
Re-Contact Date: 7/4/2008  
Re-Order Date:

Job Type: Mailing

Job Title: PrintStream 12.2 Doc Update

Description:

Phone: 415.466.1234  
Fax: 415.466.1235  
Email: sue@alaskainc.com

**Close**

**Note** FSC quote (located at the right of the **Sub Account** button) – indicates that this job uses only Forest Stewardship Council (FSC) approved paper.


To change **Quantity** click the pencil eraser icon (middle, right) and enter the **New Quantities** and **Save**.

**TROUBLE SHOOTING:** If you do not have a package created, the system will not allow you to change quantity in this field; you will need to enter a package first in the # Packages screen.

\*\*\* If you have two or more packages and/or differing component qtys, we advise changing the quantity in the #

Packages screen and selecting the **package recalc** button  in the tool bar.

If you change the qty in the Quote Header screen or did a 'pkg recalculation' and you notice that the component qty and/or a process qty for a component is now zero (0), you need to 'assign' the zero-quantity components to a package in the # Packages screen. Select **Save** and click the **package recalc** button again to update.


This will happen if you ADD components using either the Add One Mail Component  or Add Components

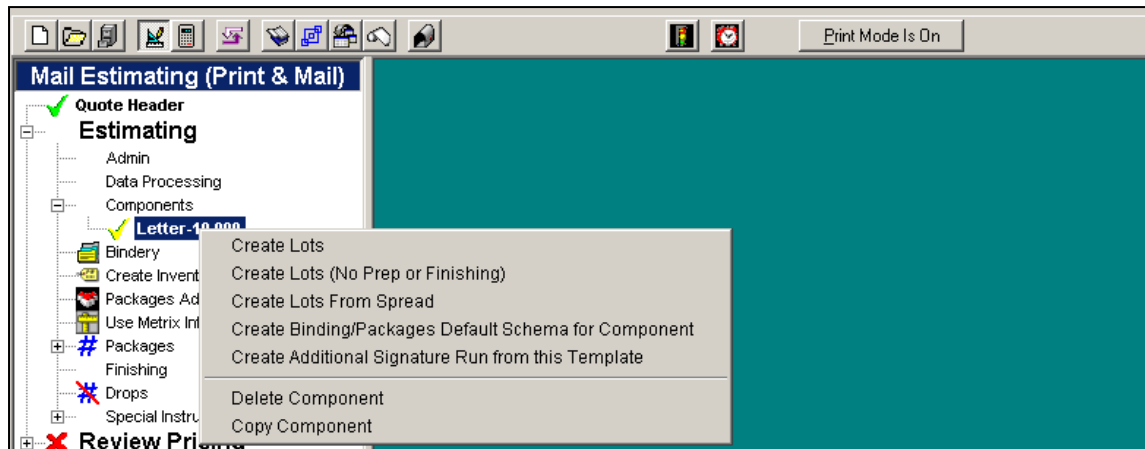


and then do not assign the added components to a package in the # Packages screen.

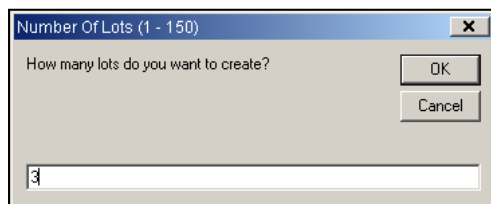
## Print Component Lots/Versions Feature

There is an option to create print lots or versions for a **Printed in House** component. First completely create the

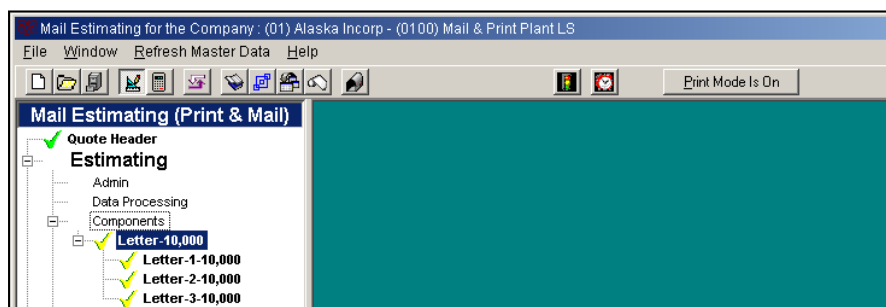
print component. Then while in EDIT mode  (triangle w/pencil icon), highlight the print component (has a yellow check mark). Right-click the component name and select **Create Lots**. Select **Create Lots (No Prep or Finishing)** if you want Prep or Finishing to appear for the Main Lot and not for the children lots.



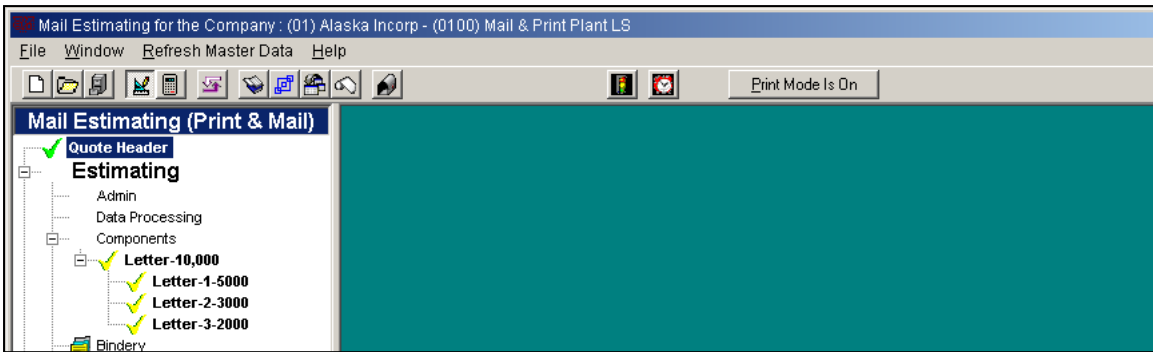
Enter the # of lots/versions and 'OK.'



The system will make an **EXACT** copy of the Main print component (initial qty, pre-press, ink colors, section finishing, etc., will ALL be copied to each version) The system will re-name each lot/version the component name with a -1, -2, -3 ...etc. The Main component holds **ALL** the pricing information.



Change the quantities of each lot to the qty needed for each component lot. The sum of all Lots must equal the total quantity of the Main component. For example, if the Main component quantity is 10,000, then the sum of all three Lot quantities must total 10,000.



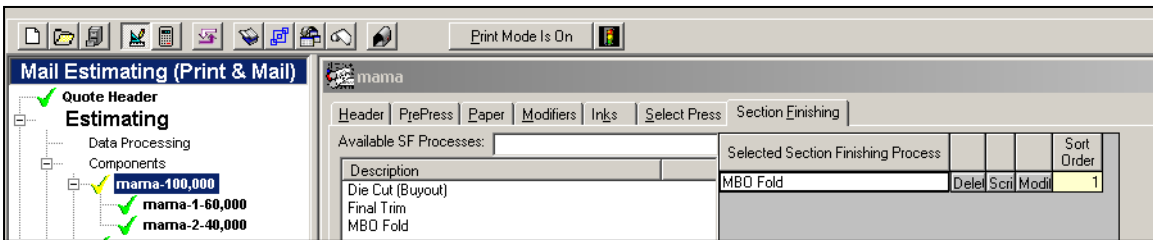
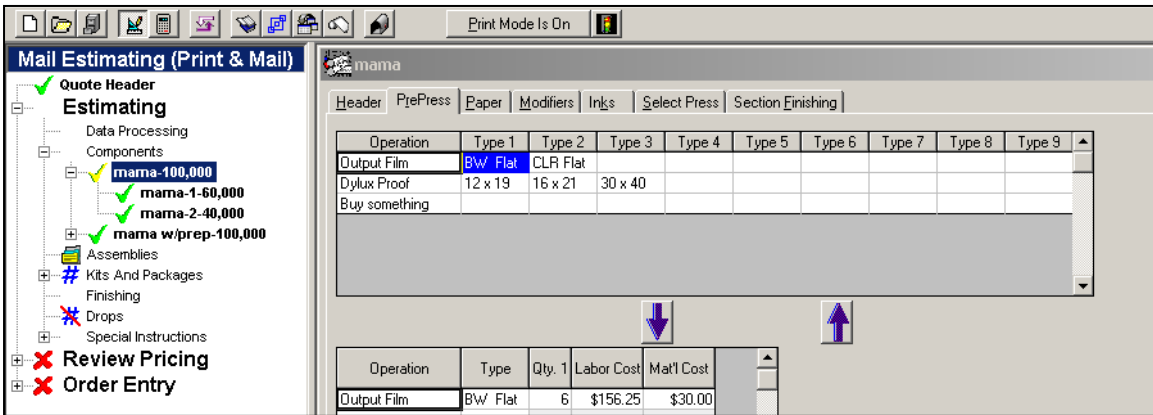
Select the Main print component (it now has a + sign before the yellow check mark) and enter all additional chargeable specs.: total # of ink colors, additional plates, wash ups, PrePress, etc.

All pricing information **MUST** be added to the Main component to appear on the quote letter and invoice. If a different paper is used for a lot/version, we recommended creating a separate print component for each paper change.

The bold-faced type used on this component indicates this component is to be printed in-house. Each Lot created under the Main component will also be bold-faced type. Lot-based component processing allows the user to price and process each run separately. Each run will display on the work order or work ticket as a separate run item. Remember that **ALL** pricing changes **MUST** be made to the Main component to appear on the quote letter and invoice.

Use **Create Lots (No Prep or Finishing)** if you wish to not carry over the parent component prepress and section finishing activities.

Main component – prepress and section finishing:



Lots created will not carry over the prepress and section finishing activities.

Mail Estimating (Print & Mail)

Quote Header  
Estimating  
Data Processing  
Components  
mama-100,000  
mama-1-60,000  
mama-2-40,000  
mama w/prep-100,000  
Assemblies  
Kits And Packages  
Finishing  
Drops  
Special Instructions  
Review Pricing  
Order Entry

LOT mama-1

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Operation	Type 1	Type 2	Type 3	Type 4	Type 5	Type 6	Type 7	Type 8	Type 9
Output Film	BW Flat	CLR Flat							
Dylux Proof	12 x 19	16 x 21	30 x 40						
Buy something									

Operation Type Qty. 1 Labor Cost Mat'l Cost

Mail Estimating (Print & Mail)

Quote Header  
Estimating  
Data Processing  
Components  
mama-100,000  
mama-1-60,000  
mama-2-40,000

LOT mama-1

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Description	Available SF Processes	Selected Section Finishing Process	Sort Order
Die Cut (Buyout)			
Final Trim			
MBO Fold			

Use **Create Lots From Spread** to either manually enter lot details or copy and paste lot details from a spreadsheet.

Mail Estimating for the Company: (01) Alaska Incorp - (0100) Mail & Print Plant LS - [Create Lots From selected Spread]

File Window Refresh Master Data Help

Mail Estimating (Print & Mail)

Quote Header  
Estimating  
Data Processing  
Components  
Letter-10,000  
Letter-1-5000  
Letter-2-3000  
Letter-3-2000  
Bindery  
Create Inventory  
Packages Advanced  
Use Metrix Interface  
Packages  
Finishing  
Drops  
Special Instructions  
Review Pricing  
Order Entry

Form Sequential Binding Number	Inventory Code	Lot QTY	Lot Descr	Plates Front	Plates Back	Number Up
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						

☐ No Prep or Finishing for Created Lots

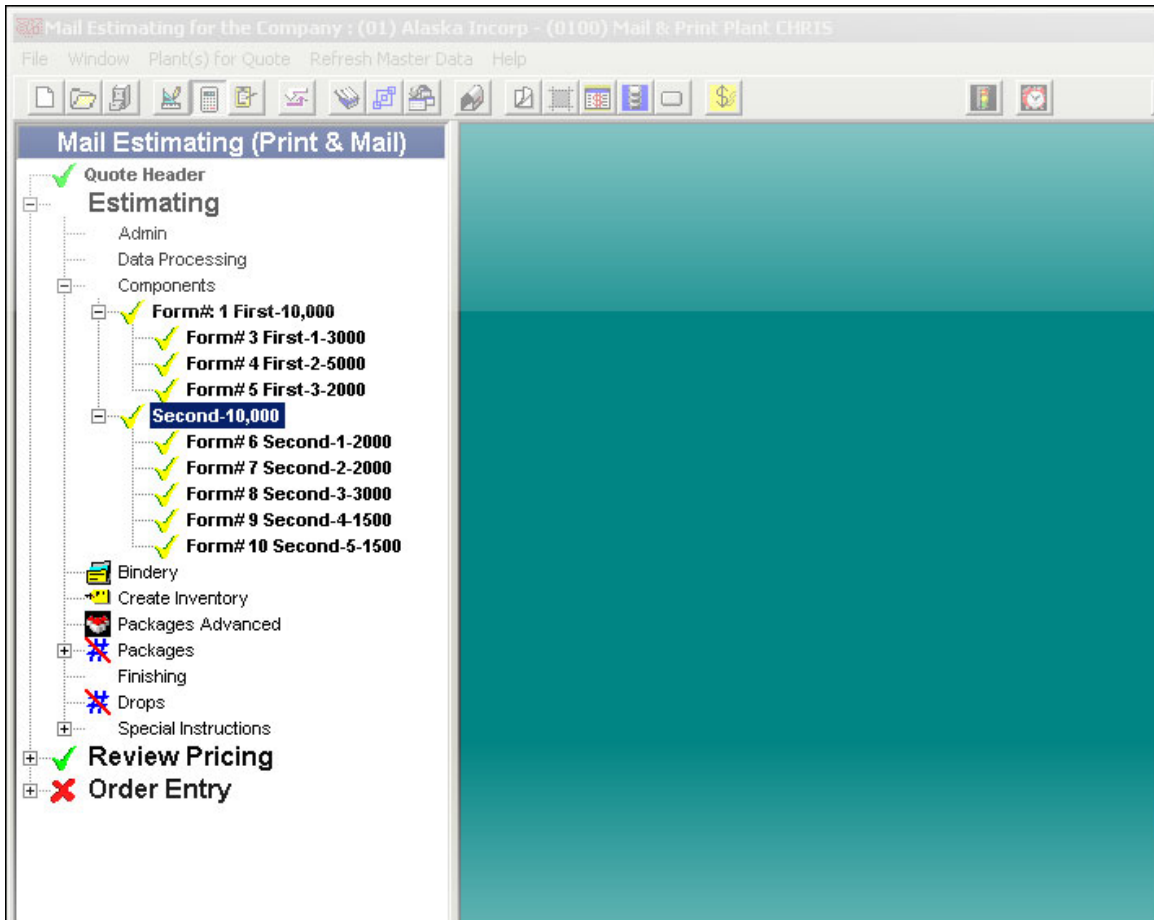
OK Cancel

6025 Alaska Inc. 0100 - Lot Test 0 10,000

## Move Lots from Component to another Component

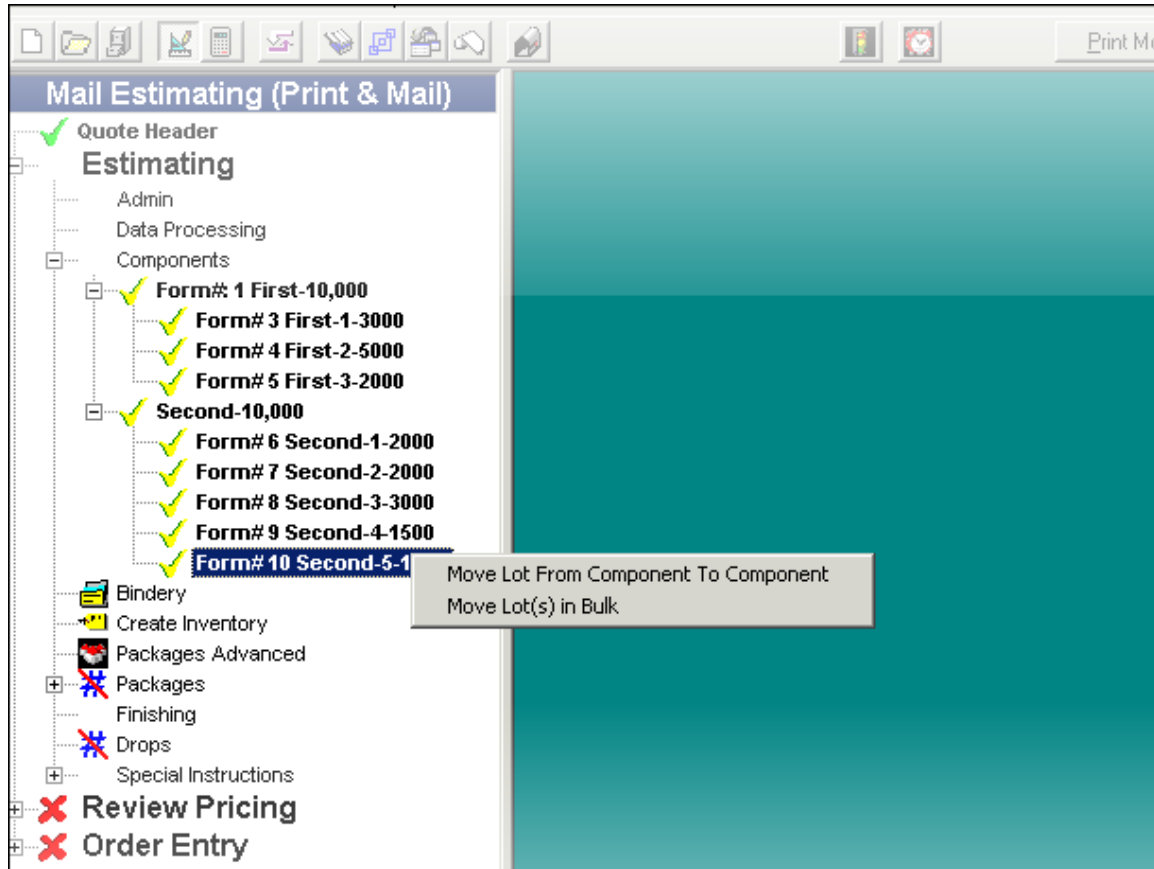
Lots may be moved from one component to another.

Example below has two components-3 lots in first component and 5 lots in 2<sup>nd</sup> component.

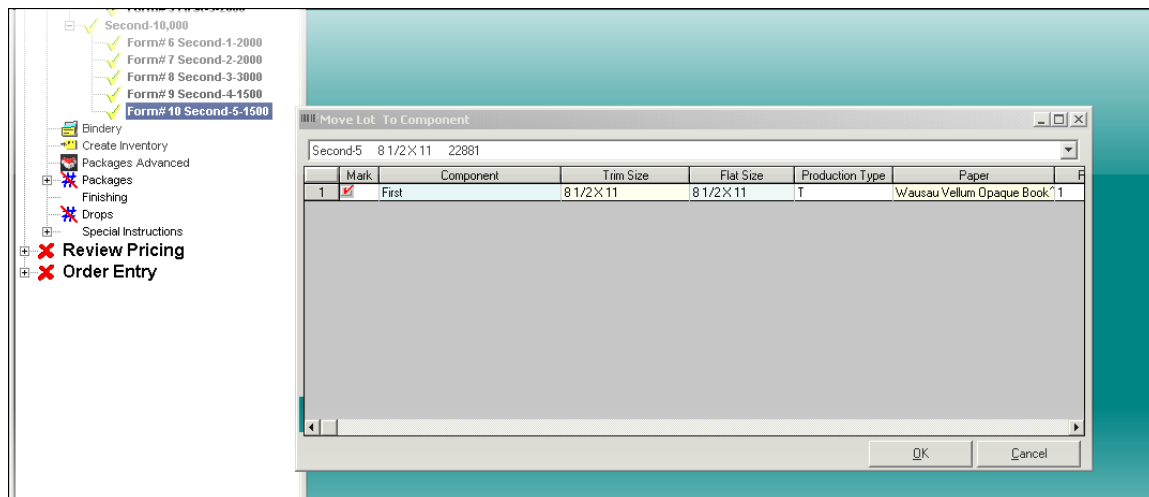


Right-click one of the lots and select one of the two options.

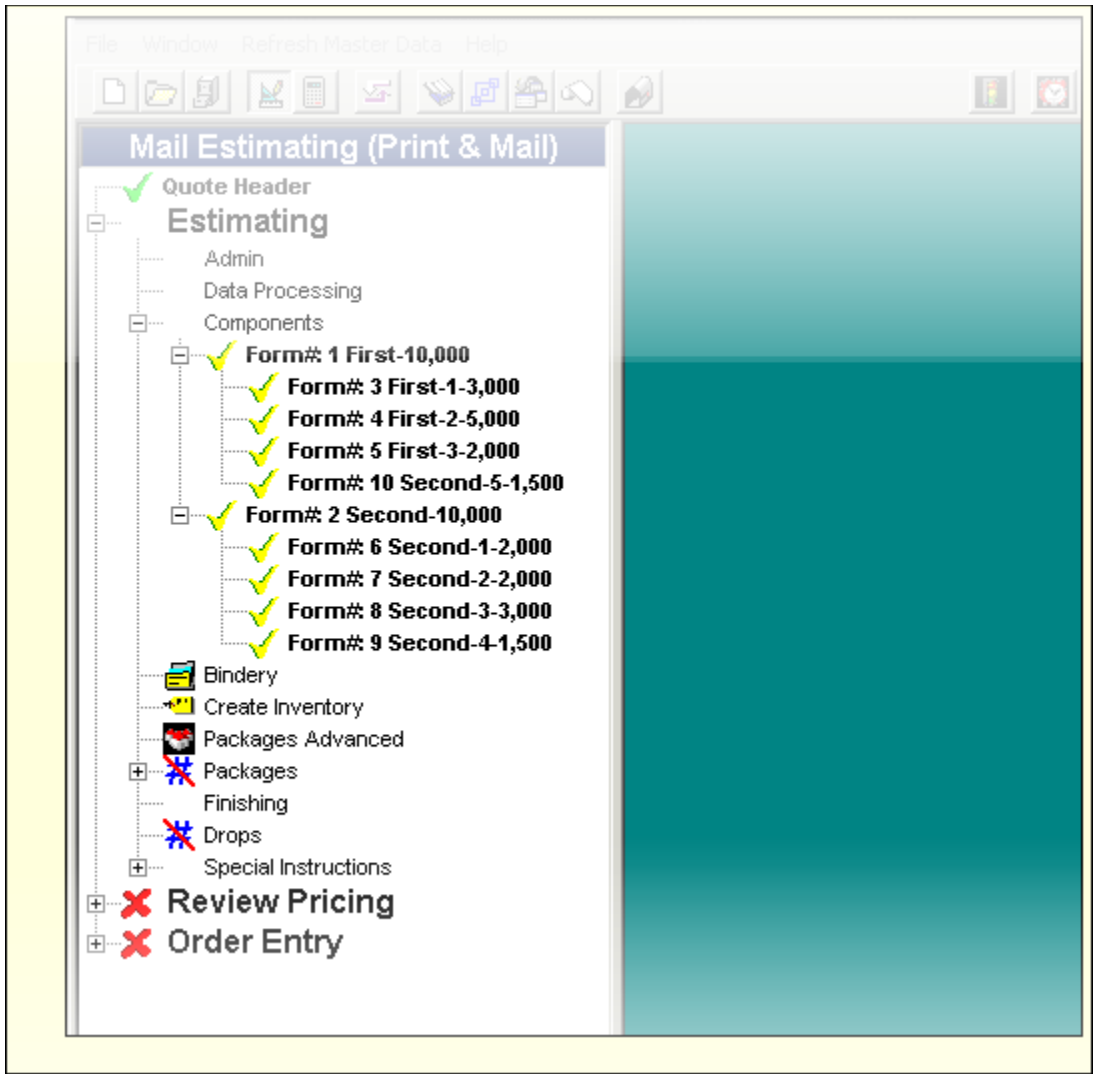
Option 1-Move Lot from Component to Component-use this option to move a single lot from one component to another.



Place a check mark next to the component to which the lot will be moved then click **OK**. Below the lot is being moved from the second component to the first component.

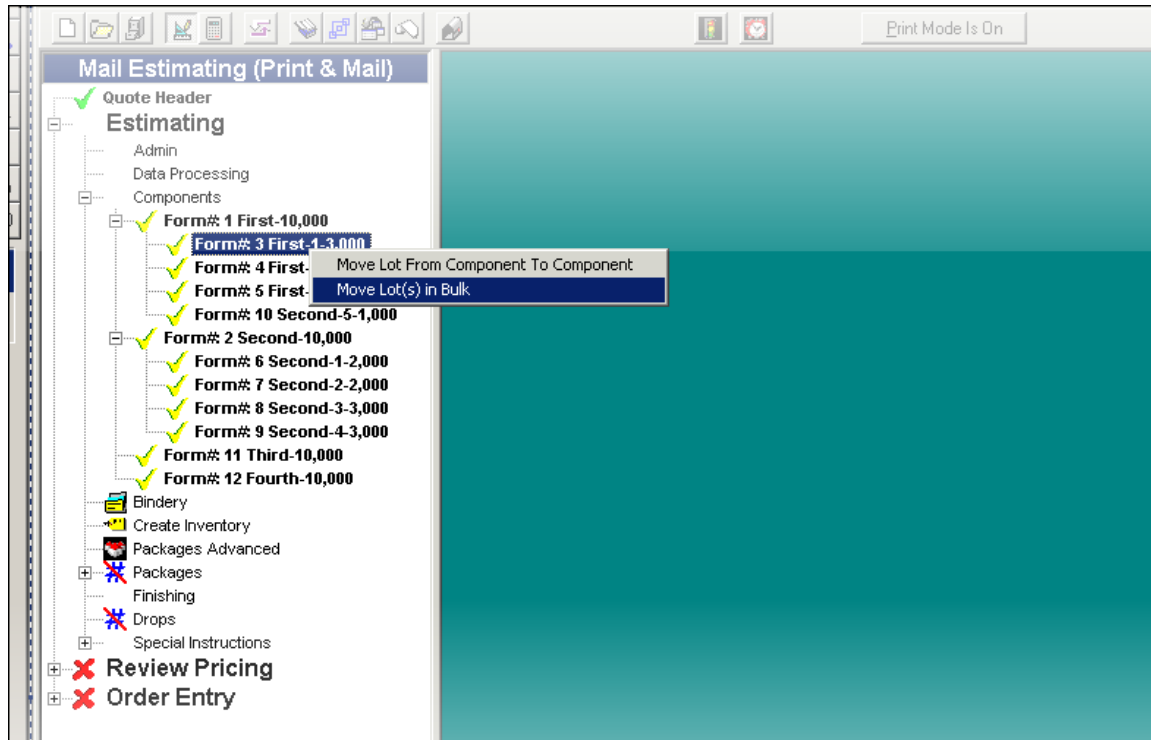


Remember to update the lot quantities so they total to the quantity of their corresponding parent components.

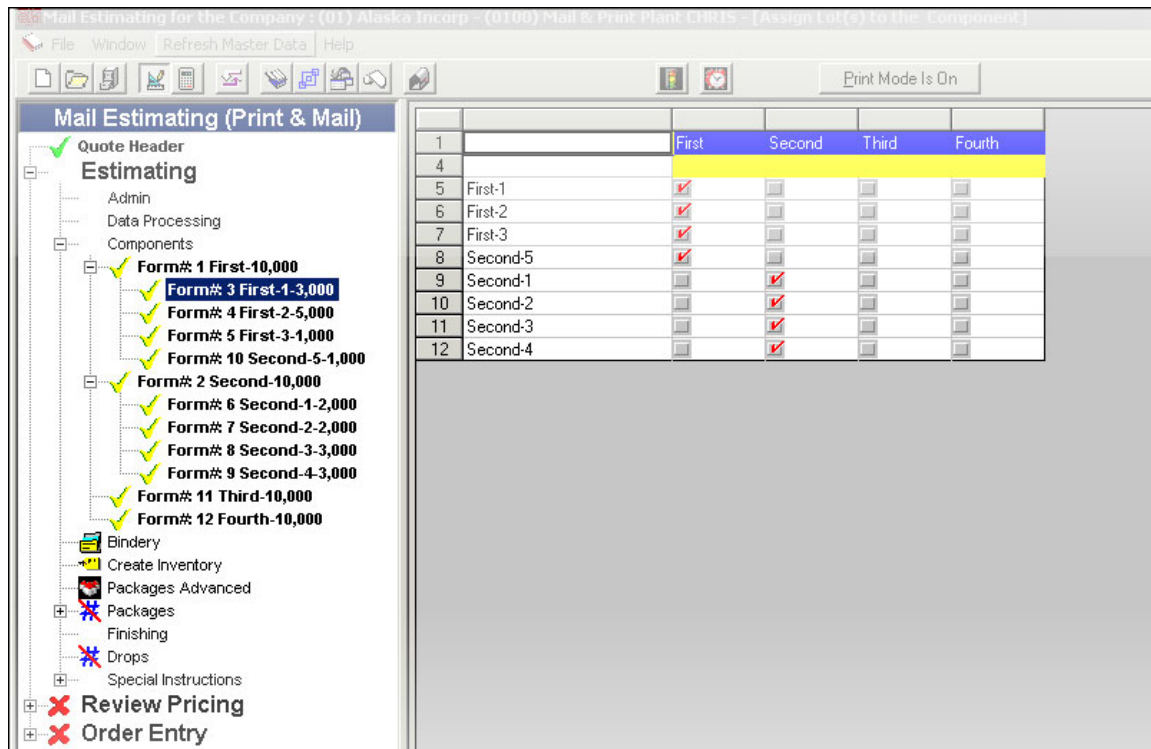




Option 2: Move multiple lots from one component to another-right-click a lot and select "Move Lot(s) in Bulk".



Select the lots to move and the component to which they are to be moved:



Lot 1 and 2 from first component have been selected to move to the third component; Lot 3 and 4 from the second component have been selected to move to the fourth component. Click **OK** to save.

Remember to update the lot quantities so they total to the quantity of their corresponding parent components.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS - [Assign Lot(s) to the Component]

File Window Refresh Master Data Help

Print Mode Is On

**Mail Estimating (Print & Mail)**

Quote Header  
Estimating  
Admin  
Data Processing  
Components

- Form# 1 First-10,000
- Form# 3 First-1-3,000
- Form# 4 First-2-5,000
- Form# 5 First-3-1,000
- Form# 10 Second-5-1,000
- Form# 2 Second-10,000
- Form# 6 Second-1-2,000
- Form# 7 Second-2-2,000
- Form# 8 Second-3-3,000
- Form# 9 Second-4-3,000
- Form# 11 Third-10,000
- Form# 12 Fourth-10,000

Bindery  
Create Inventory  
Packages Advanced  
Packages  
Finishing  
Drops  
Special Instructions

	First	Second	Third	Fourth
1				
4				
5 First-1				
6 First-2				
7 First-3				
8 Second-5				
9 Second-1				
10 Second-2				
11 Second-3				
12 Second-4				

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS

File Window Refresh Master Data Help

Print Mode Is On

**Mail Estimating (Print & Mail)**

Quote Header  
Estimating  
Admin  
Data Processing  
Components

- Form# 1 First-10,000
- Form# 5 First-3-3000
- Form# 10 Second-5-7000
- Form# 2 Second-10,000
- Form# 6 Second-1-7500
- Form# 7 Second-2-2500
- Form# 11 Third-10,000
- Form# 3 First-1-6000
- Form# 4 First-2-4000
- Form# 12 Fourth-10,000
- Form# 8 Second-3-6500
- Form# 9 Second-4-3500

Bindery  
Create Inventory  
Packages Advanced  
Packages  
Finishing  
Drops  
Special Instructions

Review Pricing  
Order Entry

**LOT Second-3**

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: Second-3

Template: 16pg Sht 8.5x11 View Notes

No. Runs: 1 Bound as 1 sigs. Number Of Pages 0

Finish(Trim)Size: 8 1/2 x 11 Number Of Sheets 0

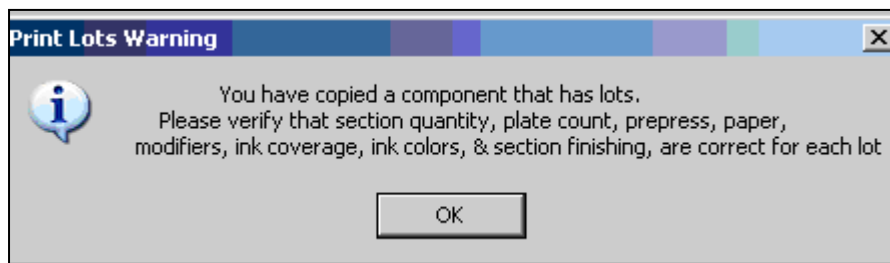
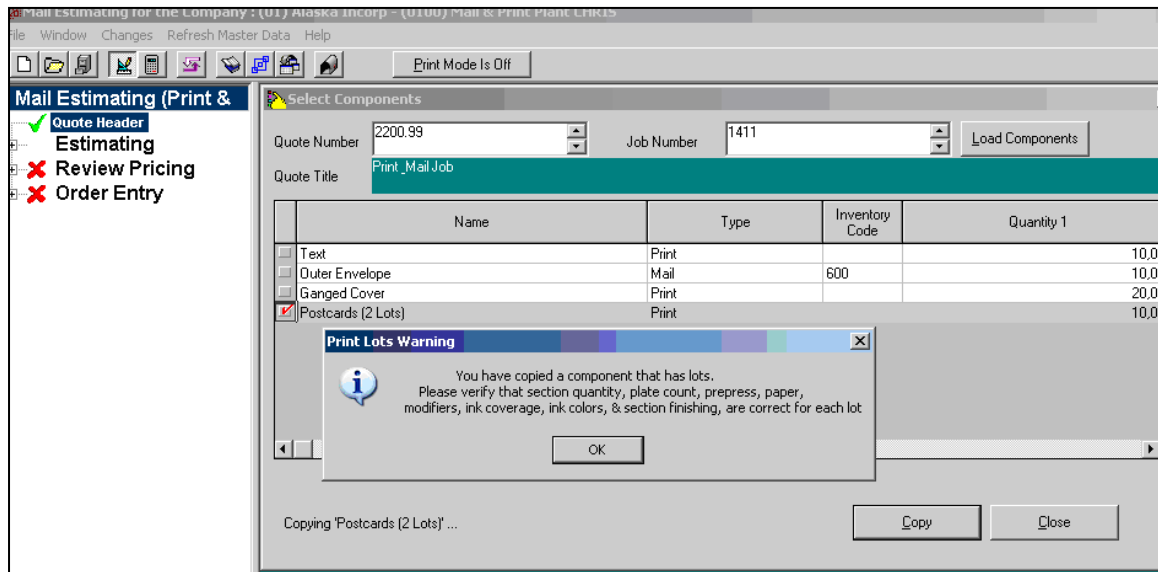
Flat Size: 8 1/2 x 11 Form Number 8

	10,000	10,000	10,000	10,000	10,000	10,000
Section Qty:	6500	6500	6500	6500	6500	6500

☐ Lock Quantity

## Copying a Component that has Lots

This message will display when a component with lots is copied:



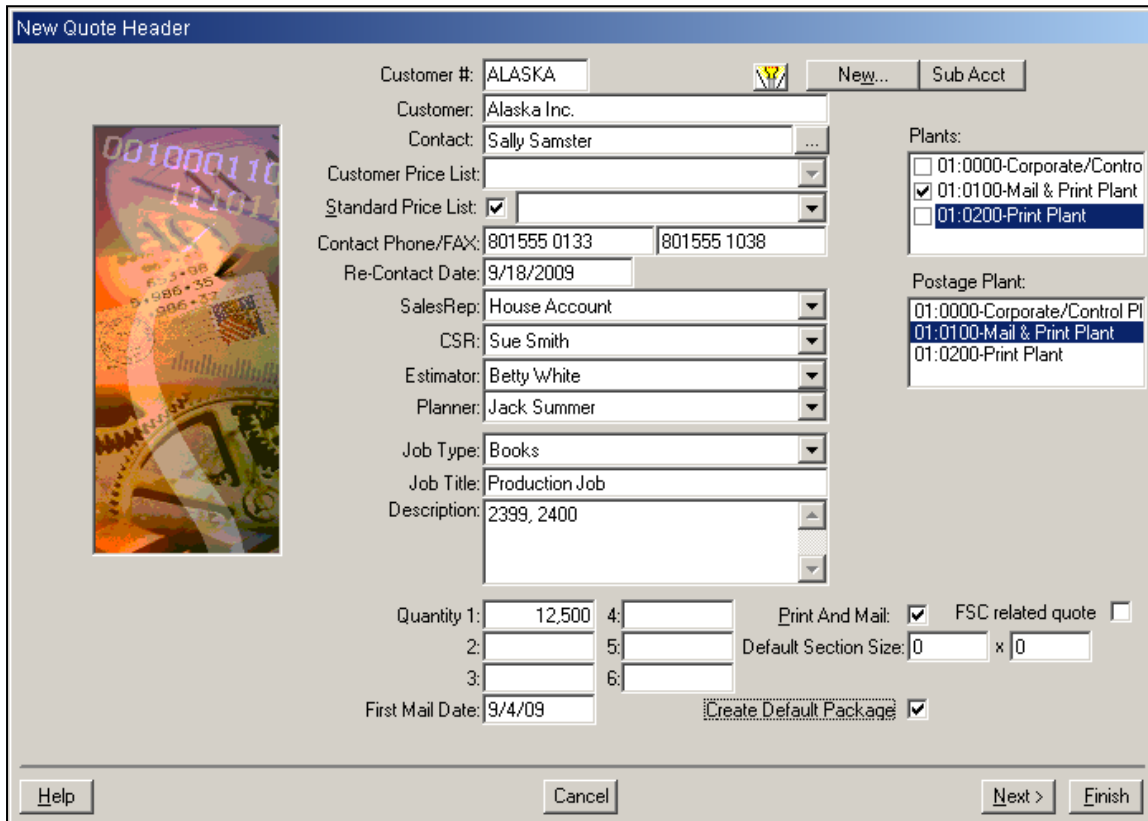
## Ganging Multiple Customer Jobs in One Production Job

Printers have customer jobs that may share similar print specifications such as paper and inks. In order to manufacture them efficiently, it is necessary to gang multiple customer jobs onto one sheet to be printed. This programming allows for the ganging of these customer jobs onto a 'Production' job for their printing. Production costs accrued for the printing of the 'Production' job are pushed to the customer job to accurately track the costs of each customer job.


Create Customer Jobs as needed. These are regular jobs which were created for customer work and are NOT ganged. Example: Job #2399 with Qty of 2,500 and Job #2400 with Qty of 10,000.

Create a 'Production' Job to Gang the Customer Jobs;

Create a new estimate with job quantity equal to total of ganged component quantities. Example: Production Job Qty of 12,500 = Job #2399 Qty of 2,500 + Job #2400 Qty of 10,000.



**New Quote Header**

Customer #: ALASKA  New... Sub Acct

Customer: Alaska Inc.

Contact: Sally Samster ...

Customer Price List: ...

Standard Price List: ☒ ...

Contact Phone/FAX: 801555 0133 801555 1038

Re-Contact Date: 9/18/2009

SalesRep: House Account

CSR: Sue Smith

Estimator: Betty White

Planner: Jack Summer

Job Type: Books

Job Title: Production Job

Description: 2399, 2400

Quantity 1: 12,500 4: ...

2: ... 5: ...

3: ... 6: ...

First Mail Date: 9/4/09

Print And Mail: ☒ FSC related quote ☐

Default Section Size: 0 x 0

Create Default Package ☒

Plants:

- ☐ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

Postage Plant:

- 01:0000-Corporate/Control Pl
- 01:0100-Mail & Print Plant
- 01:0200-Print Plant

Help Cancel Next > Finish

Create a Gang Component using Gang Template for the size needed.

[illegible]

Enter PrePress, Paper, Ink, and Select Press for the gang component.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

### Mail Estimating (Print & Mail)

- Quote Header
- Estimating
  - Admin
  - Data Processing
  - Components
    - Gang Run-12500**
    - Bindery
    - Packages
    - Finishing
    - Drops
    - Special Instructions
  - Review Pricing
  - Order Entry

### Gang Run

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

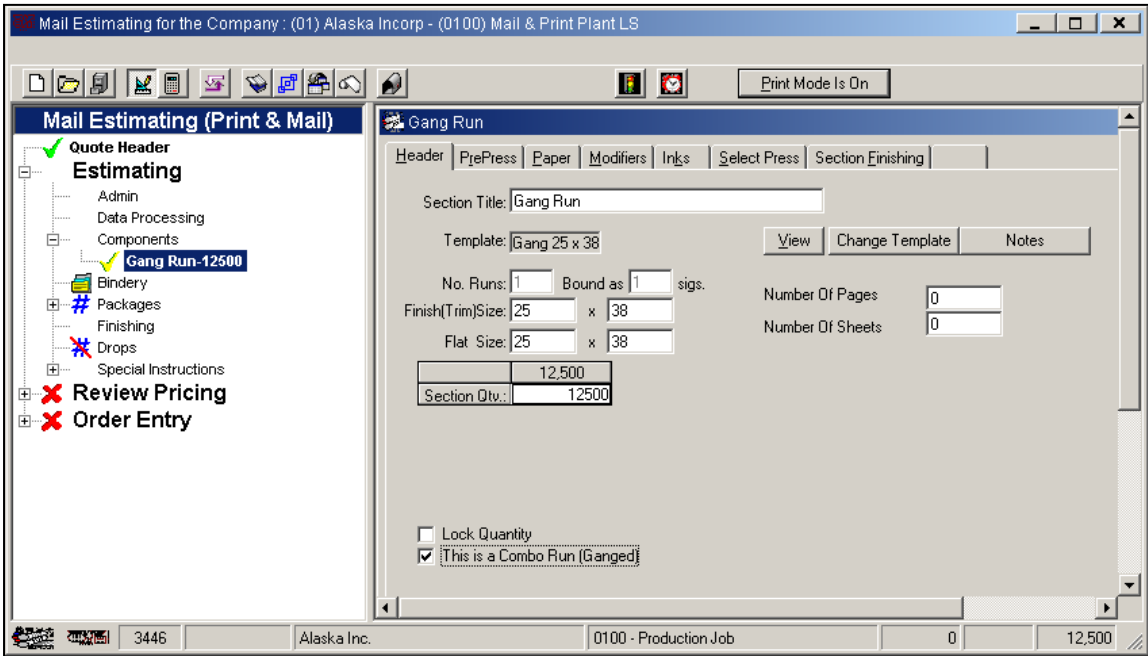
☒ Front ☐ Back **Press Type:** Sheet

	12,500	
Section Qty:	12500	
Press:	Komori 6 Color	✓
Perfect		☐
Finish (Trim) Size:	25 x 38	
Number Up:	1	✓
Press Size:	25 x 38	✓
Number Out:	1	✓
Paper Size:	25 x 38	✓

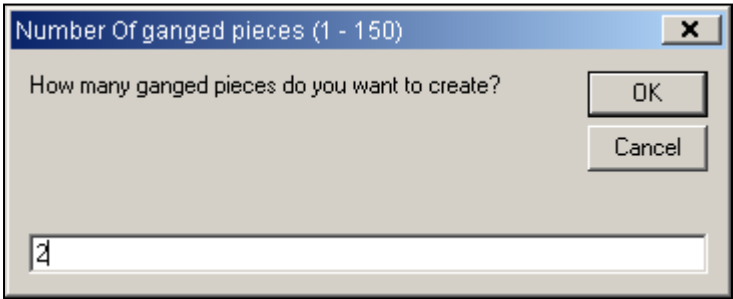
PF All Options Find Press

3446 Alaska Inc. 0100 - Production Job 0 12,500

Select the **This is a Combo Run (Ganged)** check box for this gang component.



Right-click the gang component in tree and enter # of ganged pieces.



Calculate estimate and convert to job. \*Select **Production Job** as shown below.

**O.E. Job Header**

Job Quantity: 12,500

Enter Job Number or leave blank for automatic assignment:

Order Date: 9/4/2009

Start Date: 9/4/2009

First Mail Date: 9/4/2009

Last Mail Date: 9/4/09

Priority:

Re-Order Date:

P/O Number:

Part Number:

Previous Job Number:

Work w/Job Number:

Reprint from:

Film File Number:

New Job: Yes

Exact Repeat: Yes

Alter Specs: Yes

Art Required: Yes

Film Required: Yes

Unders: Yes

Overs: Yes

Copy Vendors for Buyout Processes ☒

O.E. Notes

☐ Special Job : will be used for the recurring scheduling ONLY

☒ Production Job : job is processing multiple Printed In House Components for Customer's jobs

Cancel Save

Return to edit mode and open gang component header screen.

**Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS**

Print Mode Is On

**Mail Estimating (Print & Mail)**

Quote Header

Estimating

Admin

Data Processing

Components

Gang Run-12,500

Gang Run-1-12,500

Gang Run-2-12,500

Bindery

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

**Gang Run**

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: Gang Run

Template: Gang 25 x 38

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 25 x 38

Flat Size: 25 x 38

Number Of Pages: 0

Number Of Sheets: 0

Section Qty.: 12,500

Due to the Ganging calculation method the main component will use MAX num of sheets from all the related lots. Be aware that every editing which is affecting the number of press sheets can update the MAX qty picked up by the main component. This change can potentially require re-selecting press for the main component.


☐ Lock Quantity

☒ This is a Combo Run (Ganged)

3446.99 2401 Alaska Inc. 0100 - Production Job 0 9/4/2009 12,500

Open Ganging Grid.

☐ Lock Quantity  
☒ This is a Combo Run (Ganged)



Help for Gang Calc

	Customer's Job Number	Customer's Component ID	% of Production Cost	Component	Qty Required	Flat Size 1	Flat Size 2	Flat Size	Trim Size 1(Finish)	Trim Size 2(Finish)	Finish Size	Section Qty	# Up	Qty Produced	Excess Qty	Exc Pac
1				Gang Run		25	38	25x38	25	38	25x38	12500	1	12500		
2	0	0	50%	Gang Run-1	12500	25	38	25x38	25.00000	38.00000	25x38	12500	1	12,500	0.000	
3	0	0	50%	Gang Run-2	12500	25	38	25x38	25.00000	38.00000	25x38	12500	1	12,500	0.000	
152			100%	TOTALS	25000							12500	2	25000	0	
153				Waste Statistics											0.00%	

Reload

Print

Apply To Component

12500

Link Customer Job components to grid. Edit component data, size, # up, etc.

Job #2399 - Bus Flyer component

Get Component for Ganging

Job No :

2399

Customer Job #2

	Component Name	Paper used	Component Qty	Component Required Qty	Trim Size 1	Trim Size 2	Customer's Job Number
1	Bus Flyer	Carnival Text^^0100 w	2500	2772	8.5	11	2399

Job #2400 - Car Flyer component

Get Component for Ganging

Job No :

2400

Customer Job #1

	Component Name	Paper used	Component Qty	Component Required Qty	Trim Size 1	Trim Size 2	Customer's Job Number
1	Car Flyer	Carnival Text^^0100 w	10000	10500	8.5	11	2400



Job #2399 - Bus Flyer component and Job #2400 - Car Flyer component have been added. Number up for **Car Flyer** has been changed from '1' to '3' to maximize efficiency.

Help for Gang Calc																
	Customer's Job Number	Customer's Component ID	% of Production Cost	Component	Qty Required	Flat Size 1	Flat Size 2	Flat Size	Trim Size 1(Finish)	Trim Size 2(Finish)	Finish Size	Section Qty	# Up	Qty Produced	Excess Qty	Exc Pag
1				Gang Run		25	38	25x38	25	38	25x38	3500	1	3500		
2	2399	14566	24%	Bus Flyer	2772	17	11	17x11	8.50000	11.00000	8.5x11	2772	1	3,500	0,728	26
3	2400	14568	76%	Car Flyer	10500	17	11	17x11	8.50000	11.00000	8.5x11	3500	3	10,500	0,000	
152			100%	TOTALS	13272							3500	4	14000	728	26
153				Waste Statistics											5.49%	26
◀ ▶																
Reload		Print		Apply To Component		12500 ▼										

Click **Apply to Component** to exit.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

**Mail Estimating (Print & Mail)**

Quote Header  
Estimating

- Admin
- Data Processing
- Components
  - Gang Run-3500**
  - Bus Flyer-2772**
  - Car Flyer-10500**
- Bindery
- Packages
- Finishing
- Drops
- Special Instructions
- Review Pricing**
- Order Entry**

**Gang Run**

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: Gang Run

Template: Gang 25 x 38 View Notes

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 25 x 38

Flat Size: 25 x 38

12,500

Section Qty.: 3500

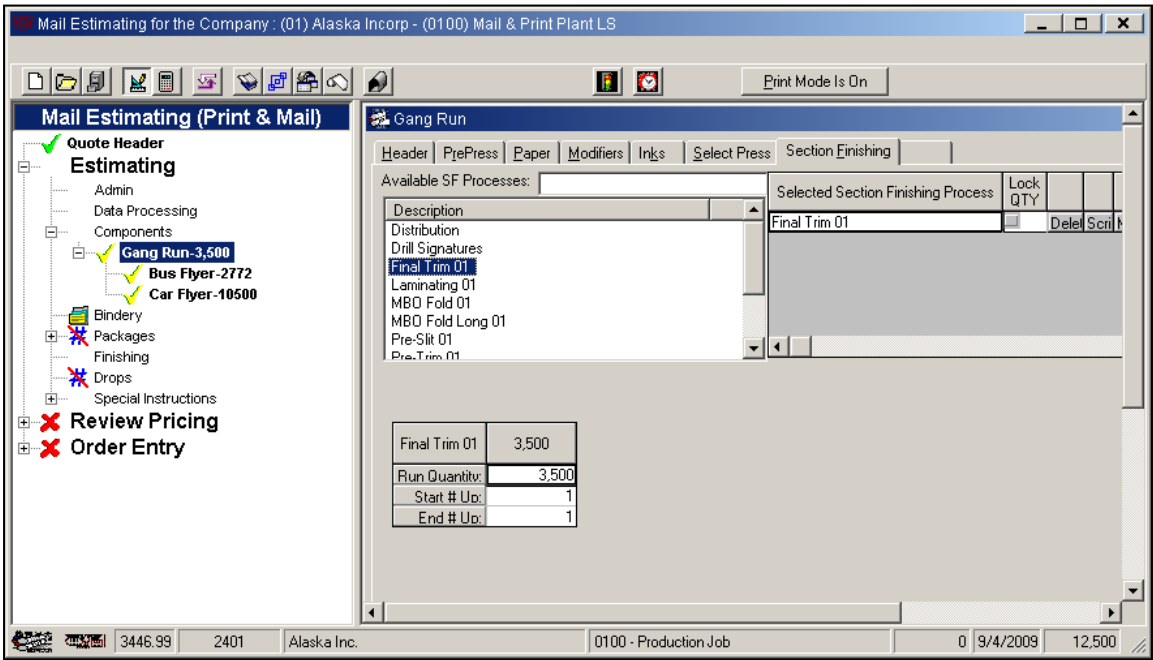
Due to the Ganging calculation method the main component will use MAX num of sheets from all the related lots. Be aware that every editing which is affecting the number of press sheets can update the MAX qty picked up by the main component. This change can potentially require re-selecting press for the main component.

☐ Lock Quantity

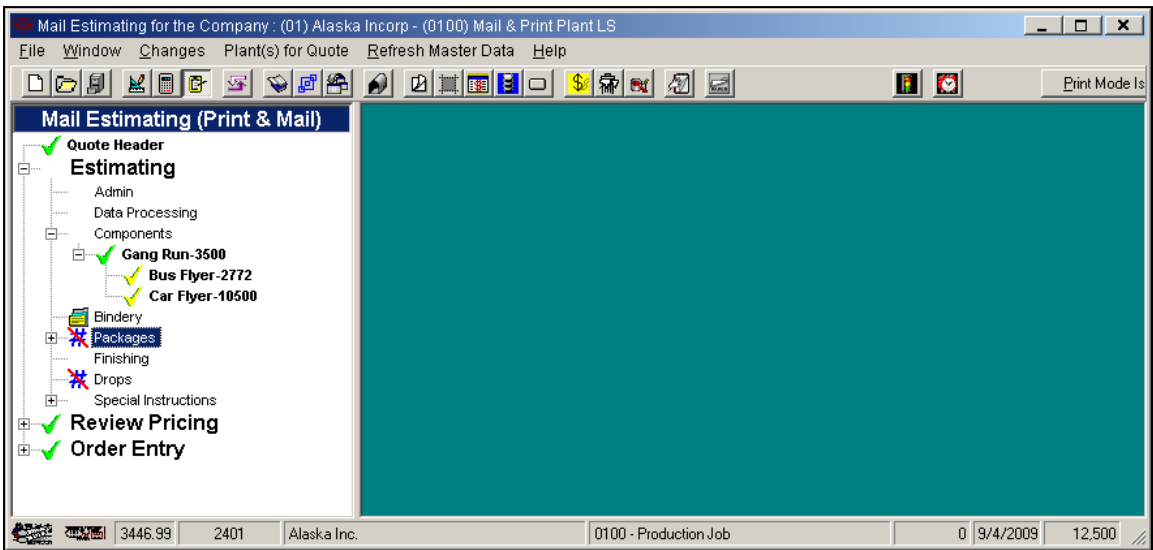
☒ This is a Combo Run (Ganged)

3446.99 2401 Alaska Inc. 0100 - Production Job 0 9/4/2009 12,500

Enter Cutting/Trimming in Parent Gang component. \*Leave default as 1up - the system knows how many up from the Ganging Grid screen.



Return to Order Entry mode.



Complete Scripts if necessary, Reserve Paper, and enter Ink details if needed.

[illegible]

Production Job is now ready for processing. View the **Component** screen to see the Production and Customer Job relationships.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS - [Component Summary]

Mail Estimating (Print & Mail)

Quote Header

Estimating

Admin

Data Processing

Components

Gang Run-3500

Bus Flyer-2772

Car Flyer-10500

Bindery

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Order For display	X D el et	Production Job #	Customer's Job #	Description	Quantity	Item #	Inventory Code
2		0	0	Gang Run	3,500		
2		2401	2399	Bus Flyer	2,772		
2		2401	2400	Car Flyer	10,500		

Print

Cancel

Save

3446.99

2401

Alaska Inc.

0100 - Production Job

0

9/4/2009

12,500

Customer Support module also shows the relationship for Production and Customer Jobs.

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

File

View

Help

Options

Job Status

Status Reports

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

Materials

Billing

Shipping

Estimating

Work Ticket

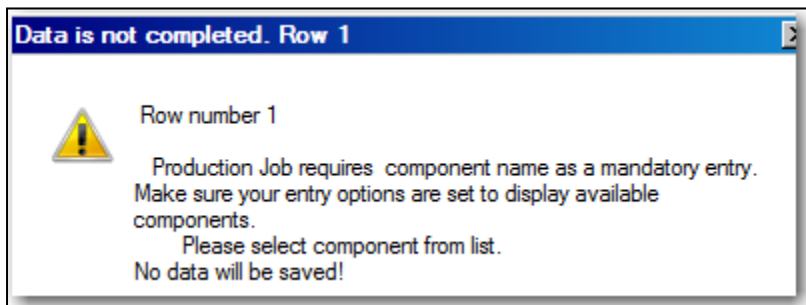
Work Order

Quote Nu...	Job Number	Customer	Title	Quant...	Quote D...	Start ...	1st Shi...	Last Shi...	Sales Rep	Customer/Production Job	List Of Related Jobs
3444.99	2399	Babba Inc.	Customer Job #2	2,500	9/4/2009	9/4/20...	9/4/2009	9/4/2009	House ...	Customer's Job	2401
3445.99	2400	AAA Ins...	Customer Job #1	10,000	9/4/2009	9/4/20...	9/4/2009	9/4/2009	Rob Hales	Customer's Job	2401
3446.99	2401	Alaska Inc.	Production Job	12,500	9/4/2009	9/4/20...	9/4/2009	9/4/2009	House ...	Production Job	2399, 2400

### Overview of the costing functionality built around Ganging of Components

Each Job Cost entry point will occur in a standard way as the production job is being processed and each of the following programs have been modified to handle the special cost capture: Shopfloor, Timesheet, Job Cost Entry, Inventory Manager, Simple Issue.

Each of these programs will require the user to select the appropriate gang component in order to assure the costs are eventually reallocated properly. If a component is not selected a message will appear similar to the one shown below.



Once costs are captured on the Production Job, there are several mechanisms built into the program to trigger a cost reallocation. This cost relocation will take all the job cost records and redistribute them proportionately to the Customer Jobs linked to this Production Job. All posting to the general ledger will only occur on the records that have been reallocated to the Customer Job.

WIP reports will only show the Customer job numbers with cost, not the Production Job.

The programs that will trigger the cost allocation from the Production Job to the Customer Job(s) are:

Generation of the Billing Worksheet for either the Customer or the Production Job (reallocation occurs automatically)

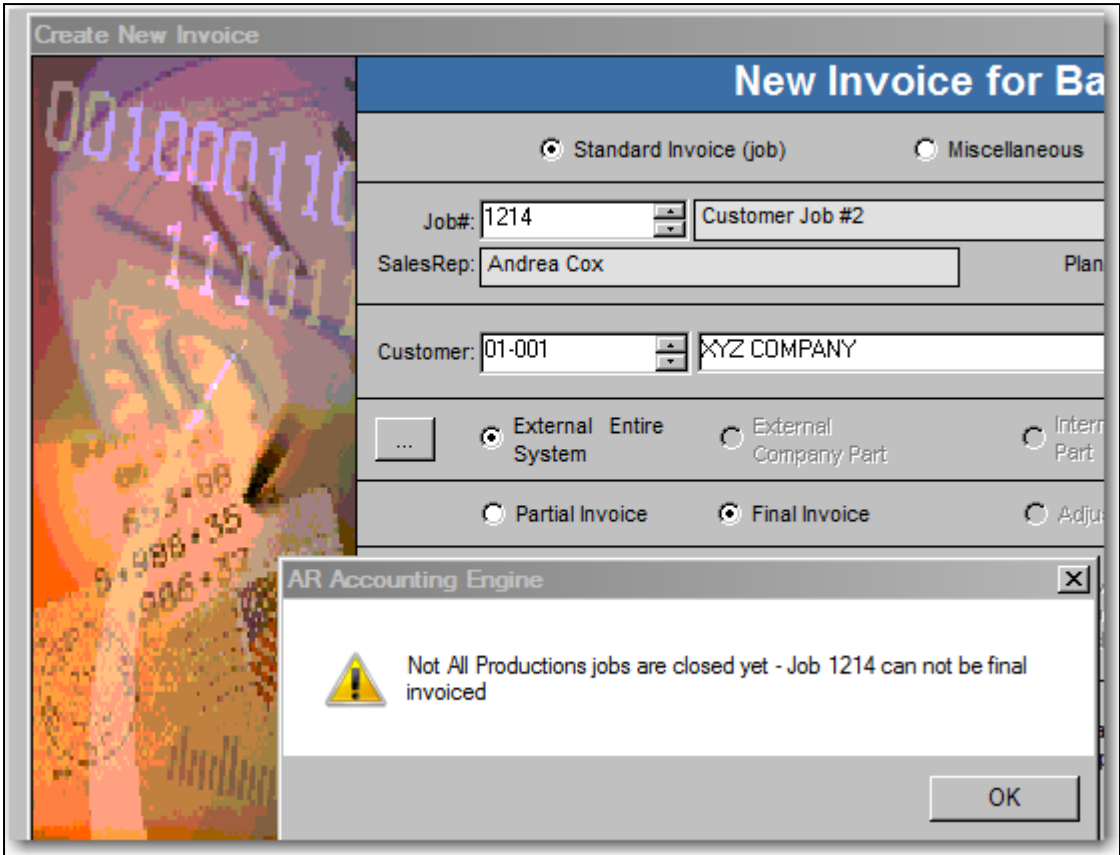
Within the Sales Prebill program under the Run Reports menu there is an option to Move Production Cost to Customer Jobs (reallocation may be triggered manually)

Generation of an A/R Invoice for either the Customer Job or the Production Job (notes and screenshots below on closing the Production Job) (reallocation occurs automatically)

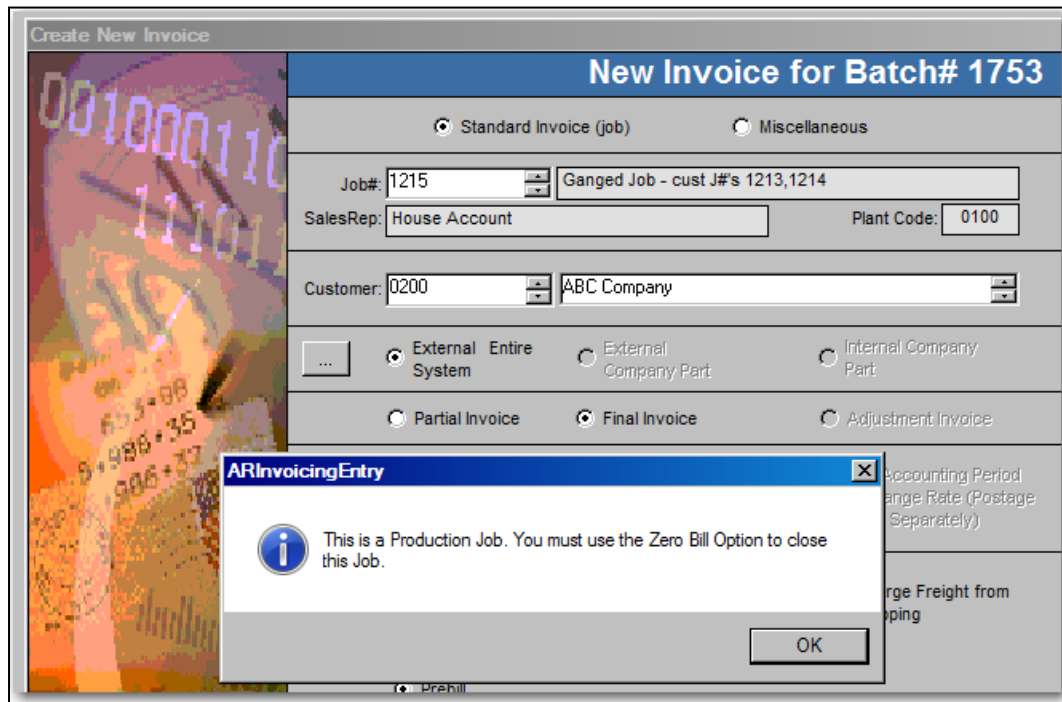
Closing the accounting period for WIP Material will be prevented until all costs have been reallocated. (reallocation occurs automatically)

By having reallocation triggers at each of these points, the program is ensuring WIP accuracy for month end.

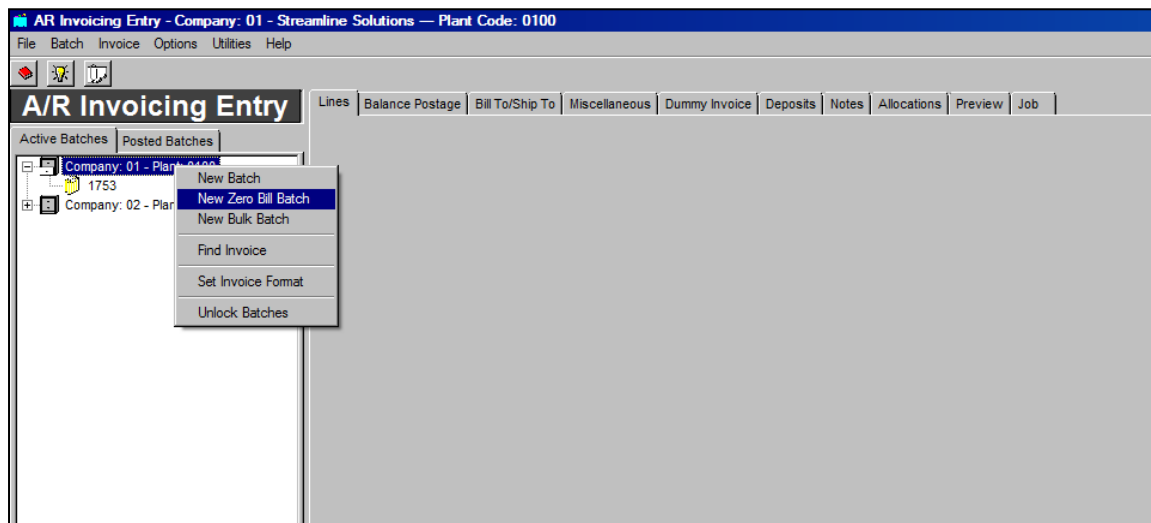
The Production Job needs to be final billed and posted prior to final billing any of the related Customer Jobs. This is to ensure that all the costs have been properly reallocated. The user will receive the following message if they attempt to bill a customer job prior to closing the related Production Job.



To close a Production Job the Zero Bill Option should be used. If a user attempts to final invoice a Production Job using a standard invoice, they will receive the following message.



A Zero Bill is created by right-clicking the Company/Plant within the Active Batch Tree and selecting New Zero Bill Batch. Follow the wizard to complete the transaction and refer to the A/R documentation for additional detail if needed.



**Note** The 'invoice' created using the Zero Bill option for a Production Job will not contain any G/L allocations for either revenue or expenses. The revenue and expense allocations and all impact to the general ledger will be a result of posting related to the related Customer Jobs.

## Gang Run Option Allows Work and Turn Press Method

Enter Template Finish Trim as the 1-up ganged sheet size. Enter Layout # up of the Finish Trim size as in this example-12 x 18 running 2-up.

Template 'Gang run 2 up'

Title: Gang run 2 up 0100\*Mail & Print Plant

Text

Cover

Pages: 2 Number Of Pages for QL: 0

Bind as: 1 Number Of Sheets for QL: 0

Finish(Trim) 12 x 18

Size:

Work and Turn

Work and Tumble

Work and Twist

Paper

Name:Color:

Grain Direction:

With Grain

Cross Grain

None

Precut:

Yes

No

Auto

Without Bleeds

With Bleeds

< Qty.	1st dim.	2nd dim.	1st dim.	2nd dim.	# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
99,999,999	0	0	0	0	2	Metal	<input type="checkbox"/>	0	2 x 1	
							<input type="checkbox"/>			
							<input type="checkbox"/>			

Gripper

Top Margin

Bottom Margin

Left Margin

Right Margin

Vertical Gutters

Horizontal Gutters

0

0

0

0

0

0

0

Ink

Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:		
Ink 1:		
Ink 2:		
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing

Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing

☒ Save as Permanent Template

OK

Cancel



Enter Quantity, Flat Size 1 and Flat Size 2, Trim Size 1 and Trim Size 2, and imposition of each individual element in the gang run:

Help for Gang Calc																
	Component	Qty Required	Flat Size 1	Flat Size 2	Flat Size	Trim Size 1(Finish)	Trim Size 2(Finish)	Finish Size	Section Qty	# Up	Qty Produced	Excess Qty	Excess Paper%	Square " Area	Total Square "	Squ Per
1	Gang run 2 up		12	18	12x18	12	18	12x18	1500	2	1500			216.00000	324.000.00000	
2	Antelope	1000	6	5	6x5	6.00000	5.00000	6x5	1000	1	1,500	0,500	50.00%	30.00000	30.000.00000	
3	Gazelle	2000	5	4	5x4	5.00000	4.00000	5x4	1000	2	3,000	1,000	50.00%	40.00000	40.000.00000	
4	Lion	3000	6	4	6x4	6.00000	4.00000	6x4	1500	2	3,000	0,000	.00%	48.00000	72.000.00000	
5	Tiger	4000	6	5	6x5	6.00000	5.00000	6x5	1334	3	4,500	0,500	12.50%	90.00000	120.000.00000	
152	TOTALS	10000							1500	8	12000	2000	112.50%	208.00000	262.000.00000	
153	Waste Statistics											20.00%	112.50%	8.00000	62.000.00000	

Select the Work and Turn imposition on the **Modifiers** tab:

Gang run 2 up

Header | PrePress | Paper | **Modifiers** | Inks | Select Press | Section Finishing

☒ Front ☐ Back

Modifiers

Modifiers	Qty.	Orig. Mins	Orig MR Waste	Rep Mins	Rep MR Waste	Run Speed Reduct
1/2 Fold on Multi Web						
100						
101						
102						
103						
104						
105						
106						
107						
108						
109						

Add Bleeds Cross-grain ☐ **Work and Turn** ☒ Dutch Cut ☐  
 Add bleeds w/grain ☐ Work and Tumble ☐ Num. First M/Rs: 1  
 Work and Twist ☐

Select Press > Find Press – runs 2-up 12 x 18 on a 19 x 25 Press Sheet.

Gang run 2 up

Header | PrePress | Paper | **Modifiers** | Inks | **Select Press** | Section Finishing

☒ Front ☐ Back **Press Type:** Sheet

	10,000
Section Qty.:	1500
Press:	Komori 6 Color ✓
Perfect	<input type="checkbox"/>
Finish (Trim) Size:	12 x 18
Number Up:	2 ✓
Press Size:	19 x 25 ✓
Number Out:	1 ✓
Paper Size:	19 x 25 ✓

PF All Options Find Press

Mail Estimating (Print & Estimate)	
<input checked="" type="checkbox"/>	Quote Header
<input checked="" type="checkbox"/>	Estimating
<input type="checkbox"/>	Admin
<input type="checkbox"/>	Data Processing
<input type="checkbox"/>	Components
<input checked="" type="checkbox"/>	Gang run 2 up-1,500
<input checked="" type="checkbox"/>	Antelope-1000
<input checked="" type="checkbox"/>	Gazelle-2000
<input checked="" type="checkbox"/>	Lion-3000
<input checked="" type="checkbox"/>	Tiger-4000
<input type="checkbox"/>	Bindery
<input checked="" type="checkbox"/>	Packages
<input checked="" type="checkbox"/>	Finishing
<input checked="" type="checkbox"/>	Drops
<input type="checkbox"/>	Special Instructions
<input checked="" type="checkbox"/>	Review Pricing
<input checked="" type="checkbox"/>	Order Entry

Gang run 2 up - Print Override				
Press Front	Press Back	Ink Front	Ink Back	Section
	1,500			
Press:	Komori 6 Color	<input checked="" type="checkbox"/>		
Preout:		<input checked="" type="checkbox"/>		
Finish (Trim) Size:	12 x 18			
Num. Up:	2	<input checked="" type="checkbox"/>		
Press Size:	19 x 25	<input checked="" type="checkbox"/>		
Num. Out:	1	<input checked="" type="checkbox"/>		
Paper Size:	19 x 25	<input checked="" type="checkbox"/>		
Waste	703			
Job M/R (Hrs.):	0:30			
Plate M/R (Hrs.):	0:40			
Plates:	Metal			
Extra Plates:	0			
Section Qty.:	1,453			
Run Speed	2,565	<input checked="" type="checkbox"/>		
Washups (Hrs.):	1:00			
Passes:	1			
Number shts	1,453			
Run Hours:	0:38			

Recalc Section

Notes... Paper Notes

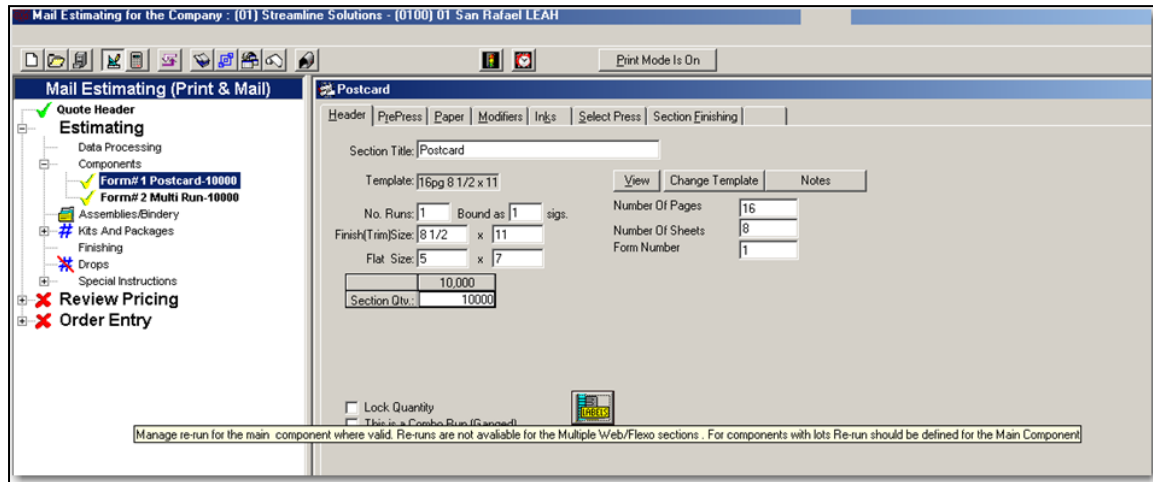
Paper Specifications										
Section\Vendor	Paper Weight	M Weight	Mill Size	Mach. Size	Out	Quantity	\$ Rate	\$ Cost	Precut	
2 Pp	Red Paper Supply		Kromekote C2s Cover-CWT^A0100 white							
	80.00	146.00	19 x 25	19 x 25	1	1,453shts	87.60/100 0 shts	\$127.28	0.00	

Press Specifications										
Section	Side	Method	Press	Runs	Overs	Ink Colors	Plates	M/R	Run	Wash
Main Ganged Gang run 2 up 12X18						Section Qty: 1,500				
2 Up	Front	W&Turn	Momori 6 Color	1,453	703	4 Proc Black, Proc Cyan, Proc Mag, Proc Yellow	4 Metal	1.17 hr	0.63 hr	1.00 hr
						2565 iph				
						Medium Coverage	\$37.24	\$90.00	\$408.33	\$219.42 \$350.00
Ganged*Antelope 6X6						Section Qty: 1,000	Num Up On Press Sheet	1 Up		
Ganged*Gazelle 5X4						Section Qty: 2,000	Num Up On Press Sheet	2 Up		
Ganged*Lion 6X4						Section Qty: 3,000	Num Up On Press Sheet	2 Up		
Ganged*Tiger 6X6						Section Qty: 4,000	Num Up On Press Sheet	3 Up		

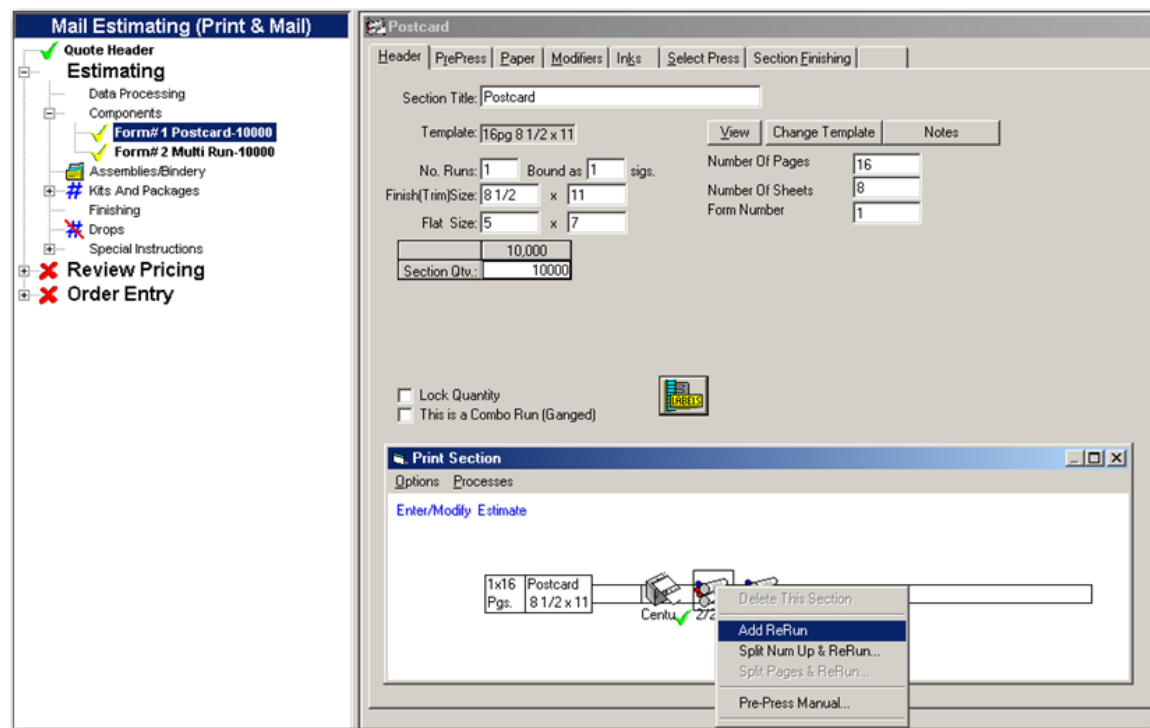
## Access Re-run Definition in the Print Mode

When in Print Mode, you have access to the re-run definition. This access will only be allowed if the component does not have a web or flexo layer applied to it.

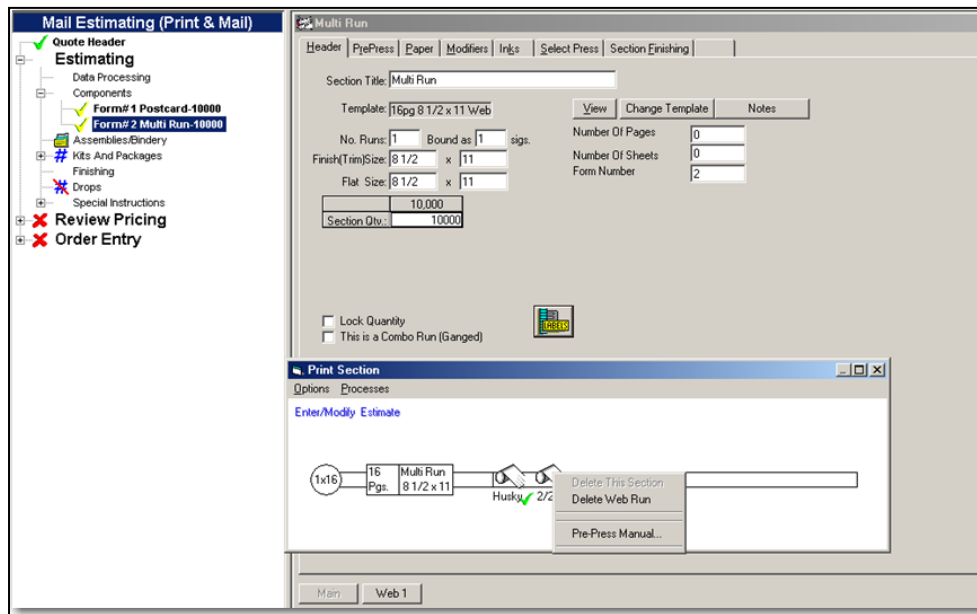
To access when in Print Mode, select the component then select the button in mid screen **Labels**.



Right-click as you would when trying to add a re-run when the Print Mode was off and select Add ReRun.



If the item is a Web or Flexo layer, the option to Add ReRun will not be present.

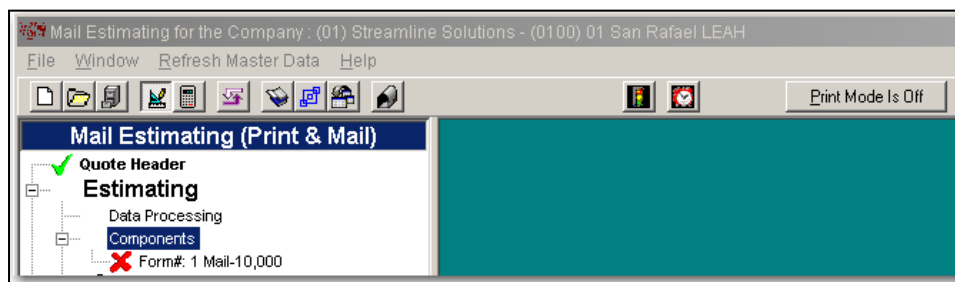


## Set Default to Print Mode is On

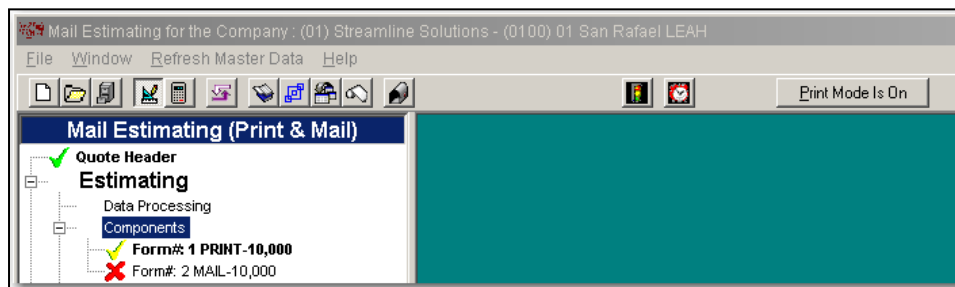
There is a system setting available in System Defaults, that when checked and opening an existing Print and Mail quote/job, the Print Mode will default to be On. Contact your PrintStream support rep to enable this feature.



If there are no print components defined for the quote/job, the Print Mode will be off.



If there is a print component defined for the quote/job, the Print Mode will be on. This feature only works if opening an existing quote/job. If you are creating a new quote, the existing programming will be in place where the Print Mode will be off.



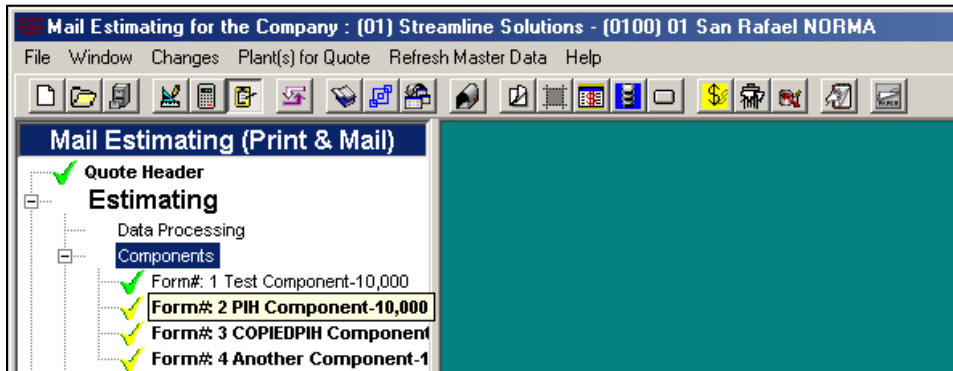
## Assign Form Numbers to Components

Ability to Assign Form Numbers to Components Whereby Form Number Determines Bind Sequence

This feature is optional can enabled by contacting your Production Support rep.

Form numbers are auto assigned for individual components as they are created. The form numbers display on the tree in Estimating with component/forms description as well as in the component/form Header screen.

When creating Lots or additional signature runs, the user gets an auto prompt for the starting form number to assign. The form number will be unique for each Lot in a form that has Lots or for each additional signature run. Gang runs will only have one form number assigned and will display the same form number for each component/form on the gang run. Those numbers can then be changed in the Bound Component Screen, especially in situations where multiple ganged components/forms are in the same bound component.



## Print/Mail Default Qty Lock for print in house lots

When creating lots from a print component, if the parent component has a quantity lock . . .

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH

Print Mode Is On

**Mail Estimating (Print & Estimating)**

- Quote Header
- ✓ Data Processing
- Components
  - ✓ **Parent - 1 lot-10,500**
  - ✓ **Parent - 1 lot-1-10**
  - ✓ **Parent - 2 lot-21,000**
  - ✓ **Parent - 4 lot-12,000**
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
    - 1: Pkg 1 for 1 lot-10,000
  - Finishing

**Parent - 1 lot**

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Section Title: Parent - 1 lot

Template: 16pg 8 1/2 x 11

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Number Of Pages: 0

Number Of Sheets: 0

10,000

Section Qty.: 10500

. . . then the child lot(s) created for it will, by default, be locked. This Lock Quantity field does not prevent user from editing the quantities from this screen. It will prevent any package quantity calculations from over-riding this quantity.

Example here is Parent/Child has quantity lock of 10,500.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH

Print Mode Is On

**Mail Estimating (Print & Estimating)**

- Quote Header
- ✓ Data Processing
- Components
  - ✓ **Parent - 1 lot-10500**
  - ✓ **Parent - 1 lot-1-10**
  - ✓ **Parent - 2 lot-21,000**
  - ✓ **Parent - 4 lot-12,000**
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
    - 1: Pkg 1 for 1 lot-10,000
  - Finishing
    - ✗ Drops
    - Special Instructions
  - ✗ **Review Pricing**
  - ✗ **Order Entry**

**LOT Parent - 1 lot-1**

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Section Title: Parent - 1 lot-1

Template: 16pg 8 1/2 x 11

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Number Of Pages: 0

Number Of Sheets: 0

10,000

Section Qty.: 10500

☒ Lock Quantity

But the package quantity is 10,000. **Save** the package and recalculate packages.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [All Packages]

Hide

Print Mode Is On

**Mail Estimating (Print & Estimating)**

Quote Header

Estimating

Data Processing

Components

Parent - 1 lot-10500

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance	Quantity	Seq.
All Pkg. Total:						10,000	
Job#	0	Some testing	LEAH	Leah's Account	Number:	1	
Job Qty	10000	Mail Dates			Description:	Pkg 1 for	
					Quantity:	10,000	
Parent - 1 lot-1			Common	10,500	500	10,000	0

The printed quantity will remain locked at 10,500 but any component processes assigned to the child component will have the quantity of the package.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Parent - 1 lot-1-10,500]

File Window Refresh Master Data Help

Print Mode Is Off

**Mail Estimating (Print & Estimating)**

Quote Header

Estimating

Data Processing

Components

Parent - 1 lot-10500

Parent - 1 lot-1-10

Parent - 2 lot-21,000

Parent - 4 lot-12,000

Assemblies/Bindery

Create Inventory

Packages Advanced

Kits And Packages

1: Pkg 1 for 1 lot-10,000

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Description: Parent - 1 lot-1 Versions: 1 ...

Date on Hand:

Quantity before Overs: 10,500

Waste: 0

Total Quantity: 10,500

Inventory

Inv. Description:

Overs to:

Insert Notes:

Comments:

Additional Info

Finish (Trim) Size	8 1/2x11
Flat Size	8 1/2x11
Caliper	0
Pc Weight	0.000
Bundle Qty	0
Num Of Pages	0
Num Of Sheets	0

Notes... Notes... Delete Component Copy Component Save Cancel

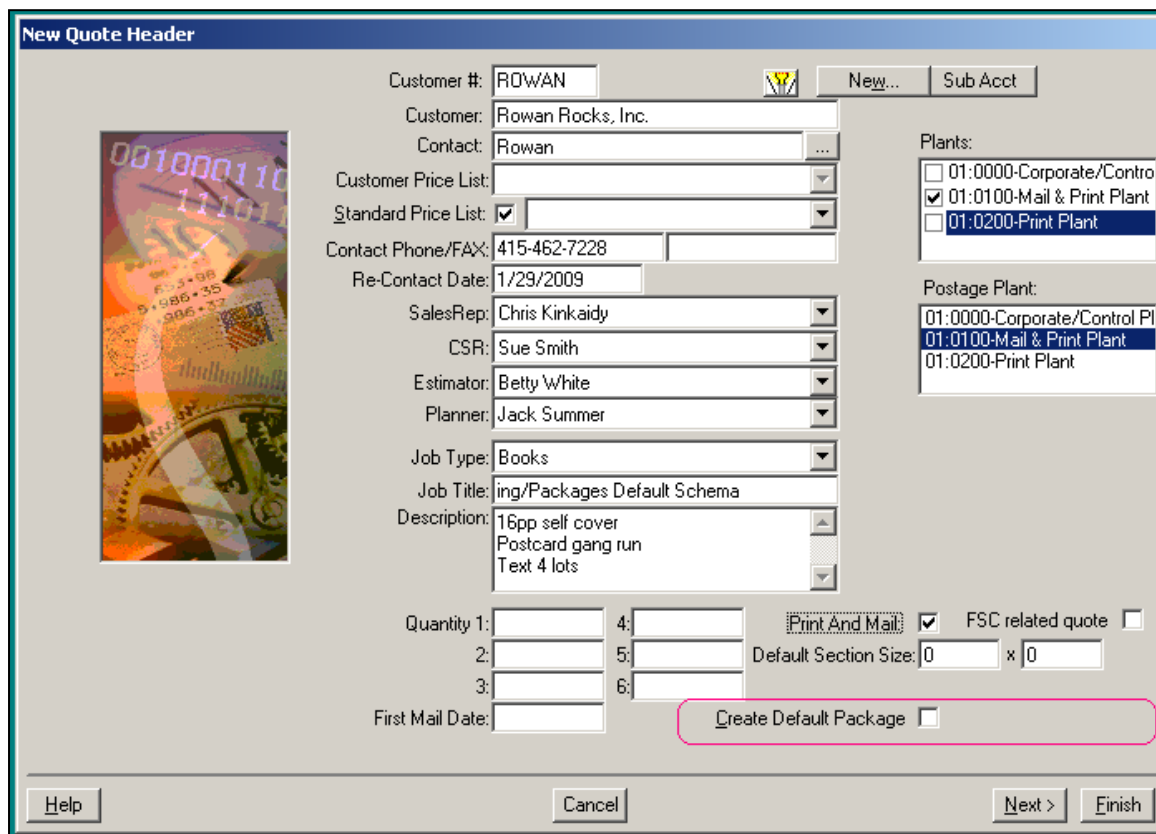
Process Description	Quantity	Qty Lock	Cycle Based	Quoted Price	All Pkgs
Printing					
Laser					
Inkjet					
Cheshire/P/Back					
Laser 14" form	10,000			\$353.00	\$ N

## Create Binding/Package Default Schema for Print Component


A new feature which allows the user to create both the package quantity and the bound component quantity simultaneously.

### RULES:

- It is not necessary to check the option to Create a Default Package in the Quote Header.
- If the Default Package option is checked, a Default Package will be created in addition to the package with the bound components. In order to bring the quantities into balance, either delete the Default Package or delete the components from the Default Package.
- Each Printed Component must be fully defined before using the feature.
- Once a Bound Component has been created, quantity edits must be done in the Packages screen.
- Loose pieces that are not part of the bound component must be added as separate packages.
- Any printed in house component type may use this feature (single printed components, component parts of a gang run, components with lots).





**New Quote Header**

Customer #: ROWAN  New... Sub Acct

Customer: Rowan Rocks, Inc.


Contact: Rowan ...


Customer Price List: 


Standard Price List: ☒ 


Contact Phone/FAX: 415-462-7228


Re-Contact Date: 1/29/2009

SalesRep: Chris Kinkaidy 


CSR: Sue Smith 

Estimator: Betty White 

Planner: Jack Summer 

Job Type: Books 

Job Title: ing/Packages Default Schema

Description: 16pp self cover  
Postcard gang run  
Text 4 lots 

Plants:

- ☐ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

Postage Plant:

- 01:0000-Corporate/Control Pl
- 01:0100-Mail & Print Plant
- 01:0200-Print Plant

Quantity 1:  4:  **Print And Mail:** ☒ FSC related quote ☐

2:  5:  Default Section Size: 0 x 0

3:  6:

First Mail Date:

**Create Default Package** ☐

Help Cancel Next > Finish



Before using the feature, the Printed In House Components must be fully defined. The components may be single print components, components with lots, or ganged forms.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant CHRIS

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header  
Estimating  
Admin  
Data Processing  
Components  
Postcard-gang run-1,000  
Spring-5000  
Summer-2500  
Winter-1500  
Fall-1000  
Binding  
Packages  
Finishing  
Drops  
Special Instructions  
Review Pricing  
Order Entry

Postcard-gang run

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: Postcard-gang run

Template: Postcards-ganged View

No. Runs: 1 Bound as 1 sigs.

Trim Size: 19 x 25

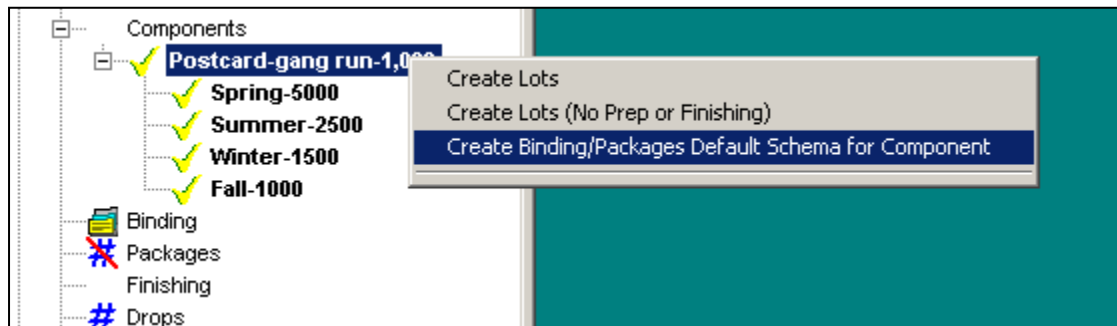
10,000  
Section Qty: 1000

Due to the Ganging calculation method the main component will use MAX num of sheets from all the related lots. Be aware that every editing which is affecting the number of press sheets can update the MAX qty picked up by the main component. This change can potentially require re-selecting press for the main component.

☐ Lock Quantity  
☒ This is a Combo Run (Ganged)

This is an example of a Postcard-Gang run with 4 versions on the press sheet

Right-click the main component to access the feature **Create Binding/Packages Default Schema for Component**.



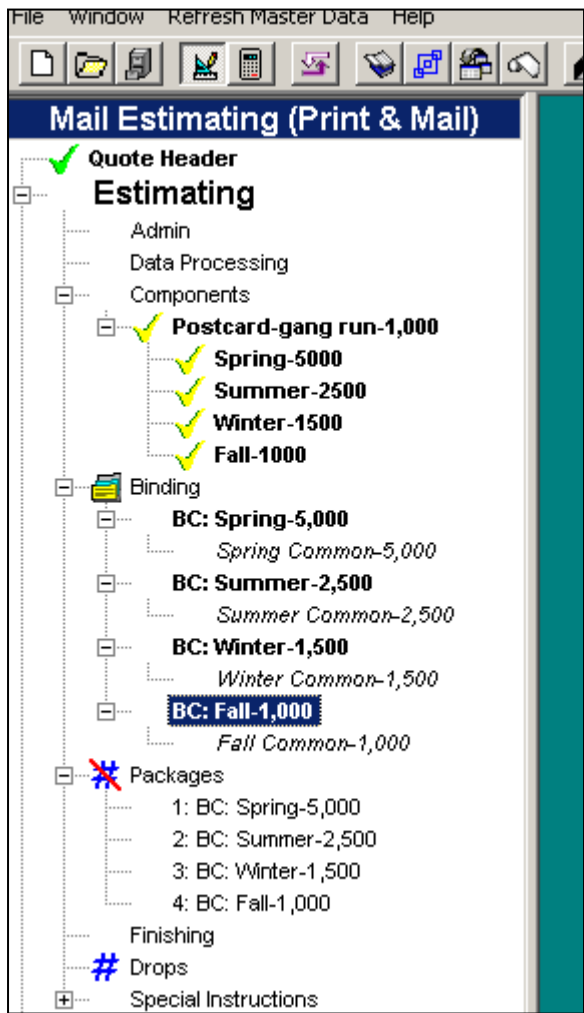
Confirm by clicking **Yes**.

Confirm

Would you like to create Bound Component/Package per valid component instance?

Yes No

The Bound Components and Packages are simultaneously created. Note the designation “BC” which means Bound Component.



**Example 1: GANGED PRESS FORM:**

Right-click each Bound Component to add the required Bindery Processes:

When the screen opens, it will display the Bound Component Name and Quantity. There will be a red check mark next to the Component Name. The imposition and quantity out of the press sheet for each piece is what determines the bound component quantity. This example has 4 pieces for 4 different quantities all running on the same press sheet.

Select the required Bindery Process for the Bound Component. The example below is BC-Spring for a quantity of 5000. Carton Packing is the selected Bindery Process being applied to the Bound Component.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS - [Bound Component]

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header  
Estimating

Admin  
Data Processing  
Components

Postcard-gang run-1,000  
✓ Spring-5000  
✓ Summer-2500  
✓ Winter-1500  
✓ Fall-1000

Binding  
BC: Spring-5,000  
Spring Common-5,000  
BC: Summer-2,500  
Summer Common-2,500  
BC: Winter-1,500  
Winter Common-1,500  
BC: Fall-1,000  
Fall Common-1,000

Packages  
1: BC: Spring-5,000  
2: BC: Summer-2,500  
3: BC: Winter-1,500  
4: BC: Fall-1,000

Bound Component Name: BC: Spring Quantity: 5000

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run	.....
1 Spring Common						
2 Summer Common						
3 Winter Common						
4 Fall Common						
	Bindery Buyout 01					
	Book Trimming					
	Carton Pack 01	✓				
	Delivery Local 01					
	Freight 01					
	Perfect Bind (B/O Waste)					
	Saddlestitch 01					
	Shrinkwrap 01					
	Truck Freight 01					

Note that the selected bound component "BC-Spring" is marked with a red check  
Note that the quantity is 5000 here and also in the packages screen  
Add the required bindery process for the selected bound component

Repeat the above steps, selecting the required Bindery Process for BC:Summer. The Bindery Process is Shrinkwrap for a quantity of 2500.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS - [Bound Component]

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header  
Estimating

Admin  
Data Processing  
Components

Postcard-gang run-1,000  
✓ Spring-5000  
✓ Summer-2500  
✓ Winter-1500  
✓ Fall-1000

Binding  
BC: Spring-5,000  
BC: Summer-2,500  
BC: Winter-1,500  
BC: Fall-1,000

Packages  
1: BC: Spring-5,000  
2: BC: Summer-2,500  
3: BC: Winter-1,500  
4: BC: Fall-1,000

Finishing  
# Drops  
Special Instructions  
Review Pricing  
Order Entry

Bound Component Name: BC: Summer Quantity: 2500

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run	.....
1 Spring Common						
2 Summer Common						
3 Winter Common						
4 Fall Common						
	Bindery Buyout 01					
	Book Trimming					
	Carton Pack 01					
	Delivery Local 01					
	Freight 01					
	Perfect Bind (B/O Waste)					
	Saddlestitch 01					
	Shrinkwrap 01	✓				
	Truck Freight 01					

BC Summer  
Shrinkwrapping added to this component  
Quantity 2500

To change the quantity of the bound components, make the edits in the Packages screen. Quantity changes will ripple through the processes, bound components, and packages simultaneously.

Component	Inv. Code	Item #	Version	Ver. Qty	Ver. Balance	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq
*BC: Spring			Common	6,000	0	6,000	1										
*BC: Summer			Common	3,000	0			3,000	2								
*BC: Winter			Common	2,500	0					2,500	3						
*BC: Fall			Common	1,250	0							1,250	4				

Example 2: MAIN COMPONENT WITH 4 LOTS

The 'Create Binding/Packages Default Schema for Component,' also works for Printed In House sections with Lots.

The Main Component and the Lots must be fully defined first.

Confirm

Would you like to create Bound Component/Package per valid component instance?

Yes No

**Mail Estimating (Print & Mail)**

**Quote Header**

**Estimating**

Admin  
Data Processing  
Components

- Postcard-gang run-1,250
- Main Text-4 Lots-12,750
  - Lunar New Year-4,250
  - Bastille Day-3,000
  - Cinquo de Maio-3,500
  - Inauguration Day '09-2,000

**Binding**

- BC: Spring-6,000
- BC: Summer-3,000
- BC: Winter-2,500
- BC: Fall-1,250
- BC: Lunar New Year-4,250
  - Lunar New Year Common-4,250
- BC: Bastille Day-3,000
  - Bastille Day Common-3,000
- BC: Cinquo de Maio-3,500
  - Cinquo de Maio Common-3,500
- BC: Inauguration Day-2,000
  - Inauguration Day '09 Common-2,000

**# Packages**

- 1: BC: Spring-6,000
- 2: BC: Summer-3,000
- 3: BC: Winter-2,500
- 4: BC: Fall-1,250
- 5: BC: Lunar New Year-4,250
- 6: BC: Bastille Day-3,000
- 7: BC: Cinquo de Maio-3,500
- 8: BC: Inauguration Day-2,000

**All Packages**

Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity
All Pkg. Total:	25,500								
Job#	0	Create B	ROWAN	Rowan P	escription:	Number:	5	6	7
Job Qty	12750	Mail Dat		Quantity:		BC: Lunar	4,250	BC: Bastil	3,000
Component	Inv. Code	Item #	Version	Ver. Qty.	er. Balanc				
*BC: Spring			Common	6,000	0				
*BC: Summer			Common	3,000	0				
*BC: Winter			Common	2,500	0				
*BC: Fall			Common	1,250	0				
*BC: Lunar New			Common	4,250	0		4,250	5	
*BC: Bastille D			Common	3,000	0			3,000	6
*BC: Cinquo de			Common	3,500	0				3,500
*BC: Inaugurati			Common	2,000	0				

**MainText has 4 lots**  
Using the feature to "Create Binding/Package Default Schema for Component" will simultaneously update package quantities, bound component quantities and process quantities based on the values entered for each Lot

If package counts are altered on this screen, use the utility "Adjust Package Counts" to update data processing and finishing packag

Cancel Save Printlt Display

Example 3: PRINTED IN HOUSE COMPONENT (NO LOTS OR GANGS):

Mail Estimating (Print & Mail)

Quote Header

Estimating

Admin

Data Processing

Components

Postcard-gang run-1,250

Main Text-4 Lots-12,750

Brochure-12,750

Binding

Packages

Finishing

Drops

Special Instructions

Create Lots

Create Lots (No Prep or Finishing)

Create Binding/Packages Default Schema for Component

Confirm

Would you like to create Bound Component/Package per valid component instance?

Yes

No

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant CHRIS - [Bound Component]

Mail Estimating (Print & Mail)

Quote Header

Estimating

Admin

Data Processing

Components

Postcard-gang run-1,250

Main Text-4 Lots-12,750

Lunar New Year-4,250

Bastille Day-3,000

Cinquo de Maio-3,500

Inauguration Day '09-2,000

Brochure-12,750

Binding

BC: Spring-6,000

BC: Summer-3,000

BC: Winter-2,500

BC: Fall-1,250

BC: Lunar New Year-4,250

BC: Bastille Day-3,000

BC: Cinquo de Maio-3,500

BC: Inauguration Day-2,000

BC: Brochure-12,750

Brochure Co

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Bound Component Name

BC: Brochure

Quantity

12750

	Component Name	Process Name	Valid Data	Process Name
1	Spring Common			
2	Summer Common			
3	Winter Common			
4	Fall Common			
5	Lunar New Year Comm			
6	Bastille Day Common			
7	Cinquo de Maio Comm			
8	Inauguration Day '09			
9	Brochure Common			

Bindery Buyout 01	<input checked="" type="checkbox"/>	Shrinkwrap 01
Book Trimming		
Carton Pack 01		
Delivery Local 01		
Freight 01		
Perfect Bind (B/O Waste)		
Saddlestitch 01		
Shrinkwrap 01		
Truck Freight 01		

Add New Bound Component

Edit Bound Component

Review Bound Component

Review Waste For Bound Component

Bind Common Runs

The Brochure bound component may be edited by right clicking on BC: Brochure and selecting "Edit Bound Component"

In this example, Shrinkwrap 01 and Truck Freight 01 are the Bindery Processes being added.

Note the Component Name is flagged, the Bound Component Name and quantity are auto filled into the fields.

#### Example 4: UNBOUND LOOSE PIECES

Add Loose Pieces into a separate package for the extras that are not being bound or processed in the bindery:

The screenshot shows the software interface for adding loose pieces to a package. On the left is a tree view with categories like Admin, Data Processing, Components, Binding, Packages, Finishing, Drops, and Special Instructions. The 'Components' category is expanded, showing a list of items including Postcard-gang run, Main Text, Lunar New Year, Bastille Day, Cinquo de Maio, Inauguration Day, and Brochure. The 'Binding' category is also expanded, showing a list of items including BC: Spring, BC: Summer, BC: Winter, BC: Fall, BC: Lunar New Year, BC: Bastille Day, BC: Cinquo de Maio, BC: Inauguration Day, and BC: Brochure. The 'Packages' category is highlighted with a blue box. The 'Display' button at the bottom right is highlighted with a pink box.

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance			
*BC: Spring			Common	6,000	0			
*BC: Summer			Common	3,000	0			
*BC: Winter			Common	2,500	0			
*BC: Fall			Common	1,250	0			
*BC: Lunar New Year			Common	4,250	0			
*BC: Bastille D.			Common	3,000	0			
*BC: Cinquo de			Common	3,500	0			
*BC: Inaugurat			Common	2,000	0			
*BC: Brochure			Common	12,750	0	12,750	9	0

Click "Display" option to access the individual pieces.

Add the required loose piece count into a separate package that is not being bound.

If package counts are altered on this screen, use the utility "Adjust Quantity Package Counts" to update data processing and finishing package counts.

Buttons: Cancel, Save, PrintIt, Display

This example shows that the BC Brochure package requires 10,000 and 2,750 will be put into a separate package for samples. This would be the case if there are no bindery processes being applied to these samples.

If there are different bindery processes being applied to the Samples, it would be necessary to create another Bound Component to reflect the different processing.

Mail Estimating for the Company : (01) Alaska Inco - (0100) Mail & Print Plant CHRIS - [All Packages]

Quote Header  
Estimating

Admin  
Data Processing  
Components

- Postcard-gang run-1,250
- Main Text-4 Lots-12,750
- Lunar New Year-4,250
- Bastille Day-3,000
- Cinco de Maio-3,500
- Inauguration Day '09-2,000
- Brochure-12,750

Binding

- BC: Spring-6,000
- BC: Summer-3,000
- BC: Winter-2,500
- BC: Fall-1,250
- BC: Lunar New Year-4,250
- BC: Bastille Day-3,000
- BC: Cinco de Maio-3,500
- BC: Inauguration Day-2,000
- BC: Brochure-12,750

Package Recalc

Finishing  
Drops  
Special Instructions

Review Pricing  
Order Entry

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance	Quantity	Seq.	Quantity	Seq.	Quantity	Seq.
All Pkg. Total:						38,250					
Job#	0	Create Bindir	ROWAN	Rowan Rock	Number:	9		10			
Job Qty	12750	Mail Dates			Description:	BC: Brochure		Brochure Samples			
					Quantity:	10,000		2,750			
Spring			Common	0	0						
Summer			Common	0	0						
Winter			Common	0	0						
Fall			Common	0	0						
*BC: Spring			Common	6,000	0						
*BC: Summer			Common	3,000	0						
*BC: Winter			Common	2,500	0						
*BC: Fall			Common	1,250	0						
Lunar New Year			Common	0	0						
Bastille Day			Common	0	0						
Cinco de Maio			Common	0	0						
Inauguration Day			Common	0	0						
*BC: Lunar New			Common	4,250	0						
*BC: Bastille D.			Common	3,000	0						
*BC: Cinco de			Common	3,500	0						
*BC: Inaugurat			Common	2,000	0						
Brochure			Common	0	-2,750			2,750	2		
*BC: Brochure			Common	12,750	0		12,750	9		0	1

In this example, the BC: Brochure count has changed to 10,000  
There is an additional package for 2,750 Brochure Samples

Enter the Quantity for the samples in the cell highlighted so that it applies to only the Loose Pieces (Brochures) and not the Bound Component

Remember to use Package Recalc to update package quantities

After **Package Recalc**, click **Suppress** to return the Packages screen to the Bound Component view (individual pieces will be suppressed from this view).

Estimating (Print & Mail)

Quote Header  
Estimating

Admin  
Data Processing  
Components

- Postcard-gang run-1,250
- Spring-6,000
- Summer-3,000
- Winter-2,500
- Fall-1,250
- Main Text-4 Lots-12,750
- Lunar New Year-4,250
- Bastille Day-3,000
- Cinco de Maio-3,500
- Inauguration Day '09-2,000
- Brochure-12,750

Binding

- BC: Spring-6,000
- BC: Summer-3,000
- BC: Winter-2,500
- BC: Fall-1,250
- BC: Lunar New Year-4,250
- BC: Bastille Day-3,000
- BC: Cinco de Maio-3,500
- BC: Inauguration Day-2,000
- BC: Brochure-10,000

Package Recalc

Finishing  
Drops  
Special Instructions

Review Pricing  
Order Entry

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance	Seq.	Quantity	Seq.	Quantity	Seq.	Quantity	Seq.
All Pkg. Total:							38,250					
Job#	0	Create Bindir	ROWAN	Rowan Rock	Number:	7		8		9		10
Job Qty	38250	Mail Dates			Description:	BC: Cinqu		BC: Inaug		BC: Broch		Brochure
					Quantity:	3,500		2,000		10,000		2,750
Spring			Common	0	0							
Summer			Common	0	0							
Winter			Common	0	0							
Fall			Common	0	0							
*BC: Spring			Common	6,000	0							
*BC: Summer			Common	3,000	0							
*BC: Winter			Common	2,500	0							
*BC: Fall			Common	1,250	0							
Lunar New Year			Common	0	0							
Bastille Day			Common	0	0							
Cinco de Maio			Common	0	0							
Inauguration Day			Common	0	0							
*BC: Lunar New			Common	4,250	0							
*BC: Bastille D.			Common	3,000	0	6						
*BC: Cinco de			Common	3,500	0		3,500	7				
*BC: Inaugurat			Common	2,000	0			2,000	8			
Brochure			Common	2,750	0							2,750 2
*BC: Brochure			Common	10,000	0					10,000	9	

Printed in House quantity remains at 12,750  
BC: Brochure Quantity is now 10,000  
Brochure Samples are 2,750



Print & Mail)

Print Mode Is On

All Pkg. Total: 38,250		Job# 0		Create Bindir ROWAN	Rowan Rock	Number:	Seq. 7	Quantity 3,500	Seq. 8	Quantity 2,000	Seq. 9	Quantity 10,000	Seq. 10	Quantity 2,750
Job Qty 38250		Mail Dates				Description:	BC: Cinqu	BC: Inaug	BC: Broch	Brochure				
Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance									
*BC: Spring			Common	6,000	0									
*BC: Summer			Common	3,000	0									
*BC: Winter			Common	2,500	0									
*BC: Fall			Common	1,250	0									
*BC: Lunar New			Common	4,250	0									
*BC: Bastille D			Common	3,000	0	6								
*BC: Cinquo de			Common	3,500	0		3,500	7						
*BC: Inaugurati			Common	2,000	0				2,000	8				
*BC: Brochure			Common	10,000	0						10,000	9		

when "suppress" is clicked, this list will show only the Bound Components

**Example 5: ADDING LOOSE PIECES FOR PARTS OF A GANG RUN OR LOTS:**

The same procedure may be followed to add loose pieces for parts of a gang run or lots:

Click **Display** to reveal the individual ganged pieces and lots.

Enter new packages for the loose pieces. If there will be different quantities, a separate package must be created for each quantity.

In this example, there are 2 new packages to account for loose pieces of each item that is not part of a bound component.

These package quantities are being added to the overall quantity, so when packages are recalculated, new totals will be displayed in the tree to the left.

Job#	Job Qty	Component	Comp	Version	sr.	Q	Balance	Brochure	Brochure	Four Seasons Samples	Calendar Event Samples
0	36	May						2,750	2,750	1,000	1,000
		Spring	Comp	0	1,000					1,000	1
		Summer	Comp	0	1,000					1,000	2
		Winter	Comp	0	1,000					1,000	3
		Fall	Comp	0	1,000					1,000	4
		*BC: Spring	Comp	0	0						
		*BC: Summer	Comp	0	0						
		*BC: Winter	Comp	500	0						
		*BC: Fall	Comp	250	0						
		Lunar New Year	Comp	0	1,000						1,000 1
		Bastille Day	Comp	0	1,000						1,000 2
		Cinquo de Maio	Comp	0	1,000						1,000 3
		Inauguration Day '09	Comp	0	1,000						1,000 4
		*BC: Lunar New Y	Comp	250	0						
		*BC: Bastille Day	Comp	0	0						
		*BC: Cinquo de M	Comp	500	0						
		*BC: Inauguration	Comp	0	0						
		Brochure	Comp	750	5,500	2,750	2	2,750	2		
		*BC: Brochure	Comp	0	0						

In this example there are 2 new packages to account for loose pieces of each item that is not part of a bound component. These are in addition to the required quantities so the counts entered will add to the quantities for each ganged piece or lot.

Four Seasons Samples contain 1000 each of Spring, Summer, Winter & Fall into a single package

Calendar Events have 1000 each of Lunar New Year, Bastille Day, Cinquo de Maio and Inauguration Day '09 samples.

If package counts are altered on this screen, use the utility "Adjust Quantity Package Counts" to update data processing and finishing package counts.

Save changes for All Packages:

**Quote Header**  
**Estimating**  
 Admin  
 Data Processing  
 Components  
 ✓ Postcard-gang run-1,250  
   ✓ Spring-6,000  
   ✓ Summer-3,000  
   ✓ Winter-2,500  
   ✓ Fall-1,250  
 ✓ Main Text-4 Lots-12,750  
   ✓ Lunar New Year-4,250  
   ✓ Bastille Day-3,000  
   ✓ Cinco de Maio-3,500  
   ✓ Inauguration Day '09-2,000  
 ✓ Brochure-12,750  
 Binding  
   BC: Spring-6,000  
   BC: Summer-3,000  
   BC: Winter-2,500  
   BC: Fall-1,250  
   BC: Lunar New Year-4,250  
   BC: Bastille Day-3,000  
   BC: Cinco de Maio-3,500  
   BC: Inauguration Day-2,000  
   BC: Brochure-10,000  
 Packages  
 Finishing  
 Drops  
 Special Instructions  
**Review Pricing**

All Pkg. Total: 50				Number:	11	12	13	14
Job#	0	Cre	ROW	Row	Brochure	Brochure	Four Seasons Samples	Calendar Event Samples
Job Qty	3E	Mai	Quantity:	2,750	2,750	1,000	1,000	1,000
Component	C	em	ersion	er. Q	Bala			
Spring			Cont	0	-1,000			
Summer			Cont	0	-1,000			
Winter			Cont	0	-1,000			
Fall			Cont	0	-1,000			
*BC: Spring			Cont	0,000	0			
*BC: Summer			Cont	0,000	0			
*BC: Winter			Cont	500	0			
*BC: Fall			Cont	250	0			
Lunar New Year			Cont	0	-1,000			1,000 1
Bastille Day			Cont	0	-1,000			1,000 2
Cinco de Maio			Cont	0	-1,000			1,000 3
Inauguration Day '09			Cont	0	-1,000			1,000 4
*BC: Lunar New Y			Cont	250	0			
*BC: Bastille Day			Cont	0,000	0			
*BC: Cinco de M			Cont	500	0			
*BC: Inauguration			Cont	500	0			
Brochure			Cont	750	-5,500	2,750 2	2,750 2	
*BC: Brochure			Cont	0,000	0			

**Mail Estimating (Print & Mail)**  
 ? Save changes for All Packages?  
 Yes No

After package recalc:

**Mail Estimating (Print & Mail)**  
 Print Mode Is On

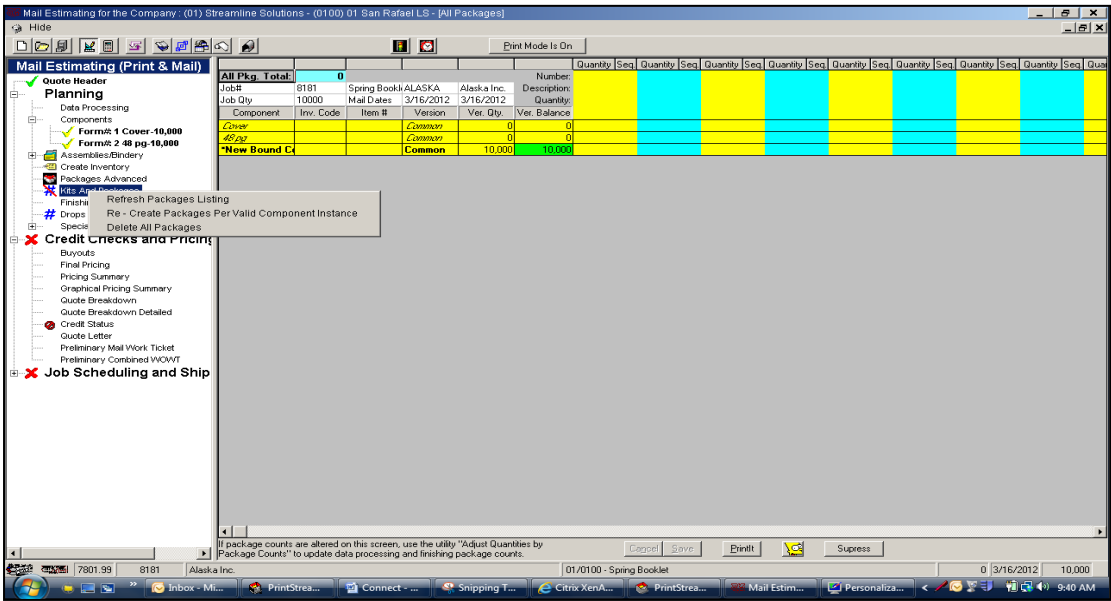
**Quote Header**  
**Estimating**  
 Admin  
 Data Processing  
 Components  
 ✓ Postcard-gang run-2,250  
   ✓ Spring-7,000  
   ✓ Summer-4,000  
   ✓ Winter-3,500  
   ✓ Fall-2,250  
 ✓ Main Text-4 Lots-16,750  
   ✓ Lunar New Year-5,250  
   ✓ Bastille Day-4,000  
   ✓ Cinco de Maio-4,500  
   ✓ Inauguration Day '09-3,000  
 ✓ Brochure-12,750  
 Binding  
   BC: Spring-6,000  
   BC: Summer-3,000  
   BC: Winter-2,500  
   BC: Fall-1,250  
   BC: Lunar New Year-4,250  
   BC: Bastille Day-3,000  
   BC: Cinco de Maio-3,500  
   BC: Inauguration Day-2,000  
   BC: Brochure-10,000  
 Packages  
 Finishing

All Pkg. Total: 50				Number:	7	8	9	10	13	14
Job#	0	Cre	ROW	Row	BC: Cinqu	BC: Inaug	BC: Broch	Brochure	Four Seas	Calendar
Job Qty	4C	Mai	Quantity:	3,500	2,000	10,000	2,750	1,000	1,000	1,000
Component	C	em	ersion	er. Q	Bala					
Spring			Cont	0,000	0				1,000 1	
Summer			Cont	0,000	0				1,000 2	
Winter			Cont	0,000	0				1,000 3	
Fall			Cont	0,000	0				1,000 4	
*BC: Spring			Cont	0,000	0					
*BC: Summer			Cont	0,000	0					
*BC: Winter			Cont	500	0					
*BC: Fall			Cont	250	0					
Lunar New Year			Cont	0,000	0					1,000 1
Bastille Day			Cont	0,000	0					1,000 2
Cinco de Maio			Cont	0,000	0					1,000 3
Inauguration Day '09			Cont	0,000	0					1,000 4
*BC: Lunar New Y			Cont	250	0					
*BC: Bastille Day			Cont	0,000	0	6				
*BC: Cinco de M			Cont	500	0	3,500 7				
*BC: Inauguration			Cont	0,000	0		2,000 8			
Brochure			Cont	750	0			2,750 2		
*BC: Brochure			Cont	0,000	0				10,000 9	

After Package Recalc, the 1000 samples have been added to the counts for the ganged pieces and the lots

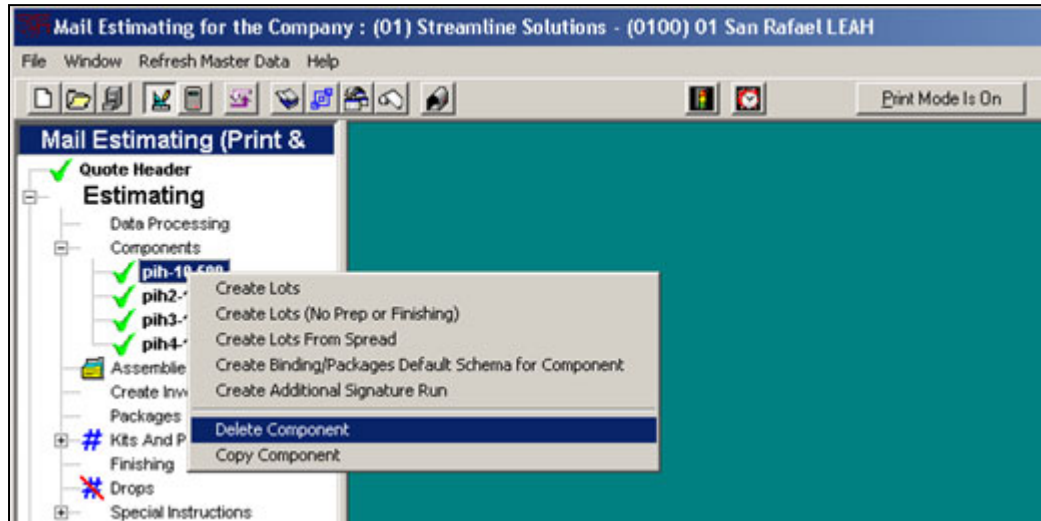
## Auto Create Packages

This new option was added specifically for Print only type estimates and jobs. The previous requirement was that all quotes had to have at least one package with all components linked in order to have the ability to copy the quote or convert it to a job. When a bound component is present only the bound component should link to the package unless there are extra copies of the individual components required. With simple print quotes that are only a single version, quotes can now be converted to jobs without a package, also quotes can now be copied for the same quantity without a package.

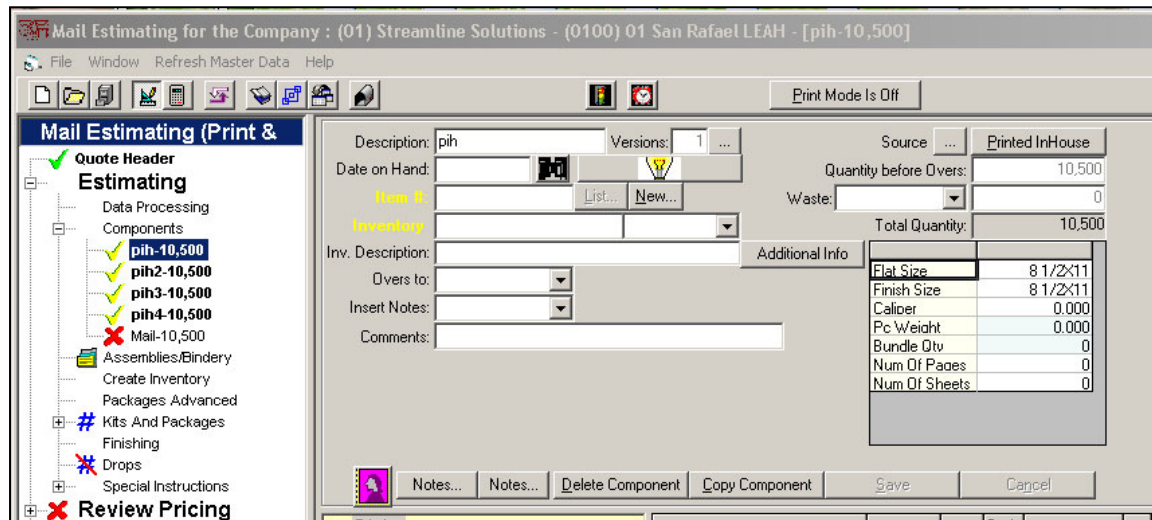


## Print Component Delete and/or Copy Feature

An enhancement for printed in house components where users can now **Delete Component** and/or **Copy Component** when in edit mode. Highlight the printed in house component, then right-click the mouse. Choose either to delete or copy the component.



You can continue to use the same option within the component screen but was added for when user was in Print Mode On it gives the user the ability to copy or delete.



## Inbound and Outbound Inventory Options

### Overview

The basic principal of the Create Inventory screen is to facilitate the creation of inventory items for Printed Components. The Inventory Item number serves two primary purposes: 1) Assign a unique item number for tracking/filing of digital assets associated with the component; and 2) Assign a unique item number for storing the printed components in inventory.

This assignment of WIP item numbers to printed components should not change, in any way, the workflow associated with the process of assigning “Component” item numbers to “mailing” components.

### WIP Item # (Into Inventory)

This item number essentially represents materials being pushed INTO inventory from a Job.

The Create Inventory screen allows a user to assign a new or existing WIP inventory item number to any component.

This WIP Item number is then used to create a unique inventory item number. This item number can be used as a unique ID number for storing or filing digital assets associated with this component. For example: a Printed Form is assigned an Item# 12345. All proofs, pre-press files etc., will then be filed using a naming convention of 12345. After the item is printed – these forms could then be stored in the warehouse under item #12345 until at a later point where they need to be pulled from inventory for imprinting, personalization or mailing.

If this form needs to be re-printed again as an exact re-print on a future job, it would be possible for the CSR to use this same item number again and associate it with the same form on a future job. In this scenario the user would NOT necessarily need to create a new item number for that component on the future job.

When WIP Item numbers are created the system produces the following inventory and scheduling events:

Process	Type	Details
Stock Order	Inventory Event	<p>Create an “On Order” record against the inventory item number for the expected production quantity to indicate that this item is about to be replenished into inventory for the anticipated qty. When a user looks at the inventory master file screen they should see an “on order” qty related to the job that this component is on. This qty should be based on the “number up” field defined at the item level. Assuming that this component is for a qty of 100,000 with an allowance of 4,000 waste for the component mailing processes and bindery and finishing processes and is printed 4up on the press and will be received into inventory in a 4up format – then the user would enter “4” into the number up field for this inventory item.</p> <p>The “On Order” qty displayed on the inventory screen would show a qty of 26,000. <math>(100,000 + 4,000 \text{ waste} / 4\text{up} = 26,000)</math></p> <p>It is very difficult to determine exactly what component processes might need to be worked on prior to receiving the item number into inventory. In some cases it may involve trimming and or folding first. So as a general rule the assumption will be that all section finishing, and component finishing processes are ignored when calculating the expected waste qty for the component after it comes off press.</p> <p>Worst case scenario is that the “On Order” qty may be slightly inflated if the item is actually trimmed and folded first which would of course consume some of the waste. Regardless of this anomaly you never really know your final qty off press till the item is actually received into inventory anyway. Once this receipt has taken place then inventory on hand qtys will then be confirmed and correct at that stage.</p> <p>If the Printed Component Qty has been “Locked” then the Stock Order qty should be based on the total component qty i.e. JOBPAPER.QTY1.</p>
Receipt	Scheduled Task	<p>Create an Inventory “Receipt” scheduled task for this item number for the same qty as is created for the above “Stock Order”. Identical logic is used for determining the qty for this scheduling task. The “Date” for this task should be based on the date that the item is finished printing. At the job creation stage this date is likely to be blank. Once the scheduling system has scheduled the job this date will be updated as the schedule is revised.</p>

Process	Type	Details
Reservation	Inventory Transaction	NEVER create this kind of transaction for a WIP Item # - as this item number refers to the material going INTO inventory.
Issue	Scheduled Task	NEVER create this kind of transaction for a WIP Item # - as this item number refers to the material going INTO inventory. Please see notes at the end of this section about handling cases where component print qtys are "Locked".
Transfer	Scheduled Task	NEVER create this kind of transaction for a WIP Item # - as this item number refers to the material going INTO inventory.
Return	Scheduled Task	NEVER create this kind of transaction for a WIP Item # - as this item number refers to the material going INTO inventory.

### Component Item # (Out of Inventory)

This item number essentially represents materials being pulled OUT OF inventory for use on a job.

The Component Mailing Screen allows a user to assign a new or existing Component inventory item number to any component. This Component item number is used to identify what materials need to be pulled (issued) from inventory to use in the personalization, binding or assembly of the finished package. For example: a Component is assigned an Item# 12345. These forms would at some point be stored in the warehouse under item #12345. When Component Item numbers are assigned to a component, the system produces the following inventory and scheduling events:

Process	Type	Details
Stock Order	Inventory Event	NEVER create this kind of transaction for a Component Item # - as this item number refers to the material being pulled OUT OF inventory.
Receipt	Scheduled Task DETAILS ARE STILL BEING WORKED OUT FOR THIS.	Receipts are sometimes created. If the Component Item# is the same as the WIP Item # for this component – then the system should NEVER create receipt tasks – because the receipt task has already been created for the WIP Item# If the Component Item# is different than the WIP item# then the following logic should be used for determining Receipt Tasks: At the time of the job creation – if there is enough material available in inventory for this job then a receipt task should NOT be created. This same logic should be followed every time the job qtys change and the job is updated. Basically the system will check the available qty and if it is equal to or greater than the qty for this component on this job then do NOT create a receipt task. If the available qty is less than the required qty for the job then the system should create a receipt task for the difference between what is available and what is needed for the job.
Reservation	Inventory Transaction	ALWAYS create inventory reservations for Component Item Numbers. When a user looks at the inventory master file screen they should see a "Committed" qty related to the job that this component is on. This qty should be based on the "number up" field defined at the item level. Assuming that this component is for a qty of 100,000 with an allowance of 4,000 waste for the component mailing processes and bindery and finishing processes and is printed 4up on the press and will be received into inventory in a 4up format – then the qty would be based on this 4up format. The "Committed Qty" qty displayed on the inventory commitments screen for this job would show a qty of 26,000. (100,000 + 4,000 waste / 4up = 26,000) It is very difficult to determine exactly what component processes might need to be worked on prior to receiving the item number into inventory. In some cases it may involve trimming and or folding first. So as a general rule the assumption will be that all section finishing, and component finishing processes are ignored when calculating the expected waste qty for the component after it comes off press. Worst case scenario is that the "Commitment" qty may be slightly inflated if the item is actually trimmed and folded first which would of course consume some of the waste. Regardless of this anomaly – any leftovers returned to inventory at the end of the job would correct this assumption.

Process	Type	Details
Issue	Scheduled Task	<p>ALWAYS create "Issue" scheduled tasks for a Component Item # - as this item will always need to be pulled (issued) from inventory for the job.</p> <p>The following procedure should be followed when determining which "Cost Center" the issue task should be directed to.</p> <p>First look for each component process on the component. If there is a flag (new field) on the process master file for the process that says to "ignore process for inventory issues", then hop over this process and proceed to the next process. Once all of the component processes are checked then move onto the finishing processes and apply the same logic. If ALL processes are set to ignore – then the system would completely suppress the creation of an issues task.</p> <p>Option to create issues tasks as "Package: level.</p> <p>Provide an option on the job creation window where the job is initially created that allows the user to select to create inventory issues as "package" level.</p> <p>The system would then display a grid of all packages and their components. By default the system would assign an "issue" sequence number for each package starting at 1 and incrementing for each package. If the user wished to consolidate multiple packages into a single issue – they could renumber the issue sequence for packages if necessary.</p> <p>The system would then compute the qty of material and waste needed for each component and package and generate separate issue tasks accordingly. Ideally the system would also look at the setup waste for each process – and include this waste qty for setup in each of the separate issue tasks. The waste qty for the run waste should use a pro-rata basis for the qty of each package.</p> <p>There would ideally also be an option in the inventory issues program to easily filter all issues for a job and be able to manually consolidate issues tasks for the same component for multiple packages. This would allow the warehouse to decide at the last minute if they wished to issue a consolidated qty for multiple packages for the same job if it looked like the date of the tasks was the same for multiple packages.</p>
Transfer	Scheduled Task	<p>CREATE "Transfer" scheduled tasks for a Component Item # - only if the system setting to create these is turned ON.</p> <p>The qty for these "transfer" events should be based on the component qty required "After" the first eligible mailing process on the component – divided by the number up defined on the inventory item.</p> <p>The Date of these scheduled tasks should be updated by the scheduling system based on the completion date of the first eligible component process.</p> <p>The exact same logic for issue tasks using multiple packages should also be applied to the "transfer" tasks.</p> <p>When determining the cost center for the transfer task the system should also use similar logic to the issues tasks where it checks for the "ignore process for inventory issues" flag.</p>
Return	Scheduled Task	<p>CREATE "Return" scheduled tasks for a Component Item # - only if the system setting to create these is turned ON</p> <p>Return records at this time should only be created at the job level, and will not initially be supported at package level.</p> <p>The qty of the Return Scheduled Task should be 0 (zero) as it is completely unknown as to what qty might be left at the end of the production process.</p> <p>The Date for these tasks should always be one (1) day after the last mail date.</p>



As a result of this special programming, the screen display for the inventory item links has been modified with a different description.

Items being **pulled from** Inventory will now read as **Item # From Inventory**.

Items being **put into** inventory from the WIP programming will display as **Item # To Inventory**.

Mail Component display example:

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Form#: 2 New Component-10,000]

File Window Changes Refresh Master Data Help

Print Mode Is Off

**Mail Estimating (Print & Estimating)**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Form#: 1 LTR-10,000
    - Form#: 2 Mail-10,000
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
  - Finishing
  - Drops
  - Special Instructions
  - Review Pricing
  - Order Entry

Description: Mail Versions: 1 ... POD ☐ Source ...

Date on Hand:  Quantity before Overs: 10,000

Item # From Inv: 1414 List... New... Waste:  0

Inventory Code: Customer inventory item Total Quantity: 10,000

Inv. Description: Description field for customer inventory Additional Info

Overs to:

Insert Notes:

Comments:

WIP ....

Item # To Inventory List... New...

Inv. Description:

Notes... Notes... Delete Component Copy Component Save Cancel

Form #	2
Finish/Trim Size	0x0
Flat Size	0x0
Caliper	0.000
Pc Weight	0.000
Bundle Qty	0
Num Of Pages	0
Num Of Sheets	0
Verified	<input type="checkbox"/>

Print Component display example:

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Form#: 1 LTR-10,000]

File Window Changes Refresh Master Data Help

Print Mode Is Off

**Mail Estimating (Print & Estimating)**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Form#: 1 LTR-10,000
    - Form#: 2 Mail-10,000
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
  - Finishing
  - Drops
  - Special Instructions
  - Review Pricing
  - Order Entry

Description: LTR Versions: 1 ... Source ... Printed InHouse

Date on Hand:  Quantity before Overs: 10,000

Item # From Inventory List... New... Waste:  0

Inventory Code: 77133 LTR Total Quantity: 10,000

Inv. Description: 8.5 x 11 Centura Gloss Bk 60# White Additional Info

Overs to:

Insert Notes:

Comments:

WIP ....

Item # To Inv: 77133 List... New...

Inventory Code: 77133 LTR

Inv. Description: 8.5 x 11 Centura Gloss Bk 60# White

Notes... Notes... Delete Component Copy Component Save Cancel

Form #	1
Finish/Trim Size	8 1/2x11
Flat Size	8 1/2x11
Caliper	0.000
Pc Weight	0.000
Bundle Qty	0
Num Of Pages	16
Num Of Sheets	8
Verified	<input type="checkbox"/>

## Copy Option for Bids When Converting Quote to Job

For mail-related buyout processes, we have added the ability to retain the buyout bids for all vendors that participated in the buyout process.

Here is an example of a multiple quantity quote with several buyout processes and vendors:

	Process	Select From Bids	20,000 Cost	20,000 Sell	30,000 Cost	30,000 Sell	40,000 Cost	40,000 Sell	50,000 Cost	50,000 Sell	60,000 Cost	60,000 Sell
Data Processing	PURCHASE LIST	Bids	\$180.00	\$225.00	\$240.00	\$300.00	\$280.00	\$350.00	\$300.00	\$375.00	\$300.00	\$375.00
Finishing	COURIER (Buyout)	Bids	\$45.00	\$56.25	\$45.00	\$56.25	\$45.00	\$56.25	\$45.00	\$56.25	\$45.00	\$56.25
sm	PRE-PRESS BUYOUTS	Bids	\$70.00	\$87.50	\$70.00	\$87.50	\$70.00	\$87.50	\$70.00	\$87.50	\$70.00	\$87.50
sm	PRINT #9 1-COLOR	Bids	\$110.00	\$137.50	\$136.50	\$170.63	\$182.00	\$227.50	\$212.50	\$265.63	\$255.48	\$319.35

Buyout Bids For 'PURCHASE LIST'								
Vendor Details		10,000	20,000	30,000	40,000	50,000	60,000	
Name	<b>Printing Company</b>	Setup 0.00	0.00	0.00	0.00	0.00	0.00	
	Minimum	0.00	0.00	0.00	0.00	0.00	0.00	
Reference	Per M ▾	10.0000	9.0000	8.0000	7.0000	6.0000	5.0000	
	Tax	0.00	0.00	0.00	0.00	0.00	0.00	
	Freight	0.00	0.00	0.00	0.00	0.00	0.00	
Contact	▾ Total	100.00	180.00	240.00	280.00	300.00	300.00	
Turntime	0 Accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Notes								
Name	<b>ACME WIDGETS INC.</b>	Setup 0.00	0.00	0.00	0.00	0.00	0.00	
	Minimum	0.00	0.00	0.00	0.00	0.00	0.00	
Reference	Per M ▾	10.0000	9.0000	8.0000	7.0000	6.0000	5.0000	
	Tax	0.00	0.00	0.00	0.00	0.00	0.00	
	Freight	0.00	0.00	0.00	0.00	0.00	0.00	
Contact	Fred Flintstone ▾ Total	100.00	180.00	240.00	280.00	300.00	300.00	
Turntime	0 Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Notes								

Buyout Bids For 'COURIER (Buyout)'							
Vendor Details		1	1	1	1	1	1
Name	CANOPY, LLC	Setup	0.00	0.00	0.00	0.00	0.00
		Minimum	0.00	0.00	0.00	0.00	0.00
Reference		Per Unit	50.0000	50.0000	50.0000	50.0000	50.0000
		Tax	0.00	0.00	0.00	0.00	0.00
		Freight	0.00	0.00	0.00	0.00	0.00
Contact		Total	50.00	50.00	50.00	50.00	50.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes							
Name	NWC Print	Setup	0.00	0.00	0.00	0.00	0.00
		Minimum	0.00	0.00	0.00	0.00	0.00
Reference		Per Unit	45.0000	45.0000	45.0000	45.0000	45.0000
		Tax	0.00	0.00	0.00	0.00	0.00
		Freight	0.00	0.00	0.00	0.00	0.00
Contact		Total	45.00	45.00	45.00	45.00	45.00
Turntime	0	Accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes							

When converting a quote to a job by default the Copy Vendors for Buyout Processes will be checked.

**O.E. Job Header**

Job Quantity: ☐ 10,000 ☒ 40,000 ☐ 50,000 ☐ 60,000

Enter Job Number or leave blank for automatic assignment:  P/O Number:  New Job: Yes

Order Date: 6/11/2009 Part Number:  Exact Repeat: Yes

Start Date: 6/11/2009 Previous Job Number:  Alter Specs: Yes

First Mail Date:  Work w/Job Number:  Art Required: Yes

Last Mail Date:  Reprint from:  Film Required: Yes

Priority:  Film File Number:  Unders: Yes

Re-Order Date:  Overs: Yes

**Copy Vendors for Buyout Processes** ☒

O.E. Notes

☐ Special Job : will be used for the recurring scheduling ONLY

☐ Production Job : job is processing multiple Printed In House Components for Customer's jobs

Cancel Save

The multiple vendors that participated in the buyout bids will be retained. If the user needs to change the vendor, he/she has the original quoted amounts that were provided from all the vendors.

	Process	Select From Bids	40,000 Cost	40,000 Sell
Data Processing	PURCHASE LIST	Bids	\$280.00	\$350.00
Finishing	COURIER (Buyout)	Bids	\$45.00	\$56.25
sm	PRE-PRESS BUYOUTS	Bids	\$70.00	\$87.50
sm	PRINT #9 1-COLOR	Bids	\$182.00	\$227.50

Buyout Bids For 'PURCHASE LIST'			
Vendor Details			40,000
Name	Printing Company	Setup	0.00
		Minimum	0.00
Reference		Per M	7.0000
		Tax	0.00
		Freight	0.00
Contact		Total	280.00
Turntime	0	Accepted	<input checked="" type="checkbox"/>
Notes			
Name	ACME WIDGETS INC.	Setup	0.00
		Minimum	0.00
Reference		Per M	7.0000
		Tax	0.00
		Freight	0.00
Contact	Fred Flintstone	Total	280.00
Turntime	0	Accepted	<input type="checkbox"/>
Notes			

**Buyout Bids For 'COURIER (Buyout)'**

Vendor Details		1	
Name	CANOPY, LLC	Setup	0.00
		Minimum	0.00
Reference		Per Unit	50.0000
		Tax	0.00
		Freight	0.00
Contact		Total	50.00
Turntime	0	Accepted	<input type="checkbox"/>
Notes			
Name	NWC Print	Setup	0.00
		Minimum	0.00
Reference		Per Unit	45.0000
		Tax	0.00
		Freight	0.00
Contact		Total	45.00
Turntime	0	Accepted	<input checked="" type="checkbox"/>
Notes			

## Buyouts / Subcontracts

To review mail buyouts click the + sign next to **'Review Pricing'** in the 'Mail Estimating Tree,' then select 'Buyouts.' This is a **view only** screen.

To enter \$ amounts (cost and sell price), locate the processes in the 'Final Pricing Screen' and click. Enter both the Cost and Sell (or Quoted) price. Click (the lower) **X** to close or select a different area on the Mail Estimating Tree.

**Note** A red **X** next to Buyouts means you need to enter a Cost for the processes and/or a Sell price in the Final Pricing Screen.

A green question mark [?] next to Buyouts means your cost is more than your sell price

**Bids** allows user to see which vendors bids are being sent to for each buyout process.

**Mail Estimating - [Buyouts]**

File Window Help

**Mail Estimating (Print & Mail)**

Quote Header

Estimating

PreProcessing

Components

- Bus Reply Card-6,000
- OE 6x9-9,000
- Letter A-9,000
- Letter B-3,000
- Letter C-1,000
- Brochure-7,000
- BRE-4,000
- New Component-10,000
- Insert 1-10,000
- Insert 2-10,000

# Packages

Finishing

Drops

Special Instructions

Review Pricing

Buyouts

Process	Select From Bids	10,000 Cost	10,000 Sell	50,000 Cost	50,000 Sell	100,000 Cost	100,000 Sell	250,000 Cost
Data Processing PURCHASE LIST	Bids	\$10.00	\$10.00	\$50.00	\$100.00	\$100.00	\$250.00	
Data Processing PROGRAMMING (Buyout)	Bids	\$75.00	\$150.00	\$75.00	\$75.00	\$75.00	\$75.00	\$75.00
OE 6x9 PRINT #9 1-COLOR	Bids	\$225.00	\$225.00	\$45.00	\$90.00	\$90.00	\$225.00	
OE 6x9 INKJET BUYOUT	Bids	\$900.00	\$900.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OE 6x9 CHESHIRE BUYOUT	Bids	\$450.00	\$450.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Insert 1 PRE-PRESS BUYOUTS	Bids	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Note the newly added **Print** button on the bottom of the Buyouts screen. This feature allows the user to print the screen showing each process with the quantities, cost and sell.

Buyout Overview

Print

## Buyouts / Subcontracts: Scripts, E-mail Specs to Vendor

If you select a buyout/subcontract process (e.g., Print Buyout) you have the option to setup scripts which are information needed to process the order. The script QandA's will print on the Work Order / Ticket and can be emailed to your vendor.

To answer mandatory or optional **scripts** for a buyout/subcontract process, click the **N** button (to the right of the process description). Mandatory scripts are in a **bold** font, optional are in a regular font. Multiple-choice scripts are answered by checking the gray box (red check displays) under the 'Select' column. Multiple-choice scripts will automatically save and display the next question. When entering 'text' answers, select the **Scripts Save** button when finished.

To email the script QandA's and specs to your vendor, select the **Email for quote...** button (bottom/center of screen) then enter: Project Name, Request Date, Quote Needed (by) and Our Contact. Select the **Email** button. PrintStream will automatically open your email and display the project information, script QandA's (specs), and the pricing needed for each quantity.

**Buyout Bids** feature allows estimator to send out the quote to multiple vendor for bids.

The screenshot displays the 'Mail Estimating (Print & Mail)' application window. The main interface includes a 'Quote Header' section with various input fields and a 'Printing' section with a hierarchical tree of components. A 'Notes & Scripts - PRINT #9 1-COLOR' dialog box is open, showing 'Special Change Order Notes' and 'Scripts print on Work / Order & Ticket and print on the PO...'. At the bottom of the dialog are buttons for 'Buyout Bids', 'Email for quote...', and 'Quote Letter Save'.

Select Email for Quote.

Enter project information for the email and **OK**.

Mail Estimating - [OSE-10,000]

File Window Refresh Master Data Help

Mail Estimating

Quote Header

Estimating

✓ Data Process

✓ Letter-1

✗ OSE-10

✗ BRE-10

✗ Packages

✗ Finishing

✗ Drops & Pos

✗ Special Instl

✓ Review Pr

✗ Buyouts

✗ Final Pricing

✗ Quote Breal

✓ Credit Statu

✗ Quote Lette

✗ Order Enti

Description: OSE Versions: 1 ... POD ☐ Source:

Date on Hand:  Quantity before Overs: 10,000

Item #:  List... New... W/aster:

Email For Buyout Bids For 'PRINT #9 1-COLOR'

	Vendor	Account Num	Contact	10,000	50,000	100,000	150,000	250,000	400,000
1	Bob's Food Supply Co	BOBS	Betty Lou Who	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Ice Breakers	ICE01		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	A Company	AComp	Joe Big Boss	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Fed-Ex	9955		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	DMM Vendor	DMMVEND	Victor Vendor	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter Project Information

Project Name:

Request Date:

Quote Needed:

Our Contact:

Ok

Vendor Account Num.:  Vendor Name:  Add Vendor

Email Close Save

You have several ways to manage and email buyout processes.

Select buyouts for Data Processing, Components or Finishing Processes. Click the N to open the Notes and Scripts box. This is also the area to have access to select Vendors for requesting Bid Buyouts or enter free form for Email Buyouts.

Process Description	Quantity	Qty Lock	Cycle Based	Quoted Price	All Pkgs	Sort Order	Additional Info
PRE-PRESS BUYOUTS	1			\$0.00	N	P	5160
PRINT #9 1-COLOR	20,000			\$0.00	N	P	5220

Select the **Buyout Bids** button to select vendors from Master File Vendor.

In the Vendor account number or Vendor name field, enter the vendors you wish to include in the request for Buyout Bids email and Buyout Bids Overview. Enter acct or name, select Add Vendor.

	Vendor	Account Num	Contact	1
1	<input checked="" type="checkbox"/> Bid	CF intro bro	Component Finishing	PRE-PRESS BUYOUTS
2	<input checked="" type="checkbox"/> Bid	CF intro bro	Component Finishing	PRINT #9 1-COLOR

Vendor Account Num.: Vendor Name:  \*Unselecting any Quantity from bidding is automatically removing Vendor

Not All Vendors are applied yet All Vendors are already applied

Once Vendors are selected, you can select the specific Contact for that Vendor – this is set up in the MF Vendor PO Addresses. If using the Email option here, be sure your contacts have email addresses. Then click **Save**.

	Vendor	Account Num	Contact	1
1	Printing Company	100	Leah VanWynsb	<input checked="" type="checkbox"/>
2	Mail Company	54321		<input checked="" type="checkbox"/>

Vendor Account Num.: Vendor Name:  \*Unselecting any Quantity from bidding is automatically removing Vendor

54321 Mail Company

Not All Vendors are applied yet All Vendors are already applied



You'll notice that the Buyout Bids window selected was for the process of Print # 9 1-Color. If you have other buyouts assigned to that component, you have the ability to also select those buyouts for requesting the buyout bids. To include, check any of the boxes in yellow and then select Apply selected Vendors to checked Processes.

Email For Buyout Bids For 'PRE-PRESS BUYOUTS'

	Vendor	Account Num	Contact	1
1	Printing Company	100	Leah VanWynsb	<input checked="" type="checkbox"/>
2	Mail Company	54321	The Mail Man	<input checked="" type="checkbox"/>

Vendor Account Num.: Vendor Name:  \*Unselecting any Quantity from bidding is automatically removing Vendor

54321 Mail Company

	In Bid	Group Type/Component	Process Description	Scripts Questions/Answers
1	<input type="checkbox"/> Bid	CF intro bro Component Finishing	PRE-PRESS BUYOUTS	
2	<input checked="" type="checkbox"/> Bid	CF intro bro Component Finishing	PRINT #9 1-COLOR	

Not All Vendors are applied yet

Buyouts now highlighted in blue are assigned to the above vendors selected for requesting the buyout bids. Note that you have an option to clear or select the check boxes to select all or you can select the icon to auto select or auto unselect all.

	In Bid	Group Type/Component	Process Description	Scripts Questions/Answers	BUYOUT RECNUM	BUYOUT TY
1	<input checked="" type="checkbox"/> Bid	# 9 Envelope Component Finishing	PRE-PRESS BUYOUTS		13113	MAILPROC
2	<input checked="" type="checkbox"/> Bid	# 9 Envelope Component Finishing	PRINT #9 1-COLOR		13112	MAILPROC

Not All Vendors are applied yet

Buyout process with Scripts and Modifiers can be included in the Buyout Overview.

Notes & Scripts - INKJET BUYOUT

Font Size

12pt

Snipe Required

NO

Scripts Save

Quote Letter Notes

Script Questions and Answers will display here.

Email For Buyout Bids For 'INKJET BUYOUT'

	Vendor	Account Num	Contact	20,000
1	Printing Company	100	Leah VanWynsb	

Vendor Account Num.: Vendor Name: 100 Printing Company \*Unselecting any Quantity from bidding is automatically removing Vendor

Add Vendor Save

	In Bid	Group Type/Component	Process Description	Scripts Questions/Answers
1	<input checked="" type="checkbox"/> Bid	CF Bre Component Finishing	INKJET BUYOUT	Font Size = 12pt Snipe Required = NO

Not All Vendors are applied yet

All Vendors are already applied

Email Apply selected Vendors to checked Processes Close

If you wish to un-assign a vendor for the email or buyout overview, clear one of the quantities for that vendor and click **Save**. The below message will appear. Click **OK**.

Please note that this is an all or nothing meaning that the vendor selected will have the opportunity to provide estimates when using the Email option. Otherwise, in the Buyout Overview spreadsheet you will have the ability to manipulate the data.


**Email For Buyout Bids For 'PRINT 6X9 1-COLOR'**

	Vendor	Account Num	Contact	10,000	20,000	30,000
1	Printing Company	100	Leah VanWynsb...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Mail Company	200	The Mail Man	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Vendor Account Num.: Vendor Name:

	In Bid	Group Type/Component	Process Description	Scripts Questions/Answers	BUYOUT RECNUM	BUYOUT TY
1	<input checked="" type="checkbox"/> Bid	6 x 9 envelope Comp...	PSBuyoutUtils			MAILPROC

No Quantity selected for the vendor Mail Company; vendor will not be included to any bidding for the quote.

 Not All Vendors are applied yet

By clearing the **Quantity** check box for the vendor will only remove that vendor from the buyout activity you are in. If in this screen this vendor was linked to multiple buyouts displayed in the bottom portion and you wish to remove them entirely from all processes it was linked to here, right-click the vendor and select Remove Vendor from Bidding.

Description: New Component

Versions: 1

POD

Source:

Date on Hand:

Quantity before Overs:

Waste:

Total Quantity:

Inv. Description:

Overs to:

Additional Info

Flat Size

Finish Size

Caliber

Item #:

List...

New...

Quantity before Overs:

Waste:

Total Quantity:

Flat Size

Finish Size

Caliber

Email For Buyout Bids For "PRINT #9 2-COLOR, Papersize: 8 1/2 x 11, # Up: One, Color: 4color/4color, Additional Coating?: Var..."

	Vendor	Account Num	Contact	
1	Printing Company	100	Leah VanWynsbe	
			The Mail Man	

Remove Vendor From Bidding

Vendor Account Num:

Vendor Name:

200

Mail Company

Add Vendor

Save

	In Bid	Group Type/Component	Process Description	Scripts Questions/Answers	BUYOUT RECNUM	BUYOUT TY
1	<input checked="" type="checkbox"/>	New Component Component Finishing	PRINT #9 2-COLOR, Papersize: 8 Send To =		13914	MAILPROC
2	<input checked="" type="checkbox"/>	New Component Component Finishing	PRINT #10 2-COLOR		13915	MAILPROC

Not All Vendors are applied yet

All Vendors are already applied

Close

The buyout processes and vendors are now linked to the components. In the Buyouts Screen, select the **Buyout Overview** button at the bottom left of the screen.

**Mail Estimating (Print & Mail)**

- ✓ **Quote Header**
- ✓ **Estimating**
  - Data Processing
  - Components
  - Assembly
  - Package
  - Finishing
  - Drops
  - Special Instructions
- ✓ **Review Pricing**
  - Buyouts**
  - Final Pricing
  - Pricing Summary
  - Quote Breakdown
  - ✗ Credit Status
  - Quote Letter
  - Preliminary Mail Work Ticket
- ✗ **Order Entry**

Process	Select From Bids	10,000 Cost	10,000 Sell	20,000 Cost	20,000 Sell	30,000 Cost	30,000 Sell	40,000 Cost	40,000 Sell	50,000 Cost	50,000 Sell
Data Processing	DATA ENTRY (Buyout)	Bids	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00	\$50.00
tr 1	PRINT #101-COLOR	Bids	\$10.00	\$10.00	\$20.00	\$20.00	\$30.00	\$30.00	\$40.00	\$40.00	\$50.00
tr 2	PRINT 5x9 1-COLOR	Bids	\$10.00	\$10.00	\$20.00	\$20.00	\$30.00	\$30.00	\$40.00	\$40.00	\$50.00
tr 3	PRINT 9x12 1-COLOR	Bids	\$10.00	\$10.00	\$20.00	\$20.00	\$30.00	\$30.00	\$40.00	\$40.00	\$50.00
Data Processing	PURCHASE LIST	Bids	\$10.00	\$10.00	\$20.00	\$20.00	\$30.00	\$30.00	\$40.00	\$40.00	\$50.00

**Buyout Overview** **Print**

A **Print** button is now available in the lower right corner of the Buyouts screen for mail buyout processes.

## Buyout Bids Spreadsheets

In the **Work with Spread/Excel** tab you have several options available to select or suppress which data you wish to work with.

Bids/ Buyouts Overview

Work with Spread/Excel

Reporting

	A	B	C	D	E	F	G	H	I	J
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										
25										
26										
27										

Load Data

Export to Excel

Quote Bids Documents

Print Out

Reload as ....

☐ Zero Pricing as for Bidding Email

☐ Supress Extra Info

Data ProcessingC

Section Finishing(Component F)S

FinishingF

Upon opening the window, click Load Data. This will bring in all quantities from the estimate, all vendors that were selected and all buyout processes selected in the data processing, component processing and finishing screens.

**Bids/ Buyouts Overview**

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J
1	<b>QUOTE # 1453</b>	<b>Buyout jobs</b>								
2	Participating Vendors					1		Printing Comp		
3	Qty (s)								10000	20000
4										300
5										
6	General Process Info	Component Finishing # 9 Envelope PRE-PRESS			13113					
7	Process Setup								\$0.00	\$0.00
8	Process Min Charges								\$0.00	\$0.00
9	Process Unit Of Measure								1000	1000
10	Process Price								\$0.00	\$0.00
11	Order Qty								1	1
12	Process Tax Charges								\$0.00	\$0.00
13	Process Freight Charges								\$0.00	\$0.00
14	Process Total Price								\$0.00	\$0.00
15	Avg Price Per ....								\$0.00	\$0.00
16	Accepted ....									
17										
18										
19	General Process Info	Component Finishing # 9 Envelope PRINT #9 1-			13117					
20	Process Setup								\$0.00	\$0.00
21	Process Min Charges								\$0.00	\$0.00
22	Process Unit Of Measure								1000	1000
23	Process Price								\$0.00	\$0.00
24	Order Qty								10000	20000
25	Process Tax Charges								\$0.00	\$0.00
26	Process Freight Charges								\$0.00	\$0.00
27	Process Total Price								\$0.00	\$0.00

Reload as ....  
☐ Zero Pricing as for Bidding Email  
☐ Supress Extra Info  
 Data Processing C  
 Section Finishing(Component F) S  
 Finishing F

Printing Company 1  
 Mail Company 5

The Suppress Extra Info option is a set of items from the listing that is hardcoded. Checking this box will remove the Process Tax Charges, Process Freight Charges and Aver. Price Per lines from the grid.

Bids/ Buyouts Overview

Work with Spread/Excel | Reporting |

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	QUOTE # 1453	Buyout jobs														
2	Participating Vendors						1	Printing Comp				5	Mail Compan			
3	Qty (s)								10000	20000	30000			10000	20000	30000
4																
5																
6	General Process Info	Component Finishing # 9 Envelope PRE-PRESS				13113										
7	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
8	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
9	Process Unit Of Measure								1000	1000	1000			1000	1000	1000
10	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
11	Order Qty								1	1	1			1	1	1
14	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
16	Accepted ....															
17																
18																
19	General Process Info	Component Finishing # 9 Envelope PRINT #9 1-				13117										
20	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
21	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
22	Process Unit Of Measure								1000	1000	1000			1000	1000	1000
23	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
24	Order Qty								10000	20000	30000			10000	20000	30000
27	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
29	Accepted ....															
30																
31																
32	General Process Info	Component Finishing 6 x 9 envelope PRINT 6x9 1				13121										
33	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
34	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
35	Process Unit Of Measure								1000	1000	1000			1000	1000	1000
36	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
37	Order Qty								10000	20000	30000			10000	20000	30000
40	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00

Load Data

Export to Excel

Quote Bids Documents

Print Out

Reload as ....

☐ Zero Pricing as for Bidding Email

☒ Suppress Extra Info

Data Processing

Section FinishingComponent F

Finishing

Printing Company

Mail Company



If you wish to work with 1 vendor at a time for the spreadsheet, select that vendor and click Load Data.

**Bids/ Buyouts Overview**

Work with Spread/Excel | Reporting |

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	<b>QUOTE # 1453</b>	<b>Buyout jobs</b>														
2	Participating Vendors						1	Printing Comp								
3	Qty (s)								10000	20000	30000					
4																
5																
6	General Process Info	Component Finishing # 9 Envelope PRE-PRESS			13113											
7	Process Setup								\$0.00	\$0.00	\$0.00					
8	Process Min Charges								\$0.00	\$0.00	\$0.00					
9	Process Unit Of Measure								1000	1000	1000					
10	Process Price								\$0.00	\$0.00	\$0.00					
11	Order Qty								1	1	1					
12	Process Tax Charges								\$0.00	\$0.00	\$0.00					
13	Process Freight Charges								\$0.00	\$0.00	\$0.00					
14	Process Total Price								\$0.00	\$0.00	\$0.00					
15	Avg Price Per ....								\$0.00	\$0.00	\$0.00					
16	Accepted .....															
17																
18																
19	General Process Info	Component Finishing # 9 Envelope PRINT #9 1-			13117											
20	Process Setup								\$0.00	\$0.00	\$0.00					
21	Process Min Charges								\$0.00	\$0.00	\$0.00					
22	Process Unit Of Measure								1000	1000	1000					
23	Process Price								\$0.00	\$0.00	\$0.00					
24	Order Qty								10000	20000	30000					
25	Process Tax Charges								\$0.00	\$0.00	\$0.00					
26	Process Freight Charges								\$0.00	\$0.00	\$0.00					
27	Process Total Price								\$0.00	\$0.00	\$0.00					
28	Avg Price Per ....								\$0.00	\$0.00	\$0.00					
29	Accepted .....															
30																
31																
32	General Process Info	Component Finishing 6 x 9 envelope PRINT 6x9 1			13121											
33	Process Setup								\$0.00	\$0.00	\$0.00					
34	Process Min Charges								\$0.00	\$0.00	\$0.00					
35	Process Unit Of Measure								1000	1000	1000					
36	Process Price								\$0.00	\$0.00	\$0.00					
37	Order Qty								10000	20000	30000					
38	Process Tax Charges								\$0.00	\$0.00	\$0.00					
39	Process Freight Charges								\$0.00	\$0.00	\$0.00					
40	Process Total Price								\$0.00	\$0.00	\$0.00					
41	Avg Price Per ....								\$0.00	\$0.00	\$0.00					
42	Accepted .....															

Reload as ....  
☐ Zero Pricing as for Bidding Email  
☒ Suppress Extra Info  
 Data Processing ☐ C ☐ S ☐ F  
 Section Finishing(Component F) ☐ S ☐ F  
 Finishing ☐ C ☐ S ☐ F

Printing Company ☐ 1  
 Mail Company ☐ 5

If you wish to work with buyouts in the different areas of Data Processing, Component Process or Finishing, select the box you wish to work with.

**Bids/ Buyouts Overview**

Work with Spread/Excel | Reporting |

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	<b>QUOTE # 1453</b>	<b>Buyout jobs</b>														
2	Participating Vendors						1	Printing Comp								
3	Qty (s)								10000	20000	30000	5	Mail Compan		10000	2
4																
5																
6	General Process Info	Data Processing		PURCHASE LIST		13126										
7	Process Setup															
8	Process Min Charges															
9	Process Unit Of Measure															
10	Process Price															
11	Order Qty															
12	Process Tax Charges															
13	Process Freight Charges															
14	Process Total Price															
15	Avg Price Per ....															
16	Accepted .....															
17																
18																
19	General Process Info	Component Finishing # 9 Enve PRE-PRESS BUYOUTS				13113										
20	Process Setup								\$0.00	\$0.00	\$0.00					\$0.00
21	Process Min Charges								\$0.00	\$0.00	\$0.00					\$0.00
22	Process Unit Of Measure								1	1	1					1
23	Process Price								\$25.00	\$25.00	\$25.00					\$30.00
24	Order Qty								1	1	1					1
25	Process Tax Charges								\$0.00	\$0.00	\$0.00					\$0.00
26	Process Freight Charges								\$0.00	\$0.00	\$0.00					\$0.00
27	Process Total Price								\$25.00	\$25.00	\$25.00					\$30.00
28	Avg Price Per ....								\$0.00	\$0.00	\$0.00					\$0.00
29	Accepted .....								Y	Y	Y					
30																
31																
32	General Process Info	Component Finishing # 9 Enve PRINT #9 1-COLOR				13117										
33	Process Setup								\$0.00	\$0.00	\$0.00					\$0.00
34	Process Min Charges															
35	Process Unit Of Measure															
36	Process Price															
37	Order Qty															
38	Process Tax Charges															
39	Process Freight Charges															
40	Process Total Price															
41	Avg Price Per ....															
42	Accepted .....															

Reload as ....  
☐ Zero Pricing as for Bidding Email  
☒ Suppress Extra Info  
 Data Processing ☐ C ☐ S ☐ F  
 Section Finishing(Component F) ☐ S ☐ F  
 Finishing ☐ C ☐ S ☐ F

Printing Company ☐ 1  
 Mail Company ☐ 5  
 DP House Inc. ☐ 4  
 ACME WIDGETS INC. ☐ 11

And select Load Data.

Bids/ Buyouts Overview

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	QUOTE # 1453	Buyout jobs												
2	Participating Vendors						1	Printing Comp	10000	20000	30000	5	Mail Compan	10000
3	Qty (s)													
4														
5														
7	Process Setup													
16	Accepted....													
17														
18														
19	General Process Info	Component Finishing # 9 Enve PRE-PRESS BUYOUTS				13113								
20	Process Setup								\$0.00	\$0.00	\$0.00			\$0
21	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0
22	Process Unit Of Measure								1	1	1			
23	Process Price								\$25.00	\$25.00	\$25.00			\$30
24	Order Qty								1	1	1			
25	Process Tax Charges								\$0.00	\$0.00	\$0.00			\$0
26	Process Freight Charges								\$0.00	\$0.00	\$0.00			\$0
27	Process Total Price								\$25.00	\$25.00	\$25.00			\$30.0
28	Avg Price Per ....								\$0.00	\$0.00	\$0.00			\$0.0
29	Accepted....								Y	Y	Y			
30														
31														
32	General Process Info	Component Finishing # 9 Enve PRINT H91-COLOR				13117								
33	Process Setup								\$0.00	\$0.00	\$0.00			\$0
34	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0
35	Process Unit Of Measure								1000	1000	1000			10
36	Process Price								\$10.50	\$10.25	\$9.50			\$10
37	Order Qty								10000	20000	30000			100
38	Process Tax Charges								\$0.00	\$0.00	\$0.00			\$0
39	Process Freight Charges								\$0.00	\$0.00	\$0.00			\$0
40	Process Total Price								\$105.00	\$205.00	\$285.00			\$105.0
41	Avg Price Per ....								\$0.01	\$0.01	\$0.01			\$0.0
42	Accepted....								Y	Y	Y			

Load Data

Export to Excel

Quote Bids Documents

Print Out

Reload as ....

☐ Zero Pricing as for Bidding Email

☐ Supress Extra Info

☐ Data Processing

☐ Section Finishing(Compnent F

☐ Finishing

Printing Company

1

Mail Company

5

DP House Inc.

4

ACME WIDGETS INC.

11

There is also an additional filter box available next to the Section Finishing/Component box. When selected, you can also select which components you wish to only display.

Check Components for Reporting/Display

	Component Name		JobPaper
1	# 9 Envelope	<input type="checkbox"/>	5036
2	#10 envelope	<input checked="" type="checkbox"/>	5037
3	6 x 9 envelope	<input type="checkbox"/>	5038

OK

Cancel

Click **OK** on the above filter and then select **Load Data**.

**Bids/ Buyouts Overview**

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>QUOTE # 1453</b>	<b>Buyout jobs</b>												
2	Participating Vendors						1	Printing Comp				5	Mail Company	
3	Qty (s)								10000	20000	30000			10000
4														
5														
7	Process Setup													
16	Accepted ....													
17														
18														
20	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00
29	Accepted ....								Y	Y	Y			
30														
31														
33	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00
42	Accepted ....								Y	Y	Y			
43														
44														
45	General Process Info	Component Finishing #10 envre INKJET BUYOUT		Font Size = 12 pt	13120									
46	Process Setup													\$25.00
47	Process Min Charges													\$75.00
48	Process Unit Of Measure													1000
49	Process Price													\$7.50
50	Order Qty													10000
51	Process Tax Charges													\$0.00
52	Process Freight Charges													\$0.00
53	Process Total Price													\$100.00
54	Avg Price Per ....													\$0.01
55	Accepted ....													Y
56														
57														
59	Process Setup								\$0.00	\$0.00	\$0.00			
68	Accepted ....								Y	Y	Y			
69														

Reload as ....  
☐ Zero Pricing as for Bidding Email  
☐ Suppress Extra Info  
 Data Processing ☐ C ☐ S ☐ F  
 Section Finishing(Component F) ☐ S ☐ F  
 Finishing ☐ F

Printing Company   
 Mail Company   
 DP House Inc.   
 ACME WIDGETS INC.

Otherwise, clearing any of the boxes and clicking **Load Data** will refresh this screen. Once you have the information you wish to have on the spreadsheet or create multiple spreadsheets, click the **Export to Excel** button.

**Bids/ Buyouts Overview**

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
5															
6	General Process Info	Component Finishing # 9 Envelope PRE-PRESS				13113									
7	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	
8	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	
9	Process Unit Of Measure								1000	1000	1000			1000	
10	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	
11	Order Qty								1	1	1			1	
14	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	
16	Accepted ....														
17															
18															
19	General Process Info	Component Finishing # 9 Envelope PRINT #91				13117									
20	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	
21	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	
22	Process Unit Of Measure								1000	1000	1000			1000	
23	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	
24	Order Qty								10000	20000	30000			10000	
27	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	
29	Accepted ....														
30															
31															
32	General Process Info	Component Finishing #10 envelope INKJET BUYOUT		Font Size = 12 pt	13120										
33	Process Setup													\$0.00	
34	Process Min Charges													\$0.00	
35	Process Unit Of Measure													1000	
36	Process Price													\$0.00	
37	Order Qty													10000	
40	Process Total Price													\$0.00	
42	Accepted ....														
43															

Reload as ....  
☐ Zero Pricing as for Bidding Email  
☒ Suppress Extra Info  
 Data Processing ☐ C ☐ S ☐ F  
 Section Finishing(Component F) ☐ S ☐ F  
 Finishing ☐ F

Printing Company   
 Mail Company

Name your file and save to the appropriate folder.

These spreadsheets can be emailed to your vendors or be used to manage quotes coming in from vendors before entering data into the buyout bids pricing screen in Mail Estimating.

To later link these spreadsheets to your quote or job, click the Quote Bids Documents, select Add from the Streamline Media Manager and select the file(s) you wish to attach to the quote or job. Note that if you attach documents when it is a quote and later convert quote to a job, these documents will not be attached to the job. You will need to re-attach to the job.

Pricing now comes in from your vendors and you are now ready to enter all pricing details from all vendors in the Buyout Pricing screen.

Buyout Bids For 'PRE-PRESS BUYOUTS'

Vendor Details		1	1	1
Name	<b>Printing Company</b>	Setup	0.00	0.00
		Minimum	0.00	0.00
Reference		Per Unit	25.0000	25.0000
Contact		Tax	0.00	0.00
		Freight	0.00	0.00
	Leah VanWynsberghe	Total	25.00	25.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>
Notes				
Name	<b>Mail Company</b>	Setup	0.00	0.00
		Minimum	0.00	0.00
Reference		Per Unit	30.0000	31.5000
Contact		Tax	0.00	0.00
		Freight	0.00	0.00
	The Mail Man	Total	30.00	31.50
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>
Notes				

☐ - Total    ☐ - Best Price       

Buyout Bids For 'PRINT #9 1-COLOR'

Vendor Details		10,000	20,000	30,000
Name	<b>Printing Company</b>	Setup	0.00	0.00
		Minimum	0.00	0.00
Reference		Per M	10.5000	10.2500
Contact		Tax	0.00	0.00
		Freight	0.00	0.00
	Leah VanWynsberghe	Total	105.00	205.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>
Notes				
Name	<b>Mail Company</b>	Setup	0.00	0.00
		Minimum	0.00	0.00
Reference		Per M	10.5000	10.5000
Contact		Tax	0.00	0.00
		Freight	0.00	0.00
	Leah VanWynsberghe	Total	105.00	210.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>
Notes				

☐ - Total    ☐ - Best Price

Buyout Bids For 'INKJET BUYOUT'

	Vendor Details		10,000	20,000	30,000
Name	<b>Mail Company</b>	Setup	25.00	25.00	25.00
		Minimum	75.00	75.00	75.00
Reference		Per M	7.5000	7.5000	7.5000
Contact		Tax	0.00	0.00	0.00
		Freight	0.00	0.00	0.00
		Total	100.00	175.00	250.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes					

☐ - Total   ☐ - Best Price     

Buyout Bids For 'PRINT 6X9 1-COLOR'

	Vendor Details		10,000	20,000	30,000
Name	<b>Printing Company</b>	Setup	0.00	0.00	0.00
		Minimum	0.00	0.00	0.00
Reference		Per M	10.5000	10.2500	9.5000
Contact		Tax	0.00	0.00	0.00
		Freight	0.00	0.00	0.00
		Total	105.00	205.00	285.00
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes					

☐ - Total   ☐ - Best Price

Once all the pricing is entered, you do have the ability to come back to this grid and Load Data. All the pricing entered will be loaded now. You can save a new spreadsheet to keep this data if you wish.

Bids/ Buyouts Overview

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	QUOTE # 1453	Buyout jobs														
2	Participating Vendors						1	Printing Comp	10000	20000	30000	5	Mail Compan	10000	20000	30000
3	Qty (s)															
4																
5																
6	General Process Info	Component Finishing # 9 Enve PRE-PRE				13113										
7	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
8	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
9	Process Unit Of Measure								1	1	1			1	1	1
10	Process Price								\$25.00	\$25.00	\$25.00			\$30.00	\$31.50	\$24.50
11	Order Qty								1	1	1			1	1	1
14	Process Total Price								\$25.00	\$25.00	\$25.00			\$30.00	\$31.50	\$24.50
16	Accepted ....															
17																
18	General Process Info	Component Finishing # 9 Enve PRINT #9				13117										
19	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
20	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
21	Process Unit Of Measure								1000	1000	1000			1000	1000	1000
22	Process Price								\$10.50	\$10.25	\$9.50			\$10.50	\$10.50	\$9.75
23	Order Qty								10000	20000	30000			10000	20000	30000
24	Process Total Price								\$105.00	\$205.00	\$295.00			\$105.00	\$210.00	\$292.50
25	Accepted ....															
26																
27	General Process Info	Component Finishing #10 enve INKJET Bl. Font Size = 12 pt 13120														
28	Process Setup													\$25.00	\$25.00	\$25.00
29	Process Min Charges													\$75.00	\$75.00	\$75.00
30	Process Unit Of Measure													1000	1000	1000
31	Process Price													\$7.50	\$7.50	\$7.50
32	Order Qty													10000	20000	30000

Load Data    Reload as ....    ☐ Zero Pricing as for Bidding Email    Printing Company: 1    Mail Company: 5

Export to Excel    ☒ Suppress Extra Info    Data Processing: C    Section Finishing(Component F): S    Finishing: F

Quote Bids Documents    Print Out

Or if you wish to have re-quoted for whatever reason, check the box Zero Pricing as for Bidding Email and then select Load Data. This will reload all data as it was prior to entering any pricing in the Buyouts Pricing screen.

Bids/ Buyouts Overview

Work with Spread/Excel | Reporting

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	QUOTE # 1453	Buyout jobs														
2	Participating Vendors						1	Printing Comp	10000	20000	30000	5	Mail Compan	10000	20000	30000
3	Qty (s)															
4																
5																
6	General Process Info	Component Finishing # 9 Enve PRE-PRE				13113										
7	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
8	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
9	Process Unit Of Measure								1	1	1			1	1	1
10	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
11	Order Qty								1	1	1			1	1	1
14	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
16	Accepted ....															
17																
18	General Process Info	Component Finishing # 9 Enve PRINT #9				13117										
19	Process Setup								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
20	Process Min Charges								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
21	Process Unit Of Measure								1000	1000	1000			1000	1000	1000
22	Process Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
23	Order Qty								10000	20000	30000			10000	20000	30000
24	Process Total Price								\$0.00	\$0.00	\$0.00			\$0.00	\$0.00	\$0.00
25	Accepted ....															
26																
27	General Process Info	Component Finishing #10 enve INKJET Bl. Font Size = 12 pt 13120														
28	Process Setup													\$0.00	\$0.00	\$0.00
29	Process Min Charges													\$0.00	\$0.00	\$0.00
30	Process Unit Of Measure													1000	1000	1000
31	Process Price													\$0.00	\$0.00	\$0.00
32	Order Qty													10000	20000	30000

Load Data    Reload as ....    ☒ Zero Pricing as for Bidding Email    Printing Company: 1    Mail Company: 5

Export to Excel    ☒ Suppress Extra Info    Data Processing: C    Section Finishing(Component F): S    Finishing: F

Quote Bids Documents    Print Out

## Buyout Bid Reporting

In the **Reporting** tab, you have 3 report options for you or management to review.

Generic Bid Form:

**Bids/ Buyouts Overview**

Work with Spread/Excel | **Reporting**

☒ Generic Bid Form  
☐ Request For Bid Summary Report  
☐ Request For Bid Summary with Details Report

Print Preview

**Bidding report...**

1 of 3 | 100% | Total:18 100% 18 of 18

BID\_GenericFor  
2Componenter

*Streamline Solutions* Component Finishing # 9 Envelope

**REQUEST FOR BID**

Quote No 1453.00 Job Title Buyout jobs

Job No

**Component Finishing # 9 Envelope**

# 9 Envelope  
PRE-PRESS BUYOUTS

	*	10,000	20,000	30,000
**	1	1	1	
Minimum \$				
Per Unit \$				
Total \$				

PRINT #9 1-COLOR

	*	10,000	20,000	30,000
**	10,000	20,000	30,000	
Minimum \$				
Per Unit \$				
Total \$				

Request For Bid Summary Report:

Bids/ Buyouts Overview

Work with Spread/Excel | Reporting

☐ Generic Bid Form

☒ Request For Bid Summary Report

☐ Request For Bid Summary with Details Report

Print

Preview

Bidding report...

BID\_RequestFc

2Componer

2Componer

2Componer

Streamline Solutions

REQUEST FOR BID SUMMARY REPORT

Customer :

50026

Quote No

1453.

Leah

Job No

Job Title

Buyout jobs

Component Finishing # 9 Envelope	10,000	20,000	30,000
Mail Company	\$0.0135	\$135.00	\$0.0121
Accepted Vendor With MarkUp %	\$241.50	\$0.0106	\$317.00
Printing Company	\$0.0130	\$130.00	\$0.0115
Accepted Vendor With MarkUp %	\$230.00	\$0.0103	\$310.00
Component Finishing #10 envelope	10,000	20,000	30,000
Mail Company	\$0.0100	\$100.00	\$0.0088
Accepted Vendor With MarkUp %	\$175.00	\$0.0083	\$250.00
Component Finishing 6 x 9 envelope	10,000	20,000	30,000
Printing Company	\$0.0105	\$105.00	\$0.0103
Accepted Vendor With MarkUp %	\$205.00	\$0.0095	\$285.00



## Request For Bid Summary with Details Report:

**Bids/ Buyouts Overview**

Work with Spread/Excel   Reporting

☐ Generic Bid Form  
☐ Request For Bid Summary Report  
☒ Request For Bid Summary with Details Report

Print   Preview

Bidding report...

1 of 1   100%   Total: 2   100%   2 of 2

BID\_RequestFc  
1

Alaska Inscorp   Printed: 8/4/2009 2:29:08PM   Page 1 of 1   Page 1 of 1

**REQUEST FOR BID SUMMARY /DETAILS REPORT**

Customer: AAA Insurance   Quote No 2733.99  
 Job Title Insurance Guidelines 2009   Job No 1675  
 3 versions, 48pg. plus cover stitched booklet.

Job Quantity 100,000

	Min Charge Amt	Price Per Unit	Total Charge	Avg Charge Per Unit	Process Order Qty
<b>Data Processing</b>					
PROGRAMMING (Buyout)					
Project description = 12345					
Expected turnaround time = Same day					
Mail Company	\$0.00	\$0.00	\$0.00	\$0.0000	1
Printing Company	\$0.00	\$0.00	\$0.00	\$0.0000	1
<b>Total Request For Bid - Data Processing - Qty: 100,000</b>					
Mail Company			\$0.00	\$0.0000	
Printing Company			\$0.00	\$0.0000	
<b>Peer Review</b>	<b>Date</b>	<b>Initials</b>			
<b>Management Review</b>	<b>Date</b>	<b>Initials</b>			

Calendar - Micros...   Streamline - Time...   buyoutbids [Com...   PrintStream - DB: ...   Mail Estimating for...   Bidding report...   2:29 PM

Once pricing is reviewed and decisions are made on which vendor will be used for quoting, return to the Buyout Pricing screen and select which best price you wish to use.

Buyout Bids For 'PRE-PRESS BUYOUTS'

Vendor Details		1	1	1	
Name	Printing Company	Setup	0.00	0.00	0.00
		Minimum	0.00	0.00	0.00
Reference		Per Unit	25.0000	25.0000	25.0000
Contact		Tax	0.00	0.00	0.00
		Freight	0.00	0.00	0.00
		Total	25.00	25.00	25.00
Turntime	0	Accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notes					
Name	Mail Company	Setup	0.00	0.00	0.00
		Minimum	0.00	0.00	0.00
Reference		Per Unit	30.0000	31.5000	24.5000
Contact		Tax	0.00	0.00	0.00
		Freight	0.00	0.00	0.00
		Total	30.00	31.50	24.50
Turntime	0	Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notes					

- Total

- Best Price

Save

Close

All best pricing is now selected from each of my vendors, quantities and buyouts as you can see in the Cost columns for each quantity.

	Process	Select From Bids	10,000 Cost	10,000 Sell	20,000 Cost	20,000 Sell	30,000 Cost	30,000 Sell
# 9 Envelope	PRE-PRESS BUYOUTS	Bids	\$25.00	\$0.00	\$25.00	\$0.00	\$24.50	\$0.00
# 9 Envelope	PRINT #9 1-COLOR	Bids	\$105.00	\$0.00	\$205.00	\$0.00	\$285.00	\$0.00
#10 envelope	INKJET BUYOUT	Bids	\$100.00	\$0.00	\$175.00	\$0.00	\$250.00	\$0.00
6 x 9 envelope	PRINT 6X9 1-COLOR	Bids	\$105.00	\$0.00	\$205.00	\$0.00	\$285.00	\$0.00

## Buyout Cost in the Final Pricing Screen

In the Final Pricing screen, you can see the Buyout Cost now populate the Cost field in this screen. If you wish to include these costs as the Book Rate, you can bring in these costs easily one of two ways.

Process	Min. Charge	Setup Charge	Number of Cycles	Qty.	per	Book Rate	Markup %	Qty. Rate	Cost	Book Price	Markup \$	Quoted Price
# 9 Envelope - PRE-PRESS	\$0.00	\$0.00	1	1	/1000	\$1.0000	0.00	\$1.0000	\$25.00	\$0.00	\$0.00	\$0.00
# 9 Envelope - PRINT #91	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$105.00	\$0.00	\$0.00	\$0.00
#10 envelope - INKJET BU	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$100.00	\$0.00	\$0.00	\$0.00
6 x 9 envelope - PRINT 6X	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$105.00	\$0.00	\$0.00	\$0.00

Print

Desired Markup (%):  Total @ Book Rate:   
 Desired Total:  Average Effective Markup (%):   
 Quoted Total:

For all mail processes...  
☐ Lock Markup %  
☐ Lock Quoted Rate

Pricing Summary

	Cost Total	Difference	Quoted Total
Process:	\$335.00	(\$335.00)	\$0.00
Component:		\$0.00	
Print:	\$0.00	\$0.00	\$0.00
	\$335.00	(\$335.00)	\$0.00

Reset  
Save & Recalc

Option 1: Drill down to the activity. Click the **dollar** button next to the Buyout Cost field.

**Pricing Details - PRE-PRESS BUYOUTS**

Calculation Base Quantity:

**Standard Run Speed**


<=99,999,999

	Standard	Override	Lock
Make Ready (Hours)	0.00	<input type="text" value="0.00"/>	
Run Speed (per Hour)	0	<input type="text" value="0"/>	<input type="checkbox"/>
Run Time (Hours)			
Number of Workers		0.00	

**Standard Pricing**

<=99,999,999

	Book Price/Rate	Lock Rate	Markup (%)	Lock MU	Quoted Rate	Extended Price	Lock QP
Setup:	\$0.00		<input type="text" value=""/>			\$0.00	<input type="checkbox"/>
Minimum charge:	\$0.00					\$0.00	<input type="checkbox"/>
Rate per 1000:	\$1.0000	<input type="checkbox"/>	0.00	<input type="checkbox"/>	\$1.0000	\$0.00	<input type="checkbox"/>
Total:	\$0.00				Total:	\$0.00	

Buyout Cost:  

The Rate per 1000 will be brought in. Note that only the Setup, Minimum charge, and rate will be brought in. If you have Freight and Tax, this option will not work for you.

**Pricing Details - PRE-PRESS BUYOUTS**

Calculation Base Quantity:

**Standard Run Speed**


<=99,999,999

	Standard	Override	Lock
Make Ready (Hours)	0.00	<input type="text" value="0.00"/>	
Run Speed (per Hour)	0	<input type="text" value="0"/>	<input type="checkbox"/>
Run Time (Hours)			
Number of Workers		0.00	

**Standard Pricing**

<=99,999,999

	Book Price/Rate	Lock Rate	Markup (%)	Lock MU	Quoted Rate	Extended Price	Lock QP
Setup:	\$0.00		<input type="text" value=""/>			\$0.00	<input type="checkbox"/>
Minimum charge:	\$0.00					\$0.00	<input type="checkbox"/>
Rate per 1000:	\$25.0000	<input type="checkbox"/>	0.00	<input type="checkbox"/>	\$25.0000	\$25.00	<input type="checkbox"/>
Total:	\$25.00				Total:	\$25.00	

Buyout Cost:  

Option 2: Select the **dollar** button in the bottom right hand corner of the final pricing screen. This will bring the cost into the Book Rate fields for all buyout processes for the quantity tab you are on.

Process	Min. Charge	Setup Charge	Number of Cycles	Qty.	per	Book Rate	Markup %	Qtd. Rate	Cost	Book Price	Markup \$	Quoted Price
# 9 Envelope - PRE-PRESS	\$0.00	\$0.00	1	1	/1000	\$1.0000	0.00	\$1.0000	\$25.00	\$0.00	\$0.00	\$0.00
# 9 Envelope - PRINT #9 1:	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$105.00	\$0.00	\$0.00	\$0.00
#10 envelope - INKJET BU	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$100.00	\$0.00	\$0.00	\$0.00
6 x 9 envelope - PRINT 6x9	\$0.00	\$0.00	1	10,000	/1000	\$0.0000	0.00	\$0.0000	\$105.00	\$0.00	\$0.00	\$0.00

Print

Desired Markup (%):  Total @ Book Rate: **\$0.00**  
 Desired Total:  Average Effective Markup (%):   
 Quoted Total: **\$0.00**

For all mail processes...  
☐ Lock Markup %  
☐ Lock Quoted Rate

Pricing Summary:

	Cost Total	Difference	Quoted Total
Process:	\$335.00	(\$335.00)	\$0.00
Component:		\$0.00	
Print:	\$0.00	\$0.00	\$0.00
	<b>\$335.00</b>	<b>(\$335.00)</b>	<b>\$0.00</b>

Reset  
Save & Recalc

When you select the button, you will receive this message. If you had previously made entries to buyout activities and included any markups, these entries will be cleared out once you click Yes in the below message.

**Confirm update for pricing for the selected QTY**

Are you sure you want to update all buyout pricing/cost from the Accepted Bid for the Selected QTY?  
 In case if there are NO accepted Bid for the mail buyout - cost/pricing will be left as it is....  
 Ready to proceed?

Yes No

You can then enter each process markup/sell value or at the final pricing level.

Process	Min. Charge	Setup Charge	Number of Cycles	Qty.	per	Book Rate	Markup %	Qtd. Rate	Cost	Book Price	Markup \$	Quoted Price
# 9 Envelope - PRE-PRESS	\$0.00	\$0.00	1	1	/1000	\$25.0000	40.00	\$35.0000	\$25.00	\$25.00	\$10.00	\$35.00
# 9 Envelope - PRINT #91	\$0.00	\$0.00	1	10,000	/1000	\$10.5000	40.00	\$14.7000	\$105.00	\$105.00	\$42.00	\$147.00
#10 envelope - INKJET BU	\$105.00	\$35.00	1	10,000	/1000	\$7.5000	40.00	\$10.5000	\$100.00	\$100.00	\$40.00	\$140.00
6 x 9 envelope - PRINT 6x9	\$0.00	\$0.00	1	10,000	/1000	\$10.5000	40.00	\$14.7000	\$105.00	\$105.00	\$42.00	\$147.00

Print

Desired Markup (%):  Average Effective Markup (%): 40.00%

Desired Total:  Quoted Total: \$469.00

Total @ Book Rate: \$335.00

For all Un & F

### Pricing Details - PRINT #9 1-COLOR

Calculation Base Quantity: 10,000

#### Standard Run Speed

<=99,999,999

	Standard	Override	Lock
Make Ready (Hours)	0.00	0.00	
Run Speed (per Hour)	0	0	<input type="checkbox"/>
Run Time (Hours)			
Number of Workers		0.00	

#### Standard Pricing

<=99,999,999

	Book Price/Rate	Lock Rate	Markup (%)	Lock MU	Quoted Rate	Extended Price	Lock QP
Setup:	\$0.00					\$0.00	<input checked="" type="checkbox"/>
Minimum charge:	\$0.00					\$0.00	<input checked="" type="checkbox"/>
Rate per 1000:	\$10.5000	<input type="checkbox"/>	40.00	<input type="checkbox"/>	\$14.7000	\$147.00	<input checked="" type="checkbox"/>
Total:	\$105.00				Total:	\$147.00	

Buyout Cost: \$105.00

Cancel Save

## Buyout Entry has now been Enhanced

You can enter all buyouts (print and mail related) pricing in the Buyouts area of the quote. Once the bids are accepted you can visually see on the Buyouts screen if the Bids have been accepted.

Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Buyouts]

for Quote Refresh Master Data Help

Print Mode Is Off

Bids Are Created	Bids are Accepted	Inv Item #	Inventory Code	Process	Bidding Vendors	Select From Bids	10,000 Cost	10,000 Sell	20,000 Cost	20,000 Sell
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Data Processing			\$45.00	\$9.00	\$45.00	\$9.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Finishing			\$75.00	\$0.00	\$75.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PIH			\$250.00	\$0.00	\$440.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			PIH			\$0.00	\$0.00	\$0.00	\$0.00

Buyout Bids For 'INKJET BUYOUT' PIH

Vendor Details		10,000	20,000	30,000
Name	NWC Print			
	Setup	0.00	0.00	0.00
	Minimum	0.00	0.00	0.00
Reference	Per M	25.0000	22.0000	22.0000
	Tax	0.00	0.00	0.00
	Freight	0.00	0.00	0.00
Contact	Total	250.00	440.00	660.00
Turntime	0			
	Accepted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes	Markup %	0.00	0.00	0.00

## New Calculation and Display for Ink Quantity and Cost

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant LS

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

16 pg Form Plant 1 - Print Override

Press Front | Press Back | Ink Front | Ink Back | Ink Cost | Section Finishing

	Ink FRONT	Cost for 5000	Lbs/ Sq In for 5000	Cost for 10000	Lbs/ Sq In for 10000	Cost for 15000	Lbs/ Sq In for 15000
1	Black	\$3.22	0.65	\$5.71	1.15	\$8.22	1.65
2	PMS 1	\$8.48	0.85	\$15.06	1.51	\$21.70	2.17
3	PMS-3	\$8.48	0.85	\$15.06	1.51	\$21.70	2.17
4		\$20.18		\$35.83		\$51.62	

	Ink BACK	Cost for 5000	Lbs/ Sq In for 5000	Cost for 10000	Lbs/ Sq In for 10000	Cost for 15000	Lbs/ Sq In for 15000
1	Black	\$2.83	0.57	\$5.24	1.05	\$7.69	1.54
2	PMS 1	\$7.45	0.75	\$13.84	1.39	\$20.29	2.03
3	PMS-3	\$7.45	0.75	\$13.84	1.39	\$20.29	2.03
4		\$17.73		\$32.92		\$48.27	

**Press Specifications**

Section	Side	Method	Press	Runs	Overs	Ink Colors	Plates	M/R	Run	Wash
Main Ganged Cover 3 Versions				Section Qty: 15,000						
28X40										
1Up	Front	S/wise	640 Heidelberg	16,650	842	5 Proc Black-6.07 Lb - \$42.37 Proc Cyan-8 Lb - \$54.00 Proc Mag-8 Lb - \$54.00 Proc Yellow-8 Lb - \$54.00 Aqueous F-27.71 Lb - \$86.12	4 Metal	1.17hr	3.33hr	1.00hr
				4845 iph						
	1 secs		Heavy Coverage			\$290.49	\$166.67	\$408.33	\$1,164.93	\$350.00
1Up	Back		240 Heidelberg	15,808	408	1 Black-8.23 Lb - \$46.11	1 Metal	0.67hr	3.14hr	0.00hr
				5000 iph						
			Light Coverage			\$46.11	\$22.50	\$100.00	\$471.27	\$0.00
Ganged*California Cover				Section Qty: 25,000 Num Up On Press Sheet: 2 Up						
8 1/2X11										
Ganged*Arizona Cover				Section Qty: 15,000 Num Up On Press Sheet: 1 Up						
8 1/2X11										
Ganged*Utah Cover				Section Qty: 10,000 Num Up On Press Sheet: 1 Up						
8 1/2X11										



## Mail Process: Final Pricing Screen

To review mail processes pricing, click the + sign next to **Review Pricing** in the **Mail Estimating Tree**, then select **Final Pricing**.

To override pricing or to enter **buyout** pricing and costs, click the process description and enter a quoted rate (sell price) and the buyout cost. You have the option to **Override** make ready hours, runs speeds and/or run time. There is an option to change the Quoted Price, Book Price/Rate, Markup % or price. Lock in changes by clicking the lock MU or Lock QP boxes (red check mark).

Enter a Desired Total or a Desired Global Markup (%). Enter a discount % by typing a – (minus sign) before the number then choose the option to **Save** and Recalculate, Reset or review Component Pricing.

Select the **Component** pricing option (lower/right) if you have attached \$ valued inventory to a component (e.g., jiffy bags). The cost and/or sell price will display, or choose the option to override the sell price if desired. Cost and sell pricing are entered in 'Master File – Inventory,' in the Main Information Screen. If a zero-cost item is set in Master Files Inventory with the Sell Method in the Main Information Screen set to anything but Use Cost, and a Sell Price is entered, this zero-cost inventory item when added to an estimate will show in the **Component** pricing summary.

Current Quantities			
	On Hand	On Order	Totals
Quantity :		0	0
Committed :	15,000	0	15,000
Available :	-15,000	0	-15,000
Value :	\$0.00	\$0.00	\$0.00

Component	Total Qty	Per	Cost	Sell	Total Cost	Quoted Price
Letter	5,000 / 1,000		\$0.0000	\$10.0000	\$0.00	\$50.00

	Cost Total	Difference	Quoted Total
Process	\$408.13	\$136.87	\$545.00
Component	\$0.00	\$50.00	\$50.00
Print	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$408.13</b>	<b>\$186.87</b>	<b>\$595.00</b>

Click (the lower) **X** to close or select a different area on the Mail Estimating Tree.

**Note** Any processes that are locked (red checked) in the pricing screen will not be affected by a global markup or global discount and will appear in **BOLD**. Marked up pricing or discount pricing will appear in **ITALIC**.

Users with a lower security level (Example: 3, 4, 5) will not be able to change or override pricing. (See your **System Administrator**.)

Mail Estimating (Print & Mail)

Quote Header

Estimating

PreProcessing

Components

Bus Reply Card-6,000

OE 6x9-9,000

Letter A-9,000

Letter B-3,000

Letter C-1,000

Brochure-7,000

BRE-4,000

New Component-10,000

Insert 1-10,000

Insert 2-10,000

# Packages

Finishing

\* Drops

Special Instructions

Review Pricing

Buyouts

Final Pricing

Quote Breakdown

Credit Status

Quote Letter

X Order Entry

10,000 | 50,000 | 100,000 | 250,000 | 500,000 | 1,000,000

Process	Min. Charge	Setup Charge	Qty.	per	Book Rate	Markup %	Qtd. Rate	Cost
PURCHASE LIST								
	\$0.00	\$0.00	10,000	/1000	\$1.0000	0.00	\$1.0000	\$10.00
<b>Pricing Details - PRINT #9 1-COLOR</b>								
Calculation Base Quantity: 9,000								
#9, 1/0, Custom Stock, RUSH CHARGE, SAME DAY, Bindery, Score, Perf, Folding, Letter Fold								
Edit Modifiers								
Standard Run Speed								
<=99,999,999								
0								
Standard Override Lock								
Make Ready (Hours) 0.00 0.00								
Run Speed (per Hour) 1 0								
Run Time (Hours) 9,000.00								
Number of Workers 0.00								
Standard Pricing								
<=99,999,999								
\$1.0000								
Book Price/Rate Lock Rate Markup (%) Lock Quoted Rate MU Extended Price Lock QP								
Setup: \$0.00 \$0.00								
Minimum charge: \$0.00 \$0.00								
Rate per 1000: \$25.0000 50.00 \$37.5000 \$337.50								
Total: \$225.00 Total: \$337.50								
Buyout Cost: \$225.00								
Cancel Save								
For all mail processes...								
Lock Markup %								
Lock Quoted Rate								
Markup (%) 0.61%								
\$12,236.00								
\$12,311.00								
Pricing Summary								
Cost Total Difference Quoted Total								
Process: \$14,728.16 (\$2,417.16) \$12,311.00								
Component: \$0.00 \$0.00 \$0.00								
Print: \$0.00 \$0.00 \$0.00								
Reset								
Save & Reprint								

## Print: Final Pricing Screen

To review print pricing, click the + sign next to **Review Pricing** in the **Mail Estimating Tree**, then select **Final Pricing**. Select the **Print** option under Pricing Summary. There is an option to change markup % for labor, paper, materials, buyouts..., view price per 1,000 or review Process or Component Pricing.

An additional option to apply a **variation \$ or %** per printed item per quantity or enter a % in the 'Desired Variation (%)' field and select > **Apply Variation to All Components** is available. This will apply the variation to all components and all quantities.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant NORMA - [Pricing Summary]

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

Print Mode Is Off

### Mail Estimating (Print & Estimating)

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Forney Letterhead-180
    - #10 OE-180,000
    - Business Card-180,000
    - Finished Letter-180,000
    - Printed Inhouse Test-1
  - Sound Components
  - Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
  - Buyouts
  - Final Pricing**
  - Quote Breakdown
  - Credit Status
  - Quote Letter
  - Preliminary Mail Work Ticket
- Order Entry

### Final Pricing

Component	Quantity	Cost	Markup % (Avg)	Sell	Variation %	Quoted Rate/1000	Lock Rate	Quoted Price	Lock QP
Forney Letterhead	180,000	\$4,279.14	44.28	\$6,173.87	0.00	\$34.30		\$6,173.87	
#10 OE	180,000	\$6,927.12	31.04	\$9,077.12	0.00	\$50.43		\$9,077.12	
Business Card	180,000	\$1,637.94	33.51	\$2,186.79	0.00	\$12.15		\$2,186.79	
Printed Inhouse Test	180,000	\$5,287.54	28.01	\$6,768.37	0.00	\$37.60		\$6,768.37	
<b>Total</b>		<b>\$18,131.74</b>	<b>33.50</b>	<b>\$24,206.15</b>	<b>0.00</b>			<b>\$24,206.15</b>	

Item	Cost	Markup (%)	Sell
LABOR	\$13.09	60.00	\$20.95
MATERIALS	\$1.08	25.00	\$1.35
BUYOUTS	\$0.00	0.00	\$0.00
FREIGHT	\$0.00	0.00	\$0.00
POSTAGE	\$0.00	0.00	\$0.00
PAPER	\$9.59	25.00	\$11.99
	\$0.00	0.00	\$0.00
	\$0.00	0.00	\$0.00
	\$0.00	0.00	\$0.00
Flat Charges	\$0.00	0.00	\$0.00
Commissions	\$0.00	0.00	\$0.00

Component: Forney Letterhead

Desired Variation (%)

Apply Variation To All Components

	Standard (Cost/Sell)	
	\$23.77	\$34.30
Variation (%)	0.00	\$0.00
Quoted Price		\$34.30
Unit (Cost/Sell)	\$0.0238	\$0.0343

Per 1000 pricing ☒

Cancel Save

### Pricing Summary

	Cost Total	Difference	Quoted Total
Process:	\$8,762.75	\$3,952.25	\$12,715.00
Component:	\$0.00	\$0.00	\$0.00
Print:	\$18,131.74	\$6,074.41	\$24,206.15
<b>Total</b>	<b>\$26,894.49</b>	<b>\$10,026.66</b>	<b>\$36,921.15</b>

1888.99 1250 Nelson & Company 0100 - Skyler's First Birthday Mailing 180,000 7/7/2008 180,000

To override **mail process** pricing or enter mail **buyout** pricing see previous page.



**Value Added \$** - Total Cost less Materials and Buyouts expressed in dollars

20,000   50,000   100,000   250,000   300,000   500,000											
\$	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	Quoted Price Locked	Profit %	Profit \$	Value Added %	Value Added \$
	-60.739008	-119.123418	77.000000	0.000000	0.000000	77.00		-60.739008	-119.123418	100.000000	77.000000
	250.000000	50.000000	70.000000	0.000000	0.000000	70.00		250.000000	50.000000	100.000000	70.000000
	-27.923729	-183.055556	472.500000	0.000000	0.000000	472.50		-27.923729	-183.055556	100.000000	472.500000
	162.500001	92.857143	150.000000	0.000000	0.000000	150.00		162.500001	92.857143	100.000000	150.000000
	-20.000000	-25.000000	100.000000	0.000000	0.000000	100.00		-20.000000	-25.000000	100.000000	100.000000
	-100.000000	-400.000000	0.000000	0.000000	600.000000	600.00		50.000000	200.000000	33.333333	200.000000
	-68.750000	-110.000000	50.000000	0.000000	0.000000	50.00		-68.750000	-110.000000	100.000000	50.000000
	0.000000	0.000000	50.000000	0.000000	0.000000	50.00		0.000000	0.000000	100.000000	50.000000
	-41.730540	-694.321831	969.500000	61.887571	600.000000	1,569.50		-5.668986	-94.321831	74.514176	169.500000
	45.177096	202.533708	650.844302	0.000000	0.000000	650.84		45.177096	202.533708	81.447176	530.094302
	33.752342	969.444953	841.675114	-1.790274	-68.776498	3,772.90		31.357809	900.668455	79.674354	1,006.032601
	25.081897	2,800.977977	968.307220	0.000000	0.000000	13,968.31		25.081897	2,800.977977	58.796635	212.894644
	31.132271	978.974086	1,123.537739	0.000000	0.000000	4,123.54		31.132271	978.974086	78.633551	1,242.484148
	28.084216	1,951.930724	2,584.364375	-0.304531	-68.776498	22,515.59		27.694159	4,883.154226	66.582786	1,991.505695
	22.064431	1,257.608893	1,553.864375	2.255356	531.223502	24,085.09		24.817418	4,788.832395	67.099634	1,161.005695

At the bottom of the Pricing Summary screen, there are options to "Refresh" data,

Print the screen, **Save**, and **Close**:

33.752342	969.444953	841.675114	-1.790274	-68.776498	3,772.90		31.357809	900.668455	79.674354	1,006.032601
25.081897	2,800.977977	968.307220	0.000000	0.000000	13,968.31		25.081897	2,800.977977	58.796635	212.894644
31.132271	978.974086	1,123.537739	0.000000	0.000000	4,123.54		31.132271	978.974086	78.633551	1,242.484148
28.084216	1,951.930724	2,584.364375	-0.304531	-68.776498	22,515.59		27.694159	4,883.154226	66.582786	1,991.505695
22.064431	1,257.608893	1,553.864375	2.255356	531.223502	24,085.09		24.817418	4,788.832395	67.099634	1,161.005695

Refresh

PrintOut

Save

Close

wan Rocks, Inc.

0100 - Test CID 18493-Final Pricing Screen Enhancemen

0

20,000

20,000 50,000 100,000 250,000 300,000 500,000										
\$		Total Cost \$	Not Value Added Cost \$	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	Quoted Price Locked
	FOLD 8.5X11/14	196.123418	0.000000	-60.739008	-119.123418	77.000000	0.000000	0.000000	77.00	
	INKJET SETUP	20.000000	0.000000	250.000000	50.000000	70.000000	0.000000	0.000000	70.00	
	INKJET SELF MAILER	655.555556	0.000000	-27.923729	-183.055556	472.500000	0.000000	0.000000	472.50	
	INKJET UP TO 6X9	57.142857	0.000000	162.500001	92.857143	150.000000	0.000000	0.000000	150.00	
	CUT 8.5X11 IN FOLD	125.000000	0.000000	-20.000000	-25.000000	100.000000	0.000000	0.000000	100.00	
	INKJET BUYOUT	300.000000	377.630000	-100.000000	-300.000000	0.000000	0.000000	533.000000	533.00	
	INSERTER SET UP	160.000000	0.000000	-68.750000	-110.000000	50.000000	0.000000	0.000000	50.00	
	DELIVER TO POST	50.000000	0.000000	0.000000	0.000000	50.000000	0.000000	0.000000	50.00	
	TOTAL MAIL PROCES	1,563.821831	377.630000	-38.004446	-594.321831	969.500000	54.976792	533.000000	1,502.50	
	BINDERY	448.310594	120.750000	45.177096	202.533708	650.844302	0.000000	0.000000	650.84	
	BROCHURE	2,012.230161	606.866015	30.298147	609.668455	2,621.898616	0.000000	0.000000	2,621.90	
	TEXT	11,167.329243	3,755.412576	25.081897	2,800.977977	13,968.307220	0.000000	0.000000	13,968.31	
	COVER	3,144.563653	881.053591	31.132271	978.974086	4,123.537739	0.000000	0.000000	4,123.54	
	TOTAL PRINT	16,772.433651	7,364.082182	27.379177	1,592.154226	18,364.587877	0.000000	0.000000	21,364.59	
	QUOTED TOTAL	18,336.255482	7,741.712182	21.802883	1,997.832395	20,334.087877	2.386487	533.000000	22,867.09	

More detail:

\$		Total Cost \$	Not Value Added Cost \$
	FOLD 8.5X11/14 SIZE	196.123418	0.000000
	INKJET SETUP	20.000000	0.000000
	INKJET SELF MAILER	655.555556	0.000000
	INKJET UP TO 6X9	57.142857	0.000000
	CUT 8.5X11 IN FOLD	125.000000	0.000000
	INKJET BUYOUT	300.000000	377.630000
	INSERTER SET UP	160.000000	0.000000
	DELIVER TO POST	50.000000	0.000000
	TOTAL MAIL PROCES	1,563.821831	377.630000
	BINDERY	448.310594	120.750000
	BROCHURE	2,012.230161	606.866015
	TEXT	11,167.329243	3,755.412576
	COVER	3,144.563653	881.053591
	TOTAL PRINT	16,772.433651	7,364.082182
	QUOTED TOTAL	18,336.255482	7,741.712182







### Estimating Pricing Summary Screen Add Cost/M & QL Price/M

Added two additional columns to the Pricing Summary screen to display in rounded 2 digit the Total Cost \$/M and the QL Pricing/M

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Quote Pricing]

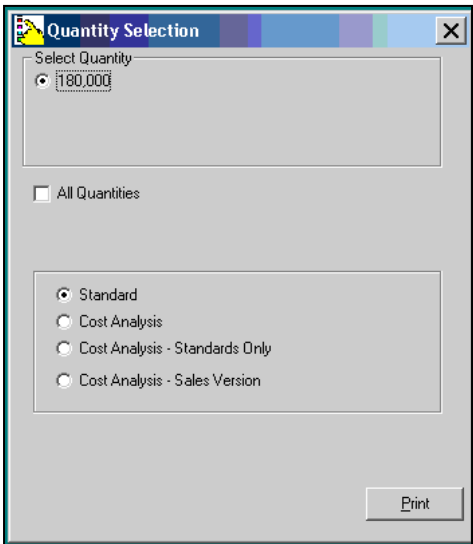
Print Mode is On

10,000 | 20,000 | 30,000 | 40,000 | 50,000 | 60,000

	\$	Quote # 11923 : Customer Acct# LEAH	Total Cost \$	Total Cost \$/M	Item Value Added Cost \$	Basic Markup %	Basic Markup \$	Basic Sell \$	Overhead Markup \$	Overhead Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	QL Pricing/M	Quoted Price Locked	Net Profit % (QL - Total Cost \$ Pricing)
ADDRESS STANDARD	4.00		4.00	0.40	0.00	2,895.70	115.83	119.834.30	0.173	116.00	120.00	0.00	0.00	120.00	12.00			3
BARCODE QUALIFY	40.00		4.00	0.00	0.00	195.70	78.28	118.284.30	1.723	80.00	120.00	0.00	0.00	120.00	12.00			6
SORT RECORDS	10.00		1.00	0.00	0.00	195.70	19.57	23.574.30	0.433	20.00	30.00	0.00	0.00	30.00	3.00			6
OUTPUT TO EXTRAJET	23.33		2.33	0.00	0.00	109.39	25.66	49.004.30	1.003	25.67	50.00	0.00	0.00	50.00	5.00			5
PURCHASE LIST	150.00		15.00	150.00	-4.30	-6.45	143.554.30	6.453	0.00	150.00	150.00	0.00	0.00	150.00	15.00			1
ENVELOPE INKJET UP	242.86		24.29	0.00	-25.84	-62.75	180.114.30	10.443	52.31	190.55	190.55	0.00	0.00	190.55	19.06			-2
INSERT, METER, SORT	353.33		35.33	0.00	45.70	161.47	514.814.30	15.193	176.67	530.00	530.00	0.00	0.00	530.00	53.00			3
TOTAL MAIL PROCESS	823.52		82.35	150.00	0.00	0.00	0.000.00	0.003	367.03	1,190.55	1,190.55	0.00	0.00	1,190.55	119.06			3
BINDING	291.67		29.17	0.00	30.00	87.50	379.174.30	12.543	100.04	391.71	391.71	0.00	0.00	391.71	39.17			2
BROCHURE	2,041.26		204.13	1,154.52	19.17	391.363	432.624.30	87.773	473.13	2,520.40	2,520.40	0.00	0.00	2,520.40	252.04			1
TOTAL PRINT	2,332.93		233.29	1,154.52	0.00	0.00	0.000.00	0.003	578.18	2,912.11	2,912.11	0.00	0.00	2,912.11	291.21			1
QUOTED TOTAL	3,156.46		315.65	1,304.52	25.68	810.481	966.934.30	135.733	946.20	4,102.66	4,102.66	0.00	0.00	4,102.66	410.27			2
AddM Price															351.8271			

## Mail Quote Breakdown

To view the quote, click **Quote Breakdown** in the **Mail Estimating Tree**. Choose a quantities option.

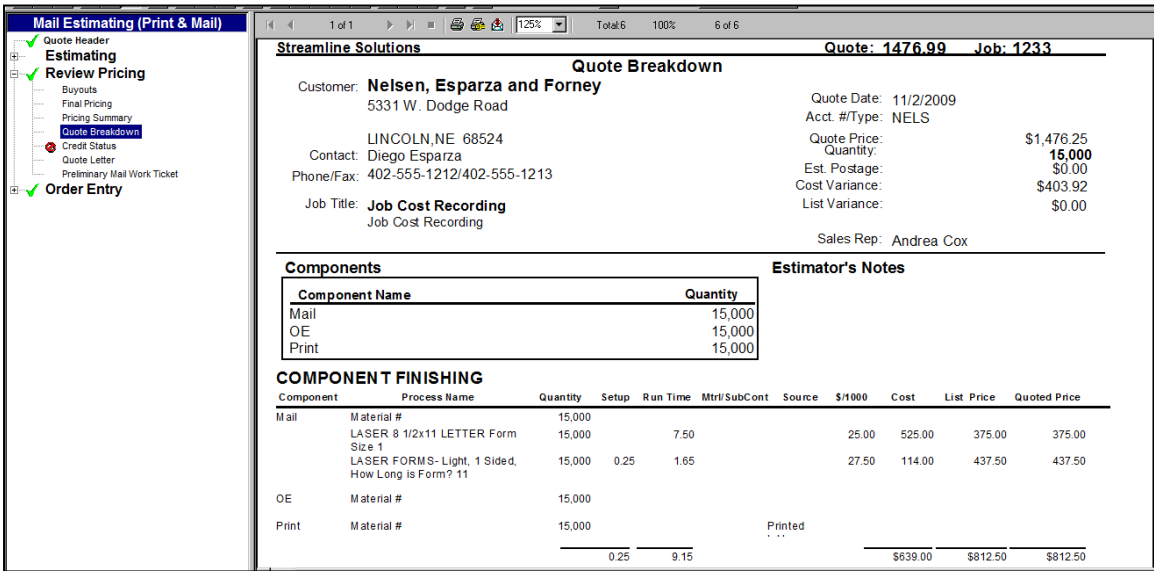


The 'Quantity Selection' dialog box has a title bar with a close button (X). It contains a 'Select Quantity' section with a radio button selected for '180,000'. Below this is a checkbox for 'All Quantities'. Further down is a group box containing four radio buttons: 'Standard' (selected), 'Cost Analysis', 'Cost Analysis - Standards Only', and 'Cost Analysis - Sales Version'. At the bottom right is a 'Print' button.

Click the **Print** button.

You can chose to Print the quote using the printer icon, or **export** to: MSWord, Excel, Crystal Reports, etc., (envelope w/ red arrow icon). Close the preview window by clicking the **X** in the upper right corner of the preview window.

The Quote Breakdown compares: costs, list prices and quoted prices. Users with a security level '5' will not be able to override pricing, view the quote breakdown or quote letter.



The 'Mail Estimating (Print & Mail)' window displays a sidebar with a tree view containing: Quote Header, Estimating, Review Pricing (with sub-items: Bayouts, Final Pricing, Pricing Summary, Quote Breakdown, Credit Status, Quote Letter, Preliminary Mail Work Ticket), and Order Entry. The main area is titled 'Streamline Solutions' and 'Quote Breakdown'. It shows customer information for 'Nelsen, Esparza and Forney' and contact details for 'Diego Esparza'. It also lists 'Quote Date: 11/2/2009', 'Acct. #/Type: NELS', 'Quote Price: \$1,476.25', 'Quantity: 15,000', 'Est. Postage: \$0.00', 'Cost Variance: \$403.92', and 'List Variance: \$0.00'. A 'Sales Rep: Andrea Cox' is noted. Below this is a 'Components' table with columns 'Component Name' and 'Quantity', listing 'Mail' (15,000), 'OE' (15,000), and 'Print' (15,000). To the right is an 'Estimator's Notes' section. At the bottom is a 'COMPONENT FINISHING' table with columns: Component, Process Name, Quantity, Setup, Run Time, Mtrl/SubCont, Source, \$/1000, Cost, List Price, and Quoted Price. It lists details for 'Mail' (LASER 8 1/2x11 LETTER Form, Size 1), 'OE' (LASER FORMS- Light, 1 Sided, How Long is Form? 11), and 'Print' (Material #).

Component	Process Name	Quantity	Setup	Run Time	Mtrl/SubCont	Source	\$/1000	Cost	List Price	Quoted Price
Mail	Material #	15,000								
	LASER 8 1/2x11 LETTER Form	15,000		7.50			25.00	525.00	375.00	375.00
	Size 1									
	LASER FORMS- Light, 1 Sided, How Long is Form? 11	15,000	0.25	1.65			27.50	114.00	437.50	437.50
OE	Material #	15,000								
Print	Material #	15,000				Printed				
			0.25	9.15				\$639.00	\$812.50	\$812.50

## Print Quote Breakdown



Select the **Quote Breakdown** icon in the tool bar to review costing details, etc.

The user has options to Print front, back or both sides and various quantities and sections.

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

### Print Activity Code Setup

<b>Variation %</b>	If you change/over-ride the quoted price (\$ or %), = % difference between suggested quoted price and marked-up quoted price.
<b>Value Added %</b>	= total marked-up price – (minus) material costs and buyout costs (%)
<b>Value Added (\$)</b>	= total marked-up price – (minus) material costs and buyout costs (\$).
<b>Approval of Mark up</b>	If you change/over-ride the quoted price (\$ or %), marked-up \$ difference between sell and cost.
<b>Approval of Variation</b>	If you change/over-ride the quoted price (\$ or %), \$ variation between sell and cost.
<b>Marked Up Cost</b>	= suggested sell (\$)

**Print Quote Breakdown**

1 of 1+ 100% Total: 1 100% 1 of 1

---

**Quote: 6023 Quote Breakdown**

Customer: **Alaska Inc.** Account No.: ALASKA Printed: **1/6/2012** 10:21:25  
 123 West Main  
 Suite 7  
 Provo, UT 84601

Contact: **Sally Samster** Quote Date: 12/20/2011  
 Phone/Fax: 801555 0133/801555 1038 Finished: 8 1/2 x 11  
 Job Title: **Copy of All Options Test** Quantity: **10,000**

Estimator: House Account  
 Sales Rep: Sue Smith  
 CSR: Sue Smith

**Estimator's Notes:**

Material/Purchase	\$Cost	\$Markup	\$Sell
Paper	2,202.70	405.16	2,607.86
Prepress Mat'l	6.00	1.50	7.50
Plates	45.00	11.25	56.25
Ink	105.98	26.51	132.49
Press Mat'l			
Bind Mat'l			
Pack/Ship Mat'l			
Buyouts			
Freight			
Click Mat'l Charge			
<b>Sub Total</b>	<b>2,359.68</b>	<b>444.42</b>	<b>2,804.10</b>

**Cost Summary**

Estimated Cost	4,273.69	Approval of Markup
Mat. Markup %	18.83 %	\$ 920.03
Lab. Markup %	24.85 %	Approval of Variation
Marked Up Cost	5,193.72	\$ 2,346.07
Variation %	15.52 %	Approval of Quoted Price
Value Added %	60.67 %	\$ 6,000.00
Value Added	3,640.32	
Unit Price	0.60	

Labor Center	Hours	\$Cost	\$Sell
Art/Comp	0.05	6.25	7.62
Proofing	2.12	84.67	103.19
Platemaking	1.00	30.00	37.48
E. Prepress	0.03	3.09	3.77
Itex	1.50	75.00	91.40
240 Heid'lbrg	9.85	1,477.67	1,847.54
Cutter	1.13	34.00	41.44
Folder	4.07	203.33	257.19
<b>Sub Total</b>	<b>19.75</b>	<b>1,914.01</b>	<b>2,389.63</b>

**Cost Breakout**

	\$ Cost	\$ Markup	\$ Sell
Comp/Art	0.00	0.00	0.00
Prep	175.01	38.47	213.48
Print/Bind	4,098.68	881.56	4,980.24
Inventory	0.00	0.00	0.00
<b>Total</b>	<b>4,273.69</b>	<b>920.03</b>	<b>5,193.72</b>

## Credit Status

To view credit status, click **Credit Status** in the **Mail Estimating Tree** under **Review Pricing**.

A red **X** next to Quote Status means the customer is over their credit limit or they are a New / Prospect customer and your Credit Department needs to update their Account Status.

There will also be a red **X** next to Credit Status if a customer has 100 or more days of unpaid invoices.

**Note** You will be able to print a Quote Letter/Proposal if a customer is over their credit limit or if they are a prospect customer; but you will not be able to convert this estimate to a job until their credit limit is increased or the prospect is issued a credit limit.

Credit Information						
Quote Quantity:	10,000	50,000	100,000	250,000	500,000	1,000,000
Open Invoices:	\$127,406.60	\$127,406.60	\$127,406.60	\$127,406.60	\$127,406.60	\$127,406.60
Jobs in Progress:	\$28,051.31	\$28,051.31	\$28,051.31	\$28,051.31	\$28,051.31	\$28,051.31
This Quote's Sell:	\$12,423.50	\$26,870.50	\$46,318.00	\$106,978.00	\$208,078.00	\$410,278.00
Unallocated Receipts:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Commitment:	\$167,881.42	\$182,328.42	\$201,775.92	\$262,435.92	\$363,535.92	\$565,735.92
Credit Limit:	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00
Over Credit Limit:						

## Print and Mail Quote Letter Screen

Click **Quote Letter** in the **Mail Estimating Tree** under **Review Pricing**. Select either the **Print And Mail Format** or the **Printer's Format**. Choosing the **Print And Mail Format** will then bring you to a second selection screen to choose either an **Itemized** or **Paragraph** format. Check the various options to customize the information you want to appear on the Quote Letter and select **Print to Word**. The PrintStream system will open Microsoft Word, drop in your Company logo, address and all of your estimated processes, pricing etc., into a Proposal template. Use standard MS Word functionality to print or modify the Quote Letter.

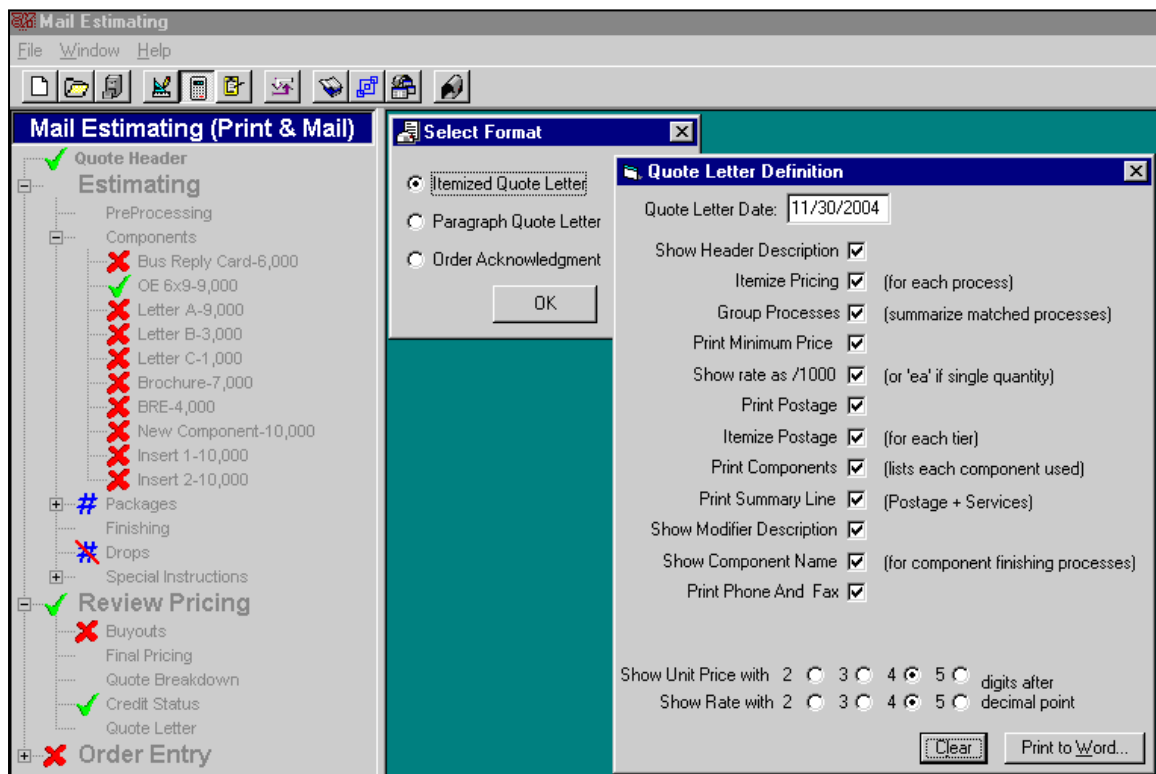
**Note** Editing or changes made to the quote letter in MS Word will not save to the original estimate. They will be saved for the current version of the **Quote Letter** only.

To close the Quote Letter, close MS Word.

To add your company logo to the Quote Letter template, consult with your System Administrator or EFI PrintStream Support.

**Note** Option to Print an Order Acknowledgment.

Users with a security level '5' will not be able to over-ride pricing, view the quote breakdown or quote letter.




## Print and Mail Quote Letter Sample and Close Estimate

The PrintStream system will open Microsoft Word, drop in your company logo, address and all of your estimated processes, pricing etc., into a Proposal template. Option to Print and/or Close Estimate.



To close this estimate, select the **Close Current Estimate** icon ("file cabinet" 3rd icon from the left) OR select **File** and **Close Quote** from the drop-down menu.

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

To add your company logo to the Quote Letter template, consult with your System Administrator or PrintStream Support Rep.

 <div> <b>streamline solutions</b>          477 Summit Avenue          Mill Valley CA 94941          T 415.380.9969          F 415.380.9685          www.printstream.com       </div>		<h3>Proposal</h3>	
Diego Esparza <b>Nelsen, Esparza and Forney</b> 5331 W. Dodge Road LINCOLN, NE 68524 <b>Ph:</b> 402-555-1212 <b>Fax:</b> 402-555-1213		<b>Proposal</b> 1476.99 <b>Date</b> November 25, 2009	
<b>Project</b> Job Cost Recording Job Cost Recording			
<b>Components</b> Print, Mail, OE			
<b>Quantity of</b> 15,000			
<b>Services</b> **Printing - Print Laser Print Letter (Mail) Laser Print Forms (Mail) Insert 2 Pc, Meter & Sort	<b>Quantity</b> 15,000 15,000 15,000 15,000	<b>Setup</b>  \$25.00	<b>Rate per</b> \$252.30 /m \$25.00 /m \$27.50 /m \$44.25 /m
			<b>Price</b> \$3,784.55 \$375.00 \$437.50 \$663.75
<b>Total Cost for Services</b>			<b>\$5,260.80</b>
<b>Estimated Postage</b>	<b>Pieces</b>	<b>Rate</b>	<b>Postage</b>
<b>Total Estimated Postage</b>			<b>\$0.00</b>
<b>Total Estimated Project Cost</b>	15,000	<b>Unit Price:</b>	\$0.3507
			<b>\$5,260.80</b>
Thank you for the opportunity to quote on this project.			

## The Printer's Format:

		<b>streamline solutions</b> 477 Summit Avenue Mill Valley CA 94941 T 415 . 380 9969 F 415 . 380 9685 www.printstream.com		<b>Proposal</b>	
		<b>Diego Esparza</b> Nelsen, Esparza and Fomey 5331 W. Dodge Road LINCOLN, NE 68524 Tel: 402-555-1212, Fax: 402-555-1213		<b>Proposal # 1476.99</b>  November 25, 2009	
We thank you for giving us the opportunity to quote on your printing requirements. We look forward to working with you on this project.					
<b>Description Job Cost Recording</b>					
<b>Content</b>					
<b>Finished Size</b> 8 1/2 x 11					
<b>Preparation of Copy</b> Print - Output Film, <del>Dylux</del> Proof					
<b>Description of Proof</b>					
<b>Paper Stocks</b> 2 Pgs. - Husky Offset 50#, White					
<b>Ink Colors</b> Print - Printed 4 color(s) throughout.					
<b>Finishing</b> Print - Trim, Fold					
<b>Pack &amp; Ship</b>					
<b>Payment Terms</b> Net 30 days.					
These prices do not include sales tax and are subject to revision on receipt of final artwork or copy.					
<b>15,000</b>					
<b>\$5,260.80</b>					
<b>\$232.86(AddM)</b>					
Should you require any assistance, please contact myself or feel free to discuss any details with our estimating team if I'm unavailable.		<b>Yours Sincerely,</b>  <b>Andrea Cox</b> <b>Manager</b>		<b>Acceptance of Proposal</b> Please proceed with the production of the above work for the quantity indicated. I understand that pricing will be confirmed on receipt of final art & <del>authors</del> corrections will be additional.	
		Customer Signature _____		Date _____ P/O # _____	
□					

## Itemized Quote Letter - Optional Sales Rep info and Customer Acceptance

Added options in the Itemized Quote Letter generation to include or not include the Sales Rep info and Customer's Acceptance part.

When check boxes are cleared:

Sign Off	Salesrep <input type="checkbox"/>	Customer's 'Accepted' part <input type="checkbox"/>
----------	-----------------------------------	---

Quote letter will just generate with sales rep name and title

<b>Gabrielle Allen</b>	
<i>Account Manager</i>	

If check box for the Sales Rep info is selected, the info will be pulled from the Master Files Customer Sales Rep set up where Sales Rep Contact Info is Active.

Number:	<input type="text" value="6"/>
Name:	<input type="text" value="Gabrielle Allen"/>
Title:	<input type="text" value="CSR"/>
Territory:	<input type="text"/>
Type	
Sales reps <input checked="" type="checkbox"/>	Estimator <input checked="" type="checkbox"/> CSR <input checked="" type="checkbox"/>
Manager <input type="checkbox"/>	Planner <input type="checkbox"/>
* Can select only up to three types.	
Active <input checked="" type="checkbox"/>	
Sales Rep Contact Info — Cont Info Active? <input checked="" type="checkbox"/>	
Phone #:	<input type="text" value="415-222-1515"/>
Fax #:	<input type="text" value="415-222-1516"/>
Email ID:	<input type="text" value="gabby@printstream.com"/>



In addition, if the **Customer's 'Accepted' part** is selected:

Sign Off	Salesrep <input checked="" type="checkbox"/>	Customer's 'Accepted' part <input checked="" type="checkbox"/>
----------	--	--

Then we will be displaying the customer acceptance section.

<b>Gabrielle Allen</b> <i>Account Manager/CSR</i> <i>Phone: 415-222-1515</i> <i>Fax: 415-222-1516</i> <i>Email: gabby@printstream.com</i>	Accepted :  Leah's Account ('CLIENT')  By _____  Name _____  Title _____  Date _____
---	--

## Preliminary Work Ticket

The Preliminary Work Ticket can be printed before the quote becomes a job and has in large red font the word 'Preliminary' to enable immediate recognition that this is not the regular work ticket.


<ul style="list-style-type: none"> <li>Buyouts</li> <li>Final Pricing</li> <li>Pricing Summary</li> <li>Quote Breakdown</li> <li>Quote Status</li> <li>Quote Letter</li> <li><b>Preliminary Mail Work Ticket</b></li> <li>Order Entry</li> </ul>	Streamline Solutions <b>PRELIMINARY</b> WORK TICKET PRODUCTION COPY QUOTE: 1476.99	
	Customer: NELS Nelsen, Esparza and Fomey 5331 W. Dodge Road LINCOLN, NE 68524 Contact: PRELIMINARY Phone: PRELIMINARY Fax: PRELIMINARY PRELIMINARY Overs To: PRELIMINARY PRELIMINARY LINCOLN, NE 68524 Attention: PRELIMINARY PRELIMINARY Bill To: PRELIMINARY PRELIMINARY LINCOLN, NE 68524 Attention: PRELIMINARY PRELIMINARY	Quantity: 15,000 Job Cost Recording Job Cost Recording PRELIMINARY

## Preliminary Combined WO WT

The Preliminary Combined WO WT can be printed before the quote becomes a job and has in large red font the word 'Preliminary' to enable immediate recognition that this is not the regular work ticket.

<div>  100% </div>								
<b>PRELIMINARY</b> Page 1 of 4								
Previous Job #		Customer	Alaska Inc.		Revision			
Exact Repeat			7200# S. 900 E.		Printed	1/9/2012 10:13:27 AM		
Quote #	1576		Suite B		1st Mail	12/30/1899		
Quote Amount			PROVO, UT 84601		Last Mail			
Custom PO #		Contact	Sally Samster		Part Number			
Overs/Unders	0% Over / 0% Under	Phone #	801 571 0877	801 572 1541	Order Date	Repeat		
Sales person		CSR		Estimator		Planner		
Chris Kinkaid		Kathy DiPaolo						
Job Title	K UDF							
Job Details								
<b>Job Summary</b>								
<b>Components</b>								
No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment/Insert Notes
1	Thing 1		1,000	Printed	8.5 x 11	8.5 x 11		
2 forms x 2 pgs, 1up Sheetwise, 1/1, ltek, Final Tim								
2	Thing 2		1,000	Printed	8.5 x 11	8.5 x 11		
1 forms x 16 pgs, 1up Sheetwise, 2/2, 240 Heidelberg, MBO Fold, 3-Hole Drill Sgs								
3	Thing 3		1,000	Printed	8.5 x 11	8.5 x 11		
1 forms x 2 pgs, 1up One side, 1/0, Xeikon								

## Open or Copy an Existing Quote

To Open an existing quote, select the **Open Existing Estimate** icon  (1st icon on the **Open existing quote** screen OR select **File > Open Quote** OR **File > Open Recent Quotes**. Select **Mail Jobs** from the drop-down menu (upper left corner of screen) or **Print and Mail Jobs** from the drop-down menu for Print and Mail jobs.



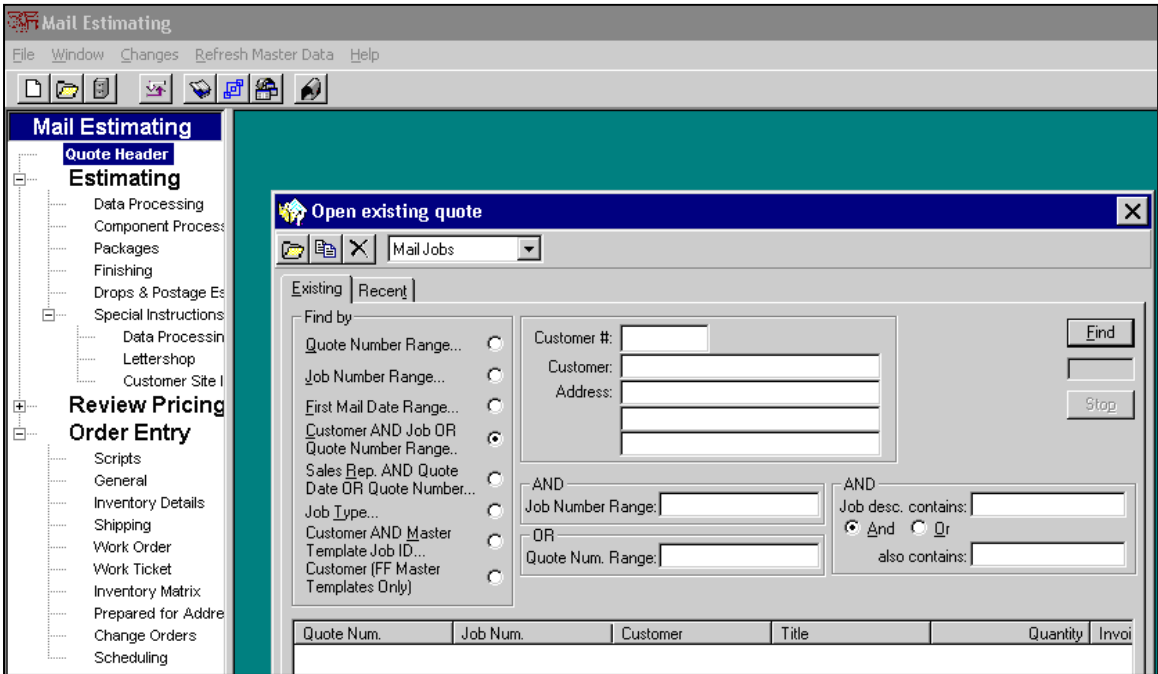
Select the **Recent** tab for a list of recent quotes; OR select the **Existing** tab and choose from the various search options, then select **Find**. Quotes/Jobs will appear at the bottom of the screen.

### Quote/Job Search Options:

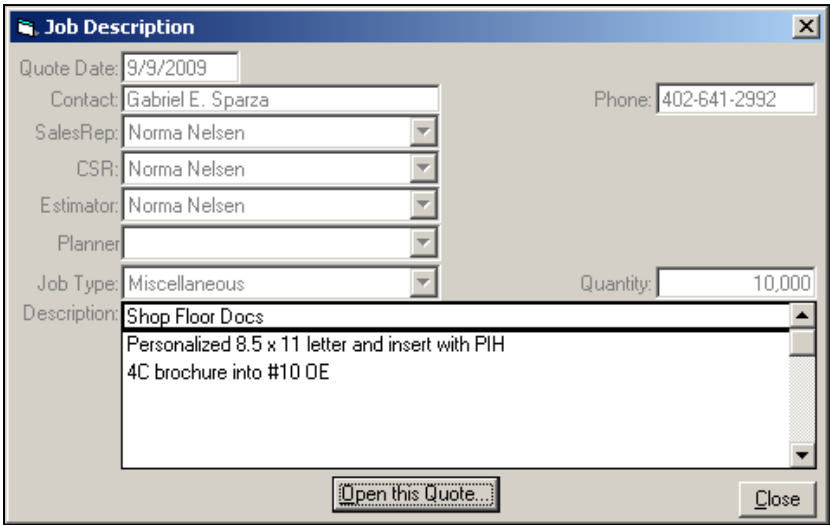
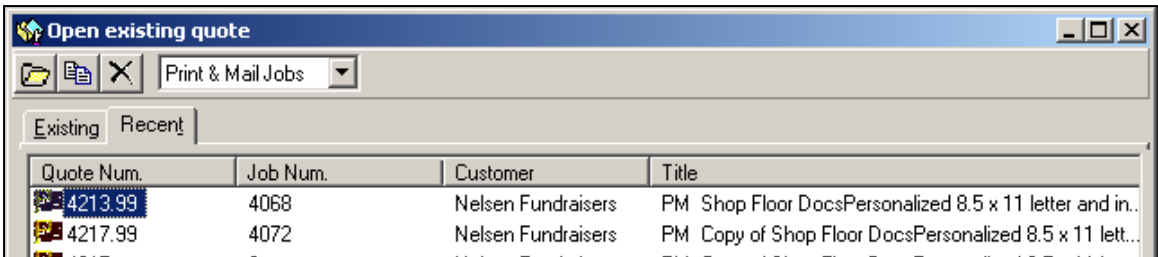
1. Quote Number Range – enter a single or range of quote numbers. Entering quote number followed by 'plus sign' will give all quotes greater than or equal to that quote number.
2. Job Number Range – enter a single or range of job numbers. Entering job number followed by 'plus sign' will give all jobs greater than or equal to that job number.
3. First Mail Date Range – enter a single or range of mail dates.
4. Customer AND Job OR Quote Number Range – enter customer number or name. Also can search using Job Number Range or Quote Number Range.
5. Sales Rep AND Quote Date OR Quote Number – select Sales Rep from drop-down list. Also can search using Quote Date Range or Quote Number Range.
6. Job Type – select Job Type drop-down list. Also can search using Quote Number Range.
7. Customer AND Master Template Job ID – enter customer number or name. Also can search using Master Job ID. Can also select to load all jobs for this master job.
8. Customer (FF Master Templates Only) – enter customer number or name. Also can select Master Type.

**Note** All of the above search options also provide the ability to enter a partial Job Description to narrow the search.

To **Open**, double-click the quote number.



To see the full description of an existing quote or job, click the quote and then right-click. A 'Job Description' window will display the quote date, contact, sales rep, CSR, estimator, planner, job type and full job description.



To **Copy**, click (or highlight) the Quote Number and select the **Copy Quote** icon (2nd icon on the Open existing quote screen). The user now has the option to change quantities and copy to the same customer or a new customer. Other options include:

Original Customer: ALASKA Alaska Inc. Cust. Price List: Std. Price List: ☒

Copy to New Customer ☒

Pricelist Used for an Original Quote :Alaska Price List 8/5/2009

Customer #: 01: Streamline \$

Customer:

Contact:  Contact Phone:

Address:

SalesRep:

Adjust all packages by (+/- %):

Package Number	Package Name	Original Quantity	New Quantity
1	Default Package	1,000	1,000

Qty 1: 1,000  Qty 4:

Qty 2: 2,000  Qty 5:

Qty 3: 5,000  Qty 6:

Clear Rate Locks ☐

Copy General Notes ☐

Copy Scripts ☐

Copy Quote Letter Notes ☐

Copy Estimator Notes ☐

Copy Drops ☐

Copy Postage Estimate ☐

Retain Overrides ☒

Retain Print Markups ☒

Copy to Version ☐

Copy Vendors for Buyout Processes ☒

Copy Vendor's bids pricing ☒

Copy Multiple FG inventory Items generated by Quote ☐

Cancel Copy

**Clear Rate Locks:** clears any pricing over-rides that were changed and locked in the final pricing screen.

**Copy General Notes:** copies notes entered in the 3-Special Instructions screens.

**Copy Scripts:** copies all script answers.

**Copy Quote Letter Notes:** copies all quote letter notes entered for each process (prints on quote letter.)

**Copy Estimator Notes:** copies estimator notes entered in the **est. notes** icon (quote header screen).

**Copy Drops and Estimated Postage:** copies all drops and, if checked estimated postage for those drops.

**Retain Overrides:** retains estimated/job quantities that were changed/overridden for a process; and retains run speeds for those processes if changed/overridden and locked in the quote being copied.

**Retain Print Markups:** retains Print Markups from previous quote.

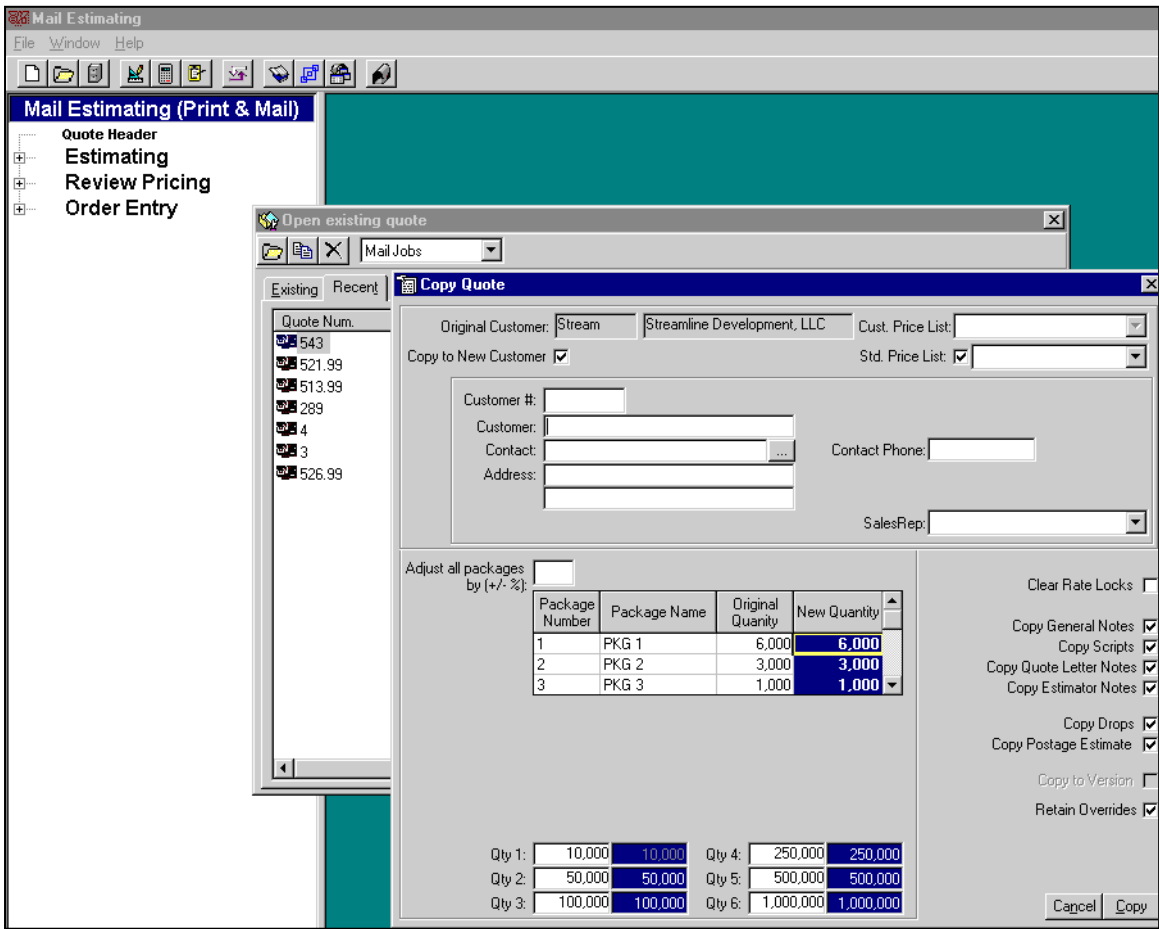
**Copy to Version:** creates a relationship between the original quote number (2001) and the copied version (.01). Example: 2001.01, 2001.02...

**Copy Vendors for Buyout Processes:** retains Vendors for Buyout Processes from previous quote.

**Copy Vendor's Bids Pricing:** retains Vendor's Bids Pricing from previous quote.

Once the quote is copied, select the **Recent** tab. Your copied quote will appear at the top of the screen with the Job Title changed to **Copy of...** (See quote 367 below: 'Copy of #10 Print and Mail'). To open the copied quote, double-click the quote number. The Title of the Quote can be changed in the Quote Header screen.

**Note** If you **copy a quote** with 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.

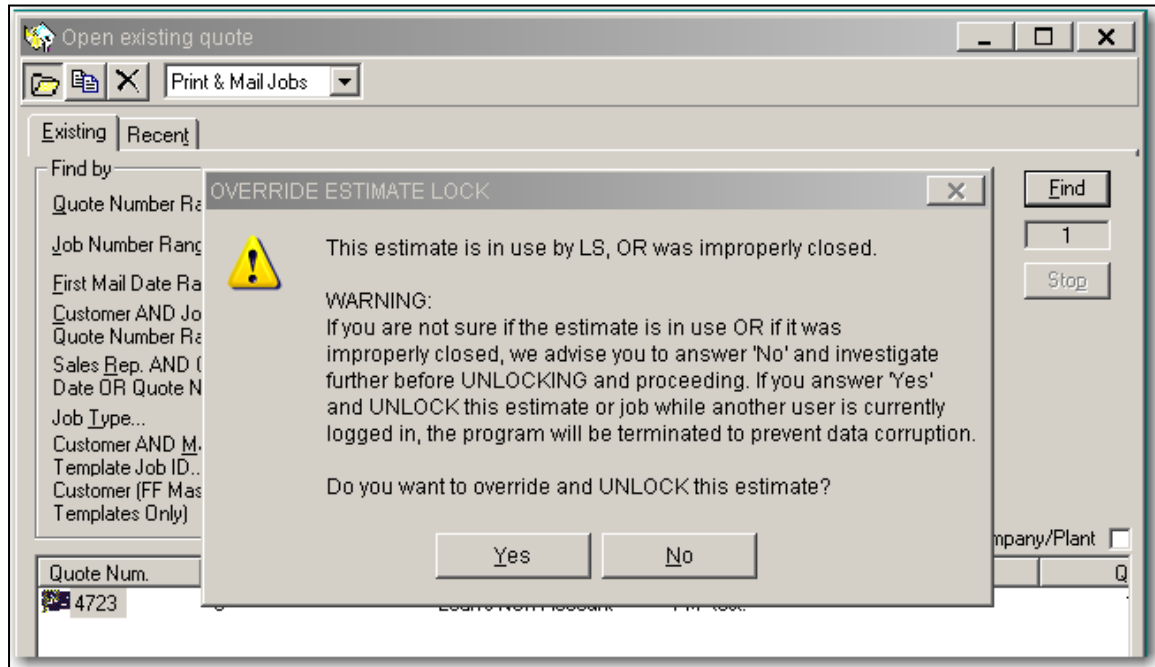


## Open Quote/Job Locked by Other User

Changes made to if a user tries to open a quote/job that has a lock on it, we give the option to open the quote/job as a View Only or open with Full Access. If the user wants the Full Access, we record in our table that the user did the override for reference.

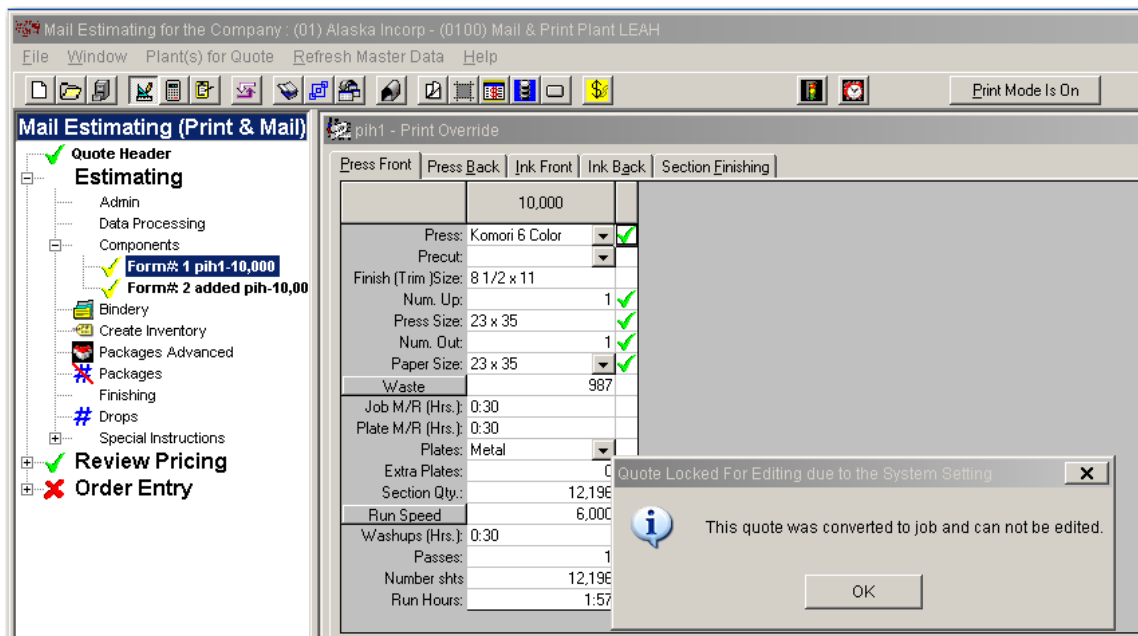
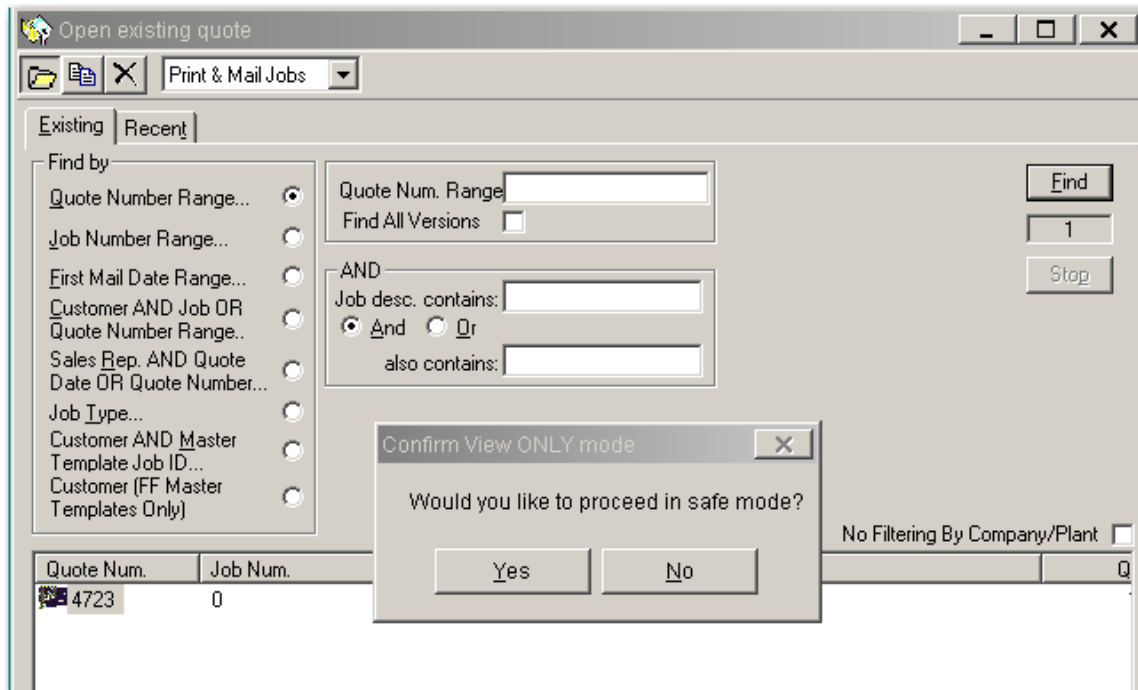
Someone has the quote/job open. Someone else tries to open it – you get the message that ‘This estimate is in use by LEAH, OR was improperly closed.’

If you click No to ‘Do you want to override and UNLOCK this estimate?’, it will just take you back to the search screen.



If you click **Yes** to 'Do you want to override and UNLOCK this estimate?', you will then be asked to proceed in safe mode?

If yes, the quote will be opened but locked from editing. If you close the estimate, this unlocks it though. You will not be prompted that another user is in the quote/job. The idea behind the message is that we provide the name of the user that has it opened or last opened – so you should check with the user to verify.





If you click no to open in safe mode, then quote/job will be opened and user will have full access to make changes. Answering No for safe mode should be done if you have verified that the name provided as the user that has it opened or last opened, does not have it open any longer.

Mail Estimating for the Company: (01) Alaska InCorp - (0100) Mail & Print Plant LEAH - [Form#: 1 pih1-10,000]

File Window Refresh Master Data Help

Print Mode Is Off

### Mail Estimating (Print & Mail)

- Quote Header
- Estimating
  - Admin
  - Data Processing
  - Components
    - Form#: 1 pih1-10,000
    - Form#: 2 added pih-10,00
  - Bindery
  - Create Inventory
  - Packages Advanced
  - Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
- Order Entry

Description: pih1 Versions: 1 ... Source: Printed InHouse

Date on Hand: Quantity before Overs: 10,000

Item & From: List... New... Waste: 0

Inventory: Total Quantity: 10,000

Inv. Description: Additional Info

Overs to: Form # 1

Insert Notes: Finish Trim Size 8 1/2x11

Comments: Flat Size 8 1/2x11

WIP: Caliber 00.0080

Item & To: List... New... Pc Weight 0.000

Inventory: Bundle Qty 0

Inv. Description: Num Of Pages 0

Num Of Sheets 0

Verified

Qty Locked

Notes... Notes... Delete Component Copy Component Save Cancel

Process Description	Quantity	Qty Lock	Quoted Price	All Pkgs
Printing				
Laser				
Inkjet				

## Order Entry

### Order Entry – Create a Job from the Quote

Once an Estimate (quote) is approved, simply find and open the original estimate (see previous page: “Finding / Searching for Existing Quote or Job”).

You cannot convert an Estimate to a Job if a red **X** remains next to a Heading (e.g., Credit Status), a Component, etc. (Need to clear from red **X** to green ‘check’).

Select the **Convert to/Update Job** icon located next to the calculator icon in the tool bar.

1. Select job quantity (if you estimated more than 1-qty.)
2. Option to enter your own Job # or leave blank and the system will automatically assign a job #.
3. Enter First Mail Date
4. Enter Last Mail Date (if only 1-drop enter the first mail date in this field)
5. Optional Priority field
6. Optional Re-Order Date field
7. Select or clear the optional **Reserve Postage** check box.
8. Option to view **O.E. Notes** if button is flashing red.
9. **P/O #** field through **Film File Number** field are all optional.
10. Answer all mandatory questions along right side of screen (‘New Job’ though ‘Overs’)
11. **Save**.

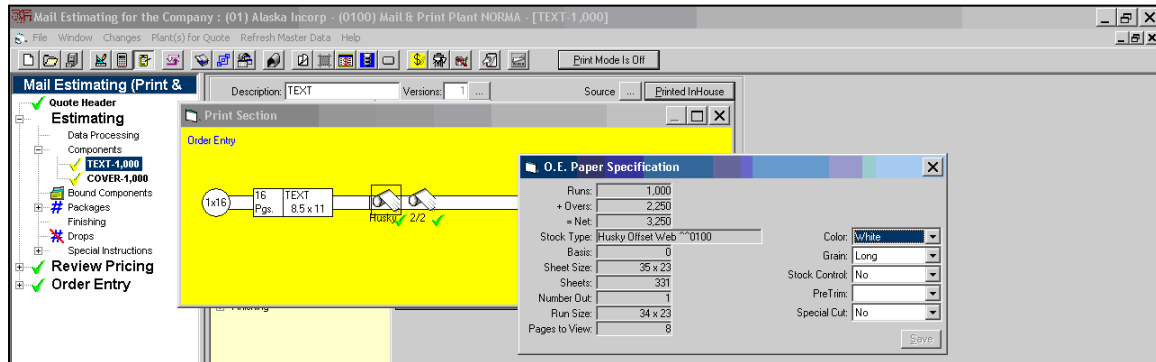
**Note** A plus sign [+] next to a heading (e.g., **Estimating**, DP, Components, Packages, Drops, **Review Pricing**, **Order Entry**, etc.) means there is information under that heading. A minus sign [-] means all information under the heading is currently displayed.

A red **X** or a red \ next to a 'Mail Estimating Tree/Heading' means there is information missing, not answered or incomplete.

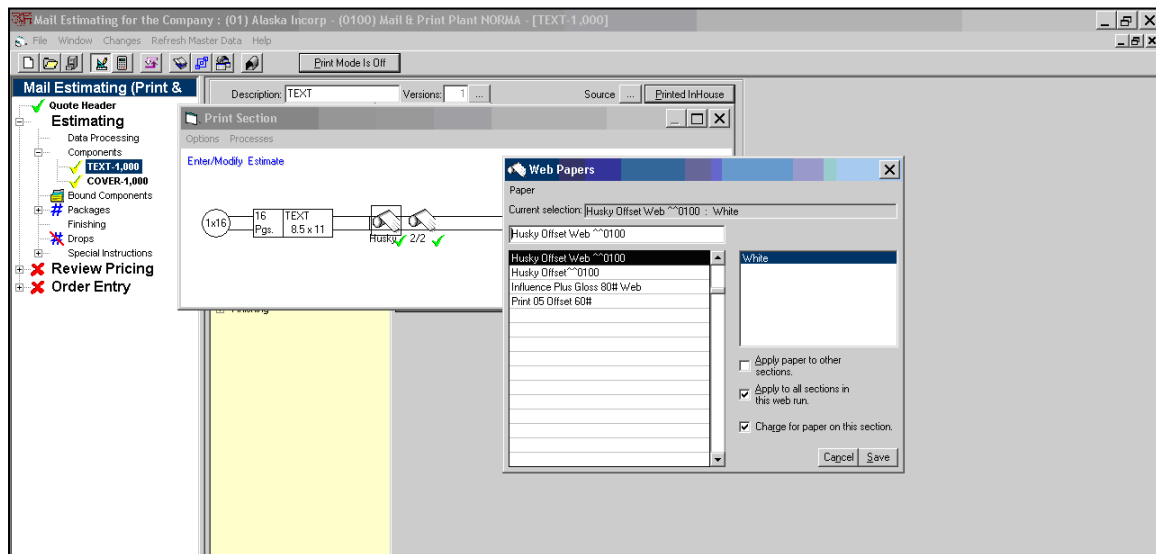
A green 'check' next to a 'Mail Estimating Tree/Heading' means all information is complete.

## Order Entry – Print: Paper Specifications and Edit Mode

To review paper specs, highlight the print component. Select the **Convert to/Update Job** icon (circled far left) to put the component in the **Order Entry** mode, and with the **Print Mode Off** (circled in center), select the **Printed in House** button (circled on right). Double-click the **Paper** icon (shown in a square in the example below). Review and make changes to color, grain, etc., in boxes to the right of the Paper Specification screen. **Save**.



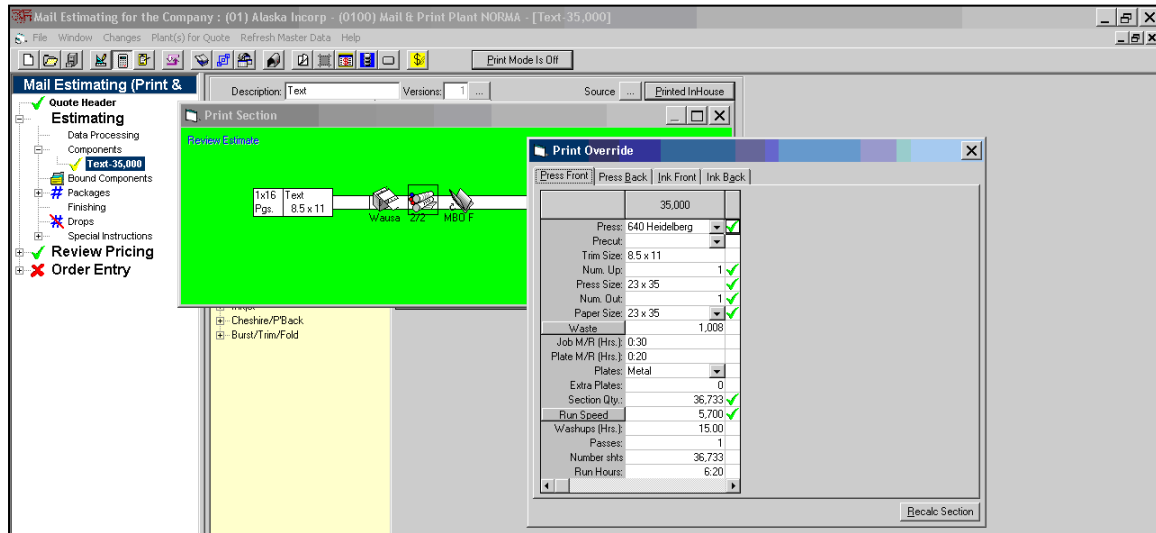
To change Stock Type, select the **edit mode** icon (circled below far left) and with the **Print Mode Off** (circled in center), select the **Printed Inhouse** button (circled on right). Double-click the **Paper** icon (shown in a square in the example below). Select the choice of paper for this component. **Save**.



When finished select the **Calculate Prices** icon (calculator button) which enables the system to re-calculate the estimate with the current changes.

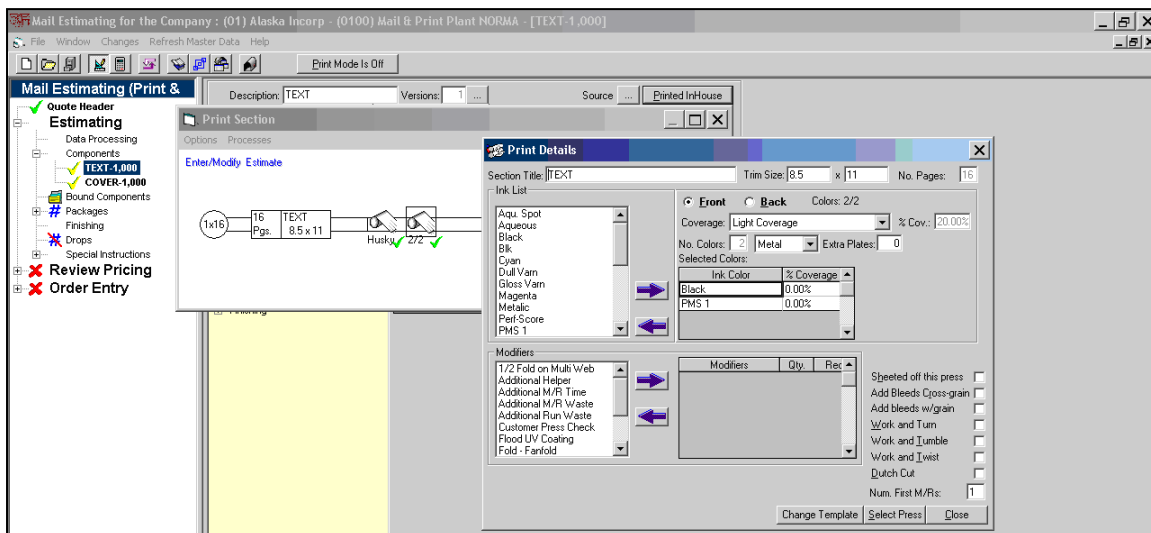
## Order Entry – Print: Review Estimate / Edit Mode

To Override or to View Press specs, highlight the print component. Select the **Calculate Prices** icon (circled – far left) and with the **Print Mode Off** (circled in center), click the **Printed Inhouse** button (circled on right). Select the **Press** icon (shown in a square in example below). Make the changes to the press front, press back, ink front and ink back. Click the **Recalc Section** button at the bottom right of the Print Override screen.



## Order Entry – Print: Enter Ink Colors or Change Press Details

To enter ink color(s), ink %, etc., highlight the component, select the **Edit Mode** button to Enter/Modify Estimate and with the **Print Mode Off**, select the **Printed in House** button. Double-click the **Press** icon. Enter the Actual Ink(s) for Side 1 and/or Side 2. This information will appear on the Print Work Ticket.



Once information is entered the red **X** next to **Actual Ink** changes to a green 'check.'

Two methods to **Change Press Details**:

1. Select the **edit mode** icon (circled far left above) and with the **Print Mode Off** (circled center in example above), select the **Printed in House** button (circled on right in example above). Double-click the **Press** icon (shown in the square in example above) and click the **Select Press** button in the lower right corner of the **Print Details** screen. When finished, close out of the press screen and select the **Calculate Prices** icon ("calculator" located next to the **edit mode** button above) to re-calculate the estimate with the current changes.
2. To Override or to View Press specs, select the **Calculate Prices** icon ("calculator"). Enter changes and select 're-calculate section.' (See Order Entry: Review Estimate / Edit Mode).

## Order Entry – Activate Print Mode (Option) - Specs

Estimators have a second option to select all print component specs from a different screen, without the need to double-click each individual icon as in the **Printed in House** option written in previous pages of this document.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS

Print Mode Is On

Mail Estimating (Print)

Quote Header

Estimating

Data Processing

Components

Thing 1-1,000

Thing 2-1,000

Thing 3-1,000

Thing 4-1,000

Thing 5-1,000

New Component-1

Bindery

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Thing 1

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Section Title: Thing 1

Template: 02pg 8.5x11 Xup

No. Runs: 2 Bound as 1 sigs.

Finish(Trim)Size: 8.5 x 11

Flat Size: 8.5 x 11

Number Of Pages: 0

Number Of Sheets: 0

Form Number: 1

	1,000	2,000	5,000
Section Qty.:	1000	2000	5000

☐ Lock Quantity

☐ This is a Combo Run (Ganged)

1576 Alaska Inc. 01/0100 - K UDF 0 1,000

- While in EDIT mode (triangle w/pencil icon), highlight your print component.
- Select the **Print Mode Is Off** button (last button on gray tool bar) to toggle it to become 'Print Mode Is On.'
- Re-select the component name from the tree structure on the left (e.g., Form).
- A screen with the following 7-tabs will display: Header, PrePress, Paper, Modifiers, Ink, Select Press, Section Finishing. Select each tab and enter your specs.
- To turn OFF this Print mode and return to the default Mail Component screen (the one with the **Printed in House** button) select the **Print Mode Is On** button (last button on gray tool bar) to toggle it to become **Print Mode Is On**.

## Order Entry – Paper Reservation Feature

Paper Reservations are activated by selecting the **Paper Reservation** button (circled on tool bar below and positioned next to the **Print Mode** button).

**Note** Point the mouse over any icon and the icon description will display with an ivory colored background.

The gray line in the following example represents the paper selected on the order. The inventory paper is listed on the line underneath it in green.

The search engine has been updated to include more search options.

The **Order** column, if checked will display under the “Need to Order” selection found in the ‘Scheduled Purchasing’ module tasks screen and can be directly ordered from that screen. See Scheduled Purchasing release notes or contact EFI PrintStream Support for more details on this feature.

Reservation				Sheeting Information				
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Order Qty Reserved	Inv. Code
DE 6x9	Env 24# Non-Window	6 x 9	6 x 9	White	253.075 shts	1,754 lbs.		
	Env 24# Non-Window		3 7/8 x 8 5/8	White			253.075	153

Materials and Outside work								
Icon	Qty	Details	Size	Part	Vendor	PO #	DelyDt	Recvd
	1	PROGRAMMING (Buyout)		Prep		0		
	250000	BRE ABC CD. PERMIT #122		Receive<BRC 4x6		0	12/15/2004	2/12/1999

**Search Inventory**

Inv Type: Paper

Classification:

Category:

Sub Category:

Product Type:

Job:

Item:

Customer:

Vendor:

Inv Desc Like:

Inv Code Like:

Color: Load

Weight:      Size:      x

☐ Below Min Qty    ☐ Inactive    ☐ Allow Rev  
☐ Negative Avail    ☐ Tracking Lot

Group/Family/Category:      Clear All   Stop

Item #	Inv Code	Rev	Details	On Hand	On Order	Allocated	Available	Min Lvl	Customer	Customer
153	153		Env 24# Non-Window White 3	1	27534	40525	-12990	0		
165	165		Centura Gloss Bk 100# White	65	2500	900000	-897435	0		
166	166		Centura Gloss Bk 100# White	0	0	0	0	0		
167	167		Centura Gloss Bk 100# White	0	0	0	0	0		
27	HUS5023x35		Husky Offset 50# White 23 x 3	90000	61001	0	151001	0		
275	275		Centura Gloss Bk 100# White	9000	0	0	9000	0		

## Order Entry – Paper 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.

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.

Paper/Material Reservation For Job 1309 For Job 1309

File

Reservation

Sheeting Information

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042 shs	936 lbs.							
	Husky Offset 50# SF		23 x 35	White					11,042	27			

Materials and Outside work

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvd	Rcvd Qty
------	-----	---------	------	------	--------	-----------	------	----------	-------	----------

Reservation

Purchasing

Select Inventory Paper for Thing

Item #:

Inv. Code:

Description:

Paper:

Color:

Size:

On Hand:

On Order:

Commit:

Avail:

Select

Clear

Color Legend

☐ - Inventory Paper Doesn't Exist

☒ - Inventory Paper Exists

☐ - Inventory Paper Reserved

☐ - Inventory Non-Paper

☐ - Inventory Non-Paper Reserved

Cancel

Reserve



## Order Entry – Paper Reservation Section

When you click 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.

**Paper/Material Reservation For Job 1309 For Job 1309**

Reservation										Sheeting Information				
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer	
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042 shts	936 lbs.								
	Husky Offset 50# SF		23 x 35	White					11,042 27					

Materials and Outside work									
Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Rcvd Qty

### Reservation

Select Inventory Paper for Thing:

Item #: 27

Inv. Code: HUS5023x35

Description: Husky Offset 50H SF

Paper: Husky Offset 50H SF

Color: White      Size: 23 x 35

On Hand: 1,753,263      On Order: 112,411

Commit: 631,152      Avail: 1,234,522

Select

Clear

### Purchasing

Color Legend:

- Inventory Paper Doesn't Exist
- Inventory Paper Exists
- Inventory Paper Reserved
- Inventory Non-Paper
- Inventory Non-Paper Reserved

Cancel Reserve

## Order Entry – Reserve Paper

For each inventoried paper you will see the quantity available, you can reserve the paper even if you do not have enough paper in inventory. The reservation will go negative and the item 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 quantity to reserve listed, is the quantity that you want to actually reserve. If you want to change the quantity to reserve, click the column **Qty to Reserve**, and change the quantity that you want reserved. 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/Material Reservation For Job 1309 For Job 1309

File

Reservation

Sheeting Information

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PD	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042 shts	936 lbs.			11,042 27				

Materials and Outside work

Icon	Qty	Details	Size	Part	Vendor	Create PD	PD #	Sched Dt	Recvd	Rcvd Qty
------	-----	---------	------	------	--------	-----------	------	----------	-------	----------

Reservation

Purchasing

Select Inventory Paper for Thing

Item #: 27

Inv. Code: HUS5023x35

Description: Husky Offset 50# SF

Paper: Husky Offset 50# SF

Color: White

Size: 23 x 35

On Hand: 1,753,263

On Order: 112,411

Commit: 631,152

Avail: 1,234,522

Select

Clear

Color Legend

- Inventory Paper Doesn't Exist
- Inventory Paper Exists
- Inventory Paper Reserved
- Inventory Non-Paper
- Inventory Non-Paper Reserved

Cancel

Reserve

## Order Entry – Paper Reservation Substitution

If the section paper is in inventory and you choose to reserve a different paper than the one that matches the estimated paper, you can type part of the **Inventory Code** in the **Search for** box and press the binocular icon. You will see a drop-down listing of inventory. Click the inventory code for the paper that you want to substitute for, and then press the **Select** button.

The new paper inventory item will replace the old item on the left side of the screen and at the top for the section that the inventory paper was substituted on. The Inventory code will be in bold indicating that the inventory item has been substituted. See sample screen below.

**Reservation**

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042 shs	936 lbs.							
	Husky Offset 50# SF		25 x 38	White					11,042 28				

**Materials and Outside work**

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvd	Rcvd Qty
------	-----	---------	------	------	--------	-----------	------	----------	-------	----------

**Reservation**

Select Inventory Paper for Thing

Item #: 28

Inv. Code: HUS5025x38

Description: Husky Offset 50# SF

Paper: Husky Offset 50# SF

Color: White

Size: 25 x 38

On Hand: 5,884

On Order: 7,150

Commit: 0

Avail: 13,034

Select

Clear

**Color Legend**

- Inventory Paper Doesn't Exist
- Inventory Paper Exists
- Inventory Paper Reserved
- Inventory Non-Paper
- Inventory Non-Paper Reserved

Cancel Reserve

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.

## Order Entry – 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** you will see a new line with the same paper appear underneath the original paper. Click the “Search for”, and find the paper to split the reservation and click the **Select** button. The inventory code for the split paper will appear on the new line you just added. Go to the **Qty to Reserve** column for the original and split paper and enter in the quantity to reserve for each paper then press the **Reserve** button to split the reservation between the two papers. See sample screen below.

**Paper/Material Reservation For Job 1309**

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042 shts	936 lbs.							
	Husky Offset 50# SF	23 x 35	23 x 35	White					10,000	27			
	Husky Offset 50# SF	25 x 38	25 x 38	White					1,042	28			

**Materials and Outside work**

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvd	Rcvd Qty
------	-----	---------	------	------	--------	-----------	------	----------	-------	----------

**Reservation**

Select Inventory Paper for Thing

Item #: 28

Inv. Code: HUS5025x38

Description: Husky Offset 50# SF

Paper: Husky Offset 50# SF

Color: White

Size: 25 x 38

On Hand: 5,884

On Order: 7,150

Avail: 13,034

Commit: 0

**Color Legend**

- Inventory Paper Doesn't Exist
- Inventory Paper Exists
- Inventory Paper Reserved
- Inventory Non-Paper
- Inventory Non-Paper Reserved

**Buttons:** Select, Clear, Cancel, Reserve

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 **Cancel** button and the new line will be removed.

## Order Entry – Paper Reservation: Create New Paper Inventory Items

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 located to the right of the **Item #** field. You will see a screen with information needed to create the new inventory item. Click in the **Paper** field, type part of the paper description for the item that you are creating inventory for and use the up and down arrow to locate the correct item. When you locate the item make sure that the color and size listed match the color and size that is on the section you are creating the inventory for. Put in a user defined inventory code, select the activity code for paper, and click **Save**.

The screenshot shows the 'Paper/Material Reservation For Job 1309' window. It contains a table with columns: Section, Paper, Press Sheet Size, Paper Size, Color, Qty Required, Qty Required, Create PO, Order, Qty Reserved, Inv. Code, Inv. Code, Qty, and Printer. The table lists three reservations for 'Thing' with 'Husky Offset 50# SF' paper. The 'New Inventory' dialog box is open, showing the 'Paper' tab. It includes fields for Customer, Paper, Color, Size, Inventory Details, and a list of checkboxes for various options.

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Code	Qty	Printer
Thing	Husky Offset 50# SF	23 x 35	23 x 35	White	11,042	shts	936	lbs.					
	Husky Offset 50# SF	23 x 35	23 x 35	White					10,000	27			
	Husky Offset 50# SF	25 x 38	25 x 38	White					1,042	28			

**New Inventory**

Select Inventory Type: Customer, Finished Goods, **Paper**, Raw Material

Mandatory: Customer, Optional / Others, Printing Specs

Customer: [Field], Load Existing Items

Paper: [Field], Color: [Field], Size: [Field]

Inventory Details: Item #: 1866, Inventory Code: 1866, Description: [Field], Number Up: 1, UOM: [Field], new UOM Conv: [Field], Created: 9/26/2014, Expiry: [Field]

Active: ☒ One time use: ☐ Track Skids: ☐ Tracking Lot: ☐ Allow Revisions: ☐ Allow Web View: ☐ Pre Printed Paper: ☐

The inventory information for the new item will be displayed on the left side of the screen. Click the **Select** button and the section paper will display with the green background with all the inventory information attached.

Click the **Reserve** button to reserve the new inventoried paper you just created.

**Note** The available quantity will go negative indicating that the reservation occurred, but there was no existing inventory to reserve.

## Order Entry – Paper Reservation: Allow Direct Purchases

The paper reservation screen now has an additional tab that allows users to create purchase orders for material or outside purchases right from the job. The purchase order window opens when the **Create Purchase Order** check box is selected and button is clicked.

In Print and Mail Estimating/Order Entry Reservation screen, check the box to **Create Purchase Order** for the component. This job has a list purchase that needs to have a job-related purchase order created.

**Paper/Material Reservation For Job 1276**

Reservation						Sheeting Information				
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. C
New Component	Husky Offset 50#	23 x 17 1/2	23 x 35	White	19,341 shts	1,639 lbs.				
	Husky Offset 50#		23 x 35	White					19,341	27

Materials and Outside work									
Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvt
1	150,000	PURCHASE LIST		Prep		<input checked="" type="checkbox"/>	0		

**Purchasing**

PO #	Vendor	Due Date	Details	Qty / Hrs
------	--------	----------	---------	-----------

Select the Plant Code for Purchase Order:  **Create PO**

Select the Plant Code (if multi-plant) for the Purchase Order and click 'Create PO.'

**Purchasing**

PO #	Vendor	Due Date	Details	Qty / Hrs
------	--------	----------	---------	-----------

Select the Plant Code for Purchase Order: **0100** **Create PO**

The job-related PO screen will display with the details for the purchase already populated. Enter the Vendor and the Due Date.

**PO 416**

**Created for Company :**

Order #: 416      Date: 3/17/2010      Ordered By: NORMA      Ref:   
 Rev #: 0      Rev Dt:      Rev By:

Vendor: **LISTS**      Lists R Us      Currency Type: USA  
 Address: 2500 W. Douglass Drive      Ph: 402-555-8787  
 Lincoln, NE 68501      Fax:

Ship To: Streamline Solutions      Ship Via:   
 Address: 100 Smith Ranch Rd      Ship To Attention:   
 Ste 124  
 San Rafael, CA 84020

Details	Due Date	Job #	Quantity	Amount
<input checked="" type="checkbox"/> PURCHASE LIST--	3/21/2010	1276	150000	\$150.00

**Total:** \$150.00  
 (in Currency)

Click **Save**. The purchase order is created.

The purchase order displays in the **Purchases** tab in the Reservation screen.

Paper/Material Reservation For Job 1276

File

Reservation

Sheeting Information

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Co
New Component	Husky Offset 50#	23 x 17 1/2	23 x 35	White	19,341	shfts	1,639	lbs.		
	Husky Offset 50#		23 x 35	White					19,341	27

Materials and Outside work

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvt
1	150,000	PURCHASE LIST		Prep			416		

Reservation

Purchasing

PO #	Vendor	Due Date	Details	Qty / Hrs
1 416	LISTS- Lists R Us	3/21/2010	PURCHASE LIST----	150000

Select the Plant Code for Purchase Order: 0100

Create PO

The expected purchase shows in the Scheduled Tasks screen.

Scheduled Tasks

Show Task Types

☐ Issues

☐ Warehouse Rcpts

☐ Ship to Vendor

☐ Put Away tasks

☐ Fulfillment Tasks

☐ Returns/Overs

☐ Non Job warehouse Rcpts

☐ Ship to Customer

☐ Unidentified Rcpts

☐ Errors

☐ Transfers

☒ Job Related PO Rcpts

☐ Destroy / Recycle

Clear All

Select Date

☒ Last 7 Days

☐ Today

☐ Next 30 Days

☐ Yesterday

☐ Equal : Date

☐ Greater Than or Equal : 3/17/2010

☐ Tomorrow

P.O. No

Item no / Inv cd

Vendor

Job No / Desc

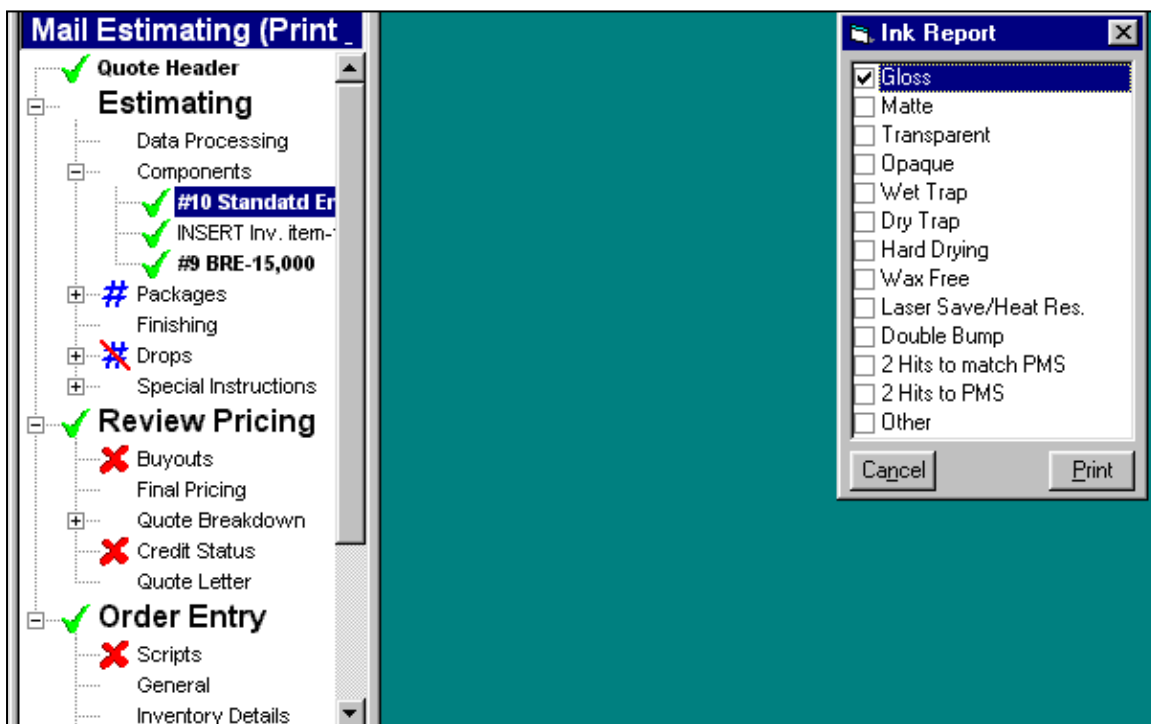
Date	Tim	Pri	JobNo	Customer	Item #	Inv cd	Rev cd	Desc	Est Qty	Act Qty	Componen	Comments
3/21/20		416	1276 - PURC	Lists R Us					150000.00	0.00		

Print Preview Set task Completed Loaded 1 Records. Search Now Select ... Close



## Order Entry – Print Ink Report

To print, select the **Printing Ink Report** icon ("a can of 'oozing' red ink: 3rd icon from the right). Select the type of ink(s) you would like to display on the report and select **Print**.



### Note Calculation for Ink Costs and Ink Pounds:

1. Take the Ink mileage from Master Files - Print > Ink screen (e.g., .25 (1/4 lb. of ink to cover 100,000 sq." solid))
2. Take the ink coverage (e.g., 25%)
3. Take the Press sheet size (e.g., 22 x 18 (for web presses: web width x cutoff)) and
4. Convert the sheet size to sq. " (e.g., = 396 sq." )
5. Multiply by the ink coverage (e.g., 25%) = 99 sq."
6. Multiply (99) by the # of impressions (e.g., 50,000) = 4,950,000 sq."
7. Divide 4,950,000 sq." by the ink mileage (100,000) = 49.5 units of 100,000 " inches
8. Take the Ink cost from Master Files - Print > Ink screen (e.g., \$10.00 per lb.)
9. Divide ink cost by the mileage (e.g., .25 (1/4 lb. of ink to cover 100,000 sq." solid)) = \$2.50 per 100,000 sq. inches
10. Multiply \$2.50 by 49.5 units = \$123.75 ink costs
11. If an ink has a minimum charge it will add that cost to the front side ink)
 

Ink Lbs. = ink units (49.5) multiplied by ink mileage (e.g., .25 (1/4 lb. of ink to cover 100,000 sq. "solid)) = 12.375 lbs.

## Order Entry – Print or Preview Work Ticket

To review or print a work ticket, select the **Work Order** icon in the tool bar (4th icon from the right).

Select the type of Work Ticket (Complete, Pre-Press, etc.) and **Print**.

Option to print ticket: 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** 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: 11/6/2002 2:29:30PM Page 1 of 2

**Job#: 165 WORK ORDER Rev. 2 Due: 10/25/2002**

Client: PRINTSTREAM Quote#: 236.99  
 Ac. No: PRINT P/O #:   
 Address: 65 MITCHELL BLVD. P.M.:   
 FIRST FLOOR  
 SAN RAFAEL, CA, 91107  
 Contact: Kathy DiPaolo Finished Size: 0 x 0  
 Phone: Fax:   
 Quantity: 100,000 of 2002 Release

Job Description	Estimator Notes	Other Notes
Order Date	CSR	Salary Rep
10/25/2002	Site Smith	Mz. Sales Rep

Activity	Time	Activity	Time	Activity	Time	Activity	Time
Proofing	0.27						
240 Heidelberg	13.77						
640 Heidelberg	16.38						
Chiller	9.62						
Sub Total	39.84						

**Pre - Press**

Section	Process	Category	Quantity	Est. Code
FORM	Dylux Proof	16 x 21	1	

**Papers**

Section	Paper Qty	Mill Size	Weight	Paper Type	Color	Out	Cut To	Vendor	Rate	Code #
FORM	53,133	20 x 26	80.00	Springhill C-15	White	1	20 x 26	D PHO USE	115.00/1000	sheet

**Ink Colors**

Section	Side	Ink Colors
FORM	Front	Proc Black, Proc Cyan, Proc Mag, Proc Yellow, PMS 1
	Back	Black

**Press**

Section	Side	Run	Up	Method	Press	Plate	Run Qty	Run Rate	Run Out
FORM (run # 53)	Front	1	2	SWW	640 Heidelberg	5 Metal	53,133	2,220	50,913

Platemaking Bar Code:

Printing Bar Code:

## Order Entry – Versions of Components and Version Notes

To select versions, click the component in the **Mail Estimating Tree**. Click the [...] **Versions** button (top/middle of screen). Enter the Number, Version and Quantity then **Save**. Click (the lower) **X** in the upper right corner of the screen to close.

To enter Version Notes click the **N** button (next to Quantity field), enter notes and **Save** or **X** to close.

**Note** Use component 'versions' when the same material (E.g., letterhead) is being lasered in two or more different languages OR is customized with different text in various parts of the letter. (E.g., Local version: 4,000; Domestic version: 10,000; International version: 1,000)

Do not use this 'version' feature if you have a different inventory item # or different processes for each version. To change qty. for a component or version, select the [...] button and enter a number, version description, quantity and **Save**.

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. On the left is a tree view with categories like 'Quote Header', 'Estimating', 'Review Pricing', and 'Order Entry'. The 'Estimating' category is expanded, showing components like 'Bus Reply Card-6,000', 'OE 6x9-9,000', 'Letter A-9,000', etc. The 'OE 6x9-9,000' component is selected. In the center, a form displays details for this component: Description: OE 6x9, Date on Hand: 12/15/2004, Item #: 320, Inventory Code: OE320, Inv. Description: OE, Overs to: Destroy, Insert Notes: FF, and Comments: Destroy after 12/25/04. To the right of this form is a 'Versions' dialog box titled 'OE 6x9 - Versions'. It contains a table with columns 'Number', 'Version', and 'Quantity'. The table lists five versions: 1 OE-CA (3,000), 2 OE-UT (2,000), 3 OE-CT (1,000), 4 OE-PA (1,500), and 5 OE-TX (1,500). Each row has an 'N' button next to the quantity. Below the table are 'Cancel' and 'Save' buttons. At the bottom of the main window, there is a table with columns: Process Description, Quantity, Lock, Based, Quoted Price, All Pkgs, and a status column. The table contains three rows: 'PRINT #9 1-COLOR- #9, 1/0, Custom Sto' (9,000, \$337.50), 'INKJET BUYOUT' (9,000, \$900.00), and 'CHESHIRE BUYOUT' (9,000, \$450.00).

Number	Version	Quantity	N
1	OE-CA	3,000	N
2	OE-UT	2,000	N
3	OE-CT	1,000	N
4	OE-PA	1,500	N
5	OE-TX	1,500	N

Process Description	Quantity	Lock	Based	Quoted Price	All Pkgs	Status
PRINT #9 1-COLOR- #9, 1/0, Custom Sto	9,000			\$337.50	N	P
INKJET BUYOUT	9,000			\$900.00	N	P
CHESHIRE BUYOUT	9,000			\$450.00	N	P

## Order Entry – Create a New Inventory Item for a Component

To create a **new** inventory item for a component, click the component name in the **Mail Estimating Tree** and click the **New** button (to the right of the **Item #** field). Enter an Inventory code, (e.g., ENV-#10REG-363) unique Description, Activity Code, Product Code and **Save** and **Quit**.

**Item #:** PrintStream system generated Item # (cannot change)

**Inventory Code:** Same as Item # (optional), simple code or identification [e.g., OE#10ENV]

**Description:** Item, size, color (How does your company, customer, vendor refer to the item?) Product number or code (printed on the item), type of job (if known)

**Activity Code:** Use default or select from the drop-down list.

**Unit of Measure:** defaults to 1000 or 1 depending on Master File setup.

**Product Code:** Use default or select from the drop-down list.

**Inv. Creation:** Date the item is created.

**Expiration:** Date the item expires (optional) for additional inventory reporting.

**Grp/Fam/Cat:** Group, Family, Category (additional inventory sorting options if needed. One time setup involved.

**One Time Use:** Only check if item will only be used once.

For reporting display purposes (e.g., Inventory Summary Report), try limiting the Inventory Code to under 15 characters and Description to under 30 characters.

**Note** We advise implementing a company policy on creating consistent and simple Inventory codes (E.g., First 3-letters of the piece, size, PrintStream's item# in ALL CAPS = ENV6x9-3630) and descriptions (First 3-letters of the piece, size, color, detail, job# if known, etc. (EXAMPLE: ENV 6x9 WHITE BLUE LOGO UPPER LEFT CORNER, JOB #2345...

When viewing reports or searching for Inventory, the item #, inventory code and the first line of the description will appear in the various screens and report printouts.

We have added a 'Number Up' field to inventory screens when creating a new inventory item, receiving, inventory import, and in the New Create WIP Inventory programming.

By default the 'Number Up' will be 1. You can change this number at any time, but note that inventory commitments may already be in place and you will need to recalculate any job that has any commitments for this item.

If this 'Number Up' quantity is changed from 1 to 4 when the item is created, in Inventory Receiving, you will see the # up defined for this item. The 'Number Up' can be changed to a different number.

Add New Line

Job #

View Items

Identified

Unidentified

Item #

Inventory Code

Revision Code

76813

Customer Inventory for Num Up

Single Piece

Save Weight

Customer Item

A customer inventory item

New Item

# UP 4

Save Number Up

this will have num up of 4

Reason codes

☐ Hold this Receipt line

Select Reasons

Tag	Code	Desc	Category
<input type="checkbox"/>	PSlip	Packing Slip	slipincorrect
<input type="checkbox"/>	IncPkg	incorrectly Pa	incorrectpkg
<input type="checkbox"/>	1010.1	1010.41	CMU

Docket : 0

Vendor Lot #:

Skids

Ctns

Pcs Per Ctn

Loose

1

0

Insert ...

Received

Ctns	Pcs/Ctn	Loose	Total Qty	Location	Pallet	Hold	Reason Cd	Reason
------	---------	-------	-----------	----------	--------	------	-----------	--------

Additionally this number can be changed in Master File Inventory Main Info screen.

76813

Customer Invento

A customer inventory item

☐ Inactive

Item # / Inv Code : 76813

Customer Inventory for Num Up

Description : A customer inventory item

this will have num up of 4

Number Up: 4

When using this inventory item on jobs, with the number up defined other than a 1, the commitment amount for the inventory item will be calculated based on that number up and quantity needed for the process it is assigned to be used on first.

<>	Process	Cost Center	Part Code	Inventory Code	Activity Code	Quantity	Est. Hours	Helper Hours	Status	P
	CUT 8.5 x 14 IN THRID	CUTTER	Common		73012	10,000	2:30		<none>	
	INKJET UP TO 6x9 ENVEL	INKJET	Common		81011	10,000	2:26		<none>	
	Issue SM->CUTTER 4 Up	CUTTER	76813			2,500			<none>	
	Receive<-SM	0	76813			2,500			<none>	
	SM Overs->???	0	76813						<none>	
	SM:CUTTER->INKJET	INKJET	76813			10,000			<none>	
	SM:INKJET->Insert	0	76813			10,000			<none>	

## Order Entry – Attach Existing Inventory Item to a Component

To select an existing inventory item for a component click the component in the **Mail Estimating Tree** and click the **List** button (to the right of the Item # field). Enter optional search fields if desired and select **Search** button. To select, double-click the item.

Optional search fields, Inv. Type, Classification, Category, Sub Category, Product Type, Job, Item, Customer, Vendor, Inv. Description Like, Inventory Code Like, (Color, Weight and Size are for Print Paper), Group, Family Category.

Optional check boxes: Below Min. Qty, Inactive, Allow Rev., Negative Available, Tracking Lot.

If an item is not on the list, option to create a new item by selecting the **blank paper** icon (next to the **binocular** icon).

Click (the lower) **X** in the upper right corner of the screen to close.

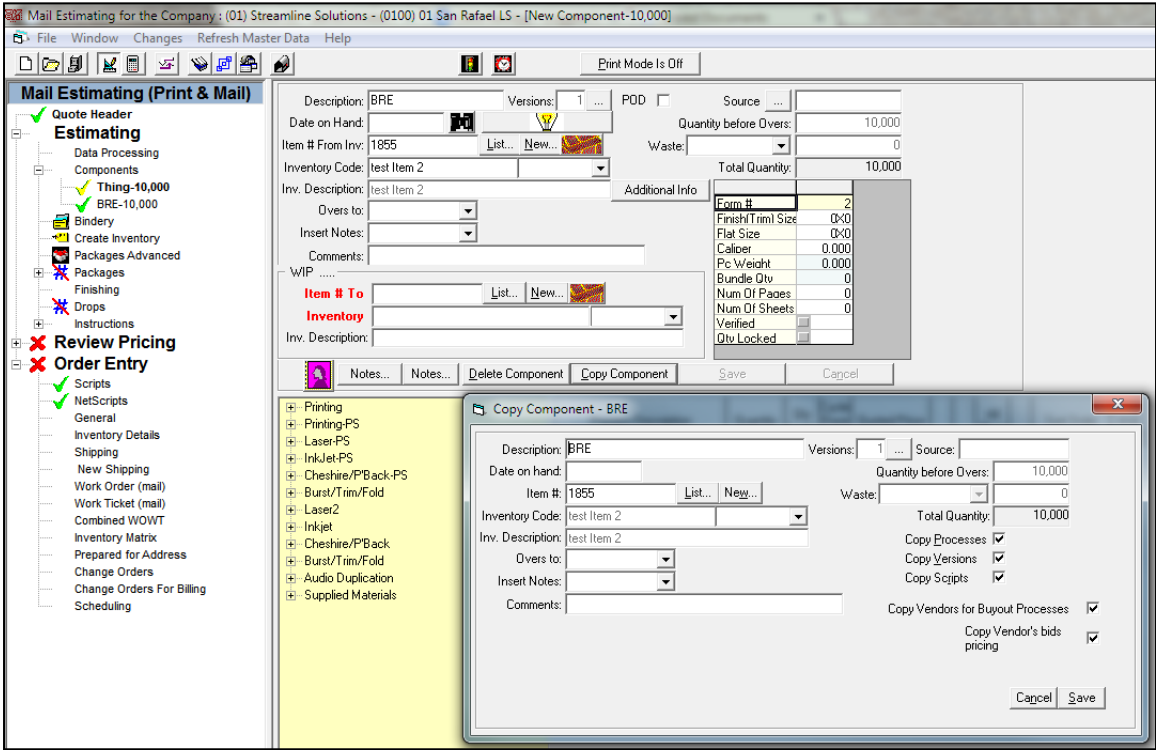
The screenshot shows the 'Mail Estimating Tree' on the left and the 'Search Inventory' dialog box in the center. The tree lists components like 'Bus Reply Card-6,000', 'DE 6x9-9,000', 'Letter A-9,000', 'Letter B-3,000', 'Letter C-1,000', 'Brochure-7,000', and 'BRE-4,000'. The 'Search Inventory' dialog box has fields for Description (BRE), Versions (1), POD, Source, Date on Hand, Item # (326), Quantity before Overs (4,000), Waste (ENVELOPE), and 400. It also has a 'List...' button and a 'New...' button. Below these are search filters for Inv Type (Customer Goods), Classification, Category, Sub Category, Product Type, Job, Item, Customer (Stream), Vendor (Streamline Development, LLC), Inv Desc Like, Inv Code Like, Color (Load), Weight, Size, and Group/Family/Category. There are checkboxes for 'Below Min Qty', 'Inactive', 'Allow Rev', 'Negative Avail', and 'Tracking Lot'. A table of inventory items is displayed, and at the bottom, it says 'Loaded 8 records.' with a 'Continue' button and a 'Search' button.

Item #	Inv Code	Rev	Details	On Hand	On Order	Allocated	Available	Min Lvl	Customer	Customer
293	NC-293		NEW COMP. INSERT	122501	0	85050	37451	0	Stream	Streamline D
300	DE-912300		DE 9x12 STD WHT WINDOW	0	0	0	0	0	Stream	Streamline D
301	DE-INV CODE		DE - Inventory Description	0	0	0	0	0	Stream	Streamline D
302	DE-2-INV COD		DE-2 INV DESCRIPTION	20000	0	110000	-90000	0	Stream	Streamline D
318	DE-318		DE6x9 CA	25500	0	44400	-18900	0	Stream	Streamline D
319	LTR-CA-319		Letter CA	0	0	20820	-20820	0	Stream	Streamline D
320	DE320		DE	55499	0	9720	45779	0	Stream	Streamline D
326	BRE-326		BRE ABC CO. PERMIT #1225	0	0	0	0	0	Stream	Streamline D

## Order Entry – Copy a Component

To copy a component, click the component in the **Mail Estimating Tree** and click the **Copy Component** button. Enter changes in the various fields and **Save**.

**Note** This feature will also copy (if selected) Processes, Versions and Scripts that are attached to the original component.





## Order Entry – Convert a Component

To convert a print in house component to a mail component, click the print component in the **Mail Estimating Tree** and click the **Source...** button and **Yes**.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left, the 'Mail Estimating Tree' is expanded to 'Components', showing a list of components: 'OE 6x9-250,000' (checked), 'Form-250,000' (unchecked), 'Insert 1-250,000' (unchecked), and 'BRC 4x6-250,000' (checked). The main window displays the details for the selected component, 'OE 6x9'. The 'Source' is set to 'Printed InHouse'. A 'Confirm Conversion' dialog box is open, asking 'Are you sure you want to convert this component to a mail component?'. The 'Yes' button is highlighted.

To convert a mail component to a print in house component, click the mail component in the **Mail Estimating Tree** and click the **Source...** button and **Yes**.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left, the 'Mail Estimating Tree' is expanded to 'Components', showing a list of components: 'OE 6x9-250,000' (checked), 'Form-250,000' (unchecked), 'Insert 1-250,000' (unchecked), and 'BRC 4x6-250,000' (checked). The main window displays the details for the selected component, 'BRC 4x6'. The 'Source' is set to 'Printed InHouse'. A 'Confirm Conversion' dialog box is open, asking 'Are you sure you want to convert this component to a print in house component?'. The 'Yes' button is highlighted.

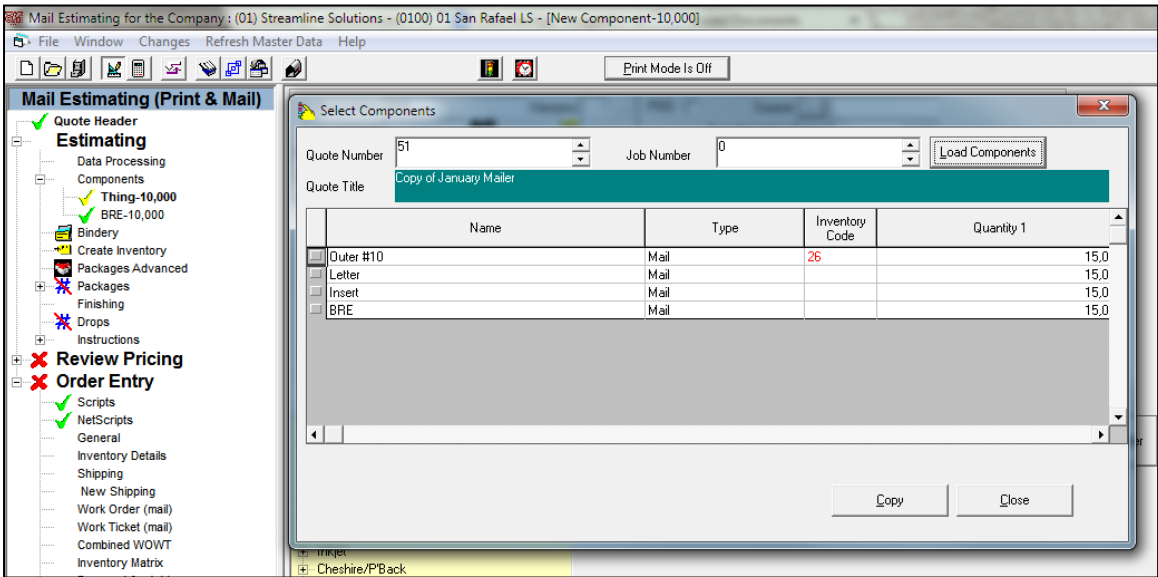
## Order Entry – Copy Components from another Quote

To copy components from another quote, click the **Copy Components from another Quote** icon (2nd icon from the right – looks like 2-spreadsheets).

Enter Quote Number and click the **Load Components** button. Click each component you need to copy (red check in gray box) and click **Copy**.

**Note** All aspects of the component are copied: Inventory item, Processes, Scripts, Versions, Notes and Waste. Copied component must be associated to the appropriate package. A component can be copied multiple times to the same job.

**Note** If you copy a component from a job that has multiple quantities, **ONLY** the first quantity is copied. If needed, the ability to edit quantities of copied components resides within versions (Mail) or sections (Print).



## Order Entry – Create Packages

To create one or more packages click **# Packages** in the **Mail Estimating Tree**. Enter the Number of the package, Description and Quantity. Click the line of each component (in inserting order) to the right of the package screen (see sample below) to assign that component to that package. This will place a number (e.g., 1, 2, 3...) next to the component and the system will automatically enter the quantity into the field. Continue to click each component in inserting order until complete.

If you need to edit quantities or inserting order, double-click in the field and enter changes. Repeat this process for each package and **Save**.

If you need to copy or delete a package, right-click the package and make the appropriate selection.

A red line through the # symbol next to 'Packages' means: there are no package(s) created, there's missing information or the package count is out of balance (see version balance field, red = qty. over, green = qty. under).

**Mail Estimating - [All Packages]**

Hide

**Mail Estimating (Print & Mail)**

Quote Header  
 Estimating  
 Data Processing  
 Components  
 # Packages  
 1: KIT A-100,000  
 2: KIT B-75,000  
 3: KIT C-25,000  
 Finishing  
 # Drops & Postage  
 Special Instructions  
 X Review Pricing  
 X Order Entry

Component	Inv. Code	Ver. Qty.	Ver. Balance	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq
<b>All Pkg. Total:</b> 200,000				Number: 1 2 3 Description: KIT A KIT B KIT C Quantity: 100,000 75,000 25,000									
Outer Envelope		200,000	0	100,000	1	75,000	1	25,000	1				
Insert ONE		125,000	0	100,000	2			25,000	2				
Insert TWO		200,000	0	100,000	3	75,000	2	25,000	3				
Insert THREE		175,000	0	100,000	4	75,000	3						
BRC		200,000	0	100,000	5	75,000	4	25,000	4				

Copy...  
Delete...

## Order Entry – View or Delete an Individual Package(s) and Create Package Notes

To view, Delete or change package quantity click the package in the **Mail Estimating Tree**. Select All Components or Package Components Only. Enter changes and/or deletions and **Save**.

Select the **Notes** button to create package notes, click **Save** and **X** to close. Package notes print on the Work Order and Work Ticket.

The screenshot displays the 'Mail Estimating' software interface. On the left is the 'Mail Estimating Tree' with a hierarchical structure. The main area shows details for 'Package: Local', including fields for 'Package Number' (1), 'Description' (Local), and 'Quantity' (5,000). Below these is a table of components. A 'Notes' window is open in the foreground, showing a text area for entering package notes and 'Cancel' and 'Save' buttons at the bottom.

**Mail Estimating Tree**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - #10 Window Envelope-25,000
    - Statement-25,000
    - BRE-25,000
    - Insert-25,000
    - Letter-25,000
  - Packages
    - 1: Local-5,000
    - 2: Domestic-15,000
    - 3: International-5,000
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
- Order Entry

**Package: Local**

Package Number: 1  
Description: Local  
Quantity: 5,000

Component	Inventory Code	Item #	Version	Version Quantity	Version Balance	Package Quantity	Seq. No.
#10 Window Env	21	21	Common	25,000	0	5,000	1
Statement	4	4	Common	25,000	0	5,000	2
BRE	5						
Insert	6						
Letter	22						

**Notes -**

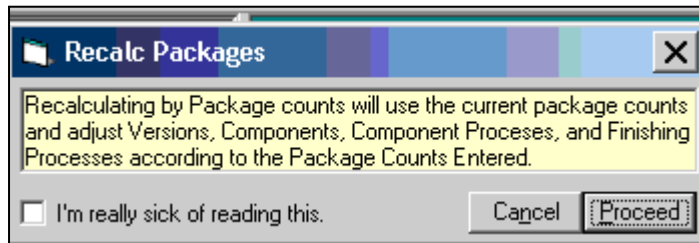
Package notes are entered in this screen.

Cancel Save

## Order Entry – Recalculating Packages (Adjust quantities based on package counts)

To change quantities based on packages, select **# Packages** in **Mail Estimating Tree**. Type in each new Quantity and **Save**.

Select the **Adjust Quantities by Package Counts** icon in the tool bar (7th icon from the left). This feature will use the current package counts and adjust Versions, Components, Component Processes and Finishing Processes according to the Package Counts Entered. Click **Proceed** to continue. Option to hide the Recalc warning by checking "I'm really sick of reading this" box.



**Note** Recalculating by package counts will not change Drop quantities; you have to manually enter quantities for both Drops and Postage. Select 'Drops/Postage' in **Mail Estimating Tree** and enter new quantities and **Save**.

A '?' mark next to a component means the component has a zero quantity. Either, enter a package qty for the component, then select the **package recalc** icon, or delete the component. You will receive an error message **Write WO Component Finishing** when trying to print a Work Order / Work Ticket if you have a component with a zero quantity.

**Mail Estimating - [All Packages]**

**Quote Header**

**Estimating**

- PreProcessing
- Components
  - Bus Reply Card-6
  - OE 6x9-23,000
  - Letter A-9,000
  - Letter B-3,000
  - Letter C-1,000
  - Brochure-7,000
  - BRE-4,000
- # Packages**
  - 1: PKG 1-7,000
  - 2: PKG 2-2,500
  - 3: PKG 3-1,500
- Finishing
- Drops
- Special Instructions
- Review Pricing**
  - Buyouts
  - Final Pricing
  - Quote Breakdown
  - Credit Status
  - Quote Letter
- Order Entry**
  - Scripts

**Recalc Packages**

Recalculating by Package counts will use the current package counts and adjust Versions, Components, Component Processes, and Finishing Processes according to the Package Counts Entered.

☐ I'm really sick of reading this.

**Cancel** **Proceed**

Number:	1	2	3
Description:	PKG 1	PKG 2	PKG 3
Quantity:	6,000	3,000	1,000
Ver. Qty.	Ver. Balance		
6,000	0	6,000	3
OE 6x9	OE 320	320	OE-CA
3,000	0	3,000	4
OE 6x9	OE 320	320	OE-UT
4,000	0	3,000	9
OE 6x9	OE 320	320	OE-CT
6,000	0	6,000	7
OE 6x9	OE 320	320	OE-PA
3,000	0	3,000	10
OE 6x9	OE 320	320	OE-TX
7,000	0	6,000	8
Letter A	LTR-CA-319	319	Common
9,000	0	6,000	5
Letter B	NC-293	293	Common
3,000	0	3,000	5
Letter C	LTR-CA-319	319	Common
1,000	0		1,000
Brochure	NC-293	293	Common
7,000	0		1,000
BRE	BRE-326	326	Common
4,000	0	3,000	7
			1,000
			7

## Order Entry – Rules for Assigning Processes to Packages

The following rules apply when assigning processes to packages.

**For Data Processing and Component Processing processes:**

When processes are added to the estimate after the package has been defined:

Mail Estimating (Print & Estimating)

Quote Header

Data Processing

Components

Assembly

**Packages**

Finishing

Drops

Special Instructions

						Quantity	Seq.	Quantity
<b>All Pkg. Total:</b>						<b>10,000</b>		
Job#		Assigning Proc	NELS	Nelsen, Espe	Description:	1		
Job Qty	10000	Mail Dates	3/31/2010		Quantity:	10,000		
Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance			
Letter			Common	10,000	0	10,000	1	
Component			Common	10,000	0	10,000	2	
OE			Common	10,000	0	10,000	3	

If the default process quantity (as defined in Master Files – Mail Process) is set to zero, the process is automatically assigned to all packages. Example: Purchase List is set to zero in Master Files Mail Processes to pull in the job quantity. Note the ‘Synchronize process quantity with quantity of all packages this process is assigned to’ is checked.

Process Description	Quantity	Qty Lock	Cycle Based	Quoted Price		All Pkgs		Sort
PURCHASE LIST	10,000	<input type="checkbox"/>	<input type="checkbox"/>	\$10.00	\$ N	<input checked="" type="checkbox"/>	P	1030
PROGRAMMING	1	<input type="checkbox"/>	<input type="checkbox"/>	\$75.00	\$ N	<input checked="" type="checkbox"/>	P	1130
OUTPUT TO TAPE/DISKETTE	10,000	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00	\$ N	<input checked="" type="checkbox"/>	P	1430

☒ Assign 'PURCHASE LIST' To Packages

☒ Synchronize process quantity with quantity of all packages this process is assigned to

Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty	Process Qty
1	Pkg 1	10,000	10,000

Total Qty of all Packages you have selected for this Process: 10,000

Total Process Qty (based on Qty you selected for each Package): 10,000

Variance Between Process Qty and Qty of Selected Packages: 0

☐ Check as Linked to Every Package

Cancel Close Save

If the default process quantity (as defined in Master Files – Mail Process) is non-zero, the process is linked to the packages with a Process Qty of zero. Example: Programming is set to one (non-zero) in Master Files Mail Processes to pull in the default quantity. Note the 'Synchronize process quantity with quantity of all packages this process is assigned to' is NOT checked.

an Rafael NORMA - [Data Processing]

Process Description	Quantity	Qty Lock	Cycle Based	Quoted Price		All Pkgs	Sort Order
PURCHASE LIST	10,000	<input type="checkbox"/>	<input type="checkbox"/>	\$10.00	\$ N	<input checked="" type="checkbox"/>	P 1030
PROGRAMMING	1	<input type="checkbox"/>	<input type="checkbox"/>	\$75.00	\$ N	<input checked="" type="checkbox"/>	P 1130
OUTPUT → TAPE/DISKETTE	10,000	<input type="checkbox"/>	<input type="checkbox"/>	\$55.00	\$ N	<input checked="" type="checkbox"/>	P 1430

☒ Assign 'PROGRAMMING' To Packages

☐ Synchronize process quantity with quantity of all packages this process is assigned to

Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty	Process Qty
1	Pkg 1	10,000	0

Total Qty of all Packages you have selected for this Process: 10,000

Total Process Qty (based on Qty you selected for each Package): 0

Variance Between Process Qty and Qty of Selected Packages: -10,000

☐ Check as Linked to Every Package

Cancel Close Save

When processes are added to the estimate before the package has been defined:

If the process is linked to all packages, the new package is linked automatically. In this example, Pkg 2 was added and gets the Purchase List process automatically assigned.

☒ Assign 'PURCHASE LIST' To Packages

☒ Synchronize process quantity with quantity of all packages this process is assigned to  

Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty		Process Qty
1	Pkg 1	10,000	<input checked="" type="checkbox"/>	10,000
2	Pkg 2	15,000	<input checked="" type="checkbox"/>	15,000

Total Qty of all Packages you have selected for this Process

25,000

Total Process Qty (based on Qty you selected for each Package)

25,000

Variance Between Process Qty and Qty of Selected Packages

0

If the process was linked to selected packages, the new package is not linked. In this example, Pkg 2 was unlinked.

☒ Assign 'PURCHASE LIST' To Packages

☒ Synchronize process quantity with quantity of all packages this process is assigned to  

Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty		Process Qty
1	Pkg 1	10,000	<input checked="" type="checkbox"/>	10,000
2	Pkg 2	15,000	<input type="checkbox"/>	0

Total Qty of all Packages you have selected for this Process

10,000

Total Process Qty (based on Qty you selected for each Package)

10,000

Variance Between Process Qty and Qty of Selected Packages

0

☐ Check as Linked to Every Package

Cancel

Close

Save



Added Pkg 3. Because Pkg 2 was unlinked before Pkg 3 was added, the process will not be linked to the added package(s).

☒ Assign 'PURCHASE LIST' To Packages

☒ Synchronize process quantity with quantity of all packages this process is assigned to

☐ Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty		Process Qty
1	Pkg 1	10,000	<input checked="" type="checkbox"/>	10,000
2	Pkg 2	15,000	<input type="checkbox"/>	0
3	Pkg 3	5,000	<input type="checkbox"/>	0

Total Qty of all Packages you have selected for this Process: 10,000

Total Process Qty (based on Qty you selected for each Package): 10,000

Variance Between Process Qty and Qty of Selected Packages: 0

☐ Check as Linked to Every Package

Cancel Close Save

If the default process quantity (as defined in Master Files – Mail Process) is non-zero, the process is linked to the packages with a Process Qty of zero.

☒ Assign 'PROGRAMMING' To Packages

☐ Synchronize process quantity with quantity of all packages this process is assigned to

☐ Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty		Process Qty
1	Pkg 1	10,000	<input checked="" type="checkbox"/>	0
2	Pkg 2	15,000	<input checked="" type="checkbox"/>	0

Total Qty of all Packages you have selected for this Process: 25,000

Total Process Qty (based on Qty you selected for each Package): 0

Variance Between Process Qty and Qty of Selected Packages: -25,000

☐ Check as Linked to Every Package

Cancel Close Save

## Order Entry – Assign Finishing Processes to Different Packages

To assign Finishing processes to different packages, select the **P** button to the far right of the process description. Clear the packages that do not apply to the selected process and **Save**.

**Note** When selecting a finishing process the system automatically flags the 'All Packages' option, which indicates that all packages are to receive the selected process. Only by deselecting the packages that will not include this process are you able to take that process off that package's processes.

Point the mouse over a process description to preview which packages have been selected for that process.

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. On the left is a tree view with categories like 'Quote Header', 'Estimating', 'PreProcessing', 'Components', 'Packages', 'Drops', and 'Special Instructions'. The 'Finishing' process is highlighted under 'Drops'. On the right, a table lists processes with columns for 'Process Description', 'Quantity', 'Qty Lock', 'Lot Base', 'Quoted Price', 'All Pkgs', and 'Sort Order'. A dialog box titled 'Assign "INSERT, METER, SORT #10 5pcs" To Packages' is open, showing a table with columns 'Pkg#', 'Package Name', 'Pkg Qty', and 'Process Qty'. The dialog also includes checkboxes for 'Synchronize process quantity with quantity of all packages this process is assigned to' and 'Proportionally divide process quantity between all packages this process is assigned to'. At the bottom, it shows 'Total Qty of all Packages you have selected for this Process' as 1,000, 'Total Process Qty (based on Qty you selected for each Package)' as 1,000, and 'Variance Between Process Qty and Qty of Selected Packages' as 0. Buttons for 'Cancel', 'Close', and 'Save' are at the bottom right.

Process Description	Quantity	Qty Lock	Lot Base	Quoted Price	All Pkgs	Sort Order
INSERT, METER, SORT #10 3pcs	7,000			\$395.50	N	P 8385
INSERT, METER, SORT #10 4pcs	9,000			\$540.00	N	P 8390
INSERT, METER, SORT #10 5pcs	10,000			\$635.00	N	P 8395
						P 8400
						P 9753
						P 9754

Pkg#	Package Name	Pkg Qty	Process Qty
1	PKG 1	6,000	0
2	PKG 2	3,000	0
3	PKG 3	1,000	1,000

Total Qty of all Packages you have selected for this Process: 1,000  
 Total Process Qty (based on Qty you selected for each Package): 1,000  
 Variance Between Process Qty and Qty of Selected Packages: 0

### For All Processes:

1. When quote is recalculated by package count:

If the process was linked to all packages, it remains linked to all packages with new quantities.

If the process was linked to selected packages, it remains linked to selected packages with new quantities.

If the default process quantity is non-zero, the process is linked to the package with a Process Qty of zero (0).

Processes with locked quantities and processes not marked to 'Synchronize process quantity with quantity of all package' are not recalculated.

2. Quantity printed on Work Order:

For processes not assigned to any packages, the work order will print the total process quantity for all packages.

For processes assigned to all packages with zero default quantity, the work order will print total process quantity for all assigned packages.

For processes assigned to specific packages, the work order will print the specific package quantity. (For processes with locked quantities and those that are not marked to 'Synchronize...', the printed quantity is proportionally divided between all drops to which a package is assigned.)

## Order Entry – Create Drops

To create one or more drops, click **Drops** in the **Mail Estimating Tree**. Enter the Number of Drop(s), Description, Mail Date, Quantity and click the package(s) in each drop (see sample below). Repeat this process for each drop and **Save**.

If you need to copy or delete a drop, right-click the drop and make the appropriate selection.

A red line through the # symbol next to **Drops** means there is missing information. The postage is not estimated or the drop counts are out of balance (see balance field, red = qty. over, green = qty. under).

**Mail Estimating (Print & Mail)**

✓ **Quote Header**  
**Estimating**  
 Data Processing  
 Components  
 # Packages  
 1: KIT A-100,000  
 2: KIT B-75,000  
 3: KIT C-25,000  
 Finishing  
 # Drops & Postage  
 1: PRJT #1234-110,000  
 2: PRJT # 3456-40,000  
 3: PRJT #0603-50,000  
 Special Instructions  
 ✗ Review Pricing  
 ✗ Order Entry

All Drops Total:		200.000	Number:	1	2	3
Description:		PRJT #1234	PRJT # 3456	PRJT #0603		
Mail Date:		04/30/01	04/30/01	05/01/01		
Quantity:		110,000	40,000	50,000		
Postage Qty:		110,000	40,000	0		
Est. Postage:		\$21,670.00	\$8,680.00	\$0.00		

#	Package	Quantity	Balance				
1	KIT A	100,000	0	50,000	25,000	25,000	
2	KIT B	75,000	0	50,000	10,000	15,000	
3	KIT C	25,000	0	10,000	5,000	10,000	

Cancel Save

## Order Entry – Estimating Postage for Drops – Front Page

You have the option to estimate postage in the Drop screen by entering a Postage Quantity and clicking the **Postage** icon (purple stamp). Use the drop-down windows to enter Postage Class, Method of Payment, Entry Office (if known) and Permit Number (if known). Enter the Single Piece Weight and click **Back Page**.

A red line through the # symbol next to **Drops** means there is missing information. The postage is not estimated or the drop counts are out of balance.

**Note** Permit #s are entered in **Postage Inventory** module. Entry Offices are entered in **Master File – Vendor**.

Mail Estimating - [All Drops]

File Window Changes Help

**Mail Estimating (Print & Mail)**

**Quote Header**

PreProcessing

Components

- Bus Reply Card-6,000
- OE 6x9-23,000
- Letter A-9,000
- Letter B-3,000
- Letter C-1,000
- Brochure-7,000
- BRE-4,000

# Packages

- 1: PKG 1-6,000
- 2: PKG 2-3,000
- 3: PKG 3-1,000

Finishing

# Drops

- 1: DROP 1-6,000
- 2: DROP 2&3-4,000

Special Instructions

- Special Info for DP
- Special Info for Production
- Special Info for Finishing

Review Pricing

Order Entry

All Drops Total: 10,000

Number: 1 2

Description: DROP 1 DROP 2&3

Mail Date: 12/15/2004 12/31/2004

Quantity: 6,000 4,000

Estimated Postage Qty: 6,000 0

Est. Postage: \$1,140.00 \$0.00

# Package Quantity Balance

1 PKG 1

2 PKG 2

3 PKG 3

**Postage ESTIMATE Counts for Quote:543.99 Drop:2**

**Form 3602-R - Standard Mail Letters and Flats - Permit Imprint**

Postage Class: Standard Mail ☐ Non-Standard Size

Method of Payment: Permit Imprint Use Rates Effective: 6/30/2002 for the Drop Date of: 12/31/2004

Entry Office:

Permit Information: Permit: N/A Permit#:

Permit Holder:

Address:

Phone: Ref:

Single Piece Weight:

Ounces: 2 Pounds: 0.125

☐ Non Identical

☐ Mixed Weights

3606 Identical Pieces:

CTAS Ref Number:

Comments:

Save Back Page

Cancel Drop : 4,000 Current:0 Cost:0.00

543.99 416 Streamline Development, LLC 10,000 12/25/2004 10,000

## Order Entry – Estimating Postage for Drops – Back Page

A second option to estimate Postage is to click the **Postage** icon under Drops/Postage in the **Mail Estimating Tree**. Use the drop-down windows to enter Postage Class, Method of Payment, Entry Office (if known) and Permit Number (if known). Enter the Single Piece Weight and click **Back Page**. Enter Quantities and check that your Drop and Current Counts are in balance (bottom of the screen), click **Front Page** and **Save**.

A red line through the # symbol next to **Drops** means there is missing information. The postage is not estimated or the drop counts are out of balance (see balance field, red = qty. over, green = qty. under).

The screenshot displays the 'Mail Estimating (Print & Mail)' software interface. The left sidebar shows a tree view with 'Drops' highlighted, indicating a missing information status (red line through #). The main window shows the 'Postage Computation' screen for 'Form 3602-R - Standard Mail Letters and Flats - Permit Imprint'.

**Quote Header**  
**Estimating**  
 PreProcessing  
 Components  
 ✓ Bus Reply Card-6,000  
 ✓ OE 6x9-23,000  
 ✓ Letter A-9,000  
 ✓ Letter B-3,000  
 ✓ Letter C-1,000  
 ✓ Brochure-7,000  
 ✓ BRE-4,000  
 # Packages  
 1: PKG 1-6,000  
 2: PKG 2-3,000  
 3: PKG 3-1,000  
 # Drops  
 1: DROP 1-6,000  
 2: DROP 283-4,000  
 Special Instructions  
 Special Info for DP  
 Special Info for Production  
 Special Info for Finishing  
 ✗ Review Pricing  
 ✗ Order Entry

**All Drops Total:** 10,000    **Number:** 1    2

**Postage ESTIMATE Counts for Quote:543.99 Drop:2**

**Form 3602-R - Standard Mail Letters and Flats - Permit Imprint**

**Postage Computation**

**Form 3602-R - Standard Mail Letters and Flats - Permit Imprint**

**A** Automation Rates - Letters and Flats 3.3 oz    **D** Letters and Flats more than 3.3 oz  
 4000    \$776,000

**B** Presorted Rates - Letters and Flats 3.3 oz  
 ECR Rates - Letters and Flats 3.3 oz

Type	Description	Rate	Quantity	Amount
None	5-Digit Letter	.190	1000	190.000
	3-Digit Letter	.203		
	AADC Letter	.212		
	Mixed AADC Letter	.219	1000	219.000
	3/5 Flat	.261		
DBMC	Basic Flat	.300		
	5-Digit Letter	.169	1000	169.000
	3-Digit Letter	.182		
	AADC Letter	.191		
	Mixed AADC Letter	.198	1000	198.000
DSCF	3/5 Flat	.240		
	Basic Flat	.279		
	5-Digit Letter	.164		
	3-Digit Letter	.177		
	AADC Letter	.186		

**Drop** 4000    **Current Counts** 4000    \$776,000

**Front Page**    **Clear Changes**    **Cancel**    **Save**

543.99    416    Streamline Development, LLC    Mail Estimating / Order Entry    10,000    12/25/2004    10,000

## Order Entry – Deleting a Drop(s) and Adding Notes to a Drop(s)

Click the **Delete this Drop** button if you want to delete a drop(s).

To add notes to a drop click the **Postage** icon in the **Mail Estimating Tree**. Select the **Notes** button, enter and **Save**. Package notes print on the Work Order and Work Ticket. Click **X** in the upper right corner of the Notes screen to close.

The screenshot displays the EFI PrintStream software interface. On the left is the 'Quote Header' sidebar with a tree structure: 'Estimating' (expanded), 'Data Processing', 'Components', 'Packages' (with a blue icon), 'Finishing', 'Drops/Postage' (with a blue icon), and 'Special Instructions'. Below the tree are buttons for 'Review Pricing' and 'Order Entry', both marked with a red 'X'. The main window shows 'Drop Number: 1', 'Description: COMMON', and 'Mail Date: 12/20/98'. To the right, a table lists 'Quantity: 63,946', 'Est. Postage Quantity: 63,946', and 'Est. Postage: \$11,591.63'. A 'Notes...' button is visible. Below this is a table with columns 'Pkg. #' and 'Pact', containing rows '2 MD' and '1 CA'. A 'Notes -' dialog box is open in the foreground, titled 'Adding Notes to a Drop...', with 'Cancel' and 'Save' buttons. At the bottom of the main window, there are radio buttons for 'All Packages' and 'Drop Packages Only' (selected), and a 'Delete this Drop' button with 'Cancel' and 'Save' sub-buttons.

Pkg. #	Pact
2	MD
1	CA

## Order Entry – Create a Statement Drop (optional)

A statement drop will allow a user to directly assign components to a drop, plus enter the absolute quantity or enter the average or **ratio to drop quantity**.

**EXAMPLE:** A job is created each month with 1 drop per day x 5 mailings a week for 4 weeks = 20 drops. Each drop includes one package with a **variable number** of components. For instance, one package has an envelope and an insert with an average (or ratio) of 3.5 pages of statements.

Select the **Add Statement Drop** icon ("black mail box"). Enter a **Drop #**, **Description**, **Mail Date** and **Quantity** (upper right, next to **Notes**). Click **All Components**. Enter the absolute quantity by clicking in the **Statement Drop Quantity** field and enter the average or ratio in the **Ratio to Drop Quantity** field. (E.g., Drop quantity is 10,000 and the ratio is 3.5 statements per package; the form calculates 35,000 statements are needed for this drop.

**Note** If you view the All Packages screen and change the package header quantities, you must change all corresponding drop quantities.

Do not mix non-statement drops and packages with statement drops and packages on the same Quote/Job number. Contact EFI PrintStream Support with questions.

The screenshot shows the 'Mail Estimating' software window. The 'Statement Drop' tab is active, displaying the 'Add Statement Drop' form. The form includes fields for Drop Number (1), Description (Statement Drop1), Mail Date (10/05/99), Quantity (10,000), Est. Postage Quantity (10,000), and Est. Postage (\$1,600.00). Below these fields is a table with columns: Component, Inventory Code, Item #, Version, Version Quantity, Version Balance, Ratio to Drop Qty, Statement Drop Quantity, and Seq. No. The table contains two rows: '#10 ENV' and 'Statement Insert'. The 'Statement Insert' row is highlighted in red. At the bottom of the form, there are radio buttons for 'All Components' (selected) and 'Drop Components Only', along with 'Delete this Statement Drop' and 'Cancel' buttons. The status bar at the bottom shows '462.99', '198', 'STREAMLINE SOLUTIONS', 'Sched. w/ Modifiers', '0', '10/05/99', and '100,000'.

Component	Inventory Code	Item #	Version	Version Quantity	Version Balance	Ratio to Drop Qty	Statement Drop Quantity	Seq. No.
#10 ENV	16	16	Common	100,000	90,000	1.0000	10,000	1
Statement Insert	386	386	Common	100,000	65,000	3.5000	35,000	2

## Order Entry - Order Acknowledgement Includes Job Number

Added Job Number to the Order Acknowledgement when a job number is present.

Quote only:

	<b>streamline solutions</b> 477 Summit Avenue Mill Valley CA 94941 T 415 . 380 9969 F 415 . 380 9685 www.printstream.com	<b>Order Acknowledgment</b>	
Leah			
<b>Leah's Account</b>		<b>Proposal</b>	4713.
123 Test		<b>Date</b>	November 9, 2009
Adding a suite			
Taylor, MI 48180			

Quote converted to Job:

	<b>streamline solutions</b> 477 Summit Avenue Mill Valley CA 94941 T 415 . 380 9969 F 415 . 380 9685 www.printstream.com	<b>Order Acknowledgment</b>	
Leah		<b>Job Number</b>	5582
<b>Leah's Account</b>		<b>Proposal</b>	4712.99
123 Test		<b>Date</b>	November 9, 2009
Adding a suite			
Taylor, MI 48180			

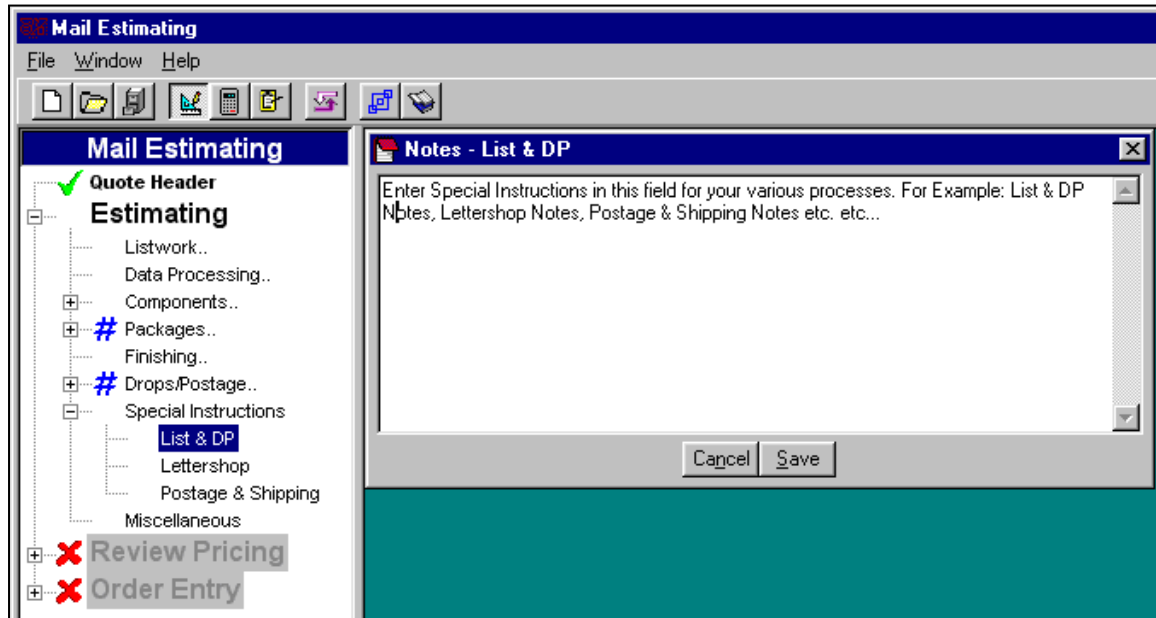


## Order Entry – Special Instructions

To enter special instructions, click the + sign next to Special Instructions and select from your custom list of headings (DP, Lettershop, Postage, etc.). Enter notes, **Save** and click **X** in the upper right corner of the Notes – List and DP screen to close.

Special Instructions print on the Work Order and Work Ticket.

**Note** The three **Special Instructions** headings can be re-named in **Master File – Mail Process**. Right-click **Special Instructions**, enter changes and **Save**.



## Order Entry – Mail Scripts

Click ‘Scripts’ in the **Mail Estimating Tree** to view or answer any scripts. Click the specific scripts you need to answer (either multiple choice or enter your answer directly into the field) and **Save**. Scripts will appear on the Work Order and Work Ticket.

A red **X** means the script(s) are still unanswered a green ‘check’ means they’re answered. Click (the lower) **X** in the upper right corner of the screen to close, OR select a different area on the Mail Estimating Tree.

**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.) Scripts do not affect pricing.

**Mail Estimating - [Notes & Scripts]**

File Window Help

**Mail Estimating**

- Quote Header
- Estimating
  - Listwork..
  - Data Processing..
  - Components..
  - # Packages..
  - Finishing..
  - # Drops/Postage..
  - Special Instructions
  - Miscellaneous
- Review Pricing
- Order Entry
  - Scripts
  - General
  - Inventory Details
  - Work Order
  - Work Ticket
  - Inventory Matrix
  - Prepared for Address
  - Change Orders
  - Scheduling

**Miscellaneous**

- DATA ENTRY
  - FILE NAME(S)
    - First choice
  - FILE NAME(S)
    - First choice
  - DATA ENTRY #2 BUYOUT
  - DATA ENTRY #2 BUYOUT
  - ADDR STD, POSTAL ENCODE
  - CONVERT ADDRESS
    - Yes
    - TEST1
      - AA
    - TESET2
      - yes
    - BAD ADDRESS
      - KEEP
      - REPORT OF BAD
        - DELETE
        - REPORT OF B.
          - HOLD
          - REPOR
            - No
- FOR DELETING
  - No
- SELECT CODES
- SELECT AFTER
- SELECT ON
- MERGE PURGE OR DE PURGE

**SELECT AFTER**

Scripts Save

Select	Answer
<input type="checkbox"/>	IMPORT
<input type="checkbox"/>	DATA ENTRY/FILE MTCE
<input type="checkbox"/>	ADDR STD
<input checked="" type="checkbox"/>	MERGE/PURGE
<input type="checkbox"/>	SPLIT FILE

Quote Letter Notes

Optional Quote Letter Notes Field..

Quote Letter Save

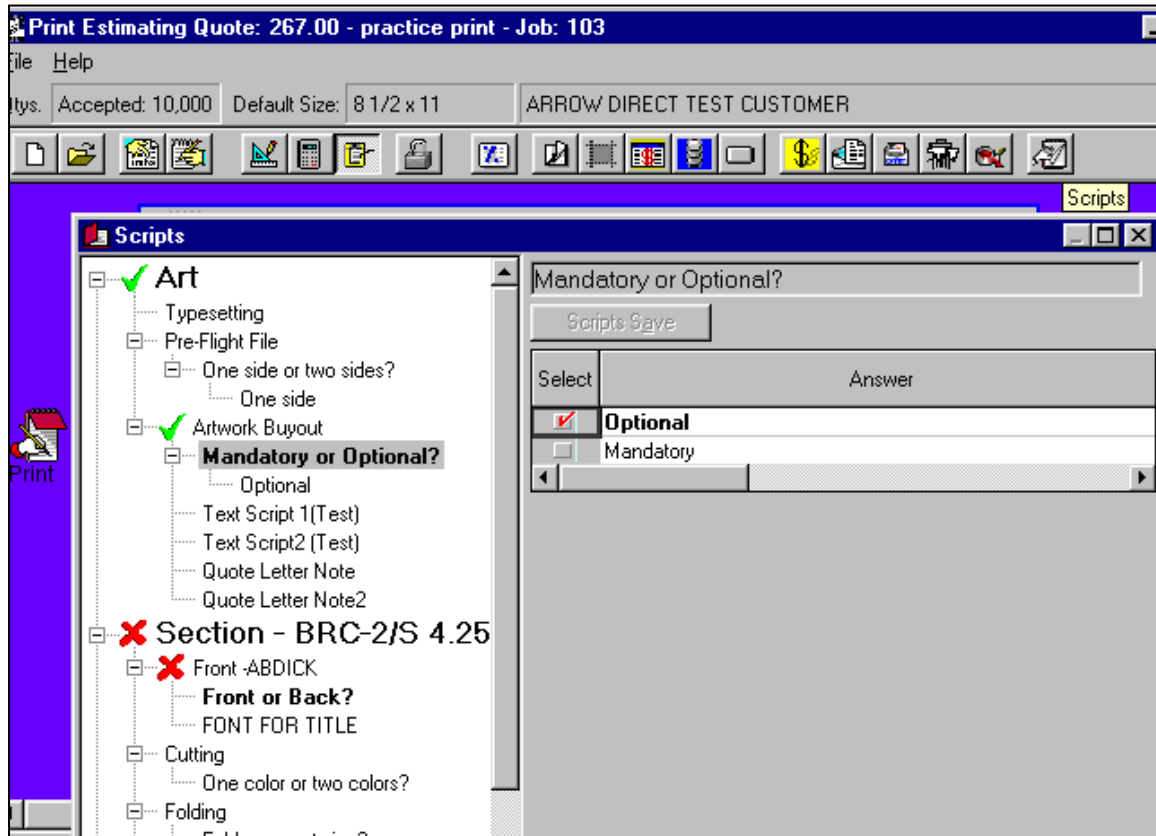
104850 103279 InsectH049 Copy of RT Error 100,000 3/4/99 100,000

## Order Entry – Printing Scripts

Select the **Printing Scripts** icon (circled in the example below, 1st icon on the right) to view or answer any scripts. Click the specific scripts you need to answer (either multiple choice or enter your answer directly into the field) and **Save**. Print Scripts will appear on the Print Work Order/Ticket.

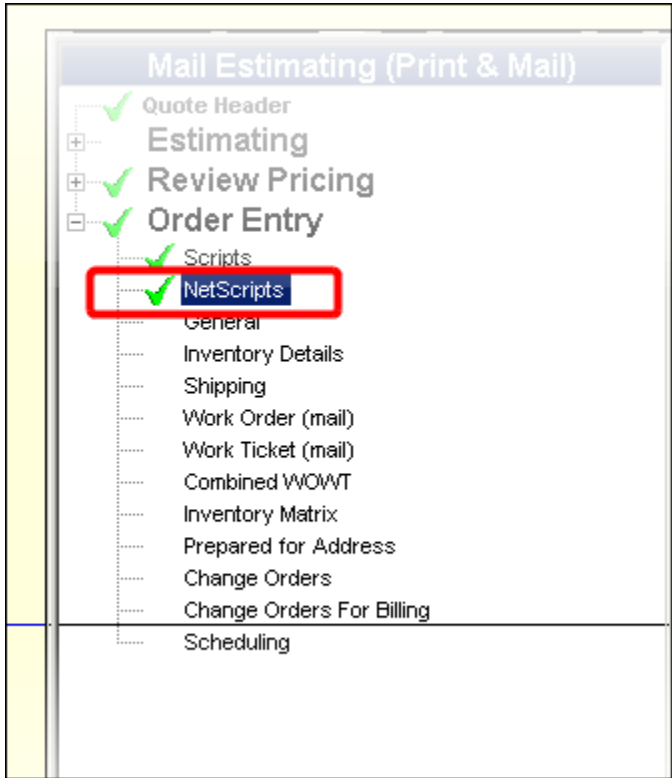
**Note** Scripts are a set of questions that give production workers information or special instructions needed to complete an activity or process (e.g., 11" Folding: letter or Z-Fold?, Text In or Text Out, etc.)

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



## Order Entry - .Net Scripts















This enhancement makes it possible for the user to answer all scripts for the Print and Mail job in one location. In Order Entry mode, select .NET Scripts.




Scripts questions appear for all processes in the job-Data Processing, Component Finishing, Mail Finishing, Press, Section Finishing, and Bindery.

Question	Replies
<b>Data Processes</b>	All the scripts are answered
<b>DATA ENTRY</b>	
Choice To Process	ALL
QUALITY?	FIRST CLASS
<b>PROGRAMMING (Buyout)</b>	
Project description	Consultation
Expected turnaround time	2 working days
<b>DIGITIZE SIGNATURE</b>	
Size?	see sample
<b>CONVERT DISK</b>	
Format?	Ascii
File Name	JIF-45
<b>SELECTION</b>	
Select What?	Field
<b>KEYCODE</b>	
Mail Class	1st
IMB	No
Confirm	Yes
Address Correction	Manual
<b>MERGE/PURGE</b>	
Type?	Business
Parameters?	Loose
<b>COUNTS REPORT</b>	
What field?	33
Sort sequence?	A>Z
Page breaks?	Yes
# of copies?	2
<b>SORT RECORDS</b>	
Sequence?	Alpha
Match Mail?	No
<b>OUTPUT TO CHESHIRE LABELS</b>	
# up?	3
<b>OUTPUT TO EKTAJET</b>	
Casing?	Upper/lowercase
Sequence?	Ascending
Output format?	PC
<b>PURCHASE LIST</b>	
What kind of List?	Customer will provide details
<b>Press</b>	Unanswered Script count: 2
<b>Booklet</b>	
<b>Sanden 10 Clr 28/22/17 (Side 1)</b>	
Press Check Required?	
<b>Sanden 10 Clr 28/22/17 (Side 2)</b>	
Press Check Required?	Yes
Date & Time	

Save

	<b>Press</b>	Unanswered Script count: 2
	<b>Booklet</b>	
	Sanden 10 Clr 28/22/17 (Side 1)	
	Press Check Required?	
	Sanden 10 Clr 28/22/17 (Side 2)	
	Press Check Required?	Yes
	Date & Time	
	Who will attend press check?	
	<b>Section Finishing Processes</b>	All the scripts are answered
	<b>Booklet</b>	
	MBO Fold 01	
	Perf/Fold?	None
	<b>Component Finishing Processes</b>	All the scripts are answered
	<b>Letter</b>	
	<b>LASER SETUP</b>	
	Font?	Redondo
	Pitch?	10
	Lines per inch?	8
	Match breaks?	No
	Date needed?	08/01/2010
	Window Envelope?	No
	<b>LASER 8 1/2x11 LETTER</b>	
	Personalized?	no
	Version changes?	yes
	explain version change	Z becomes B
	<b>Finishing Processes</b>	All the scripts are answered
	<b>Shrinkwrapping</b>	
	How many pieces per pkg?	25
	Length of Pkg	11
	Width of Pkg	9
	Chipboard required?	Yes
	Slipsheet between sets?	Yes
	<b>AFFIX ONE TAB, WHITE</b>	
	Total Qty. to Tab?	All
	OK to Cycle Partial Drops?	Yes
	100% Mailing?	Yes
	Samples?	Yes
	Seed Names?	No

 Save

## Order Entry – General Information Screen

Select **General** in the **Mail Estimating Tree** to review or enter General, Bill To or Leftovers to information. The Start Date field is the date the estimate was converted to an order.

The user has the option to view Order Entry Notes for a customer if the **O.E. Notes** button is flashing in red.

**Save** and click **X** to close or select a different area on the **Mail Estimating Tree**.

**Note** The **Bill To** and **Leftovers To** fields will appear on the Work Ticket and on Invoices, Quote Letters, etc. The General screen that contains the billing to address and leftovers to address allows existing addresses contained in the **Customer - Master File** to be accessed.

**Mail Estimating (Print & Mail)**

**Quote Header**

**Estimating**

- Data Processing
- Components
  - Thing-10,000
  - BRE-10,000
- Bindery
- Create Inventory
- Packages Advanced
- Packages
- Finishing
- Drops
- Instructions

**Review Pricing**

**Order Entry**

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

**O.E. General**

☐ OK to Schedule Job

**General**

Start Date: 9/16/2014      Priority:      New Job: Yes

First Mail Date: 10/1/2014      Part Number:      Exact Repeat: Yes

Last Mail Date: 10/1/2014      P/O Number:      Alter Specs: Yes

Re-Order Date:      Previous Job:      Art Required: Yes

Work w/Job Number:      Film Required: Yes

Reprint from:      Unders: Yes

Film File Number:      Overs: Yes

Important:

**Bill to**

Customer #: ALASKA      01: Streamline

Customer: Alaska Inc.

Contact: Sally Samster

Address: 7200# S. 900 E.

Suite B

PROVO, UT

Zip: 84601

Save Contact As: Sally Samster

Comments:

Customer Name As Defined For Selected Address

Alaska Inc.

**Leftovers to**

Customer: Alaska Inc.

Address: 7200# S. 900 E.

Suite B

PROVO, UT

Zip: 84601

Contact: Sally Samster

Comments:

**Customer Order Entry Notes**

Alaska Inc. order Entry Notes

## Order Entry – Inventory Details

Select **Inventory Details** in **Mail Estimating Tree** to view components, Item #, Inventory codes, quantity, notes, etc.

Click (the lower) **X** in the upper right corner of the screen to close, OR select a different area on the Mail Estimating Tree.

Mail Estimating - [O.E. Inventory]

File Window Help

Mail Estimating

Quote Header

Estimating

Listwork..

Data Processing..

Components..

#10 Env.-100,000

Letter-100,000

# Packages..

Finishing..

# Drops/Postage..

Special Instructions

Miscellaneous

Review Pricing

Order Entry

Scripts

General

Inventory Details

Work Order

Work Ticket

Inventory Matrix

Prepared for Address

Change Orders

Scheduling

Component	Source	Item #	Inventory Code	Inventory Type	Location	Date on hand	Quantity	Note
#10 Env.		2421	LE2421				100,000	
Letter		LU0570	LU0570				100,000	

Cancel

Save

104850

103279

InsectH049

Copy of RT Error

100,000

3/4/99

100,000



## Order Entry – Shipping Module

Option to: Preview, Add, Edit or Delete Shipments from the Mail Order Entry tree structure.

**Note** To Enable Shipping, open **Master Files – Mail Process > File > Setup > Estimating Parameters**.

See Inventory and Warehouse Screen Guide for instructions on how to use the Shipping module. Features include how to set up and record: shipments (final or partial), issue packing slips, print package labels and enable reporting on jobs which are shipped but not invoiced.

**Mail Estimating (Print & Mail)**

**Quote Header**

- ✓ **Estimating**
  - Data Processing
  - Components
    - ✓ #10 env-30,000
    - ✓ coup 1-30,000
  - # Packages
  - Finishing
  - # Drops
  - Special Instructions
- ✓ **Review Pricing**
- ✓ **Order Entry**
  - Scripts
  - General
  - Inventory Details
  - Shipping**
  - Work Order
  - Work Ticket
  - Inventory Matrix
  - ✗ Prepared for Address
  - Change Orders
  - Scheduling

**Job Shipments**

Job#: 166 Customer: Kelly Marketing  
Job Description: QLetter  
Shipments Status: FINAL

**Shipments Summary**

	Date	Delivery#	Address	City	State	Status
1	10/31/2002	37	122 West St	Windsor	CT	Confirmed Unplanned
2	10/31/2002	38	122 West St	Windsor	CT	Confirmed Unplanned

**Editing Shipment**

Pack Slip: Date: 10/31/2002 Time: 3:15:00 PM  
Cust. Acc#: 10004 Customer: Kelly Marketing  
Job#: 166 Job Desc.: QLetter

Contact: Joe Kelly Phone: 860-999-8888 Company: Kelly Marketing Address: 122 West St City: Windsor State: CT

☒ Hold Contact Responsible: Ship Method: Tracking#: Ship Cost: Ship Type: Ship To: No. of Skids:

**Shipment Confirmation**

Have all items now been shipped for this job?

= Final Shipment  
 = Partial Shipment

Item	Qty	Back Order	Item Type	Labels
1	20,000	0		Print...
2				Print...
3				Print...
4				Print...
5				Print...

## Order Entry – Mail Work Order and Work Ticket – Printing and Viewing

Select **Work Order** or **Work Ticket** in the **Mail Estimating Tree**. Enter the number of copies or select the **Set** check box. Select **Preview** or **Print**. Option to Designate as new Revision.

Click (the lower) **X** in the upper right corner of the screen to close, OR select a different area on the Mail Estimating Tree.

If you receive an error message "**Write WO Component Finishing**" when trying to print a Work Order / Work Ticket, select the **package recalc** icon in the tool bar. A ? mark next to a component means the component has a zero quantity. Enter a package qty. for the component, then select the **package recalc** icon again, or delete the component.

**Note** Work Orders can be setup to print by package or by job. You can create **custom** Work Orders that will print only the information that is needed for your various departments. Department (DP, Lettershop, All Departments, etc.) Work Orders and Work Tickets are set up in Master Files - Reports and/or Master Files - Mail Process. If you select 'set' you have the option to print one copy for each department (e.g., Production, DP, Lettershop, A/P, etc.). **Consult with your System Administrator or EFI PrintStream Support for details.**

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. On the left is a tree view with categories like 'Quote Header', 'Estimating', 'PreProcessing', 'Components', 'Packages', 'Finishing', 'Drops', 'Special Instructions', 'Review Pricing', and 'Order Entry'. The 'Mail Work Order' dialog box is open on the right. It has a title bar with a close button (X). Inside, there's a section for '(Current Revision: 0)' and a checkbox 'Designate as new Revision'. Below this is a table with columns 'Copies', 'Set', and 'Document to Print'. The table lists several items, with 'MAIL WORK ORDERS - LETTERSHOP' selected. There are 'Clear' and 'Load Pkg's And Drops' buttons. Below the table are input fields for 'Packages' (1 to 3) and 'Drop' (1 to 2). At the bottom, there's a checkbox 'Print By Package For All Drops' and 'Preview' and 'Print' buttons.

Copies	Set	Document to Print
	<input type="checkbox"/>	MAIL WORK ORDERS - EVERYTHING
	<input type="checkbox"/>	MAIL WORK ORDERS - DP
	<input type="checkbox"/>	Work Order Inserting
	<input checked="" type="checkbox"/>	MAIL WORK ORDERS - LETTERSHOP
	<input type="checkbox"/>	Work Order- Fulfillment

#	Package Description	#	Drop Description
<input checked="" type="checkbox"/>	1 PKG 1	<input checked="" type="checkbox"/>	1 DROP 1
<input checked="" type="checkbox"/>	2 PKG 2	<input checked="" type="checkbox"/>	2 DROP 2&3
<input checked="" type="checkbox"/>	3 PKG 3	<input checked="" type="checkbox"/>	2 DROP 2&3

## Order Entry – Mail Work Order and Work Ticket – Sample

A sample of a Mail Work Order in Preview mode is displayed below. (Same process to select, view or print a Work Ticket).

Click (the lower) **X** in the upper right corner of the screen to close, OR select a different area on the Mail Estimating Tree.

**Note** If you receive an error message "**Write WO Component Finishing**" when trying to print a Work Order / Work Ticket select the **package recalc** icon in the tool bar. A ? mark next to a component means the component has a zero quantity. Enter a package qty. for the component, then select the **package recalc** icon again, or delete the component.

Users have the option to **export** to: MSWord, Excel, Crystal Reports, etc. (envelope w/ red arrow icon). Another available option is to print a barcode next to each activity on the Mail Work Order. Each barcode can then be scanned into the Shop Floor module.

If you want the bar codes to print on your Work Orders, you must perform the following 2-steps:

1. ALL users that print/preview work orders MUST 'copy' and 'paste' 2-fonts (Bc128ab.ttf and Bc128abt.ttf) into EACH workstation's Fonts folder (Start > Settings > Control Panel > Fonts Folder)... then ...
2. **Contact EFI PrintStream Support**, who will need to dial into your site to activate the report (FORMATS: CUSTOMER\_REPORT = WOMAINWBC across from WOMain DEFAULT\_REPORT).

Mail Estimating - [Work Order]

File Window Changes Help

Mail Estimating (Print & Mail)

Quote Header

Estimating

PreProcessing

Components

Bus Reply Card-6,000

OE 6x9-23,000

Letter A-9,000

Letter B-3,000

Letter C-1,000

Brochure-7,000

BRE-4,000

Packages

1: PKG 1-6,000

2: PKG 2-3,000

3: PKG 3-1,000

Finishing

Drops

1: DROP 1-6,000

2: DROP 283-4,000

Special Instructions

Special Info for DP

Special Info for Production

Special Info for Finishing

Review Pricing

Buyouts

Final Pricing

Quote Breakdown

Credit Status

Quote Letter

Order Entry

1 of 1+ 75% Total:3 100% 3 of 3

Rev. PRODUCTION COPY

<b>Work Order Inserting</b>		<b>416</b>	<b>Rev. 1</b>	<b>12/1/2004</b>
Department/Work Order		Job#	Work Order Rev.	Print Date
<b>6,000</b>		<b>1</b>	<b>PKG 1</b>	
Drop Quantity		Package#	Package Name	
<b>12/15/2004</b>		<b>1</b>	<b>DROP 1</b>	
Due Date		Drop#	Drop Name	
<b>Streamline Development, LLC</b>			<b>Linda Pollard</b>	
Customer (Account #): Streamline			Sales	
<b>Mail Estimating / Order Entry</b>			<b>Roy McIntyre</b>	
Job Name (Printer Project):			CSR	
			<b>Rob Hales</b>	
			Estimator	

Package Instructions

Package notes: No Work order / Ticket

Components

Component/Version	Item#	Inventory Code/Description/Comments	Quantity	Insert Note	Overs To
Bus Reply Card/ Common	293	NC-293 NEW COMP. INSERT	6,000		
Letter A/ Common	319	LTR-CA-319 Letter CA	6,000	FF	W/House
Brochure/ Common	293	NC-293 NEW COMP. INSERT	6,000		
OE 6x9/OE-CT, OE-TX	320	OE320	12,000	FF	Destroy

## Order Entry – .Net Combo WO/WT

The .Net Combo WO/WT has been enhanced to allow report parameters to be selected / deselected and report design capabilities to customize the work ticket.

**Select Report Options**

Quote No: 1537.99      Job No: 1276      Job Qty: 150000

**Select Components**

- Components
  - ☒ Letter
  - ☒ OE
  - ☒ New Component

**Select Report Sections**

**Summary**

- ☒ Components
- ☒ Bound Components
- ☒ Paper and Material
- ☒ Assembly and Packaging
- ☒ Buyout Summary

**Detail**

- ☒ Data Processing
- ☒ Pre-Press
- ☒ Print Components
- ☒ Other Components/Buyouts
- ☒ Assembly and Packaging
- ☒ Packages
- ☒ Drops
- ☒ Postage
- ☒ Shipping

**Other Options**

- ☒ Print Bar Codes
- ☒ Print Scripts
- ☒ Print Modifiers
- ☒ Print First & Last Mail Date
- ☒ Print Shipping Notes

Design Report    ☐ View DataSet    Print Ticket    **View Ticket**    Cancel

By right-clicking any report section – areas that are boxed in – two options display: **Select All** or **Unselect All**.

**Select Report Options**

Quote No: 1537.99      Job No: 1276      Job Qty: 150000

**Select Components**

- Components
  - ☒ Letter
  - ☒ OE
  - ☒ New Component

**Select Report Sections**

**Summary**

- ☒ Components
- ☒ Bound Components
- ☒ Paper and Material
- ☒ Assembly and Packaging
- ☒ Buyout Summary

**Detail**

- ☒ Data Processing
- ☒ Assembly and Packaging

**Other Options**

- ☒ Print Bar Codes
- ☒ Print Scripts
- ☒ Print Modifiers
- ☒ Print First & Last Mail Date
- ☒ Print Shipping Notes

Design Report    ☐ View DataSet    Print Ticket    **View Ticket**    Cancel

Choosing **Unselect** un-checks all items in that report section:

**Select Report Options**

Quote No: 1537.99      Job No: 1276      Job Qty: 150000

**Select Components**

	Components
<input checked="" type="checkbox"/>	Letter
<input checked="" type="checkbox"/>	OE
<input checked="" type="checkbox"/>	New Component

**Select Report Sections**

**Summary**

<input type="checkbox"/> Components	<input type="checkbox"/> Assembly and Packaging
<input type="checkbox"/> Bound Components	<input type="checkbox"/> Buyout Summary
<input type="checkbox"/> Paper and Material	

**Detail**

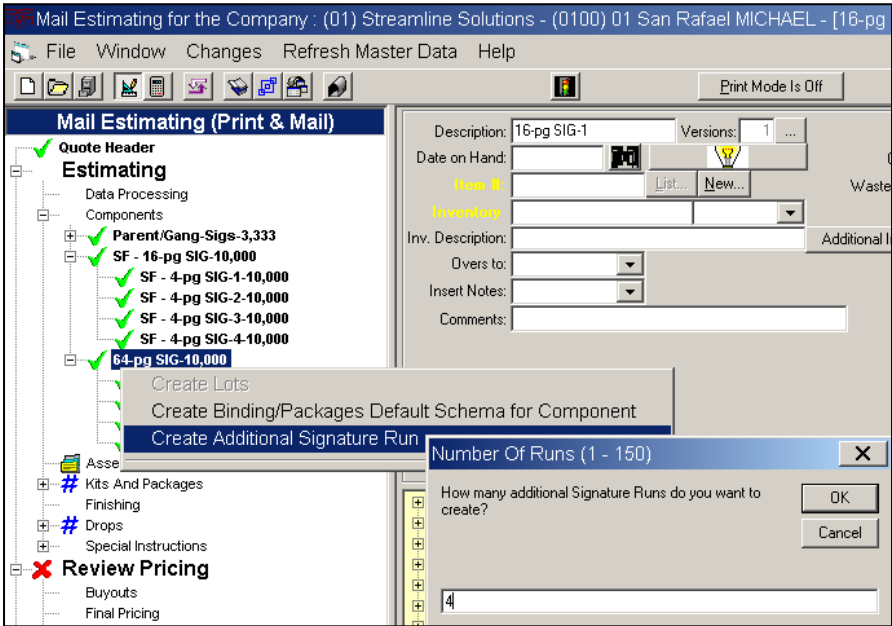
<input type="checkbox"/>	
--------------------------	--

Each area has the same control. In addition, you can select or deselect all options for all areas at once by right-clicking the **Select Report Sections** area when users will get the **Select All** and **Unselect All** options for all boxed areas.

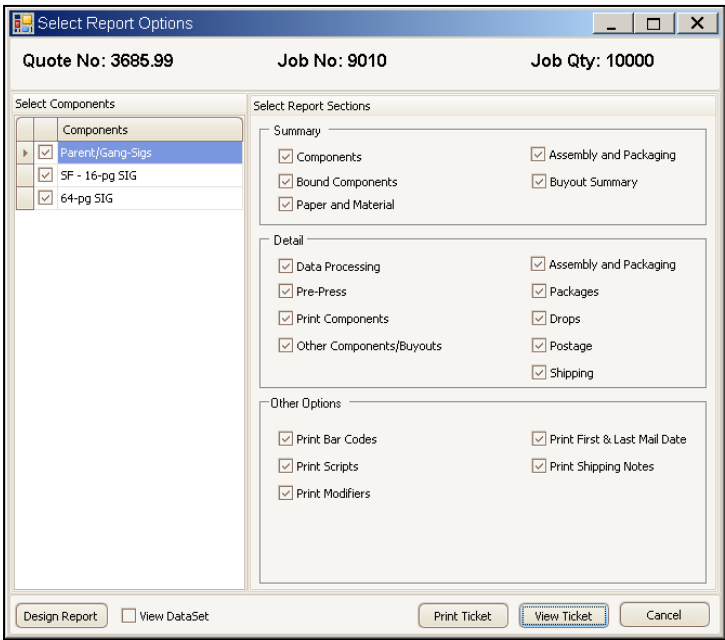
# Order Entry – Signatures Runs as Separate Runs on .Net Combo Work Order

After the press is selected, in Edit mode, right-click section and select **Create Additional Signature Run**. Enter number of runs and click **OK**.




**Note** This functionality is similar to the Lots feature. ALL pricing is held and needs to be added to the Parent or Main Section (Prep, Plates, etc.).



Signatures currently break out on the New .NET Combo Work Order.



.Net Combo Work Order displays the 4 separate signature runs.

Job # <b>9010</b>		Job #			<b>Work Ticket</b>		Rev #	Job # <b>9010</b>						
Page 3 of 5														
Section Finishing/Activity Description		Other Information		Gross Qty	Waste	Net Qty	Hours	Activity / Task ID	Task Barcode					
<b>Die Cut (Buyout)</b>		Parent/Gang-Sigs		3,534	201	3,333	0.00	<b>0</b> 169537						
<b>Final Trim</b>		Parent/Gang-Sigs		3,333	0	3,333	1.25	<b>59015</b> 169536						
#	Component Name		Order Items	Qty	Type		Flat Size		Finished Size					
<b>2</b>	<b>SF - 16-pg SIG</b>			<b>10,000</b>	<b>Printed</b>		<b>8.5 x 11</b>		<b>8.5 x 11</b>					
<b>4 forms x 4 pgs, 1up Sheetwise, 2/2, 240 Heidelberg, MBO Fold</b>														
Paper/ Material Description - (Vendor Product Code:)			Inventory ID	Material Qty	Parent Size		Cut To	#Out	Source					
<b>Centura Gloss Bk 60#</b>				<b>43,885</b>	<b>23 x 35</b>		<b>23 x 35</b>	<b>1</b>	<b>DPHOUSE</b>					
Press		Imposition		#Up										
<b>240 Heidelberg</b>		Sheetwise		1										
Front: <b>Black, PMS 1</b>														
Back: <b>Black, PMS 1</b>														
Side	Forms	Pages	#Up	Plates	Gross Qty	MR Waste	Run Waste	Net Qty	MR Hrs	Run Hrs	WU Hrs	P/M Hrs	Plate Making	Printing
Front	4	4	1	8	10,990	225	211	10,553	1.83	8.61	0.25	2.00		
Side	Forms	Pages	#Up	Plates	Gross Qty	MR Waste	Run Waste	Net Qty	MR Hrs	Run Hrs	WU Hrs	P/M Hrs	Plate Making	Printing
Back	4	4	1	8	10,553	200	203	10,150	1.33	8.28	0.00	2.00		
Front	SF - 4-pg SIG-1	2			11,042	225	212	10,604	0.83	2.16	0.25	0.50		
Back	SF - 4-pg SIG-1	2			10,604	200	204	10,200	0.33	2.08	0.00	0.50		
Front	SF - 4-pg SIG-2	2			10,965	200	211	10,553	0.33	2.15	0.00	0.50		
Back	SF - 4-pg SIG-2	2			10,553	200	203	10,150	0.33	2.07	0.00	0.50		
Front	SF - 4-pg SIG-3	2			10,965	200	211	10,553	0.33	2.15	0.00	0.50		
Back	SF - 4-pg SIG-3	2			10,553	200	203	10,150	0.33	2.07	0.00	0.50		
Front	SF - 4-pg SIG-4	2			10,965	200	211	10,553	0.33	2.15	0.00	0.50		
Back	SF - 4-pg SIG-4	2			10,553	200	203	10,150	0.33	2.07	0.00	0.50		

## Order Entry – Inventory Matrix Report

Select **Inventory Matrix** from the **Mail Estimating Tree** to view or print inventory details: component name, inventory code, package #, mail qty. + overs, available quantities on hand\*, etc.

Users have the option to **export** to: MSWord, Excel, Crystal Reports, etc. (envelope w/ red arrow icon).

Click (the lower) **X** in the upper right corner of the screen to close or select a different area on the Mail Estimating Tree.

**Note** \*Available on Hand column = qty. currently in the warehouse minus (-) all inventory commitments / job allocations.

**Mail Estimating - [Job Inventory Matrix]**

File Window Changes Help

Mail Estimating (Print & Mail)

Quote Header

Estimating

PreProcessing

Components

Bus Reply Card-6,000

OE 6x9-23,000

Letter A-9,000

Letter B-3,000

Letter C-1,000

Brochure-7,000

BRE-4,000

Packages

1: PKG 1-6,000

2: PKG 2-3,000

3: PKG 3-1,000

Finishing

Drops

1: DROP 1-6,000

2: DROP 283-4,000

Special Instructions

Special Info for DP

Special Info for Production

Special Info for Finishing

Review Pricing

Buyouts

Final Pricing

Quote Breakdown

Credit Status

Quote Letter

Order Entry

Scripts

General

Inventory Details

Shipping

Work Order

Work Ticket

Inventory Matrix

Prepared for Address

Change Orders

Scheduling

Job Inventory Matrix

Customer: Streamline Development, LLC

Job Name: 416 Mail Estimating / Order Entry

Mail Date: 12/25/2004

CSR: Roy McIntyre

Revision #: 1

Print Date: 12/1/2004

Printed By: LS

Page 1

Component Name	Inventory Code	Item #	Pkg #	Package Name	Mail Quantity	Mail Qty + Overs	Available on Hand	Estimated Overs	Actual Overs
BRE	BRE-326	326	2	PKG 2	3,000	3,300	-4,400		
	BRE-326	326	3	PKG 3	1,000	1,100	-4,400		
					4,000	4,400			
Brochure	NC-293	293	1	PKG 1	6,000	6,300	37,451		
	NC-293	293	3	PKG 3	1,000	1,050	37,451		
					7,000	7,350			
Bus Reply Car	NC-293	293	1	PKG 1	6,000	6,000	37,451		
					6,000	6,000			
Letter A	LTR-CA-319	319	1	PKG 1	6,000	6,420	-20,820		
	LTR-CA-319	319	2	PKG 2	3,000	3,300	-20,820		
					9,000	9,720			

543.99 416 Streamline Development, LLC Mail Estimating / Order Entry 10,000 12/25/2004 10,000



## Order Entry – Prepared for Address (Customer using your Permit #)

Select **Prepared for Address** from the **Mail Estimating Tree** if your customer is using your permit number and the Post Office requires their name and address on the Postal Form.

Users have the option to select from Alternate Addresses that were setup in **Master Files – Customer**.

**Note** This step can be manually entered in the **Postage Statements** module if you choose not to enter their address in this screen.

The screenshot displays the 'Mail Estimating (Print & Mail)' application window. On the left is a tree view with the following structure:

- Quote Header
- Estimating
  - PreProcessing
  - Components
    - Bus Reply Card-6,000
    - OE 6x9-23,000
    - Letter A-9,000
    - Letter B-3,000
    - Letter C-1,000
    - Brochure-7,000
    - BRE-4,000
  - Packages
    - 1: PKG 1-6,000
    - 2: PKG 2-3,000
    - 3: PKG 3-1,000
  - Finishing
    - Drops
      - 1: DROP 1-6,000
      - 2: DROP 2&3-4,000
    - Special Instructions
      - Special Info for DP
      - Special Info for Production
      - Special Info for Finishing
- Review Pricing
  - Buyouts
  - Final Pricing
  - Quote Breakdown
  - Credit Status
  - Quote Letter
- Order Entry
  - Scripts
  - General
  - Inventory Details
  - Shipping
  - Work Order
  - Work Ticket
  - Inventory Matrix
  - Prepared for Address** (highlighted)
  - Change Orders

Two dialog boxes are open over the main window:

- Prepared for...**: Contains fields for 'Ship to:' (Michael Carpino, 53 S. Greenwood Ave, Pasadena, CA 91107), 'Attention:' (M. Carpino), and 'Comments:'. It has 'Alternative Addresses', 'Cancel', and 'Save' buttons.
- Alternative Addresses**: A list box shows 'Streamline Development, LLC', 'Streamline Dev. LLC' (selected), 'Michael Carpino', and 'Streamline Dev. LLC'. To the right are fields for 'No:' (1), 'Name:' (Streamline Dev. LLC), 'Address:' (65 Mitchell Blvd, Suite Uno, San Rafael, CA), 'Zip:' (91107), 'Contact:', and 'Ship To Address'. It has 'Submit' and 'Cancel' buttons.

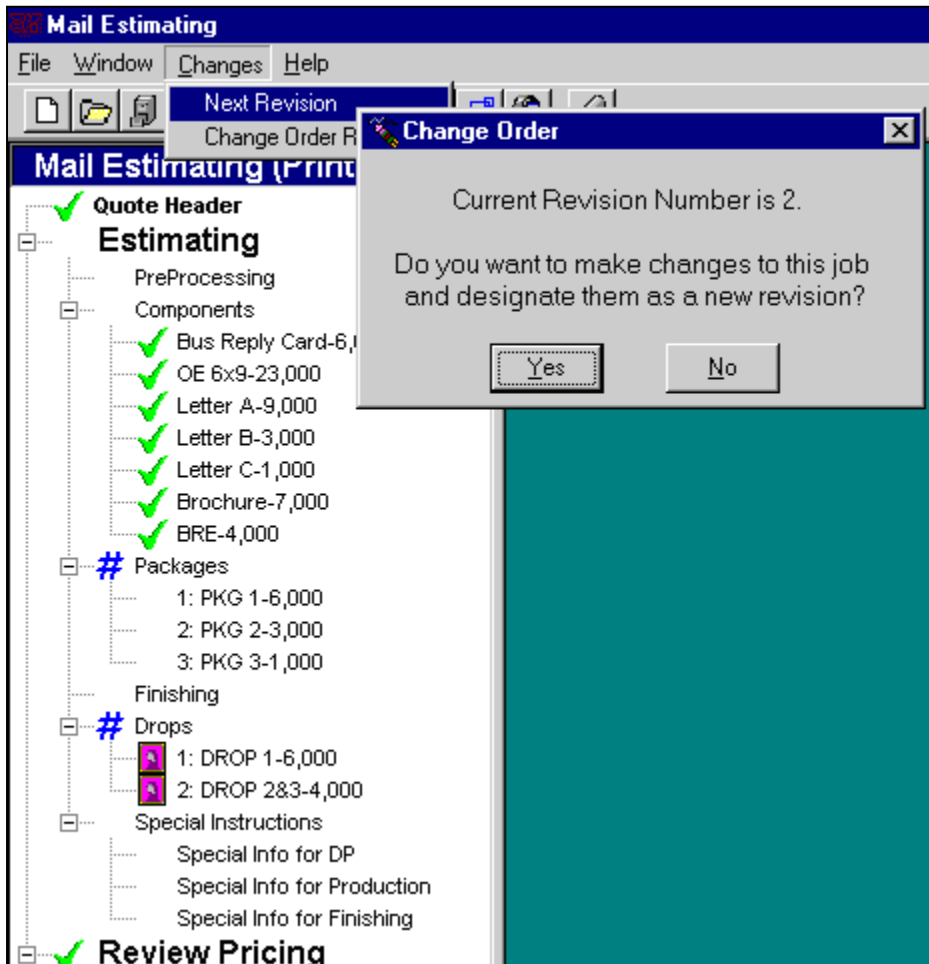
## Order Entry – Mail Changes File Option

Before you make any changes (after the estimate has been converted to a job), you have the option to designate each change to a new revision number by first selecting: Changes > Next Revision > Yes or keep the current revision # by answering > No.

This option allows a user to easily compare the current revision # and changes on the change order report with the same revision # and changes on the Work Order and/or Work Ticket.

**Note** If you do not select this option first before making changes, all change orders will save under the current revision #.

If you choose not to use this option all changes will save under revision #0.



## Order Entry – Mail Change Order Reports

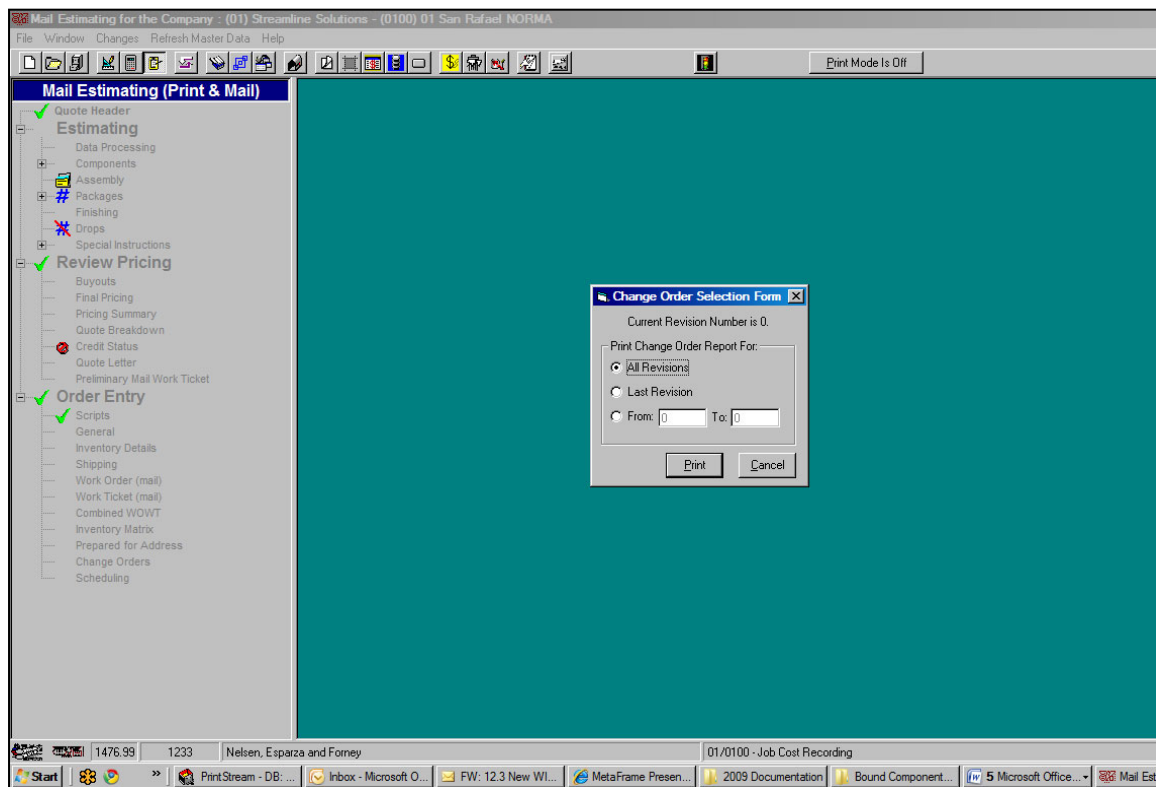
Select **Change Orders** from the **Mail Estimating Tree** or select **Changes > Change Order Report** from the menu. You have the option to view: All Revisions, the Last Revision or select from a range of current revision #s. There are two report options:

1. Print Customer Report: Approval notice for your customer to check each revision change that was made and to sign and date the report.
2. Print Internal Copy: Prints the revision #, description of change, changed by and date/time. Print Scripts and Print Bar Codes options are available to allow use of Internal Copy for production instead of printing an updated Work Order.

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

To manually add a new change request, select the **Add New** button, enter the Source, Category, Details and Notes and **Save**. Change is displayed on the Reports screen and printed on the Customer and Internal reports.

To close, click the red **X** in the upper left corner of the report, or click the lower **X** in the upper right corner, OR select a different area on the Mail Estimating Tree.



To enter a Change Order note, right-click the line item; enter a note, and **Save**.

Notes - Change Order Notes For Selected Line

Notes for this line item of the change order are entered here. Right-click on the line, enter your note and SAVE.

Suggested Pricing for Billing

375

Cancel

Save

To print an internal copy of the change order report, select **Print Internal Copy** from the option bar at the bottom of the Change Order screen.

Change Orders

Date	Revision No	User	What Changed	What Happened	Change Details	Old Qty	New Qty	Old Price	New Price
11/2/2009 4...	0	NORMA	LASER 8 1/2x11 L...	Process Added					\$375.00
11/2/2009 4...	0	NORMA	LASER FORMS	Process Price Chan...				\$62.50	\$437.50
11/2/2009 4...	0	NORMA	LASER FORMS	Process Added					\$437.50
11/2/2009 4...	0	NORMA	LASER 8 1/2x11 L...	Process Deleted		15,000			
11/2/2009 4...	0	NORMA	Job Price Changed	Process Deleted				\$375.00	
11/2/2009 6...	0	NORMA	LASER 8 1/2x11 L...	Process Added					\$375.00

Add New

Compressed Format

Print Scripts

Print Bar Codes

Print Internal Copy

Print Customer Report

To print a customer report, select **Print Customer Report** from the option bar at the bottom of the Change Order screen.

Add New

Compressed Format

Print Scripts

Print Bar Codes

Print Internal Copy

Print Customer Report

Internal Copy:

Streamline Solutions			
<b>Change Order Report</b>		Job No <b>1233</b>	
Page 1 of 1			
Customer: <b>Nelsen, Esparza and Forney</b>		Revision No: <b>0 - 0</b>	
Job Name: <b>Job Cost Recording</b>		Printed: <b>12/1/2009 2:44:27PM</b>	
Job Qty: <b>15000</b>		Printed For: <b>NORMA</b>	
Salesrep: <b>Andrea Cox</b>		First Due Date: <b>11/13/2009</b>	
ph:		Last Due Date: <b>11/13/2009</b>	
fax:		Job Started: <b>11/2/2009</b>	
CSR: <b>Linda Pollard</b>		linda@printstream.com	
ph:		fax:	
Estimator: <b>Norma Nelsen</b>		ph:	
fax:			
Rev #	Description of Change	Changed By	Date/Time
0	Process Added-LASER 8 1/2x11 LETTER	NORMA	11/2/2009 4:32:24 PM
Notes for this line item of the change order are entered here. Right-click on the line, enter your note and SAVE. Price changed: \$ 0.00 to \$ 375.00			
0	Process Price Change-LASER FORMS	NORMA	11/2/2009 4:32:32 PM
Price changed: \$ 52.50 to \$ 437.50			
0	Process Added-LASER FORMS	NORMA	11/2/2009 4:32:32 PM
Price changed: \$ 0.00 to \$ 437.50			
0	Process Deleted-LASER 8 1/2x11 LETTER	NORMA	11/2/2009 4:32:34 PM
QTY changed: 15,000 to 0			
0	Process Deleted-Job Price Changed	NORMA	11/2/2009 4:32:35 PM
Price changed: \$ 375.00 to \$ 0.00			

Customer Copy:

STREAMLINE

SOLUTIONS

4040 Civic Center Drive, Suite 543 · San Rafael, CA 94903

T 415 499 3365 · F 415 499 7677

www.printstream.com

Approval

Notice for Job

Attn: Diego Esparza

ph: 402-555-1212

fax: 402-555-1213

Nelsen, Esparza and Forney

5331 W. Dodge Road

LINCOLN, NE

Date: 12/1/2009

Revisions: 0 - 0

Your PO #:

Our Job #: 1233

Job Name: Job Cost Recording

The following changes have been made to your job. Please indicate your approval to each item in the list below and return this signed Change Notice so we may complete your project.

Rev #	Description of Change
0	Process Added-LASER 8 1/2x11 LETTER [ ]
Notes for this line item of the change order are entered here. Right-click on the line, enter your note and SAVE. Price changed: \$ 0.00 to \$ 376.00	
0	Process Price Change-LASER FORMS [ ]
Price changed: \$ 92.50 to \$ 437.50	
0	Process Added-LASER FORMS [ ]
Price changed: \$ 0.00 to \$ 437.50	
0	Process Deleted-LASER 8 1/2x11 LETTER [ ]
QTY changed: 15,000 to 0	
0	Process Deleted-Job Price Changed [ ]

The Change Order can now be emailed and the subject line has been enhanced in to include the job number and quote number.

The screenshot displays the 'Change Orders' software interface. At the top, a table lists change order details. Below the table, a 'Notes - Change Order Notes For Selected Line' window is open, showing a note about testing the email and subject line. Overlaid on this is a 'sending Email....' dialog box with fields for 'From', 'To', and 'Subject'. The 'Subject' field contains the text 'Job# 1927 Quote # 2416.99 Suggested Price for Billing : 0'. An 'Attachments' section shows a folder icon. At the bottom of the dialog, a text area contains the same subject line and the note about testing the email and subject line. A 'Suggest' button is visible at the bottom left of the main window.

Date	Revision No	User	What Changed	What Happened	Change Details	Old Qty.	New Qty.
3/5/2008 10:...	0	LEAH	Self	Change Order	Subject line for the ...		

Notes - Change Order Notes For Selected Line

Testing the change order email and subject line.

sending Email....

From: email@from.com

To: email@to.com

Subject: Job# 1927 Quote # 2416.99 Suggested Price for Billing : 0

Attachments: [Folder Icon]

Job# 1927 Quote # 2416.99 Suggested Price for Billing : 0  
Testing the change order email and subject line.

Suggest

## Order Entry - Special Line in Change Order for Paper Cost Change

If paper pricing is changed from the Paper Reviews screen during a revision, we now indicate on the Change order report – Internal and Customer copy – of that change.

Job created for printed in house item. Current pricing for the quote.

Final Pricing											
\$		Total Cost \$	Non Value Added Cost \$	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	Quoted Price Locked	N
	LETTER	2,018.49	2,018.49	25.80	520.81	2,539.30	0.00	0.00	2,539.30		
	TOTAL PRINT	2,018.49	2,018.49	25.80	520.81	2,539.30	0.00	0.00	2,539.30		
	QUOTED TOTAL	2,018.49	2,018.49	25.80	520.81	2,539.30	0.00	0.00	2,539.30		
	AddM Price:								211.0375		

Current view of Customer copy of Change Order report matches Pricing Summary screen.

Change Orders

1 of 1

100%

Total:2 100% 2 of 2

STREAMLINE<sup>®</sup>

SOLUTIONS

streamline solutions  
100 Smith Ranch Road  
Suite 124  
San Rafael, CA, 94903  
T 415.462-7225  
F 415.233-4157  
www.printstream.com

Approval  
Notice for Job

Attn: Leah  
ph:  
Leah's Account  
123 Test  
Adding a suite  
Taylor,MI

fax:

Date: 12/18/2009  
Revisions: 0 - 1  
Your PO #:   
Our Job #: 5847

Job Name: Test 22632 again

The following changes have been made to your job. Please indicate your approval to each item in the list below and return this signed Change Notice so we may complete your project.

Rev #	Description of Change
1	\$2,539.30-Quoted Price before rev. # 1
1	-

Revised Quoted Price: \$2,539.30



Current view of Internal copy of Change Order report matches Pricing Summary screen.

Streamline Solutions			
<b>Change Order Report</b>		Job No <b>5847</b>	
Page 1 of 1			
<b>Customer:</b> Leah's Account <b>Job Name:</b> Test 22632 again <b>Job Qty:</b> 10000 <b>Salesrep:</b> Gabrielle Allen ph: 415-222-1515      gabby@printstream.com fax: 415-222-1518 <b>CSR:</b> Opal Richey ph:                              fax: <b>Estimator:</b> ph:                              fax:		<b>Revision No.:</b> 0 - 1 <b>Printed:</b> 12/18/2009 4:01:43PM <b>Printed For:</b> LEAH <b>First Due Date:</b> 12/18/2009 <b>Last Due Date:</b> 12/18/2009 <b>Job Started:</b> 12/18/2009	
Rev #	Description of Change	Changed By	Date/Time
1	\$2,539.30-Quoted Price before rev. # 1	LEAH	12/18/2009 3:59:22 PM
1	-	LEAH	12/18/2009 3:59:22 PM

Mark job that this is a revision.

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. A 'Change Order' dialog box is open in the center, displaying the message: 'Current Revision Number is 1. Do you want to make changes to this job and designate them as a new revision?' with 'Yes' and 'No' buttons. The background interface includes a menu bar (File, Window, Changes, Plant(s) for Quote, Refresh Master Data, Help), a toolbar with various icons, and a left-hand tree view. The tree view has the following structure:

- Mail Estimating (Print & Mail)
  - Quote Header
  - Estimating
    - Data Processing
    - Components
    - Assemblies/Bindery
    - Create Inventory
    - Packages Advanced
    - Kits And Packages
    - Finishing
    - Drops
    - Special Instructions
  - Review Pricing
    - Buyouts
    - Final Pricing
    - Pricing Summary
    - Quote Breakdown
    - Quote Breakdown Detailed
    - Credit Status
    - Quote Letter
    - Preliminary Mail Work Ticket
    - Preliminary Combined WOWT
  - Order Entry
    - Scripts
    - NetScripts
    - General
    - Inventory Details
    - Shipping
    - Work Order (mail)
    - Work Ticket (mail)
    - Combined WOWT
    - Inventory Matrix
    - Prepared for Address
    - Change Orders

The 'Change Orders' option under 'Order Entry' is currently selected and highlighted in blue.

Go to Review Papers and changed price from 95.00/M to be 105.25/M.

Review Papers

Quantity: 10,000

Notes	State	Section	Paper	Weight	Size	Color	Quantity	M Weight	Pounds	CWT Price	Rate/M	Rate Units	Charge	Total
<input checked="" type="checkbox"/>	Main Run	letter	Centura Gloss Bk 60#	60	23 x 35	White	10,833 shts	258	2794.914	\$36.82	\$95.00	/1000 shts	Yes	\$1,029.14
<input checked="" type="checkbox"/>							10,833							\$1,140.11

Refresh

Recalc

Close

Click the **Recalc** button and then **Close**.

Review Papers

Quantity: 10,000

Notes	State	Section	Paper	Weight	Size	Color	Quantity	M Weight	Pounds	CWT Price	Rate/M	Rate Units	Charge	Total
<input checked="" type="checkbox"/>	Main Run	letter	Centura Gloss Bk 60#	60	23 x 35	White	10,833 shts	258	2794.914	\$40.79	\$105.25	/1000 shts	Yes	\$1,140.11
<input checked="" type="checkbox"/>							10,833							\$1,140.11

Refresh

You must recalculate estimate to see effects of paper changes.

Recalc

Close

Because pricing has been changed in the review mode you will need to answer **Yes** to retain the overrides and then review the Pricing Summary or Final Pricing screen.

Retain Overrides?

?

This estimate has been previously calculated, and you may have overridden some of the standards.

Do you want to retain overrides?

Yes

No

Final Pricing										
\$		Total Cost \$	Non Value Added Cost \$	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	Quoted Price Locked
	LETTER	2,129.53	2,129.53	25.76	548.57	2,678.09	0.00	0.00	2,678.09	<input type="checkbox"/>
	TOTAL PRINT	2,129.53	2,129.53	25.76	548.57	2,678.09	0.00	0.00	2,678.09	<input type="checkbox"/>
	QUOTED TOTAL	2,129.53	2,129.53	25.76	548.57	2,678.09	0.00	0.00	2,678.09	<input type="checkbox"/>
	AddM Price:								224.3759	<input type="checkbox"/>

View of the Customer copy of Change Order report.

Attn: Leah ph: Leah's Account 123 Test Adding a suite Taylor, MI	fax:	Date: 12/18/2009 Revisions: 0 - 2 Your PO #: 5847 Our Job #: 5847
Job Name: Test 22632 again		
The following changes have been made to your job. Please indicate your approval to each item in the list below and return this signed Change Notice so we may complete your project.		
Rev #	Description of Change	
1	\$2,539.30-Quoted Price before rev. # 1	[ ]
2	\$2,539.30-Quoted Price before rev. # 2	[ ]
1	-	[ ]
2	-	[ ]
2	Paper Cost-letter	[ ]
QTY changed: 1,029 to 1,140		
Revised Quoted Price: \$2,678.09		

View of the Internal copy of Change Order report.

Streamline Solutions			
<b>Change Order Report</b>			
Job No 5847			
Page 1 of 1			
Customer: Leah's Account Job Name: Test 22632 again Job Qty: 10000 Salesrep: Gabrielle Allen ph: 415-222-1515 CSR: Opal Richey ph: 415-222-1515 Estimator: ph: 415-222-1515	Revision No. 0 - 2 Printed: 12/18/2009 4:04:16PM Printed For: LEAH First Due Date: 12/18/2009 Last Due Date: 12/18/2009 Job Started: 12/18/2009		
gabby@printstream.com fax: 415-222-1516			
Rev #	Description of Change	Changed By	Date/Time
1	\$2,539.30-Quoted Price before rev. # 1	LEAH	12/18/2009 3:59:22 PM
2	\$2,539.30-Quoted Price before rev. # 2	LEAH	12/18/2009 4:02:14 PM
1	-	LEAH	12/18/2009 3:59:22 PM
2	-	LEAH	12/18/2009 4:02:14 PM
2	Paper Cost-letter	LEAH	12/18/2009 4:02:34 PM
QTY changed: 1,029 to 1,140			

# Order Entry – Scheduling Screen

Select **Scheduling** from the **Mail Estimating Tree** to schedule dates for processes, check status, complete dates and approve processes.

Enter start dates in each field under the **Scheduled** column OR highlight a cell (or multiple cells) under the **Scheduled** column **right-click** and choose a start date from a list of dates OR select the **Calendar** and **double-click** the desired date and **Save**.

Option to **Unschedule**, or flag the **Process Complete**.

Click (the lower) **X** in the upper right corner to close, OR select a different area on the Mail Estimating Tree.

Buttons along top of screen:

**Add Special Events** adds a scheduled event per job, E.g., Wait for postage check before metering. Standard or saved special events are entered in Report #625.

**Ripple Dates** highlight **Scheduled** cells first, then select the **Ripple** button.

**Close out Job** manually flags the job complete and removes it from the **Jobs** list.\* If you invoice the job it will automatically be removed from the **Jobs** list.

**Delete Events** will remove a Special Event.

**Clone Materials** will make an exact copy of a process or material (Receive, Issue, Transfer or Return).

**Print** a production report.

**Edit Job Notes** allows you to enter or edit current job notes.

**Note** **Receives, Issues, Returns and Transfers** will display and are managed from the **Scheduled Tasks** module if you enter a date in the **Scheduled** field.

## Order Entry – Scheduling – Special Events

If a special event needs to be completed before a process can be finished (e.g., postage due or tape/disk due), select **Add Spec Events** button. Check: Finishing, Pre-Press or Press, enter the special event and **OK**. The special event(s) will appear under the Process section of the Scheduling screen.

Enter start dates in each field under the **Scheduled** column OR highlight a cell (or multiple cells) under the **Scheduled** column **right-click** and choose a start date from a list of dates OR select the **Calendar** and **double-click** the desired date and **Save**. Option to **Unschedule**, or flag the **Process Complete**.

**Buttons along top of screen:**

**Add Special Events** adds a scheduled event per job (e.g., Wait for postage check before metering). Standard or saved special events are entered in Report #625.

**Ripple Dates** highlight **Scheduled** cells first, then select the **Ripple** button.

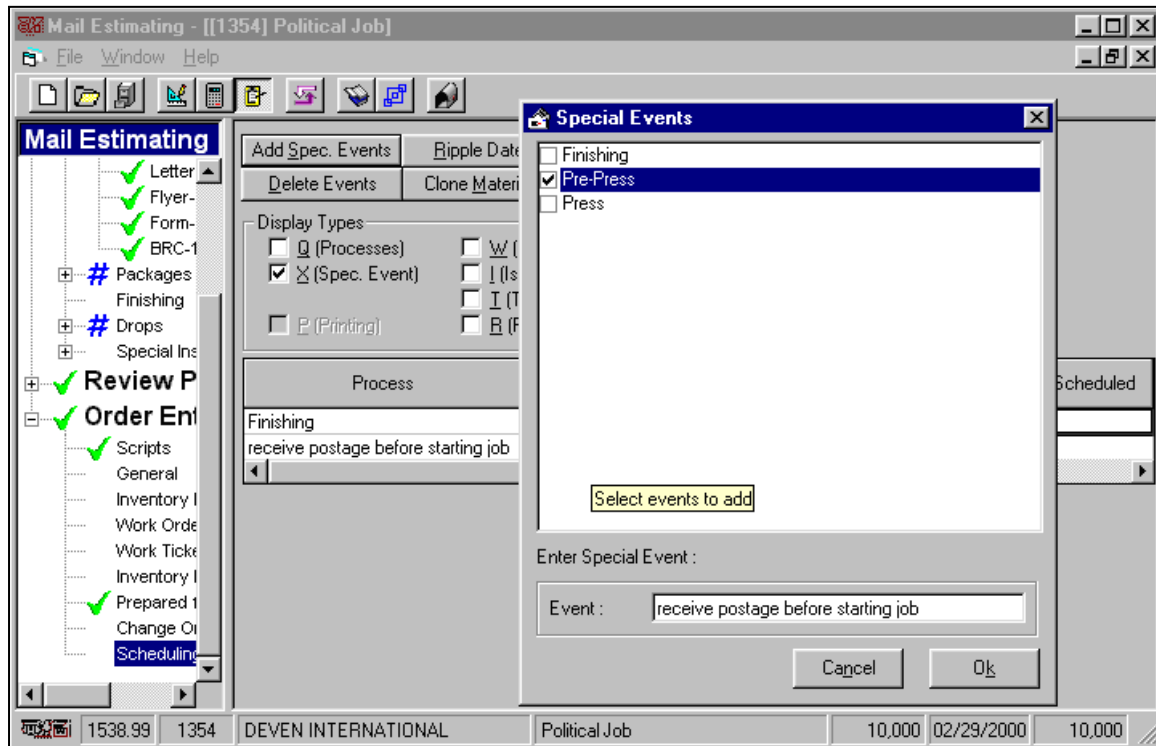
**Close out Job** manually flags the job complete and removes it from the **Jobs** list.\* If you invoice the job it will automatically be removed from the **Jobs** list.

**Delete Events** will remove a Special Event.

**Clone Materials** makes an exact copy of a process or material (Receive, Issue, Transfer, Return).

**Print** a production report.

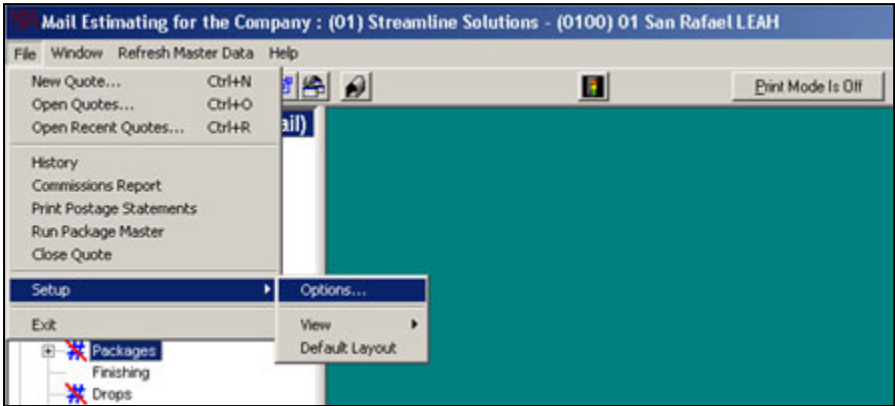
**Edit Job Notes** allows you to enter or edit current job notes.



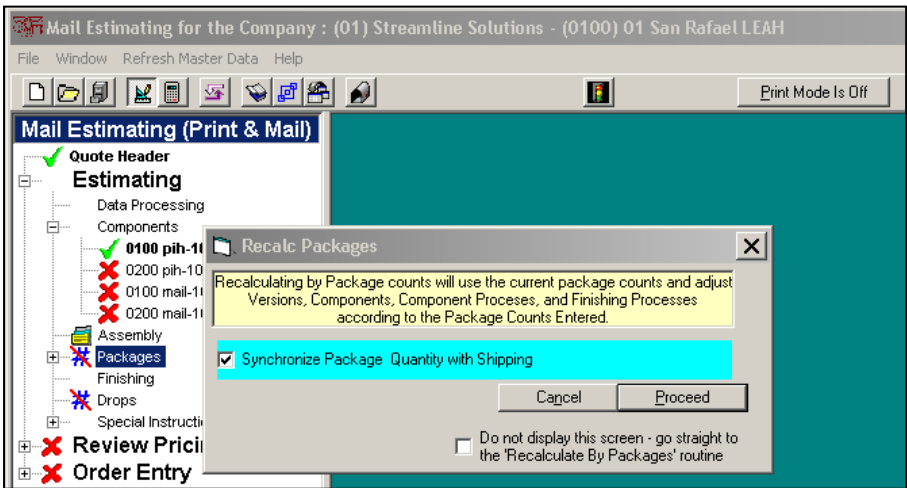
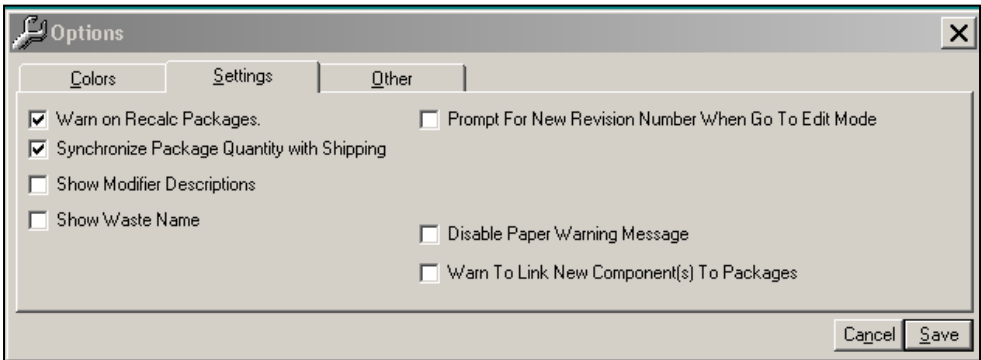
## Synchronize Package Quantity with Shipping

Added a default setting in the print and mail estimating module to Synchronize Package Quantity with Shipping as checked or not.

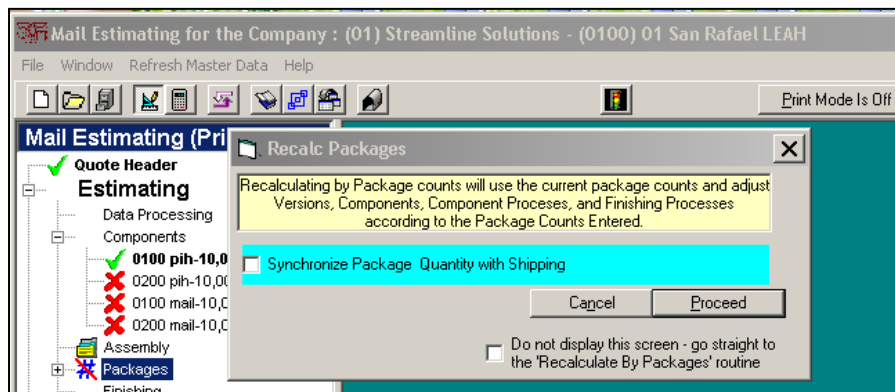
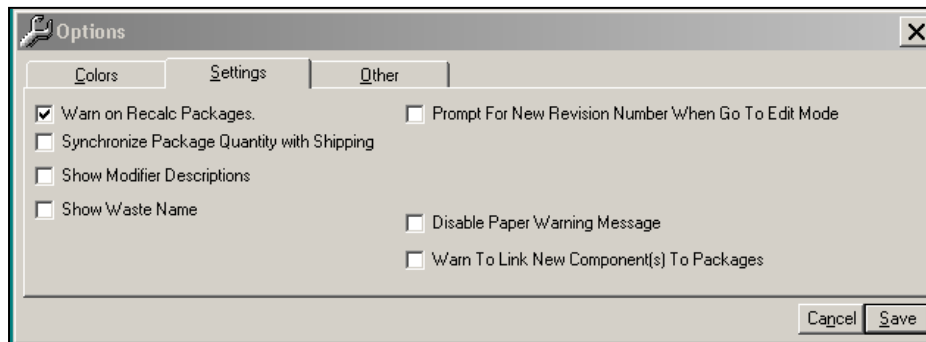
Go to **File>Setup>Options**.



Check if you wish to default the check box to Synchronize Package Quantity with Shipping.



Clear to not default the check box.



## Place Jobs on Scheduling Hold

We added a **Job Status** option in Print and Mail Estimating to allow the jobs to be placed on hold from Scheduling.

Once the quote is converted to a job, select the **Job Status** icon. You can then assign a user defined hold code, select the source, Expected close date and Cost center then add to save.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Company 01 Primary Location LEAH

File Window Changes Refresh Master Data Help

Print Mode Is Off

**Mail Estimating**

- Quote Header
- Estimating
- Data Processing
- Components
- selfmailer-10
- Bound Components
- Packages
- Finishing
- Drops
- Special Instructions
- Review Pricing
- Order Entry

**Set/Review Job Status**

Job Number: 1221 Title: Test cid 18192

Customer: leah12 Name: Leah Customer 12

Due Date: 9/15/2008

☒ Job is on Hold

Not Scheduled

Save Changes

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

Terms : Net 30  
Contact : Clarence Clemons  
Phone : 801-555-1234  
New job. No previous job entered  
Job Entry Date : 9/3/2008  
Quote : 1496.99  
Quantity : 10,000  
Quote Entry Date : 9/3/2008  
Quoted Price : \$2,331.34  
Customer Order No : N/A  
Requested Ship Date : 9/15/2008  
Promised Ship Date : N/A  
Expected Job In Date : N/A  
Sales Rep : House Account  
Planner : N/A  
Estimator : N/A  
CSR : House Account

Add New Code

Code: HL1 Description (add comments below if desired): Hold Job - Waiting for Artwork

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

Expected close date: 9/5/2008

Comments: Customer to send artwork

Cost Center: 4:ART/COMPOSITION [0]

Add

Cancel Search

Work Order

This will then place the job on a scheduling hold.

**Set/Review Job Status**

Job Number: 1221 Title: Test cid 18192

Customer: leah12 Name: Leah Customer 12

Due Date: 9/15/2008

☒ Job is on Hold

On Hold

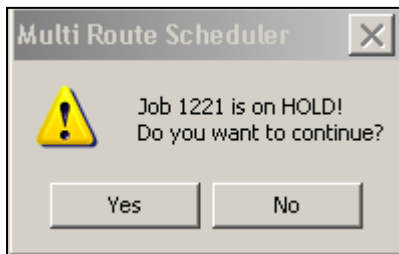
Save Changes

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

Close	Code	Description	Set By	Date Set	Caused By	Exp Close	Cost Center	Comment
<input type="checkbox"/>	HL1	Hold Job - Waiting for Artwork	LEAH	9/3/2008 12:09:34 PM	Internal	9/5/2008	ART/COMPOSITION	Customer to send artw



If you attempt in MR Scheduler to schedule the job, you will receive a message that the job is on hold.



## Copying or Deleting an Existing Quote or Job

To **Copy** an existing quote or job, click the yellow file folder in the menu bar, **Open Existing Quote** and locate the quote or job you want to copy. Click (or highlight) the Quote Number and select the **Copy Quote** icon on the screen. After selecting the **Copy Quote** button, you will have the option to change quantities and Copy to: the same customer or a new customer. You can also adjust package quantities by percentage and add additional quantities.

**Copy Quote**

Original Customer: ALASKA Alaska Inc. Cust. Price List: Std. Price List: ☒

Copy to New Customer ☒

Pricelist Used for an Original Quote :Alaska Price List 8/5/2009

Customer #: 01: Streamline Customer: Contact: Address: Contact Phone: SalesRep:

Adjust all packages by (+/- %):

Package Number	Package Name	Original Quantity	New Quantity
1	Default Package	10,000	10,000

Qty 1: 10,000 Qty 2: Qty 3: Qty 4: Qty 5: Qty 6:

Clear Rate Locks ☐  
 Copy General Notes ☐  
 Copy Scripts ☐  
 Copy Quote Letter Notes ☐  
 Copy Estimator Notes ☐  
 Copy Drops ☐  
 Copy Postage Estimate ☐  
 Retain Overrides ☒  
 Retain Print Markups ☒  
 Copy O.E. General Addresses ☐

Copy to Version ☐  
 Copy Vendors for Buyout Processes ☒  
 Copy Vendor's bids pricing ☒  
 Copy Multiple FG inventory Items generated by Quote ☐

Cancel Copy

Additional copy options include:

**Clear Rate Locks:** clears any pricing overrides that were changed and locked in the final pricing screen on the quote/job from which the copy is created.

**Copy General Notes:** copies notes entered in the 3-Special Instructions screens.

**Copy Scripts:** copies all script answers.

**Copy Quote Letter Notes:** copies all quote letter notes entered for each process (prints on quote letter).

**Copy Estimator Notes:** copies estimator notes entered in the est. notes icon (quote header screen).

**Copy Drops and Estimated Postage:** copies all drops and, if checked, estimated postage for those drops.

**Retain Overrides:** retains estimated job qtyps. that were changed/overridden for a process and retains locked-in run speeds on component and finishing processes.

**Copy O.E. General Addresses** - select to copy all information in the Order Entry > General window.

**Copy to Version:** creates a relationship between the original quote number (2001) and the copied version (.01). Example: 2001.01, 2001.02...

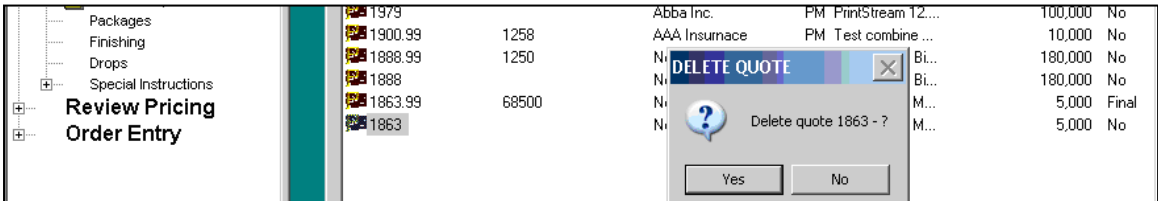
**Copy Vendors for Buyout Processes:** copies all vendors used in previous quote (no \$ in Bid Pricing screen).

**Copy Vendor's bids Pricing:** copies all vendors pricing for the Buyout Processes.

**Copy Multiple FG Inventory Items generated by Quote:** copies the FG items that were part of the original quote/job into the new quote.

Once the quote is copied select the **Recent** tab. Your copied quote will appear at the top of the screen with the Job Title changed to **Copy of....** To open, double-click the quote number. The Title of the Quote can be changed in the Quote Header screen.

To **delete** a quote, click the quote number and select the **Delete Quote** icon in the menu bar of the Open Existing Quote screen. Answer **Yes** to the Delete Quote box.



To **Delete** a job, locate the 'Delete a Job' Module. **If you do not have access to this Module see your System Administrator. Jobs that have Inventory assigned, Postage Reserved, Job Costing transactions, or jobs that have been Invoiced cannot be deleted from the system.** When trying to delete a job with any of these transactions, an information box will display to let you know there have been transactions linked to this job.

## Sales Rep or Split % Amount Changes Disallowed After Final Invoice

Options to change reps and percent of commission splits will be inactive after a final invoice is created. This change was added to work with the .net Commissions module.

**Final Invoiced**

Customer #: 50115 Sub Acct FSC quote ☐

Customer: Sales Budget Report Test Additional Info

Contact: Contact Phone: Phone: FAX:

Address: 3322 Test TAYLOR,MI 48180

**Personell Related...**

List of Salesreps for the Quote 3545.99 Copy of test  
Currently NOT active personnel displayed in red back color and NOT available for the selection.

Avaliable		Currently Assigned	
	Name		Split
1	Andrea Cox	1	Gabrielle Allen 0.00
2	Brian Pichierri		
3	Chris Kinkaid		
4	Claude		
5	Cornelius Fudge		
6	DMM Everything		
7	DMM Sales Guy		
8	Gilderoy Lockhart		
9	House Account		
10	John		
11	Leah VanWynsberghe		
12	Lily Potter		
13	Linda Pollard		
14	Michael Carpino		
15	Michael		

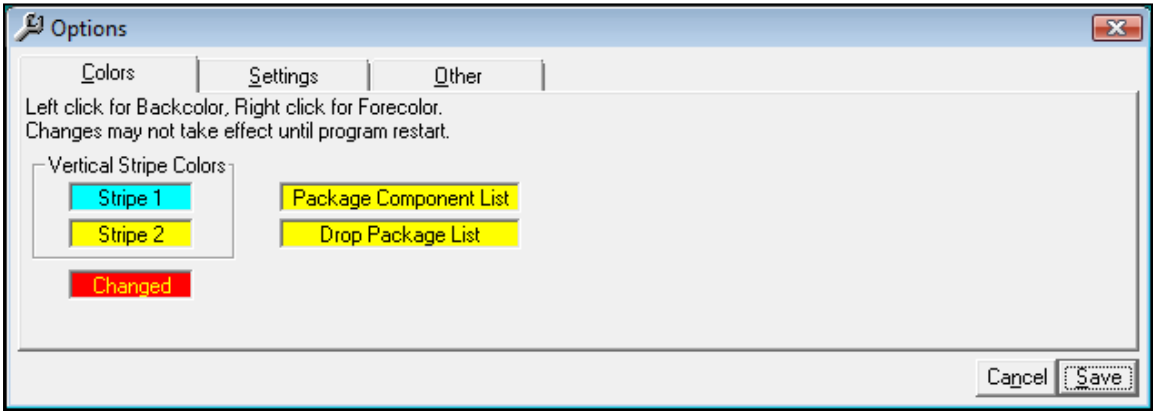
Split Total is 0%

Close Save

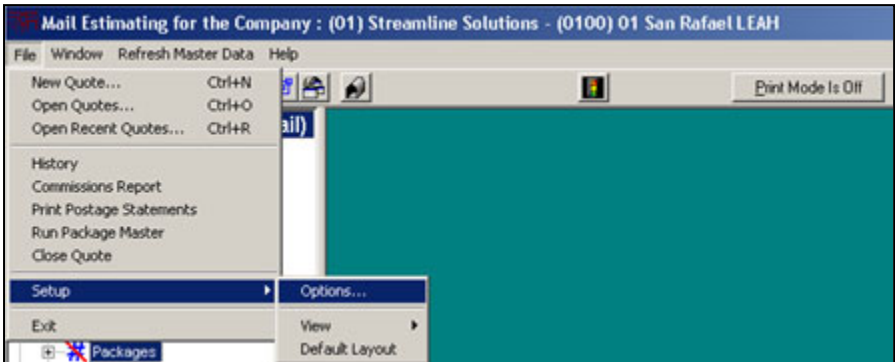
## Setup Options per Workstation

Select **File > Setup > Options** to access workstation setup options.

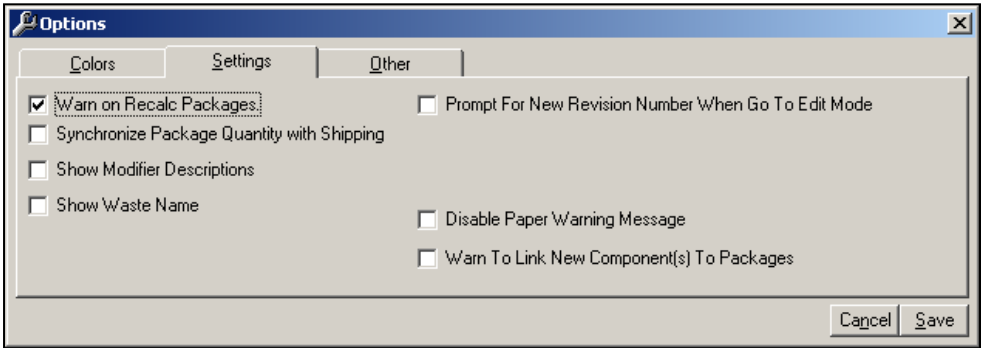
Select the **Colors** tab to choose colors for the Packages and Drop Screens.



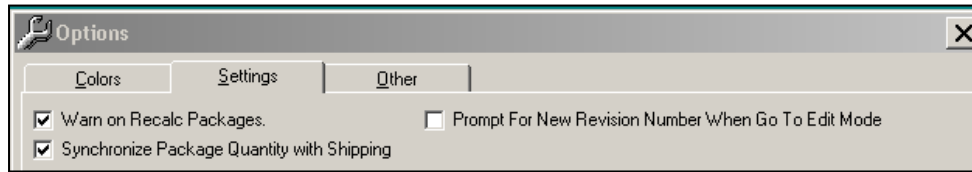
Select the **Settings** tab to set the following workstation options:



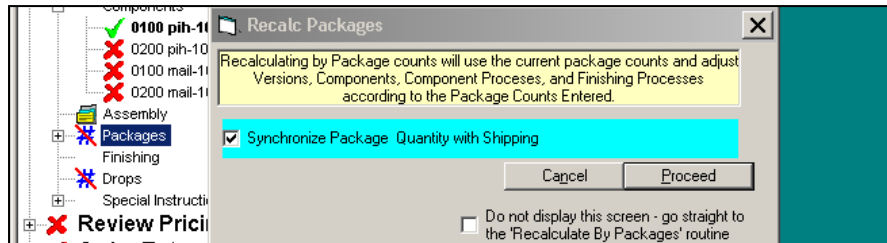
Warn on Recalc Packages – displays the warning message when Package ReCalc option (purple and white arrows icon) selected.



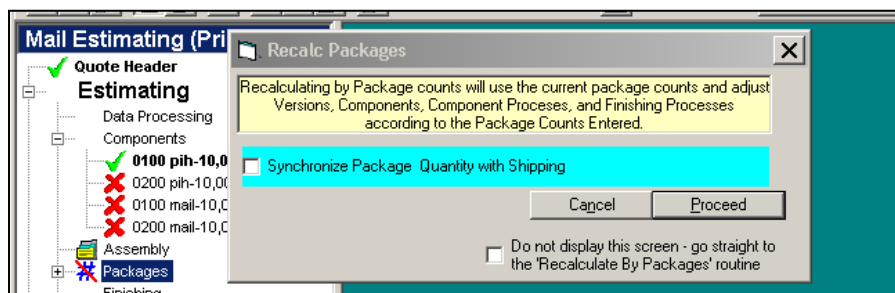
The – Synchronize Package Quantity with Shipping – checked will set the default to Synchronize Package Quantity with Shipping; cleared will default to have this option deselected.



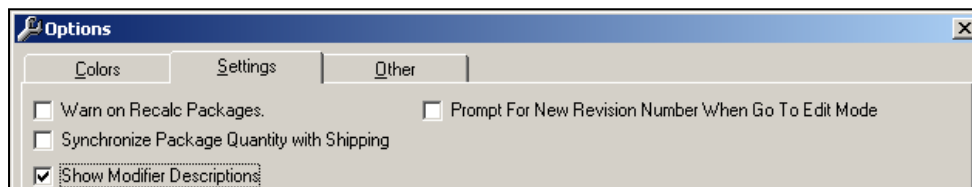
Selected:



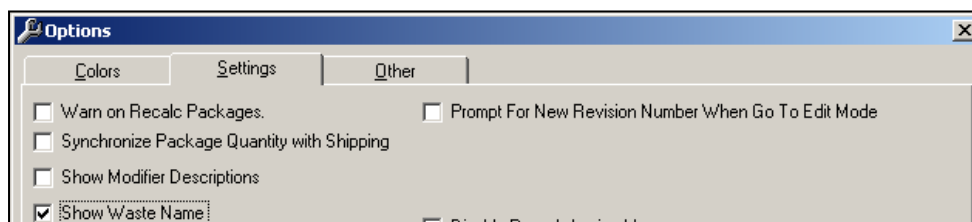
Cleared:



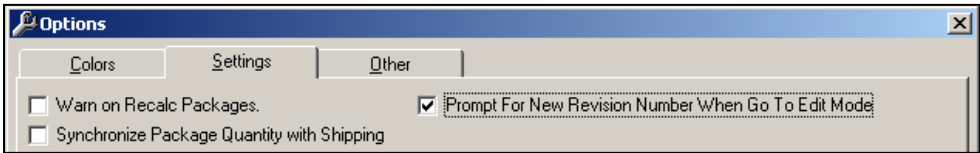
Show Modifier Descriptions – prints modifier descriptions on work orders and work ticket.



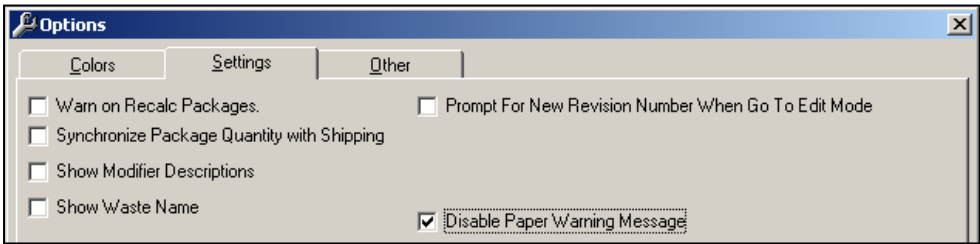
Show Waste Name - displays waste name from report 630 drop-down menu, instead of the component name on the Inventory Matrix Report.



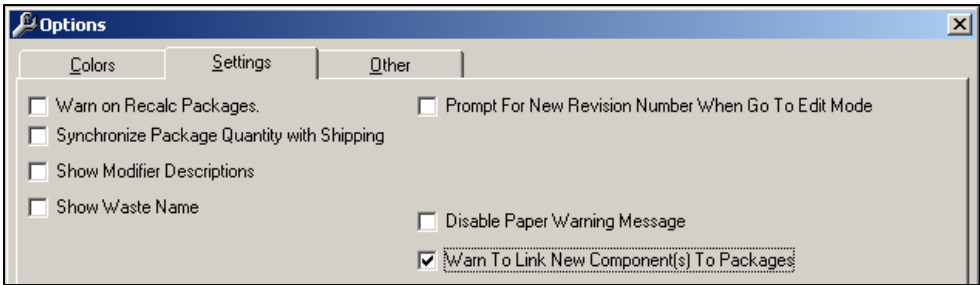
Prompt for New Revision Number when user goes to **Edit** mode.



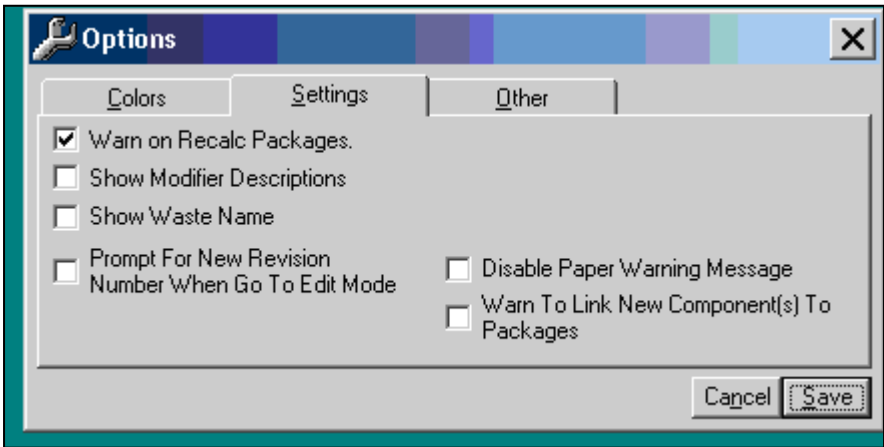
Display Paper Warning Message – displays a warning message (for Print and Mail).



Warn to Link New Component(s) to Packages.



**Other** tab is not currently used.



Choose desired settings and press **Save**.

**Note** Option settings will display per Workstation only.

## Common User Question: “Which documents do all those NOTE fields print out on?”

1. Prints on Quote Letter:
  - Quote Letter Notes (prints next to each process)
  - Description Field (prints in upper left corner)
  - Component Notes (prints next to each component -- Custom Programming: Custom PAMQLParagraph.dot Quote Letter Format ONLY)
2. Prints on Quote Breakdown (internal document: cost vs. sell):
  - Description Field (prints in upper left corner)
  - Estimator Notes (enter in quote header screen)
  - Source field (enter in component screen (upper right corner))
3. Prints on Mail Work Ticket:
  - Estimator Notes (enter in quote header screen) \*Work Ticket (ONLY)
  - Description Field \*Work Ticket (ONLY)
  - Version Notes (... button in component screen – top center) \*Work Ticket (ONLY)
4. Prints on Mail Work Order:
  - QC scripts (quality control scripts - only if created in MF-Mail Process) - \*\*Work Order (ONLY)
5. Prints on BOTH Mail Work Order and Mail Work Ticket:
  - Component 'Comments' field (prints to the far-right of each listed component)
  - Package Notes
  - Drop Notes
  - Special Instructions (Work Order: prints before each section - DP, Component, Finishing... Work Ticket: prints on last page)
  - Scripts (prints next to each process)

## Summary of Printed Notes

X - Indicates that the information prints on document.

Additional Information / Note Type	Quote Letter	Quote Breakdown	Work Ticket	Work Order	Invoice
Quote Header					
Job Description	x	x	x		x
Estimator Notes		x	x		
Quote Letter Notes	x				
Component Preparation Notes	N/A Yet				
Comments					
Source Field			x	x	
Version Notes		x			
			x		
Drop Notes			x	x	
Package Notes			x	x	
Drop Notes			x	x	
Special Instructions			x	x	



## Notes in Header Screen for Printed in House Component

Added a **Notes** button for the printed in house item that can be accessed in the following areas:

In the component screen, the 2<sup>nd</sup> **Notes** button is for the Print related notes when the print mode is off.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [Form#: 1 PIH-10,000]

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

Print Mode Is Off

**Mail Estimating (Print & Mail)**

**Quote Header**

**Estimating**

- Data Processing
- Components
  - Form# 1 PIH-10,000**
  - Assemblies/Bindery
  - Create Inventory
  - Packages Advanced
  - Kits And Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing**
- Order Entry**
  - Scripts
  - NetScripts
  - General
  - Inventory Details
  - Shipping
  - Work Order (mail)
  - Work Ticket (mail)
  - Combined WOWT
  - Inventory Matrix
  - Prepared for Address
  - Change Orders
  - Change Orders For Billing
  - Scheduling

Description: PIH Versions: 1 ... Source: ... Printed InHouse

Date on Hand: ... Quantity before Overs: 10,000

Item # Form: ... Waste: 0

Inventory: ... Total Quantity: 10,000

Inv. Description: ... Additional Info

Overs to: ... Form # 1

Insert Notes: ... Finish Trim Size 8 1/2x11

Comments: ... Flat Size 8 1/2x11

WIP: ... Caliper 00.0020

Item # To: ... Pc Weight 0.000

Inventory: ... Bundle Qty 0

Inv. Description: ... Num Of Pages 16

Num Of Sheets 8

Verified

Notes... Notes... Delete Component Copy Component Save Cancel

Notes - Print Component Notes For PIH

These are the print related component notes for the PIH item. These need to be sure they are appearing on the .net work ticket as well in the Print area of the work ticket.

Cancel Save

When the Print Mode is on:

PIH

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: PIH

Template: 16pg 8 1/2 x 11 View Change Template Notes

No. Runs: 1 Bound as 1 sigs. Number Of Pages 16

Finish Trim Size: 8 1/2 x 11 Number Of Sheets 8

Flat Size: 8 1/2 x 11 Form Number 1

Section Qty: 10,000

Notes - Print Component Notes For PIH

These are the print related component notes for the PIH item. These need to be sure they are appearing on the .net work ticket as well in the Print area of the work ticket.

Mail Estimating for the Company - (01) Streamline Solutions - (0100) 01 San Rafael LEAH

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

Print Mode Is On

**Mail Estimating (Print & Mail)**

- Quote Header
  - Estimating
    - Data Processing
    - Components
      - Form# 1 PIH-10,000**
      - Assemblies/Bindery
      - Create Inventory
      - Packages Advanced
      - Kits And Packages
      - Finishing
      - Drops
      - Special Instructions
  - Review Pricing
  - Order Entry
    - Scripts
    - NetScripts
    - General
    - Inventory Details
    - Shipping
    - Work Order (mail)
    - Work Ticket (mail)
    - Combined WOW/T
    - Inventory Matrix
    - Prepared for Address
    - Change Orders
    - Change Orders For Billing
    - Scheduling

**PIH - Print Override**

Press Front Press Back Ink Front Ink Back Section Finishing

	10,000	
Press:	240 Heidelberg	✓
Precut:		
Finish (Trim) Size:	8 1/2 x 11	
Num. Up:	1	✓
Press Size:	23 x 35	✓
Num. Out:	1	✓
Paper Size:	23 x 35	✓
Waste:	433	
Job M/R (Hrs.):	0:30	
Plate M/R (Hrs.):	0:20	
Plates:	Metal	
Extra Plates:	0	
Section Qty.:	10,833	✓
Run Speed:	5,000	✓
Washups (Hrs.):	0:15	
Passes:	1	
Number sheets		
Run Hour		

Recalc Section

Notes...

Notes - Print Component Notes For PIH

These are the print related component notes for the PIH item. These need to be sure they are appearing on the .net work ticket as well in the Print area of the work ticket.

Cancel Save

Number Of Pages

Number Of Sheets

Form Number

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH

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

Print Mode Is On

### Mail Estimating (Print & Mail)

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Form# 1 PIH-10,000**
    - Assemblies/Bindery
    - Create Inventory
    - Packages Advanced
    - Kits And Packages
    - Finishing
    - Drops
    - Special Instructions
- Review Pricing
- Order Entry
  - Scripts
  - NetScripts
  - General
  - Inventory Details
  - Shipping
  - Work Order (mail)
  - Work Ticket (mail)
  - Combined WOOT
  - Inventory Matrix
  - Prepared for Address
  - Change Orders
  - Change Orders For Billing
  - Scheduling

### PIH - Print Override

Press Front Press Back Ink Front Ink Back Section Finishing

	10,000	
Press:	240 Heidelberg	✓
Precut:		✓
Finish (Trim) Size:	8 1/2 x 11	
Num. Up:	1	✓
Press Size:	23 x 35	✓
Num. Out:	1	✓
Paper Size:	23 x 35	✓
Waste:	433	
Job M/R (Hrs.):	0:30	
Plate M/R (Hrs.):	0:20	
Plates:	Metal	
Extra Plates:	0	
Section Qty.:	10,833	✓
Run Speed:	5,000	✓
Washups (Hrs.):	0:15	
Passes:	1	
Number sh		
Run Hour		

Recalc Section

Notes...

Number Of Pages

Number Of Sheets

Form Number

### Notes - Print Component Notes For PIH

These are the print related component notes for the PIH item. These need to be sure they are appearing on the .net work ticket as well in the Print area of the work ticket.

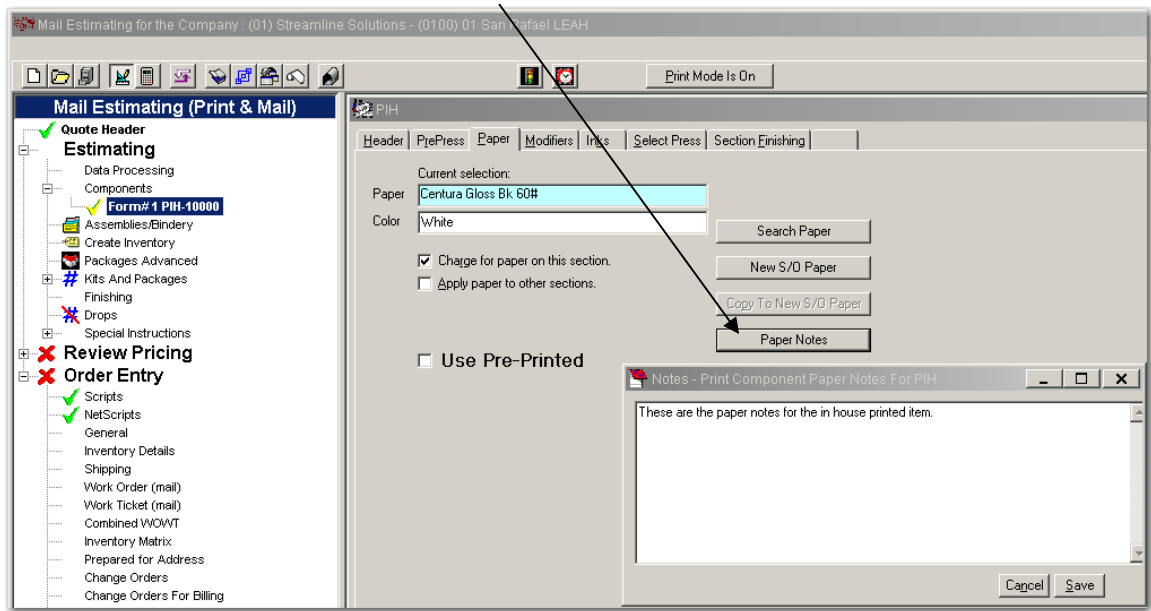
Cancel Save

These notes will be displayed on the .net Work Ticket here:

Job Summary												
<b>Components</b>												
No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes				
1	PIH		10,000	Printed	8.5 x 11	8.5 x 11						
1 forms x 16 pgs, 1up Sheetwise, 2/2, 240 Heidelberg												
These are supposed to be related to the Mail side of the notes area for the component.												
<b>Papers</b>												
#	Component	Material Description / Color	Basis Wt	M/WT	Item #/Code	Sheets/ Feet	Pounds	Parent Size	Cut to	Out	Vendor ACC# /Name	Price/Per
1	PIH	Centura Gloss Bk 60#	60	258		10,833	2,795	23 x 35	23 x 35	1	DPHOUSE	95.00
	Run Seq # 1	White									DP House Inc.	/1000 sheets
Job Details												
<b>Print Components</b>												
Press Notes												
#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size						
1	PIH		10,000	Printed	8.5 x 11	8.5 x 11						
<b>1 forms x 16 pgs, 1up Sheetwise, 2/2, 240 Heidelberg</b>												
Paper/ Material Description - (Vendor Product Code:)		Inventory ID	Material Qty	Parent Size	Cut To	#Out	Source					
Centura Gloss Bk 60#			10,833	23 x 35	23 x 35	1	DPHOUSE					
Press	Imposition	#Up										
240 Heidelberg	Sheetwise	1										
These are the print related component notes for the PIH item. These need to be sure they are appearing on the .net work ticket as well in the Print area of the work ticket.												
Front: <b>Black,PMS 1</b>												
Back: <b>Black,PMS 1</b>												

## Notes for Papers

The ability to enter paper related notes to the job is available. These can be entered when the Print Mode is on for the components and available on the **Paper** tab.



When in the Print Override.

**PIH - Print Override**

Press Front | Press Back | Ink Front | Ink Back | **Section Finishing**

10,000

Press: 240 Heidelberg ✓

Precut: ✓

Finish (Trim) Size: 8.5 x 11

Num. Up: 1 ✓

Press Size: 23 x 35 ✓

Num. Out: 1 ✓

Paper Size: 23 x 35 ✓

Waste: 433

Job M/R (Hrs.): 0:30

Plate M/R (Hrs.): 0:20

Plates: Metal

Extra Plates:

Section Qty.:

Run Speed

Washups (Hrs.): 0:15

Passes:

Number shts:

Run Hours:

Recalc Section

Notes... **Paper Notes**

**Notes - Print Component Paper Notes For PIH**

These are the paper notes for the in house printed item.

Cancel Save

The can be viewed on the .net Work Ticket in the Job Summary section for the Paper.

**Job Summary**

**Components**

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	PIH		10,000	Printed	8.5 x 11	8.5 x 11		
1 forms x 16 pgs, 1up Sheetwise, 2/2, 240 Heidelberg								
These are supposed to be related to the Mail side of the notes area for the component.								

**Papers**

#	Component	Material Description / Color	Basis Wt	M Wt	Item #/Code	Sheets/ Feet	Pounds	Parent Size	Cut to	Out	Vendor ACC# /Name	Price/Per
1	PIH	Centura Glass Bk 60#	60	258		10,933	2,795	23 x 35	23 x 35	1	DPHOUSE	95.00
	Run Seq #1	White									DP House Inc.	/1000 sheets
These are the paper notes for the in house printed item.												

In the .net Quote Breakdown.

Print						
PIH - 1 Forms x 16 Pages (16pgs), 8.5 X 11 - Printed 2/2						
Printed Component		10,000				
		Hours	Cost	Hours	Cost	H
These are the print related component notes for the PIH item. These need to be sure they are appearing on						
Plates	Plates	1:00	\$90.00		\$0.00	
	Plates..(Side1/Side2)	2/2	\$0.00		\$0.00	
Paper	Centura Gloss Bk 60#		\$1029.14		\$0.00	
These are the paper notes for the in house printed item.						
	White	10833				
	Paper Size	23 x 35				
	Number Out	1				
	Press Sheet Size	23 x 35				
	Paper Rate/1000 sheets	\$95.00				

And when you right-click in Scheduled Purchasing for the paper line.

Material Requirement

File

Task ListInventoryPurchasingSheetingPO MonitorReports

Search Criteria

☐ All☐ Direct sql

Start Date3 / 2 /2010End Date3 / 2 /2010

Selection TypeKey Word

Vendor

☐ View all Plants☐ Mail Jobs☒ Print Jobs☐ Ignore unscheduled tasks☒ Ignore Mail Components

Job

Job #6070

TitleTest

Cust CodeLEAH

NameLeah's Account

Est Delv Dt3/2/2010

Job#	Qty	UOM	Details	Size	Part	Vendor	PO#	Sch Dt	Rev
6070	10000	Sheets	Centura Gloss Bk 60#	23 x 35	PIH	DP House Inc.	0	N/A	

Edit PO

View PO

View Job Details

View Paper Notes

View Print Related Component Notes

View Mail Related Component Notes

Set Task Completed

View Buyout Bids

Open Paper Reservation

Show Details

## Print and Mail Estimating/Order Entry - Quiz / Reviews

### Beginning “Quiz” / Review

1. Create a new Estimate using the ‘Wizard.’ Enter Job title: **Beginning Quote** and 1 quantity of 50,000.
2. Estimate 3 ‘Data Processing’ activities, 1 buyout activity and over-ride 1 process quantity (e.g., Merge/Purge).
3. Create 3 ‘Components’ (Envelope #10, Letter (**Print In House**) and Flyer.
4. Estimate 3 ‘Finishing’ activities.
5. Add 1 ‘Component Process’ to each component (e.g., Inkjet – Envelope, Laser – Letter and Fold – Flyer) and over-ride 1 process quantity (e.g., Fold a different qty. than the job qty.)
6. Add Quote Letter Notes to 1 ‘Component Process,’ 1 ‘Finishing activity’ and 1 ‘Data Processing’ activity.

**Note** Type in the name of the ‘note field’ before entering notes so you can see where notes print on the Quote Letter.

7. For Letter (**Print in House**): add 1 ‘additional plate,’ change ‘ink coverage’ to medium, add a printing modifier and add 1 PMS ink to side 1.
8. Customer would like a postage estimate (1-ounce, first class, automation letter).
9. Enter a buyout **sell** price and buyout **cost** for each buyout activity and over-ride and lock pricing on 1 activity.
10. **Print** an Itemized and Paragraph Quote Letter, Print both a Mail and a Print Quote Breakdown and close Estimate.

#### **STOP HERE: Show Instructor Quote Letters before continuing...**

11. Open previous Estimate (customer approves quote and wants estimate converted to a job).
12. Attach or create new Inventory items for each mail component. Enter a Receive Date for each inventory item and enter all optional: Overs to, Insert Notes, Source and comments fields.

**Note** Type in the name of the ‘note field’ before entering notes so you can see where notes print on the Work Order and/or Work Ticket.

13. Re-name the default package: ‘**E-L-B Pack.**’
14. Enter 2 Drops and Estimate Postage for drop 1 only. Drop 1, Deliver: Post Office = 49,750 and drop 2, Deliver: Customer = 250.
15. Convert Estimate to a Job.
16. Enter **Package Notes**, **Drop Notes**, **Special Instructions**, and answer all **Scripts**. Enter exact ink colors.

**Note** Type in the name of the ‘note field’ before entering notes so you can see where the notes print on the Work Order and/or Work Ticket.

17. Enter a different contact name for the **Bill to Address** and **Overs To Address**.

**Note** Type in the name of the ‘note field’ before entering data in ‘comments’ field and ‘important’ field so you can see where data prints on Work Ticket.

18. Print a Mail Work Order (by Package), **export and print** (envelope icon) a Mail Work Ticket (Format: Word for Windows Document. Destination: Disk to File or Application) and print a Print Work Order.

**Show Instructor Work Order and Work Tickets... if you “passed” see Intermediate “Quiz.”**

## Intermediate “Quiz” / Review

1. Copy the Estimate/Quote (not job) ‘**Beginning Quote**’ with 2 estimated quantities (75,000 and 150,000) to the same Customer. (leave all other copy options cleared).
2. Open and edit the Job title to **Intermediate Quote: 2 Quantities**. Change both quantities in the Quote Header to: 100,000 and 200,000 and change the default Contact name. Enter data in the **Description** and **Estimator Notes** fields.

**Note** Type in the name of the **Note** field before entering notes so you can see where notes print on the Quote Letter, Work Order and/or Work Ticket.

3. Delete 1 **Finishing** activity, add 3 different **Finishing** activities and add 1 **Finishing** buyout.
4. Add quote letter notes to 1 ‘Finishing’ and 1 ‘Data Processing’ activity.
5. Delete all ‘Components’ and ‘Component Processes.’
6. Add 5 new components (Outer Envelope #10, Letter (**Print In House**) A-Local version, Letter (**Print In House**) B-Int’l version, Letter (**Print In House**) C-Domestic version and Business Reply Card), estimate 1 ‘Component Process’ for each **Component** and add 1 **Component** buyout.
7. Change the **Component version** quantity of the ‘**Letter A-Local version**’ (to 30,000), ‘**Letter B-Int’l version**’ (to 20,000) and ‘**Letter C-Domestic version**’ (to 50,000) and add version notes.
8. Enter a buyout **sell** price and buyout **cost** for each buyout activity and lock pricing and over-ride and lock pricing on one activity for each quantity (100,000 and 200,000). Over-ride **Print** default markups for Paper, Labor and Materials.
9. Enter a Mail Global markup of 10%, then a global discount of 10% and **Save** and **Recalc**.
10. **Print** an Itemized or Paragraph Quote Letter and close the Estimate.

**STOP HERE: Show Instructor Quote Letter before continuing...**

11. Estimate was approved for 100,000. Open Estimate **Intermediate Quote: 2 Quantities** and attach and/or create new Inventory items for each component. Enter a receive date and enter all optional Overs to, Insert Notes, Source and comments fields for at least one component.
12. Enter 3 Packages: package 1, **Letter A-Local-V** = 30,000, package 2, **Letter B-Int’l-V** = 20,000 and package 3, **Letter C-Domestic-V** = 50,000.
13. Enter 2 Drops and Postage for both: drop 1, **Local and Domestic** = 80,000; drop 2, **Int’l.** = 20,000.
14. Convert Estimate to a Job and select 100,000.
15. Enter **Package** and **Drop Notes**, **Special Instructions**, answer **Scripts**. Enter **ink** colors.

**Note** Type in the name of the **Note** field before entering notes so you can see where the notes print on the Quote Letter, Work Order, and/or Work Ticket.

16. Delete 1 ‘Data Processing,’ 1 ‘Component Process’ and 1 ‘Finishing’ activity and enter a Global markup of 5%. **Print** a Mail ‘Change Order’ Report.

**Export and print** (envelope icon) a Mail Work Ticket and print a Print Work Order/Ticket.

**Show Instructor Work Order and Work Tickets... if you “passed” see Advanced “Quiz.”**



## Advanced “Quiz” / Review

1. Create new Estimate using the Wizard. Enter Job title: **Advanced Quote** and enter three quantities: 100,000; 200,000 and 500,000.
2. Estimate 5 Data Processing activities, 1 buyout activity and over-ride 1-process quantity.
3. Create 5 Components (6"x9" Jiffy Pack, Letter (**Print In House**), Form (**Print In House**) -version A, Form (**Print In House**) -version B and Business Reply Envelope).
4. Estimate 5 Finishing activities, 1 buyout activity and over-ride 1-process quantity.
5. For Letter (**Print in House**): add 2 'additional plates,' change 'ink coverage' to heavy, add a printing modifier and add 3 PMS inks to side 1. Change the component version quantity of '**Form-version A**' = 75,000 and **Form-version B** = 25,000 and add version notes to each.  
  
You discover there are also 2 versions of the component '**Letter**' being lasered BUT the letter has the same item # for both versions. **Letter V-1** = 75,000 and **Letter V-2** = 25,000.
6. Attach a valued (finished goods) inventory item to the '**6"x9" Jiffy Pack**' component.
7. Enter a buyout **sell** price and buyout **cost** for each buyout activity and lock pricing. Over-ride and lock pricing on one activity, then enter a **Desired Total** in the Final Pricing screen.
8. Enter sell price for valued (finished good) inventory item '6"x9" Jiffy Pack' component and **Close**.
9. Customer calls and wants an estimate for the same job, but for 6 more quantities. Close Estimate and make a Copy of the original Estimate to the same customer. Change quantities to 300,000; 750,000 and 1,000,000. \*Select: Copy General Notes, Copy Scripts, Copy Quote Letter Notes, Retain (qty.) Over-rides and Copy to Version.
10. Make another Copy of the original Estimate to the same customer and change quantities to 25,000; 50,000 and 75,000. Make same copy quote selections as above\*. Open the estimates, edit job titles, check final pricing screen, etc., and **print** an Itemized or Paragraph Quote Letter for each.

**STOP HERE: Show Instructor Quote Letter before continuing...**

11. Customer approves the estimate for 750,000. Open the correct version of the Estimate and edit the Job title: '**Advanced Quote: 3 Quantities, Version**'
12. Attach and/or create new Inventory items for each mail component and enter a receive date.
13. Convert Estimate to a Job and select 750,000. Double-check **Component** version quantities.
14. Enter 2 'Packages,' package 1, **Letter1-Form-A** = 500,000 and package 2, **Letter2-Form-B** = 250,000. Select **re-adjust qty. by package calc.** option. Enter exact **ink** colors.
15. Enter 3 **Drops** = 250,000 a week (drop every Monday) and Estimate Postage - all drops. **Deliver to BMC**.

You just discover that the 'Finishing' activity 'Inserting...' only applies to Package 1, **Letter1-Form-A**.

A second 'Finishing' activity only applies to Package 2, **Letter2-Form-B**.

16. Properly indicate this, so the package information will print on the Work Order and/or Work Ticket. Make all necessary adjustments, (Drops, Postage, etc.) remember the job has already been quoted and has been converted to a Job.

The customer or 'Data Processing' just informed you that the exact counts for package 1, (**Letter1-Form-A**) = 504,550 and package 2, (**Letter2-Form-B**) = 250,450.

17. Make all necessary adjustments (Drops, Postage, etc.), remember the job has already been quoted and has been converted to a Job.
18. **Print a Change Order Report** and **Inventory Matrix Report**. **Print** a Mail Work Ticket – with New Revision checked and a Print Ticket – with New Revision checked.
19. **Delete** the version quote with the .02 suffix.

**Show Instructor Work Order and Work Ticket...congratulations you've graduated!**

# Bound Components

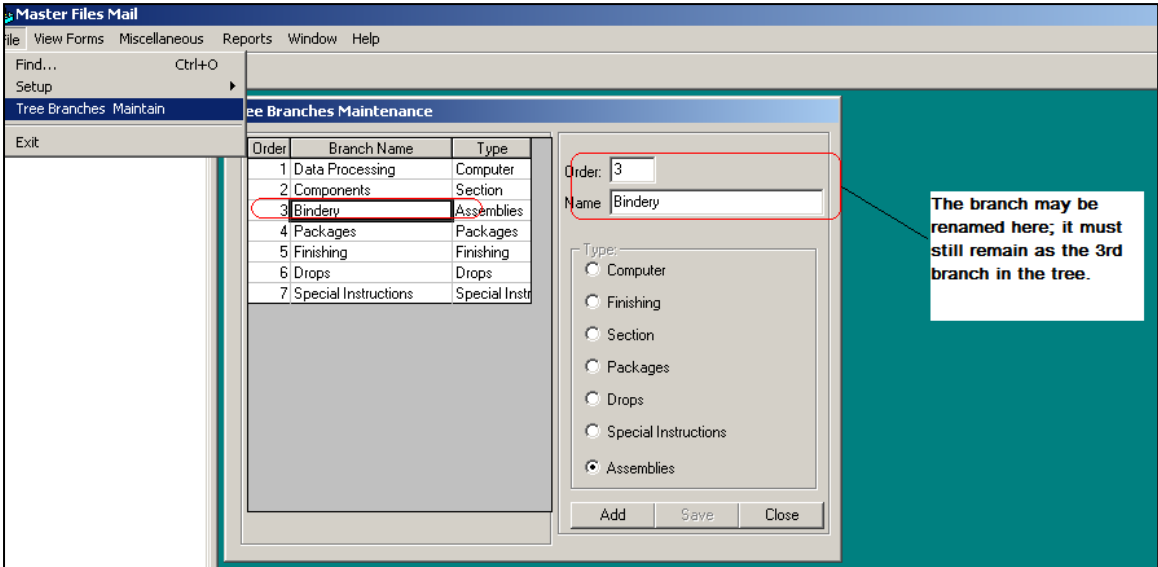
This new feature enables users of the Print and Mail Estimating module to incorporate bindery into estimates and jobs.

This option is not a chargeable feature for companies that are currently licensed for Print and Mail Estimating, but your support rep. will need to access your PrintStream database to activate this feature and do some system maintenance setups in order for it to work. Contact PrintStream Support to begin use of this feature.

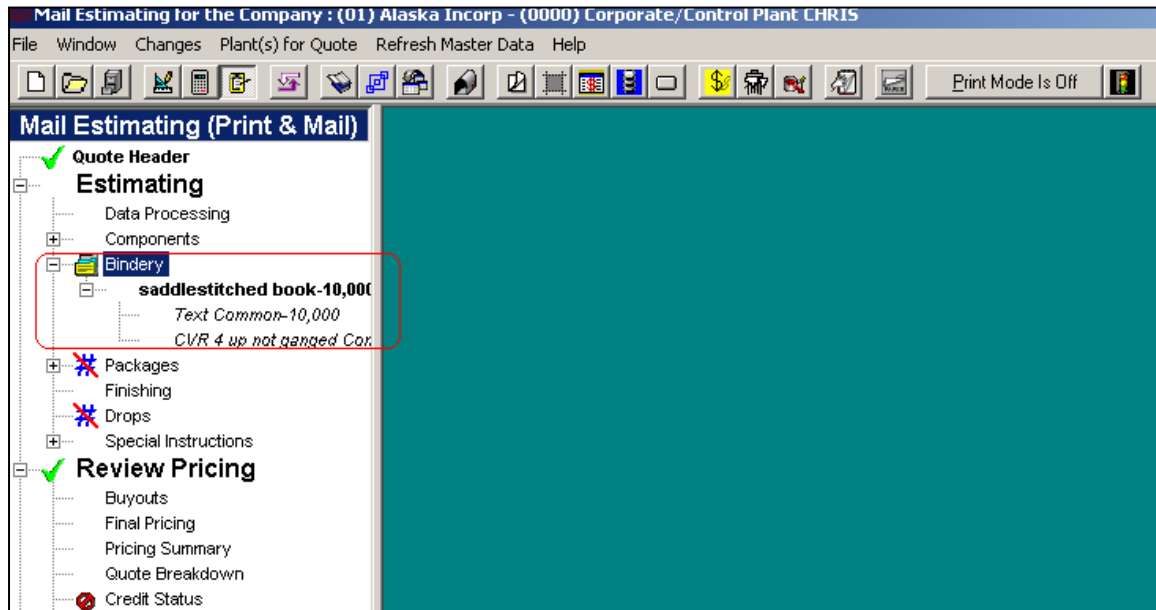
Added the ability to rename the branch **Bound Components** to a user-defined name. This was hard-coded in an earlier version as **Bound Components** and could not be changed.

To rename the **Bound Components** branch:

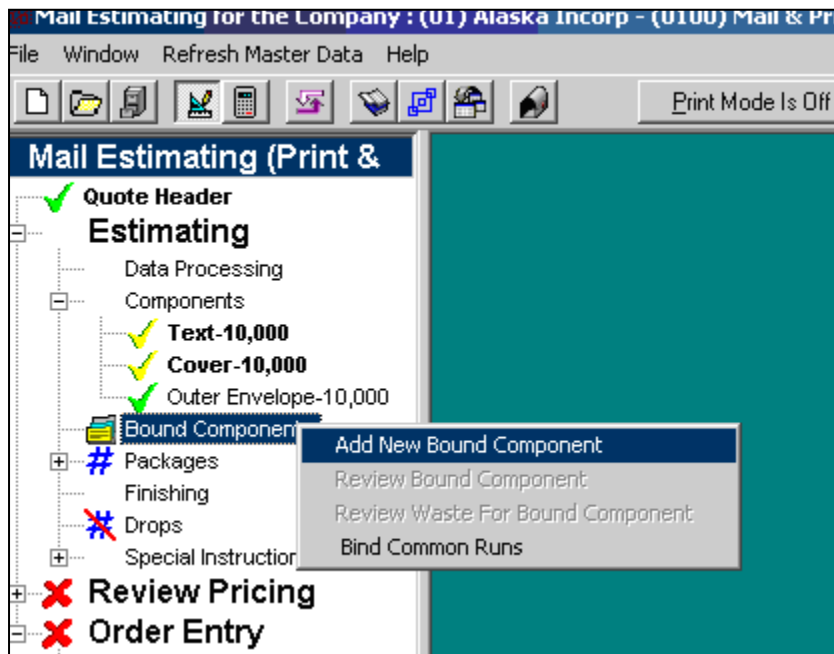
Go into **Tree Branches Maintain** in the File menu in Master Files Mail Processes.



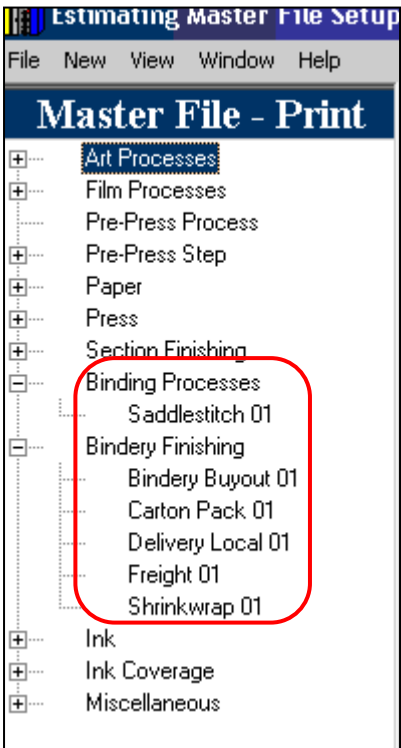
In this example, the **Bound Components** has been renamed **Bindery**. Note in the following screenshot the new name on the estimating branch.



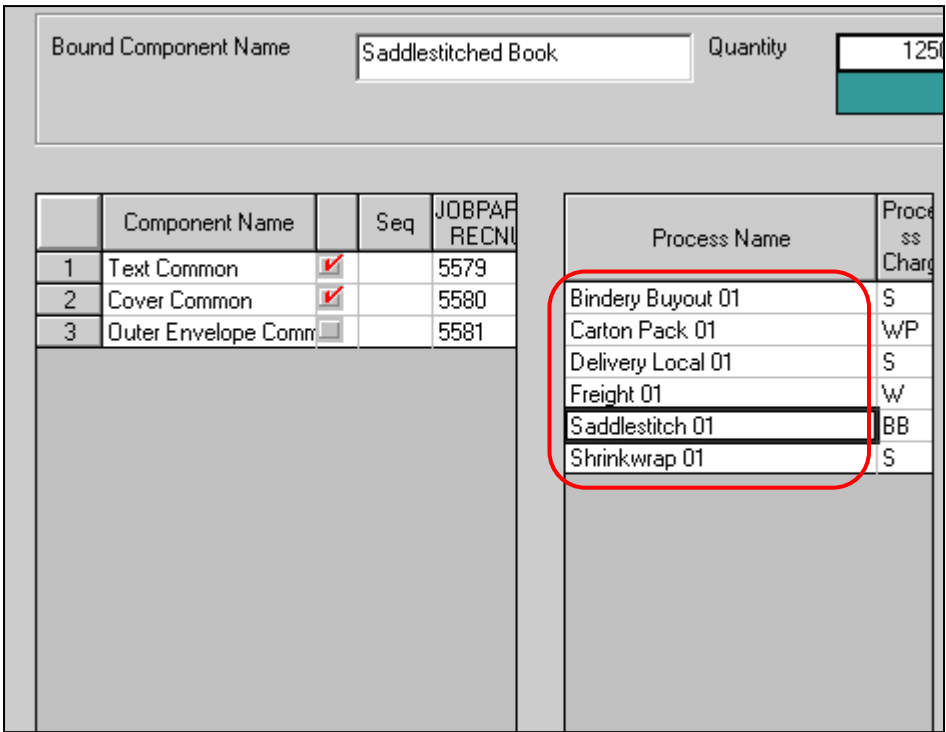
To add a Bound Component right-click **Bound Components** in the tree and highlight **Add New Bound Component** to access the bindery functions.



The processes as defined in the **Master Files Print > Binding Processes and Bindery Finishing** branches will be available for selection.



In the example below, the bindery processes are now available for selection.



Here are the steps to select the desired bindery functions:

1. Enter the Bound Component Name as in the following example: **SS Bound Component**.
2. Place a checkmark beside each individual component that will be bound-as shown below, the **Text-Common** and **Cover Common** components have been selected.
3. Double-click the Process Name to select the appropriate Bindery function for the Bound Component. In this example **Saddlestitch 01** process has been selected.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS - [Bound Component]

Print Mode Is Off

Bound Component Name: SS Bound Component      Quantity: 12500

	Component Name	Seq	JOBPAF RECNUM	Process Name	Process Charge	Valid Data	Process Name	Process	Process	Quotproc Recnum
1	Text Common	<input checked="" type="checkbox"/>	5579	Bindery Buyout 01	S	<input checked="" type="checkbox"/>	Saddlestitch 01	BE 174		13582
2	Cover Common	<input checked="" type="checkbox"/>	5580	Carton Pack 01	WP					
3	Outer Envelope Comm	<input type="checkbox"/>	5581	Delivery Local 01	S					
				Freight 01	W					
				Saddlestitch 01	BB					
				Shrinkwrap 01	S					

To add a Bindery Modifier, click the **Process** icon indicated below:

Valid Data	Process Name	Process	Pr oc	Process	Quot proc
<input checked="" type="checkbox"/>	Saddlestitch 01	BB	174		1126

To select the appropriate modifier click the and **Save**.

To deselect a modifier click the and **Save**.

(BB) Saddlestitch 01

10,000

Run Qty.: 10,000

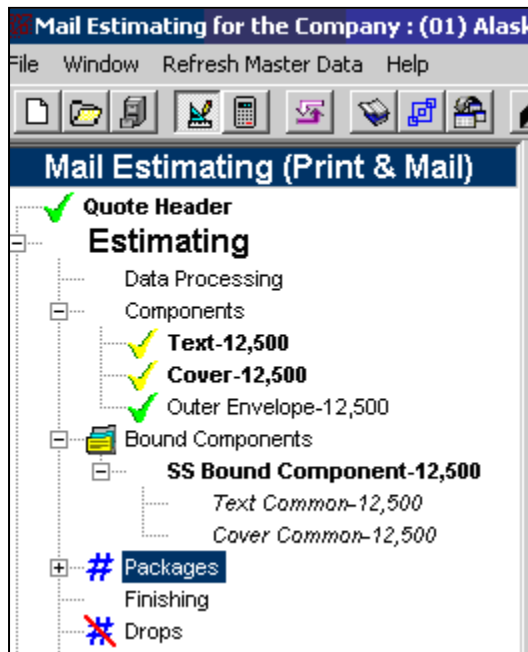
Sigs.: 6

Suggested QTY = 6

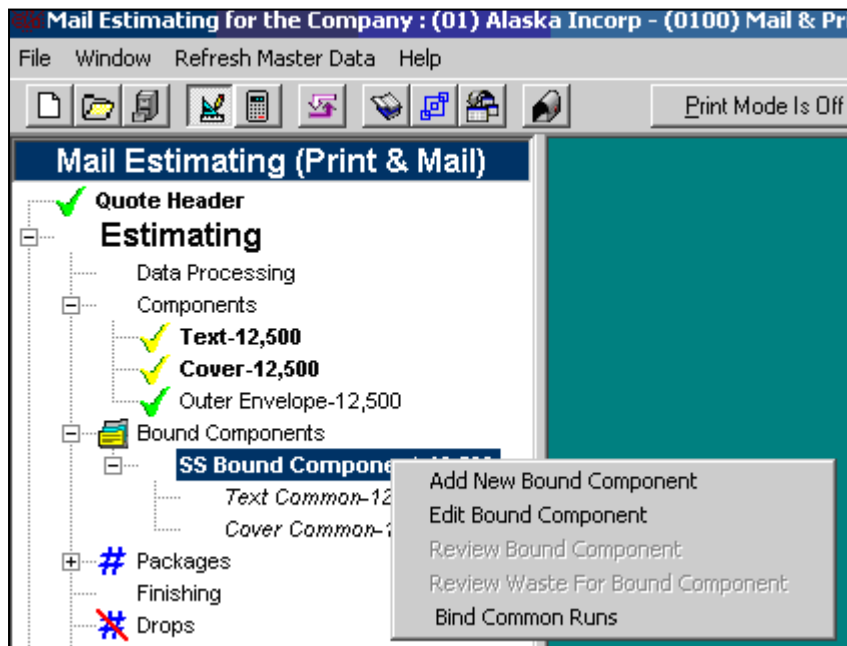
Modifiers	Quantity	Num Of Helpers
3 Hole Drill - Inline	1	

3 Hole Drill - Inline  
blow in  
Coated Stock  
tip in

Here is how the Bound Component will look in the Tree:



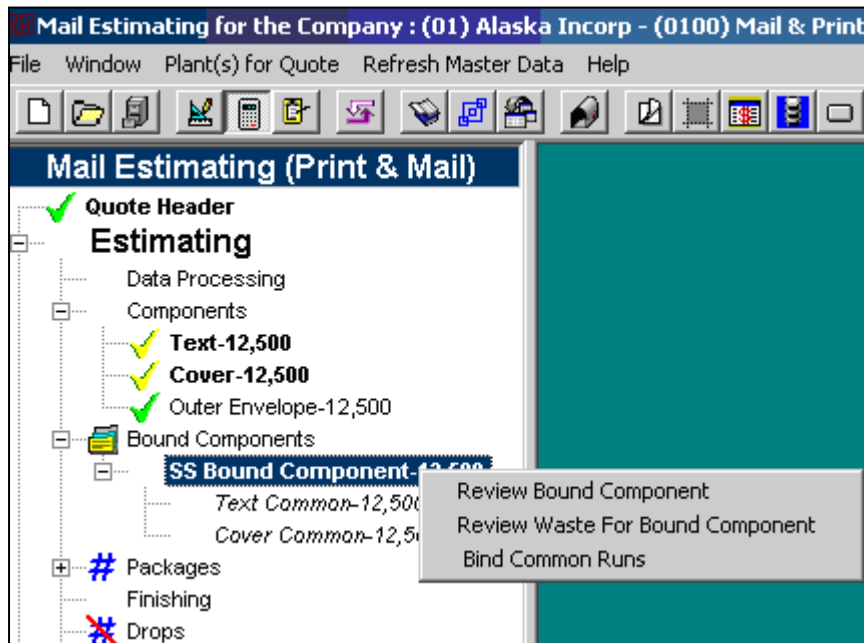
Repeat the steps described above to add as many Bound Components as needed:



After calculating the estimate, there are options to:

- Review Bound Component
- Review Waste for Bound Component
- Bind Common Runs

Right-click the individual Bound Component as in the following example **SS Bound Component** and select from the available options:



Selecting the option to **Review Bound Component** will display this screen:

The 'Review Bound Component' screen displays the following information:

Bound Component Name: SS Bound Component      Quantity: 12500

	Component Name	Seq	JOBPAR RECNUM
1	Text Common	<input checked="" type="checkbox"/>	5579
2	Cover Common	<input checked="" type="checkbox"/>	5580
3	Outer Envelope Comm	<input type="checkbox"/>	5581

Process Name	Procs Charge	Valid Data	Process Name	Pr oces	Process	Quotproc Recnum	Assigned to Common Bind Run
Bindery Buyout 01	S	<input checked="" type="checkbox"/>	Saddlestitch 01	BE 17		13582	<input type="checkbox"/>
Carton Pack 01	WP						
Delivery Local 01	S						
Freight 01	W						
Saddlestitch 01	BB						
Shrinkwrap 01	S						





## Bind Common Runs

Bind Common Runs provides the option to run similar bindery runs together, and to choose which ones to apply the setup costs to. If this option is not chosen, the system will assume that setup should be charged separately to each Bound Component of like bind style.

Example shows two Bound Components – Early Booklet Qty 65,000 and Late Booklet Qty 35,000.

### Part 1 – Standard Use (No Bind Common Runs)

Early Booklet Qty 65,000

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [Bound Component]

Print Mode Is On

Bound Component Name: Early Booklet Quantity: 65000

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run	.....
1 Text (3-16's) Common	3-Hole Drill Books	<input checked="" type="checkbox"/>	Saddle Stitch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 OE 9x12 Common	Buyout Waste	<input checked="" type="checkbox"/>	Carton Pack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Letter Common	Carton Pack	<input checked="" type="checkbox"/>				
4 Early Cover Common	Delivery Local					
5 Late Cover Common	Double O Wire Bind 11*					
	Fold Booklet Parallel					
	Freight					
	Local Delivery Zone 2					
	PB (Buyout Price)					
	Punch Sheets					
	Saddle Stitch					
	Saddle Stitch 2up					
	Shrink Wrap					
	Skid Pack					
	Skid Storage					

Late Booklet Qty 35,000.


Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [Bound Component]

Print Mode Is On

Bound Component Name: Late Booklet Quantity: 35000

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run	.....
1 Text (3-16's) Common	3-Hole Drill Books	<input checked="" type="checkbox"/>	Saddle Stitch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 OE 9x12 Common	Buyout Waste	<input checked="" type="checkbox"/>	Carton Pack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Letter Common	Carton Pack	<input checked="" type="checkbox"/>				
4 Early Cover Common	Delivery Local					
5 Late Cover Common	Double O Wire Bind 11*					
	Fold Booklet Parallel					
	Freight					
	Local Delivery Zone 2					
	PB (Buyout Price)					
	Punch Sheets					
	Saddle Stitch					
	Saddle Stitch 2up					
	Shrink Wrap					
	Skid Pack					
	Skid Storage					

Early Booklet – Job M/R = 0:50, M/R Waste = 50, Run Waste = 0.75%, Run Speed = 9,500.

 **Saddle Stitch**

100,000


Run Quantity:	65,000
Number Sigs:	4
Job M/R:	0:50
Total Run Hrs:	6:54
M/R Waste:	50
Run Waste %:	0.75%
Run Waste:	488
Run Speed:	9,500
Mat'l Cost:	\$0.00
Total Mat'l Cost:	\$0.00
Hourly Rate:	\$125.00
Total Labor Cost:	\$1,069.46

Recalc Process

Save

Cancel

Late Booklet – Job M/R = 0:50, M/R Waste = 50, Run Waste = 1.00%, Run Speed = 8,075.

 **Saddle Stitch**

100,000

Run Quantity:	35,000
Number Sigs:	4
Job M/R:	0:50
Total Run Hrs:	4:23
M/R Waste:	50
Run Waste %:	1.00%
Run Waste:	350
Run Speed:	8,075
Mat'l Cost:	\$0.00
Total Mat'l Cost:	\$0.00
Hourly Rate:	\$125.00
Total Labor Cost:	\$717.25

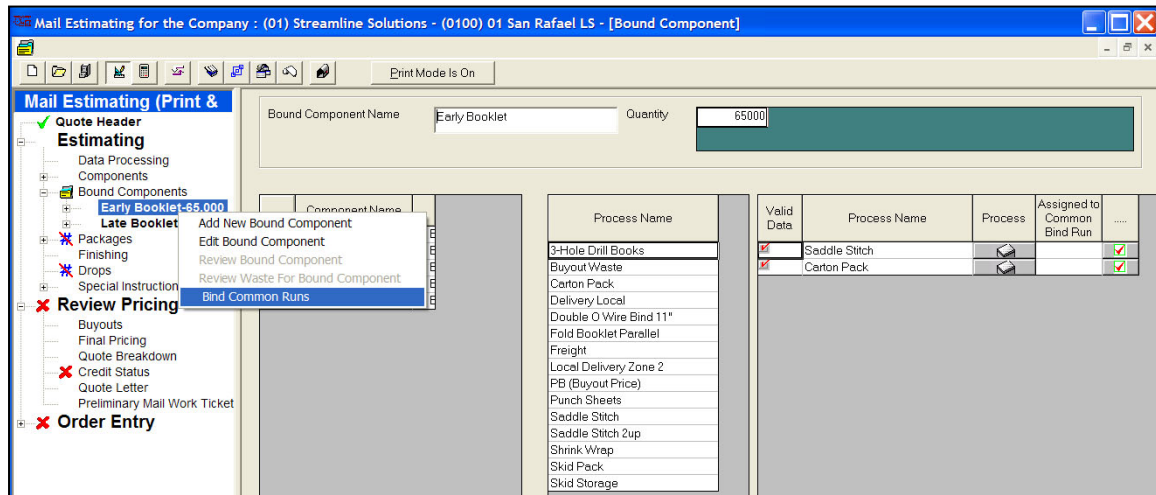
Recalc Process

Save

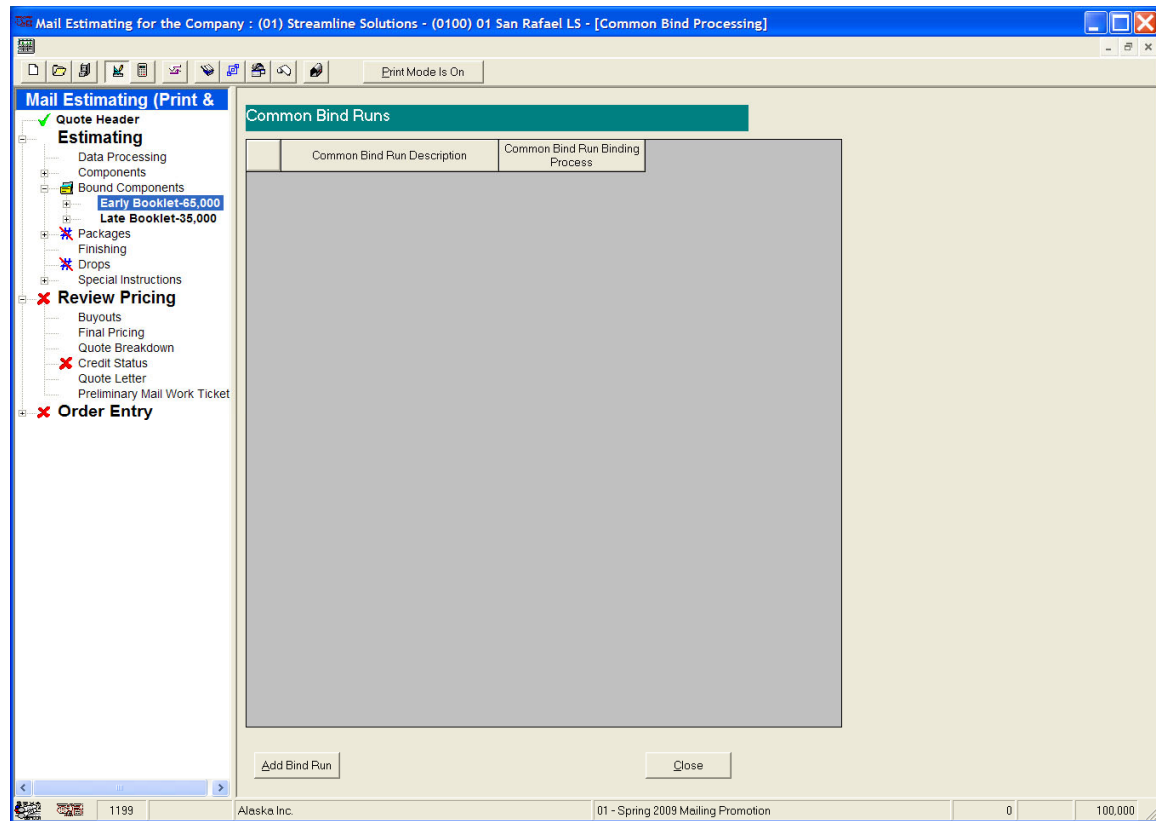
Cancel

## Part 2 – Use of Bind Common Runs

**Edit Mode** – Right-click **Early Booklet** to select **Bind Common Runs**.



**Common Bind Runs** screen – Select **Add Bind Run**.



Common Bind Run Definition screen.

Common Bind Run Definition: Binding Process and Bound Components

Bind Run \*:

For Binding Process \*:

Saddle Stitch

Running Quantity 0

Part Of Common Bindrun	Setup Is On Component	Bound Component	Currently Assigned to the Common Bind Run	Quantity	Process Type	Number Of Single Sections
------------------------	-----------------------	-----------------	---	----------	--------------	---------------------------

Type in Bind Run name.

Common Bind Run Definition: Binding Process and Bound Components

Bind Run \*:

Combine Stitching

For Binding Process \*:

Saddle Stitch

Running Quantity 0

Part Of Common Bindrun	Setup Is On Component	Bound Component	Currently Assigned to the Common Bind Run	Quantity	Process Type	Number Of Single Sections
------------------------	-----------------------	-----------------	---	----------	--------------	---------------------------

Select binding process from **For Binding Process** from drop-down list.

**Common Bind Run Definition: Binding Process and Bound Components**

Bind Run \*: Combine Stitching

For Binding Process \*: Saddle Stitch

Running Quantity 0

	Part Of Common Bindrun	Setup Is On Component	Bound Component	Currently Assigned to the Common Bind Run	Quantity	Process Type	Number Of Single Sections
1	<input type="checkbox"/> Included	<input type="checkbox"/>	Early Booklet		65000	BB	4
2	<input type="checkbox"/> Included	<input type="checkbox"/>	Late Booklet		35000	BB	4

Select **Bound Components** to include in Common Bind Run and which component(s) for Setup.

**Common Bind Run Definition: Binding Process and Bound Components**

Bind Run \*: Combine Stitching

For Binding Process \*: Saddle Stitch

Running Quantity 100000

	Part Of Common Bindrun	Setup Is On Component	Bound Component	Currently Assigned to the Common Bind Run	Quantity	Process Type	Number Of Single Sections
1	<input checked="" type="checkbox"/> Included	<input checked="" type="checkbox"/>	Early Booklet		65000	BB	4
2	<input checked="" type="checkbox"/> Included	<input type="checkbox"/>	Late Booklet		35000	BB	4

Select **Save** and Bound Components are assigned to Common Bind Run.

Common Bind Run Definition: Binding Process and Bound Components

Bind Run \*:

Combine Stitching

For Binding Process \*:

Saddle Stitch

Running Quantity 100000

	Part Of Common Bindrun	Setup Is On Component	Bound Component	Currently Assigned to the Common Bind Run	Quantity	Process Type	Number Of Single Sections
1	<input checked="" type="checkbox"/> Included	<input checked="" type="checkbox"/>	Early Booklet	Combine Stit	65000	BB	4
2	<input checked="" type="checkbox"/> Included	<input type="checkbox"/>	Late Booklet	Combine Stit	35000	BB	4

Delete

Save

Close

Early Booklet Bound Component displays as Assigned to Common Bind Run for Saddle Stitch.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [Bound Component]

Print Mode Is On

Bound Component Name: Early Booklet      Quantity: 65000

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run
1 Text (3-16's) Common	3-Hole Drill Books	<input checked="" type="checkbox"/>	Saddle Stitch	<input checked="" type="checkbox"/>	Combine Str <input checked="" type="checkbox"/>
2 OE 9x12 Common	Buyout Waste	<input checked="" type="checkbox"/>	Carton Pack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Letter Common	Carton Pack	<input checked="" type="checkbox"/>			
4 Early Cover Common	Delivery Local				
5 Late Cover Common	Double O Wire Bind 11"				
	Fold Booklet Parallel				
	Freight				
	Local Delivery Zone 2				
	PB (Buyout Price)				
	Punch Sheets				
	Saddle Stitch				
	Saddle Stitch 2up				
	Shrink Wrap				
	Skid Pack				
	Skid Storage				

1199      Alaska Inc.      01 - Spring 2009 Mailing Promotion      0      100,000

Late Booklet Bound Component displays as Assigned to Common Bind Run for Saddle Stitch.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [Bound Component]

Print Mode Is On

Bound Component Name: Late Booklet      Quantity: 35000

Component Name	Process Name	Valid Data	Process Name	Process	Assigned to Common Bind Run
1 Text (3-16's) Common	3-Hole Drill Books	<input checked="" type="checkbox"/>	Saddle Stitch	<input checked="" type="checkbox"/>	Combine Str <input checked="" type="checkbox"/>
2 OE 9x12 Common	Buyout Waste	<input checked="" type="checkbox"/>	Carton Pack	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3 Letter Common	Carton Pack	<input checked="" type="checkbox"/>			
4 Early Cover Common	Delivery Local				
5 Late Cover Common	Double O Wire Bind 11"				
	Fold Booklet Parallel				
	Freight				
	Local Delivery Zone 2				
	PB (Buyout Price)				
	Punch Sheets				
	Saddle Stitch				
	Saddle Stitch 2up				
	Shrink Wrap				
	Skid Pack				
	Skid Storage				

1199      Alaska Inc.      01 - Spring 2009 Mailing Promotion      0      100,000

Early Booklet – Job M/R = 0:50, M/R Waste = 50, Run Waste = 0.75%, Run Speed = 9,025.

Saddle Stitch Part of Common Bind Run

	100,000
Run Quantity:	65,000
Number Sigs:	4
Job M/R:	0:50
Total Run Hrs:	7:15
M/R Waste:	50
Run Waste %:	0.75%
Run Waste:	488
Run Speed:	9,025
Mat'l Cost:	\$0.00
Total Mat'l Cost:	\$0.00
Hourly Rate:	\$125.00
Total Labor Cost:	\$1,120.26

Cancel

Late Booklet – Job M/R = 0:00, M/R Waste = 0, Run Waste = 0.75%, Run Speed = 9,025.

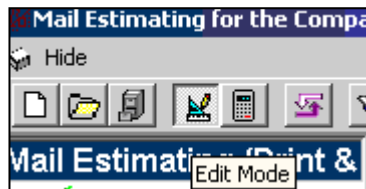
Saddle Stitch Part of Common Bind Run

	100,000
Run Quantity:	35,000
Number Sigs:	4
Job M/R:	0:00
Total Run Hrs:	3:54
M/R Waste:	0
Run Waste %:	0.75%
Run Waste:	263
Run Speed:	9,025
Mat'l Cost:	\$0.00
Total Mat'l Cost:	\$0.00
Hourly Rate:	\$125.00
Total Labor Cost:	\$547.02

Cancel

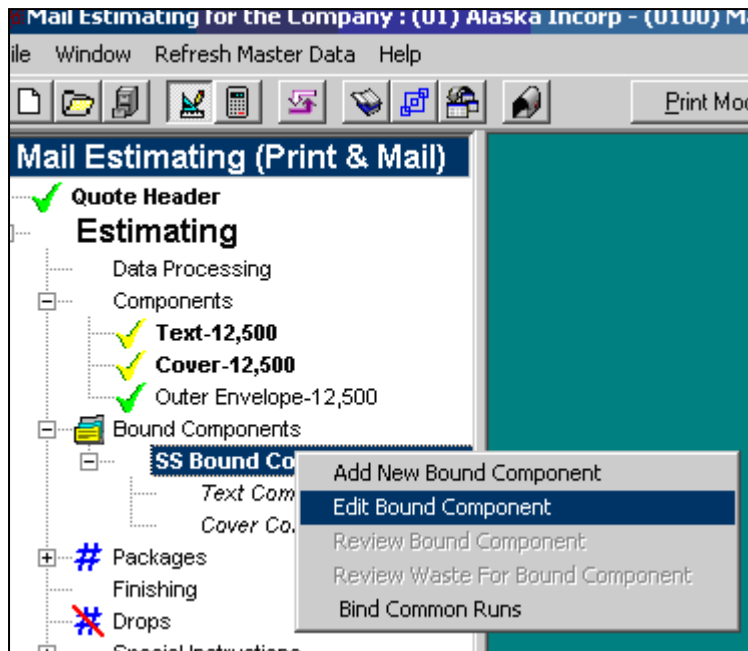


## Editing Bound Components



Click the **Edit** icon  then right-click the **Bound Component** in the Tree to bring up the available options:

**Add New Bound Component**, **Edit Bound Component** and **Bind Common Runs** are available. Select **Edit Bound Component**.




In the example below, SS Bound Component will be edited to add Carton Packing:




Bound Component Name		SS Bound Component		Quantity		12500	
----------------------	--	--------------------	--	----------	--	-------	--

	Component Name	Seq	JOBPAR RECNUM	Process Name	Process Charge	Valid Data	Process Name	Process Charge	Process	Quotproc Recnum	Assigned to Common Bind Run	.....
1	Text Common		5579	Bindery Buyout 01	S		Saddlestitch 01	BE 172		13582		
2	Cover Common		5580	Carton Pack 01	WP		Carton Pack 01	W 172		13583		
3	Outer Envelope Common		5581	Delivery Local 01	S							
				Freight 01	w							
				Saddlestitch 01	BB							
				Shrinkwrap 01	S							

In some cases additional information is required as with the Carton Packing process shown below. The process displays this red highlighted area  indicating more information is needed.

To enter the required information, click the **Process** icon:

Valid Data	Process Name	Pr oc	Pr oc	Process	Quot proc
<input checked="" type="checkbox"/>	Saddlestitch 01	BE 17			1126
	Carton Pack 01	W 17			1128

The selected carton will be highlighted in yellow. Click **Save** to be returned to the Bindery list of processes.

Carton Pack 01

12,500

Run Quantity: 12,500



Num. Boxes: 3



Lbs./Hour: 0

Product Number	Carton Number	Length	Width	Height	Wall	Books /Carton	Full Carton Weight (lbs)
1000		50	50	20	S	4,444	888.02
1	1	17	11	9	D	0	0.00
100	100	9.25	6.25	7	S	0	0.00
101	101	12.375	9.375	7	S	0	0.00
102	102	18.5	12.5	7	S	0	0.00
200	200	18	12	9	S	0	0.00
201	201	12	9	9	S	0	0.00

Save

Cancel

Valid Data	Process Name	Pr oc	Pr oc	Process	Quot proc
<input checked="" type="checkbox"/>	Saddlestitch 01	BE 17			1126
<input checked="" type="checkbox"/>	Carton Pack 01	W 17			1128

Note the  has been replaced by a 

To remove a process, right-click and select **Delete Process**.

Valid Data	Process Name	Pr oc	Pr oc	Process	Quo proc
<input checked="" type="checkbox"/>	Saddlestitch 01	BE	17		112
<input checked="" type="checkbox"/>	Carton Book 01	W	17		112
<b>Delete Process</b>					

To delete a Bound Component, make sure Print Mode is **Off** and click the **Delete Component** option in this screen:

**Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant CHRIS - [SS Bound Component]**

File Window Refresh Master Data Help

Print Mode Is Off

**Mail Estimating (Print & Estimating)**

- Quote Header
- Estimating
  - Data Processing
  - Components
    - Text-12,500
    - Cover-12,500
    - Outer Envelope-12,500
    - Bound Components
      - SS Bound Component-**
        - Text Common-12,500
        - Cover Common-12,500
  - Packages
    - Finishing
    - Drops
    - Special Instructions
  - Review Pricing
  - Order Entry

Description: SS Bound Component Versions: 1 ... POD ☐ As

Date on Hand: Quantit

Item #: List... New... Waste:

**Inventory**

Inv. Description:

Overs to:

Insert Notes:

Comments:

Notes... **Delete Component**

Printing

Laser

Inkjet

Cheshire/P'Back

Burst/Trim/Fold

Process Description

#### Important Notes

Once the Bound Component has been defined, and the individual components have been linked, editing the quantities must be done in the Package screen and Packages must be recalculated by

clicking the **PKG Recalc** button . This is the only way to update package counts and corresponding component quantities. This is also true if adding new components to an existing Bound Component.



## Lock Quantity option added for Bound Components

We have added the ability to lock the bound component quantity. This programming was added to resolve an issue when the bound component quantity is greater than the package assignment and will allow the additional bound component qty to be applied to a new package (i.e., Inventory).

Mail Estimating (Print & Mail) window showing the initial state. The left sidebar lists components: Quote Header, Estimating, Data Processing, Components, Form# 1 PIH 1-10,000, Form# 2 Cover-10,000, Assemblies/Bindery, Create Inventory, Packages Advanced, and Kits And Packages. The main table shows the following data:

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance	Quantity	Seq
PIH 1			Common	1,000	1,000		
Cover			Common	1,000	1,000		
*Bound			Common	10,000	1,000	9,000	1

Summary: All Pkg. Total: 9,000. Number: 1. Description: Default P. Quantity: 9,000.

Mail Estimating (Print & Mail) window showing the 'Lock Quantity' option selected for the Bound component. The 'Bound Component Name' is 'Bound' and the 'Quantity' is '10000'. The 'Lock Quantity' checkbox is checked. The main table shows the following data:

Component Name	Seq	Process Name	Valid Data	Process Name	Process	Lock QTY	Assigned to Common Bind Run
PIH 1 Common	1	Bindery (Buyout)					
Cover Common	2	Carton Pack					
		Delivery Local					
		Freight					
		Local Delivery Zone 1					
		Saddle Stitch					
		Shrink Wrap					
		Skid Pack					

Additionally, if the quantity of the package is higher than the locked quantity, a warning will be provided.

Mail Estimating (Print & Mail) window showing a warning dialog box. The left sidebar lists components: Quote Header, Estimating, Data Processing, Components, Form# 1 PIH 1-10,000, Form# 2 Cover-10,000, Assemblies/Bindery, Create Inventory, Packages Advanced, Kits And Packages, Finishing, Drops, Special Instructions, Review Pricing, and Order Entry. The main table shows the following data:

Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance	Quantity	Seq
PIH 1			Common	-1,000	-1,000		
Cover			Common	-1,000	-1,000		
*Bound			Common	10,000	-1,000	11,000	1

Summary: All Pkg. Total: 11,000. Number: 1. Description: Default P. Quantity: 11,000.

Confirm exit recalculation dialog box:

Bound Component Quantity is Locked with the Quantity LESS then needed for Packages. Would you like to revise locking?

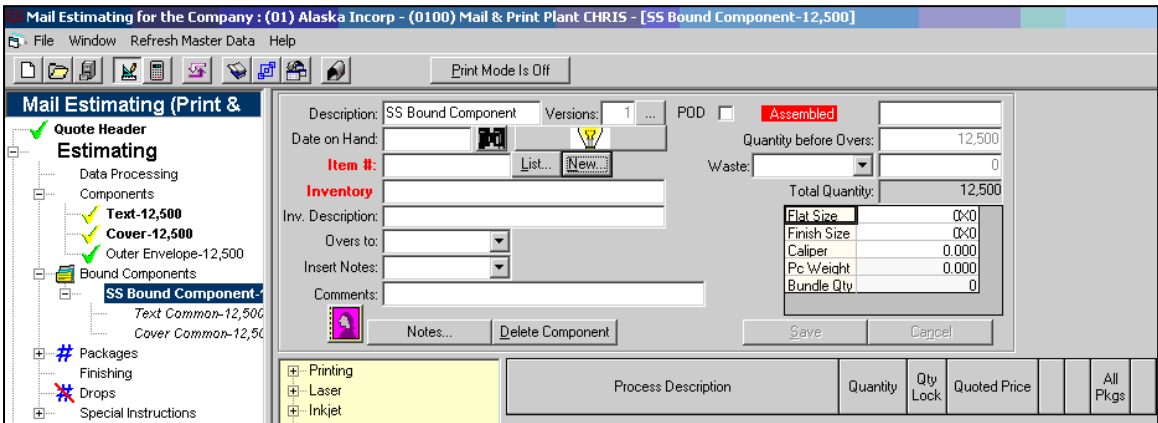
Yes No

# Inventory in Bound Components

Inventory Items may be linked to the individual components and/or the bound components.

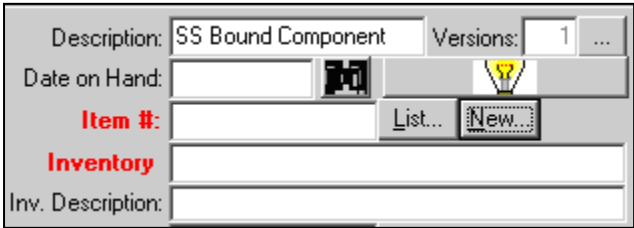
## To link an inventory item to a bound component

With Print Mode option off, highlight the bound component:



Note the **Assembled** near the top of the component screen – this indicates an “assembled” or “bound” component.

Select either **List...** to search for existing items or **New...** to create a new item.



Clicking **List** opens this screen:

**Search Inventory**

Inv Type: Customer Goods  
 Classification:   
 Category:   
 Sub Category:   
 Group:   
 Family:   
 Category:

Job:   
 Item:   
 Customer: 50016 Botsch & Company  
 Vendor:   
 Prod Cd:

Inv Desc Like:   
 Inv Code Like:   
 Color:   
 Size: x   
 Weight:

☐ Allow Rev ☐ Tracking Lot ☐ Inactive ☐ Below Min Qty ☐ Negative Avail Clear all Stop

Item #	Inv Code	Rev	Details	On Hand	On Order	Allocated	Available	Min Lvl	Customer	Customer
293	PB French-032		Perfect Bound Books-French T	0	0	0	0	0	50016	Botsch & Cor
315	Customer supp		23 x 35 uncoated white text	0	0	0	0	0	50016	Botsch & Cor
317	Envelope 9 x 1		9x12 catalog envelope open o	0	0	79341	-79341	0	50016	Botsch & Cor
319	Letters-April 20		Letters 8.5 x 11	0	0	0	0	0	50016	Botsch & Cor
320	Envelope 9 x 1		Booklet Envelope 9 x 12 white	0	0	195427	-195427	0	50016	Botsch & Cor
321	Western Sport		48pp text extras for inventory	0	0	105195	-105195	0	50016	Botsch & Cor
322	Cover Wrap su		Cover Wrap	0	0	14575	-14575	0	50016	Botsch & Cor
323	Bradfor Card		Card 5 x 7 Bradford	0	0	195427	-195427	0	50016	Botsch & Cor
324	Sub Gift Card		Gift Card 5 x 8 folded	0	0	195427	-195427	0	50016	Botsch & Cor
325	Text 48pp We		Western Text 48pp for future jo	0	0	0	0	0	50016	Botsch & Cor
349	Letter-April 200		Letter-8.5 x 11 2 color printing e	0	0	69341	-69341	0	50016	Botsch & Cor
350	DE 10 x 13 Wh		10x13 Catalog Envelope	0	0	31000	-31000	0	50016	Botsch & Cor

Loaded 22 records. Click continue to load next 300 Continue Search Select

Clicking **New** opens this screen:

**New Inventory**

Select Inventory Type: Customer Finished Goods Paper Raw Material **Customer**

**Mandatory** Optional / Others

Customer: 50016 Botsch & Company Load Existing Items

Paper:   
 Color:   
 Size:

Inventory Details:

Item #: 365   
 Inventory Code: 365   
 Description:   
 UQM:   
 new UQM Conv:   
 Created: 5/20/2008   
 Expiry:

☒ Active   
☐ One time use   
☒ Track Skids   
☐ Tracking Lot   
☐ Allow Web View

Setup:

Activity Code:   
 More   
 Expense Acc:   
 Product Code: 99   
 Customer Inventory   
 Income Acc:

## Mailing Processes

Mailing Processes may be applied to individual components or Bound Components. If the piece requires a mailing process before the component is bound, the process would be applied to the individual Component; if the process needs to be applied after being bound, it would be applied to the Bound Component.

Make sure **Print Mode is Off** so that mail component processing options are visible:

The screenshot shows the 'Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant CHRIS - [SS Bound Component-12,500]' window. The 'Print Mode Is Off' button is highlighted with a red arrow. The left sidebar shows a tree view with 'SS Bound Component' selected. The main area displays fields for Description, Date on Hand, Item #, Inventory, and various quantity and waste settings. A table on the right shows component specifications like Flat Size, Finish Size, Caliper, Pc Weight, and Bundle Qty.

### Examples:

Adding a Mail Process to an individual component:

To add a process to the individual component, highlight it in the tree, then select from the list of processes and double-click to add the process as shown below where Inkjet 9x12 Envelope has been applied to the Outer Envelope.

The screenshot shows the 'Estimating (Print & Estimating)' window. The 'Outer Envelope' is selected in the tree view. The main area displays fields for Description, Date on Hand, Item #, Inventory Code, and various quantity and waste settings. A table on the right shows component specifications like Flat Size, Finish Size, Caliper, Pc Weight, and Bundle Qty. At the bottom, a table lists the processes applied to the component.

Process Description	Quantity	Qty Lock	Quoted Price	All Pkgs
INKJET 9x12 ENVELOPE	12,500		\$215.63	N



Adding a Mail Process to a Bound Component:

To add a process to the Bound Component, highlight it in the tree, then select from the list of processes and double-click to add the process as shown below where Cheshire Magazine and Sort has been added to the **SS Bound Component**.

**Mail Estimating (Print & Estimating)**

**Quote Header**

✓ **Estimating**

Data Processing

Components

✓ **Text-12,500**

✓ **Cover-12,500**

Outer Envelope-12,500

Bound Components

**SS Bound Component**

Text Common-12,500

Cover Common-12,500

# Packages

Finishing

✗ Drops

Special Instructions

✗ **Review Pricing**

✗ **Order Entry**

Description: SS Bound Component Versions: 1 ... POD ☐ **Assembled**

Date on Hand:

Item #:  List... New...

Inventory

Inv. Description:

Overs to:

Insert Notes:

Comments:

Quantity before Overs: 12,500

Waste:  0

Total Quantity: 12,500

Flat Size: 0x0

Finish Size: 0x0

Caliper: 0.000

Pc Weight: 0.000

Bundle Qty: 0

Notes... Delete Component Save Cancel

Process Description	Quantity	Qty Lock	Quoted Price		All Pkgs	Sort O
CHESHIRE MAGAZINE & SORT	12,500		\$403.13	\$	N	P 8305

Printing

Laser

Inkjet

Cheshire/P/Back

CHESHIRE

CHESHIRE & SORT

CHESHIRE UP TO 6x9

CHESHIRE 9x12 & SORT

CHESHIRE MAGAZINE

CHESHIRE, TAB & SORT

APPLY PIGGYBACK LABEL

CHESHIRE BUYOUT

CHESHIRE SETUP

Burst/Trim/Fold

## Final Pricing

The final pricing in the print section contains the bindery pricing:

Component	Quantity	Cost	(Avg.)	Sell	%	Rate/1000	Rate	Quoted Price	QP
Text	12,500	\$3,622.38	17.56	\$4,258.41	0.00	\$340.67	<input type="checkbox"/>	\$4,258.41	<input type="checkbox"/>
Cover	12,500	\$2,168.12	17.36	\$2,544.60	0.00	\$203.57	<input type="checkbox"/>	\$2,544.60	<input type="checkbox"/>
Bindery	1	\$384.70	15.12	\$442.85	0.00		<input type="checkbox"/>	\$442.85	<input type="checkbox"/>
<b>Total</b>		<b>\$6,175.20</b>	<b>17.34</b>	<b>\$7,245.86</b>	<b>0.00</b>			<b>\$7,245.86</b>	

Item	Cost	Markup (%)	Sell
LABOR	\$380.20	15.00	\$437.23
MATERIALS	\$4.50	25.00	\$5.63
BUYOUTS	\$0.00	30.00	\$0.00
FREIGHT	\$0.00	10.00	\$0.00
POSTAGE	\$0.00	0.00	\$0.00
PAPER	\$0.00	20.00	\$0.00
	\$0.00	0.00	\$0.00
	\$0.00	0.00	\$0.00
	\$0.00	0.00	\$0.00
Flat Charges	\$0.00	0.00	\$0.00
Commissions	\$0.00	0.00	\$0.00

Component:

Desired Variation (%):

Standard (Cost/Sell):	\$384.70	\$442.86
Variation (%/\$)	0.00	\$0.00
Quoted Price		\$442.86
Unit (Cost/Sell):	\$384.7000	\$442.8600

☐ Per 1000 pricing

Pricing Summary

	Cost Total	Difference	Quoted Total
<input type="radio"/> Process:	\$896.75	(\$277.99)	\$618.76
<input type="radio"/> Component:	\$0.00	\$0.00	\$0.00
<input checked="" type="radio"/> Print:	\$6,175.20	\$1,070.66	\$7,245.86

## Quote Breakdown for Print

Print Quote Breakdown contains the bindery information:

Bindery & Finishing Specifications						
Section	Finishing Process	Number Up	In Feed Size	Hours	\$ Material	\$ Labor
Text	MBQ Fold 01	1		7.03	0.00	457.17
Process: - Text/Common-Cover/Common as SS Bound Component	Saddlestitch 01	2	0	2.96	0.00	369.79
Process: - Text/Common-Cover/Common as SS Bound Component	Carton Pack 01	4,444	0	0.42	4.50	10.41

## Work Ticket for Print

Print Work Ticket has been enhanced to show:

- Bindery Waste
- Run Out

Bindery, Assembly and Finishing								
Notes								
Section	Finishing Activity Description	# of pocket	Other Information	Gross Qty	Waste	Net Qty	Hours	ActivityCode/Task ID
	Saddlestitched Book/Saddlestitch 01	2		13,225	725	12,500	2:58	75011 #11221
		oblong or upright?: upright						
	Saddlestitched Book/Carton Pack 01	0		12,500	0	12,500	0:25	79010 #11222

PrintStream has been changed to show the description **Item #** next to the section in the Press area of the Print Work Ticket. Previously, the description was **Inv #** which some users mistook for Inventory Code. The new description is consistent with other documents and reports to identify the inventory item number.

Description: Selfmailer	Versions: 1 ...	Source: ...	Printed InHouse
Date on Hand:		Quantity before Overs:	10,000
Item #: 913	List... New...	Waste:	0
Inventory Code: Something from Inventory		Total Quantity:	10,000
Inv. Description: Something to print on and mail		Flat Size	0x0
Overs to:		Finish Size	8 1/2x11
Insert Notes:		Caliper	0
Comments:		Pc Weight	0.000
		Bundle Qty	0

Press

Unders 0%; Overs 0%

Section	Qty	Side	Runs	Up	Method	Press	Plates	Run Qty	Run Wa
Selfmailer (Item#913)	10,000	Front	1	8	S/W	640 Heidelberg	4 Metal	1,276	
						Finish Size : 8 1/2X11			
Selfmailer (Item#913)		Back	1			640 Heidelberg	4 Metal	1,276	

## Multi Co and Multi Plant Setup

Bindery in Print and Mail feature. This feature enables users of the Print and Mail Estimating Modules to incorporate bindery into estimates and jobs. Contact EFI PrintStream Support to begin use of this feature. This is not a chargeable feature for those companies licensed for Print and Mail Estimating.

The following setup is needed and EFI PrintStream Support personnel will complete:

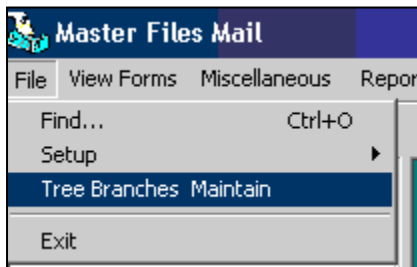
- Activate this feature in the system
- Will need access to the system
- MF Reports>System maintenance>features to purchase:
- Allow assembling with binding from PAM
- If Multi-Plant environment
- Access to WBEEdit (needs admin login)
- Table, LMS = Y for report 1106

User Set-up

Tree Structure:

Add a new branch

In **Master Files Mail>File>Tree Branches Maintain**:



A new Tree Branch Assembly must be added and the order of branches must be re-numbered so that **Assembly** is Branch 3.

Re-Number: Change the last order number first and then each one leaving the 3 blank and then click line > type a 7 over the six, and then **Save**.

Tree Branches Maintenance

Order	Branch Name	Type
1	Data Processing	Computer
2	Components	Section
3	Packages	Packages
4	Finishing	Finishing
5	Drops	Drops
7	Special Instructions	Special Instr

Order: 7

Name: Special Instructions

Type:  

Computer

Finishing

Section

Packages

Drops

Special Instructions

Add

Save

Close

Continue until the 3 is available:

Tree Branches Maintenance

Order	Branch Name	Type
1	Data Processing	Computer
2	Components	Section
4	Packages	Packages
5	Finishing	Finishing
6	Drops	Drops
7	Special Instructions	Special Instr

Order: 4

Name: Packages

Type:  

Computer

Finishing

Section

Packages

Drops

Special Instructions

Add

Save

Close

Add Assembly:

**Tree Branches Maintenance**

Order	Branch Name	Type
1	Data Processing	Computer
2	Components	Section
4	Packages	Packages
5	Finishing	Finishing
6	Drops	Drops
7	Special Instructions	Special Instr

Order:

Name:

Type:

☐ Computer  
☐ Finishing  
☐ Section  
☐ Packages  
☐ Drops  
☐ Special Instructions  
☒ Assemblies

Will now appear as follows after screen refresh:

**Tree Branches Maintenance**

Order	Branch Name	Type
1	Data Processing	Computer
2	Components	Section
3	Assembly	Assemblies
4	Packages	Packages
5	Finishing	Finishing
6	Drops	Drops
7	Special Instructions	Special Instr

Order:

Name:

Type:

☐ Computer  
☐ Finishing  
☐ Section  
☐ Packages  
☐ Drops  
☐ Special Instructions  
☒ Assemblies

## Production Jobs

### Production Job - Gang Customer Jobs to Production Job

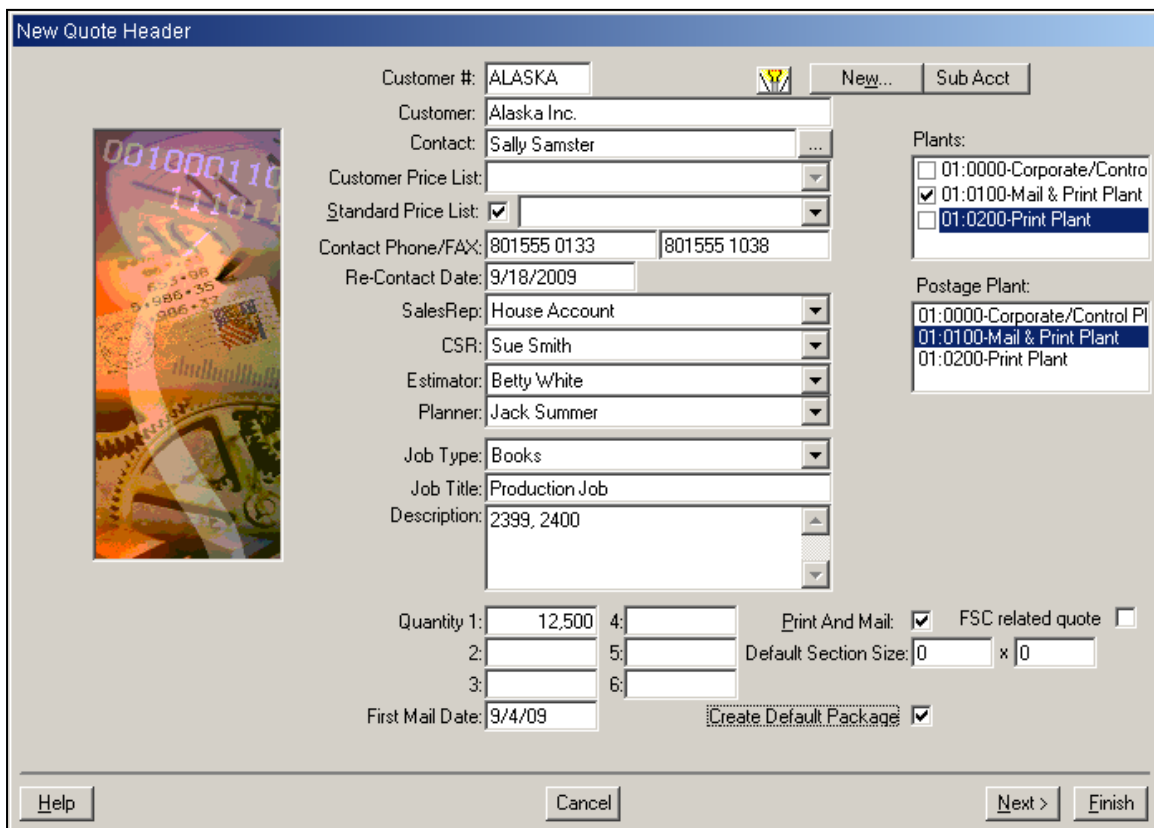
#### Create the Production Job

Printers have customer jobs that may share similar print specifications such as paper, inks, etc. In order to manufacture them efficiently, it is necessary to gang multiple customer jobs onto one sheet to be printed. This programming allows for the ganging of these customer jobs onto a 'Production' job for their printing. Production costs accrued for the printing of the 'Production' job are pushed to the customer job to accurately track the costs of each customer job.


Create Customer Jobs as needed. These are regular jobs which were created for customer work and are NOT ganged. Example: Job #2399 with Qty of 2,500 and Job #2400 with Qty of 10,000.

Create a 'Production' Job to Gang the Customer Jobs:

Create a new estimate with job quantity equal to total of ganged component quantities. Example: Production Job Qty of 12,500 = Job #2399 Qty of 2,500 + Job #2400 Qty of 10,000.





**New Quote Header**

Customer #: ALASKA  New... Sub Acct

Customer: Alaska Inc.


Contact: Sally Samster ...


Customer Price List: 


Standard Price List: ☒ 


Contact Phone/FAX: 801555 0133 801555 1038


Re-Contact Date: 9/18/2009

SalesRep: House Account 


CSR: Sue Smith 


Estimator: Betty White 


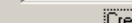
Planner: Jack Summer 



Job Type: Books 

Job Title: Production Job

Description: 2399, 2400 

Quantity 1: 12,500 4:  Print And Mail: ☒ FSC related quote ☐

2:  5:  Default Section Size: 0 x 0

3:  6: 

First Mail Date: 9/4/09 ☒ Create Default Package

Plants:

- ☐ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

Postage Plant:

- 01:0000-Corporate/Control PI
- 01:0100-Mail & Print Plant
- 01:0200-Print Plant

Help Cancel Next > Finish



Create a Gang Component using Gang Template for the size needed.

[illegible]

Enter PrePress, Paper, Ink, and Select Press for the gang component.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

### Mail Estimating (Print & Mail)

- Quote Header
- Estimating
  - Admin
  - Data Processing
  - Components
  - Gang Run-12500**
  - Bindery
  - Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
- Order Entry

### Gang Run

Header PrePress Paper Modifiers Inks Select Press Section Finishing

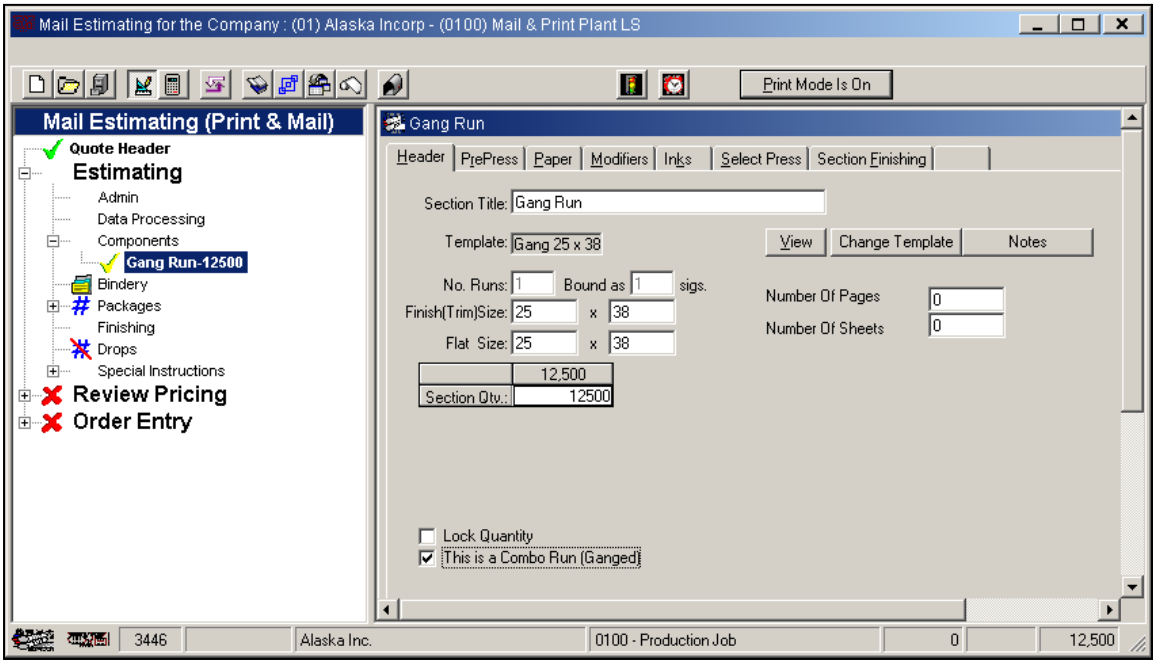
Front Back Press Type: Sheet

	12,500	
Section Qty:	12500	
Press:	Komori 6 Color	✓
Perfect		✓
Finish (Trim) Size:	25 x 38	
Number Up:	1	✓
Press Size:	25 x 38	✓
Number Out:	1	✓
Paper Size:	25 x 38	✓

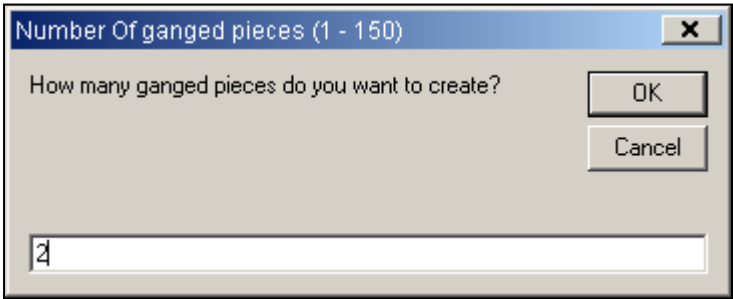
PF All Options Find Press

3446 Alaska Inc. 0100 - Production Job 0 12,500

Select the **This is a Combo Run (Ganged)** check box for this gang component.



Right-click the gang component in tree and enter a number of ganged pieces.



Calculate estimate and convert to job. \*Select **Production Job** as shown below.

**O.E. Job Header**

Job Quantity: 12,500

Enter Job Number or leave blank for automatic assignment:

Order Date: 9/4/2009

Start Date: 9/4/2009

First Mail Date: 9/4/2009

Last Mail Date: 9/4/09

Priority:

Re-Order Date:

P/O Number:

Part Number:

Previous Job Number:

Work w/Job Number:

Reprint from:

Film File Number:

New Job: Yes

Exact Repeat: Yes

Alter Specs: Yes

Art Required: Yes

Film Required: Yes

Unders: Yes

Overs: Yes

Copy Vendors for Buyout Processes ☒

O.E. Notes

☐ Special Job : will be used for the recurring scheduling ONLY

☒ Production Job : job is processing multiple Printed In House Components for Customer's jobs

Cancel Save

Return to edit mode and open gang component header screen.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

**Mail Estimating (Print & Mail)**

Quote Header

Estimating

Admin

Data Processing

Components

Gang Run-12,500

Gang Run-1-12,500

Gang Run-2-12,500

Bindery

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

**Gang Run**

Header PrePress Paper Modifiers Inks Select Press Section Finishing

Section Title: Gang Run

Template: Gang 25 x 38

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 25 x 38

Flat Size: 25 x 38

Number Of Pages: 0

Number Of Sheets: 0

Section Qty: 12,500

Section Qty: 12500

Due to the Ganging calculation method the main component will use MAX num of sheets from all the related lots. Be aware that every editing which is affecting the number of press sheets can update the MAX qty picked up by the main component. This change can potentially require re-selecting press for the main component.


☐ Lock Quantity

☒ This is a Combo Run (Ganged)

3446.99 2401 Alaska Inc. 0100 - Production Job 0 9/4/2009 12,500

Open the **Ganging Grid**.

☐ Lock Quantity  
☒ This is a Combo Run (Ganged)



Help for Gang Calc

	Customer's Job Number	Customer's Component ID	% of Production Cost	Component	Qty Required	Flat Size 1	Flat Size 2	Flat Size	Trim Size 1(Finish)	Trim Size 2(Finish)	Finish Size	Section Qty	# Up	Qty Produced	Excess Qty	Exc Pag
1				Gang Run		25	38	25x38	25	38	25x38	12500	1	12500		
2	0	0	50%	Gang Run-1	12500	25	38	25x38	25.00000	38.00000	25x38	12500	1	12,500	0.000	
3	0	0	50%	Gang Run-2	12500	25	38	25x38	25.00000	38.00000	25x38	12500	1	12,500	0.000	
152			100%	TOTALS	25000							12500	2	25000	0	
153				Waste Statistics											0.00%	

Reload

Print

Apply To Component

12500

Link Customer Job components to grid, edit component data, size, # up, etc.

Job #2399 - Bus Flyer component

Get Component for Ganging

Job No : 2399

Customer Job #2

	Component Name	Paper used	Component Qty	Component Required Qty	Trim Size 1	Trim Size 2	Customer's Job Number
1	Bus Flyer	Carnival Text^^0100 w	2500	2772	8.5	11	2399

Job #2400 - Car Flyer component

Get Component for Ganging

Job No : 2400

Customer Job #1

	Component Name	Paper used	Component Qty	Component Required Qty	Trim Size 1	Trim Size 2	Customer's Job Number
1	Car Flyer	Carnival Text^^0100 w	10000	10500	8.5	11	2400

Job #2399 - Bus Flyer component and Job #2400 - Car Flyer component have been added. Number up for **Car Flyer** has been changed from 1 to 3 to maximize efficiency.

	Customer's Job Number	Customer's Component ID	% of Production Cost	Component	Qty Required	Flat Size 1	Flat Size 2	Flat Size	Trim Size 1(Finish)	Trim Size 2(Finish)	Finish Size	Section Qty	# Up	Qty Produced	Excess Qty	Exc Pag
1				Gang Run		25	38	25x38	25	38	25x38	3500	1	3500		
2	2399	14566	24%	Bus Flyer	2772	17	11	17x11	8.50000	11.00000	8.5x11	2772	1	3,500	0,728	26
3	2400	14568	76%	Car Flyer	10500	17	11	17x11	8.50000	11.00000	8.5x11	3500	3	10,500	0,000	
152			100%	TOTALS	13272							3500	4	14000	728	26
153				Waste Statistics											5.49%	26

Click **Apply to Component** to exit.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

**Mail Estimating (Print & Mail)**

- Quote Header
- Estimating
  - Admin
  - Data Processing
  - Components
    - Gang Run-3500**
    - Bus Flyer-2772**
    - Car Flyer-10500**
  - Bindery
  - Packages
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
- Order Entry

**Gang Run**

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Section Title: Gang Run

Template: Gang 25 x 38

No. Runs: 1 Bound as 1 sigs.

Finish(Trim)Size: 25 x 38

Flat Size: 25 x 38

12,500

Section Qty.: 3500

Number Of Pages: 0

Number Of Sheets: 0

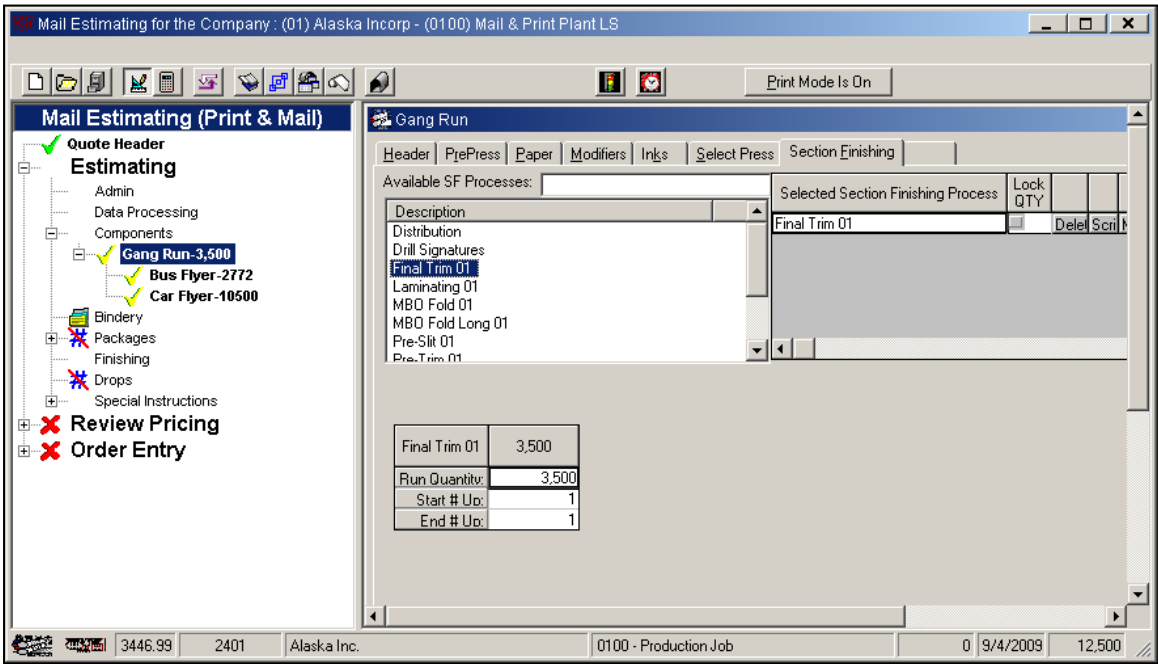
Due to the Ganging calculation method the main component will use MAX num of sheets from all the related lots. Be aware that every editing which is affecting the number of press sheets can update the MAX qty picked up by the main component. This change can potentially require re-selecting press for the main component.

☐ Lock Quantity

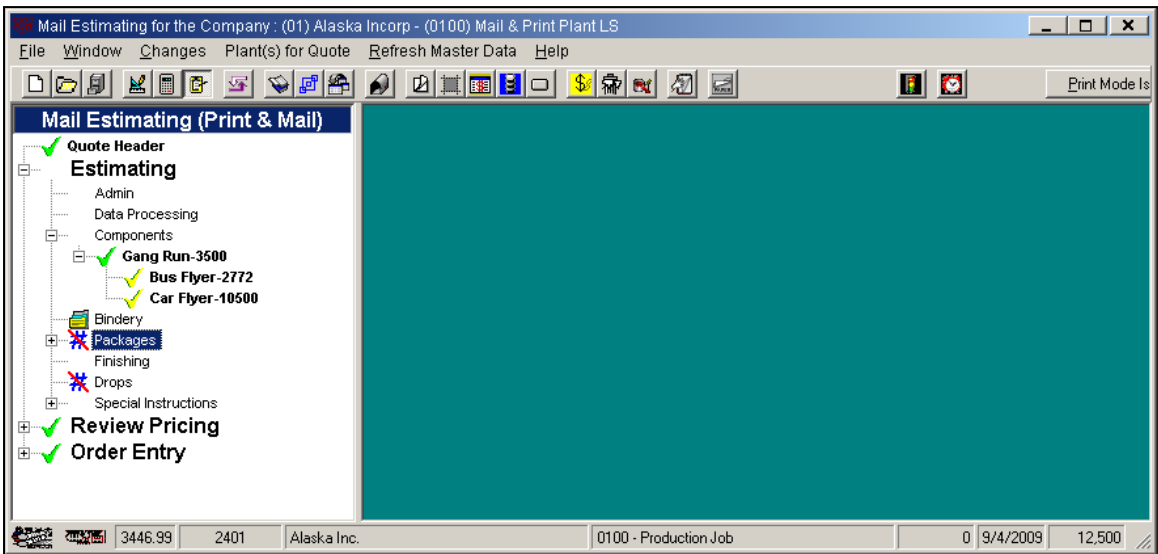
☒ This is a Combo Run (Ganged)

3446.99 2401 Alaska Inc. 0100 - Production Job 0 9/4/2009 12,500

Enter Cutting/Trimming in Parent Gang component. \*Leave default as 1up - the system knows how many up from the Ganging Grid screen.



Return to Order Entry mode.



Complete Scripts if necessary, Reserve Paper, and enter Ink details if needed.

Reservation										Sheeting Information		
Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required		Qty Required	Create PO	Order	Qty Reserved	Inv. Code	
Gang Run	Carnival Text^^0100	25 x 38	25 x 38	white	5,345 shts		856 lbs.	<input type="checkbox"/>				
	Carnival Text^^0100		25 x 38	white						5,345	551	




  

Materials and Outside work									
Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recv

### Reservation

Select Inventory Paper for Gang Run

Item #:    

Inv. Code:

Description:

Paper:

Color:

On Hand:

Commit:

Size:

On Order:

Avail:

### Purchasing

Color Legend

- ☐ - Inventory Paper Doesn't Exist
- ☐ - Inventory Paper Exists
- ☐ - Inventory Paper Reserved
- ☐ - Inventory Non-Paper
- ☐ - Inventory Non-Paper Reserved

Production Job is now ready for processing. View the **Component** screen to see the Production and Customer Job relationships.

Mail Estimating for the Company : (01) Alaska Incorp - (0100) Mail & Print Plant LS - [Component Summary]

Mail Estimating (Print & Mail)

Quote Header

Estimating

Admin

Data Processing

Components

Gang Run-3500

Bus Flyer-2772

Car Flyer-10500

Bindery

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Order For display	X Del et	Production Job #	Customer's Job #	Description	Quantity	Item #	Inventory Code
2		0		0 Gang Run	3,500		
2		2401	2399	Bus Flyer	2,772		
2		2401	2400	Car Flyer	10,500		

Print

Cancel

Save

3446.99

2401

Alaska Inc.

0100 - Production Job

0

9/4/2009

12,500

Customer Support module also shows the relationship for Production and Customer Jobs.

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

File

View

Help

Options

Job Status

Status Reports

Job Header

Scheduler

Job's Notes

Customer Notes

Costs

Purchase Orders

Materials

Billing

Shipping

Estimating

Work Ticket

Work Order

Quote Nu...	Job Number	Customer	Title	Quant...	Quote D...	Start ...	1st Shi...	Last Shi...	Sales Rep	Customer/Production Job	List Of Related Jobs
3444.99	2399	Babba Inc.	Customer Job #2	2,500	9/4/2009	9/4/20...	9/4/2009	9/4/2009	House ...	Customer's Job	2401
3445.99	2400	AAA Ins...	Customer Job #1	10,000	9/4/2009	9/4/20...	9/4/2009	9/4/2009	Rob Hales	Customer's Job	2401
3446.99	2401	Alaska Inc.	Production Job	12,500	9/4/2009	9/4/20...	9/4/2009	9/4/2009	House ...	Production Job	2399, 2400

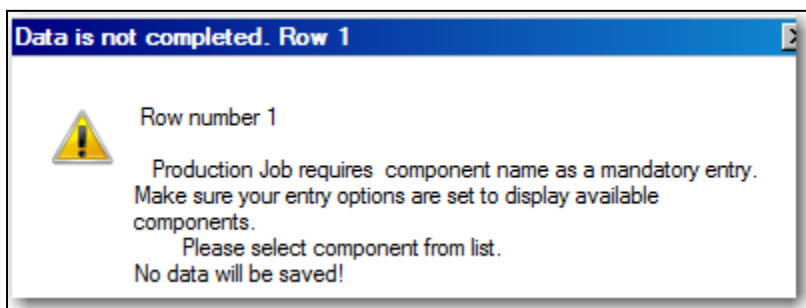


## Production Job - Cost Capture Using Ganging Feature

Each Job Cost entry point will occur in a standard way as the production job is being processed and each of the following programs have been modified to handle the special cost capture:

Shopfloor, Timesheet, Job Cost Entry, Inventory Manager, Simple Issue.

Each of these programs will require the user to select the appropriate gang component in order to assure the costs are eventually reallocated properly. If a component is not selected a message will appear similar to the one shown below.



Once costs are captured on the Production Job, there are several mechanisms built into the program to trigger a cost reallocation. This cost relocation will take all the job cost records and re-distribute them proportionately to the Customer Jobs linked to this Production Job. All posting to the general ledger will only occur on the records that have been reallocated to the Customer Job.

WIP reports will only show the Customer job numbers with cost, not the Production Job.

The programs that will trigger the cost allocation from the Production Job to the Customer Job(s) are;

Generation of the Billing Worksheet for either the Customer or the Production Job (reallocation occurs automatically)

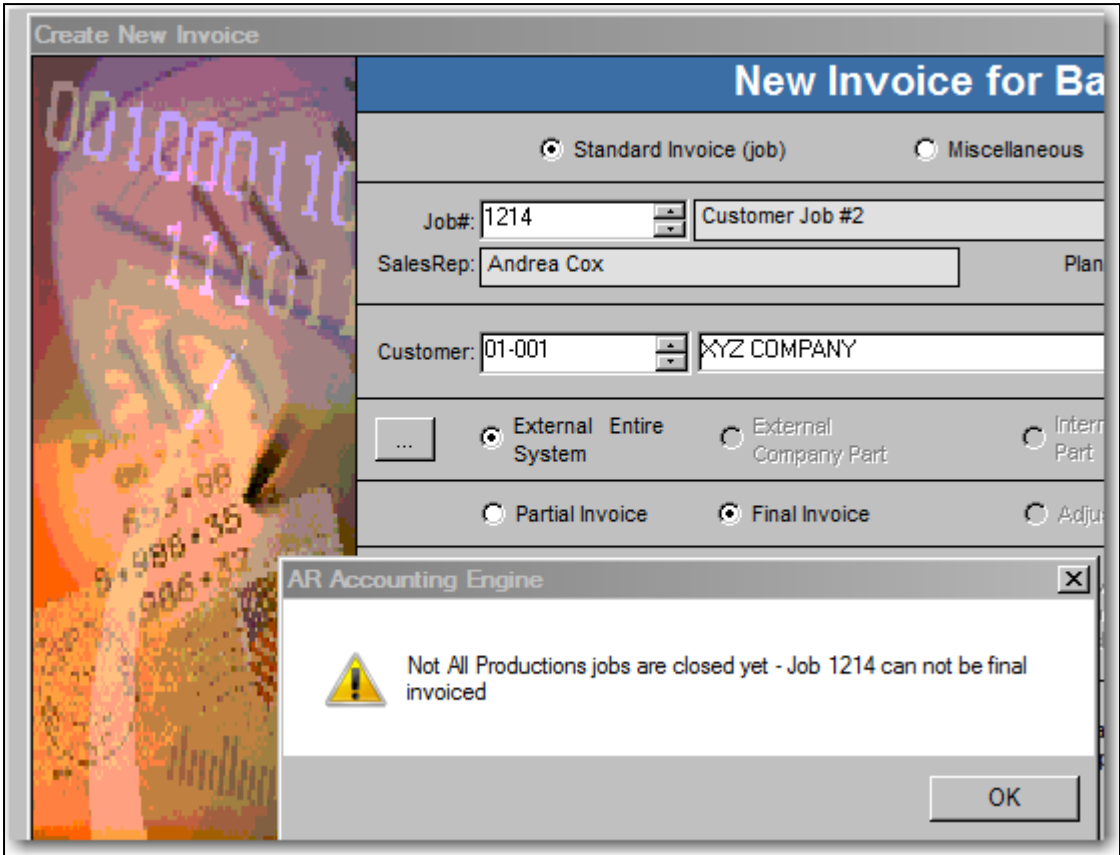
Within the Sales Prebill program under the Run Reports menu there is an option to Move Production Cost to Customer Jobs (reallocation may be triggered manually)

Generation of an A/R Invoice for either the Customer Job or the Production Job (notes and screenshots below on closing the Production Job), (reallocation occurs automatically)

Closing the accounting period for WIP Material will be prevented until all costs have been reallocated. (reallocation occurs automatically)

By having reallocation triggers at each of these points, the program is ensuring WIP accuracy for month end.

The Production Job needs to be final billed and posted prior to final billing any of the related Customer Jobs. This is to ensure that all the costs have been properly reallocated. The user will receive the following message if they attempt to bill a customer job prior to closing the related Production Job.



To close a Production Job the Zero Bill Option should be used. If a user attempts to final invoice a Production Job using a standard invoice, they will receive the following message.

A Zero Bill is created by right-clicking the Company/Plant within the Active Batch Tree and selecting New Zero Bill Batch. Follow the wizard to complete the transaction and refer to the A/R documentation for additional detail if needed.

**Note** The **invoice** created using the Zero Bill option for a Production Job will not contain any g/l allocations for either revenue or expenses. The revenue and expense allocations and all impact to the general ledger will be a result of posting related to the related Customer Jobs.

## Production Job - Save User Preferences for Gang Job Selection

The Components Overview screen allows selection and filtering by the following criteria:

- Screen Size
- Column Order/Selection
- Column Grouping
- Filters

First create a Special Production Job by selecting the option circled below in O.E. Job Header.

Mail Estimating (Print & Mail)

Quote Header

Estimating

- Admin
- Data Processing
- Components
- Bindery
- Create Inventory
- Packages Advanced
- Use Matrix Interface
- Packages
- Finishing
- Drops
- Special Instructions
- Review Pricing
- Order Entry

O.E. Job Header

Job Quantity: 10,000

Enter Job Number or leave blank for automatic assignment:

Order Date: 6/28/2010

Start Date: 6/28/2010

First Mail Date: 7/15/2010

Last Mail Date: 7/25/2010

Priority:

Re-Order Date:

P/O Number:

Part Number:

Previous Job Number:

Work w/Job Number:

Reprint from:

Film File Number:

New Job: Yes

Exact Repeat: No

Alter Specs: Yes

Art Required: Yes

Film Required: Yes

Unders: Yes

Overs: Yes

Copy Vendors for Buyout Processes ☒

O.E. Notes

☐ Special Job : will be used for the recurring scheduling ONLY

☒ Production Job : job is processing multiple Printed In House Components for Customer's jobs

Cancel Save

Click the tree branch **Components** and click the **Copy Components from Another Estimate**.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant CHRIS - [Component Summary]

Mail Estimating (Print & Mail)

Quote Header

Estimating

- Admin
- Data Processing
- Components
- Bindery
- Create Inventory
- Packages Advanced
- Use Matrix Interface
- Packages
- Finishing
- Drops
- Special Instructions
- Review Pricing
- Order Entry

Copy Components From Another Estimate

Ganged	Ganging	Sequential Binding Number	Order For display	X Del ete	Production Job #	Customer's Job #	Description	Quantity	Item # From Inventory	Inventory Code	Revision Code	Date on Hand	Over
--------	---------	---------------------------	-------------------	-----------	------------------	------------------	-------------	----------	-----------------------	----------------	---------------	--------------	------



Window and column widths may be adjusted by dragging perimeters and column widths to desired dimensions .

Search For Items To Gang

Select Items To Gang

Select items to gang with Forms

Print Report

Drag a column header here to group by that column

		Ganging Ok?	Ready To Go?	Job Number	Quote Number	Component Name	Quantity	Originals	Form Qty	Paper
	<input type="checkbox"/>	N	N	908	1171	Timson 6 x 9 - 32 P	10,000	32		1 Springhill 10PT C15 Cover White
	<input type="checkbox"/>	N	N	908	1171	Timson 6 x 9 - 16 P	10,000	16		1 Book Makers 60# Opq White
	<input type="checkbox"/>	Y	Y	912	1175	Text 32	1,500	32		1 Book Makers 60# Opq White
	<input type="checkbox"/>	Y	Y	912	1175	Text 48	1,500	48		3 Book Makers 60# Opq White
	<input type="checkbox"/>	Y	Y	912	1175	Brd Front&Back W...	1,500	2		2 999Eska Board .088 Natural
	<input type="checkbox"/>	Y	Y	912	1175	CC Front Panel - SOP	1,500	2		1 Pearl Linen Cover^^0200 White
	<input type="checkbox"/>	Y	Y	912	1175	CC Back Panel - SOP	1,500	2		1 Pearl Linen Cover^^0200 White
	<input type="checkbox"/>	Y	Y	912	1175	CC Spine - SOP 2	1,500	2		1 Pearl Linen Cover^^0200 White
	<input type="checkbox"/>	Y	Y	912	1175	Dust Jacket 4	1,500	4		1 Sterling Gloss 80# Sheet^^020
	<input type="checkbox"/>	Y	Y	912	1175	Endsheet 4	1,500	4		2 Glatfelter Endleaf 80# Sheet^^
	<input type="checkbox"/>	N	N	1909	3196	Sheet Fed 32 pag...	10,000	32		1 Book Makers 70# Opq White
	<input type="checkbox"/>	N	N	1909	3196	Soft Cover W/Tum...	10,000	4		1 Springhill 10PT C25 Cover White
	<input type="checkbox"/>	N	N	2540	3712.99	Text	325,000	16		1 Opulence Gloss Book 80# White
	<input type="checkbox"/>	N	N	7296	4317.99	Brochure	10,000	6		1 Kromekote C2s Cover white
	<input type="checkbox"/>	N	N	7296	4317.99	Text	10,000	16		1 Gloss Book White
	<input type="checkbox"/>	N	N	7296	4317.99	Text	10,000	16		1 Gloss Book White
	<input type="checkbox"/>	N	N	7455	4568.99	Postcards	10,000	2		1 Kromekote C1s Cover white
	<input type="checkbox"/>	N	N	7488	4663	16pg Sht 8.5x11	10,000	16		4 Bellissima Superfine Coated 80#
	<input type="checkbox"/>	N	N	7495	4681.99	Soft CoverSoft Co...	2,500	4		1 Springhill 12PT C15 Cover White
	<input type="checkbox"/>	N	N	7495	4681.99	Text 16	2,500	16		3 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Soft CoverSoft Co...	1,000	4		1 Springhill 10PT C15 Cover White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 48	1,000	48		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 48	1,000	48		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 24	1,000	24		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 48	1,000	48		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 48	1,000	48		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7497	4686.99	Text 32	1,000	32		1 Book Makers 50# Opq White
	<input type="checkbox"/>	N	N	7500	4684.99	Booklet	10,000	16		1 Bellissima Superfine Coated 80#
	<input type="checkbox"/>	N	N	7501	4687.99	Booklet	10,000	16		1 Bellissima Superfine Coated 80#
	<input type="checkbox"/>	N	N	7501	4687.99	SF Perfecting form	10,000	16		1 Bellissima Superfine Coated 80#
	<input type="checkbox"/>	N	N	7503	4692.99	Booklet	10,000	16		1 Bellissima Superfine Coated 80#
	<input type="checkbox"/>	N	N	7505	4697.99	Text	15,000	16		1 Vista Offset Book Tan
	<input type="checkbox"/>	N	N	7505	4697.99	Text	15,000	16		1 Vista Offset Book Tan

Grouping and filtering may be applied by dragging column names to grey area above columns.

	Job Number	Quote Number	Component Name	Quantity	Originals	Form Qty	Ink Qty	Trim Size	Colors Back	Delivery Date	Print Form Template
<input type="checkbox"/>			Paper: 80 # Vintage Velvet Text White								
<input type="checkbox"/>			Paper: 999Eska Board .088 Natural								
<input type="checkbox"/>			Paper: Accent Opaque Cover Bright White								
<input type="checkbox"/>			Paper: Accent Opaque Cover Soft White								
<input type="checkbox"/>			Paper: Bellissima Superfine Coated 80# Text High White								
<input type="checkbox"/>			Paper: Book Makers 50# Opq White								
<input type="checkbox"/>			Paper: Book Makers 60# Opq White								
<input type="checkbox"/>			Paper: Book Makers 70# Opq White								
<input type="checkbox"/>			Paper: Carnival Cover White								
<input type="checkbox"/>			Paper: Carnival Text white								
<input type="checkbox"/>			Paper: Damask Brocade Cover 100# Antique White								
<input type="checkbox"/>			Colors Front: Proc Black,Proc Cyan,Proc Mag,Proc Yellow,								
<input type="checkbox"/>			Press Run Size: 20 x 26								
<input type="checkbox"/>			Ganging Ok?: Y								
<input type="checkbox"/>			Ready To Go?: Y								
<input type="checkbox"/>			<input checked="" type="checkbox"/> 7582 4852.99 Brochure 6pp 2 up	10,000	6	1 4/4	7.125 x 8.875	Proc Black,Proc Cyan,Proc Mag,Proc Yell...	7/15/2010		
<input type="checkbox"/>			Press Run Size: 22 x 16								
<input type="checkbox"/>			Ganging Ok?: Y								
<input type="checkbox"/>			Ready To Go?: Y								
<input type="checkbox"/>			<input checked="" type="checkbox"/> 7614 4930.99 postcards	100,000	2	1 4/4	5 x 7	Proc Black,Proc Black,Proc Cyan,Proc Cy...	8/1/2010		
<input type="checkbox"/>			Paper: Damask Brocade Cover 100# Nile Blue								

Click the + next to each grouping and select from among items for ganging.

	Job Number	Quote Number	Component Name	Quantity	Originals	Form Qty	Ink Qty	Trim Size	Colors Back	Delivery Date	Print Form Template
<input type="checkbox"/>			Paper: Damask Brocade Cover 100# Antique White								
<input type="checkbox"/>			Colors Front: Proc Black,Proc Cyan,Proc Mag,Proc Yellow,								
<input type="checkbox"/>			Press Run Size: 20 x 26								
<input type="checkbox"/>			<input checked="" type="checkbox"/> Y	7582	4852.99	Brochure 6pp 2 up	10,000	6	1 4/4	7.125 x 8.875	Proc Black,Proc Cyan,Proc Mag,Proc Yell...
<input type="checkbox"/>			Press Run Size: 22 x 16								
<input type="checkbox"/>			<input checked="" type="checkbox"/> Y	7614	4930.99	postcards	100,000	2	1 4/4	5 x 7	Proc Black,Proc Black,Proc Cyan,Proc Cy...

These settings will save when ganging selection screen is closed and re-opened.

## Pre-Printed Inventory

### Using Pre-Printed Inventory in Print and Mail Estimating

Setup is required in Master Files Print prior to use of this feature in Print and Mail Estimating. See the Master Files Print document for setup instructions.

Create Item for Preprinted Inventory

**Finished Good** - If the pre-printed shell is produced at house expense and then the customer is charged for the pre-printed shell during the imprint you would set this up as Finished Goods associated with the customer.

**Customer Owned** - If the pre-printed shell is customer owned then no cost should be pulled into the quote because they have already been billed for the printing of the shells. When creating a Pre-Printed Shell inventory item whether Customer Owned or a Finished Good you must check the **Pre Printed Paper** check box first then enter Customer, select the Pre-Printed Shell Paper, Color, and Size from Master Files Print. Enter Inventory Code as desired and enter Number Up. If Inventory is a Finished Good then select the quoted appropriate costing methods on the **Options** tab.

**New Inventory**

Select Inventory Type

Customer Finished Goods Paper Raw Material *Customer*

**Mandatory** Optional / Others Printing Specs

Customer: ALASKA Alaska Inc. Load Existing Items

Paper: PrePrinted BC 80# Cvr Color: Pre-Printed Size: 8 1/2 x 11

**Inventory Details**

Item #: 1438

Inventory Code: Mako BC Shell 8up 80# Cvr Revise ...

Revision Code:

Description: Mako BC Shell 8up 80# Cvr

Teal

8 1/2 x 11

Number Up: 8

UOM: new UOM Conv: Created: 2/6/2010 Expiry:

☒ Active

☐ One time use

☒ Track Skids

☐ Tracking Lot

☐ Allow Revisions

☐ Allow Web View

☒ Pre Printed Paper

**Setup**

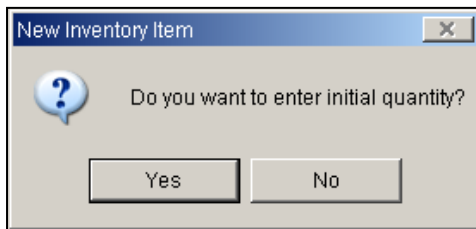
Activity Code: 90001 Customer Inventory Expense Acc: 0

Product Code: 99 Customer Inventory Income Acc: 0

P.O Inv Acc:

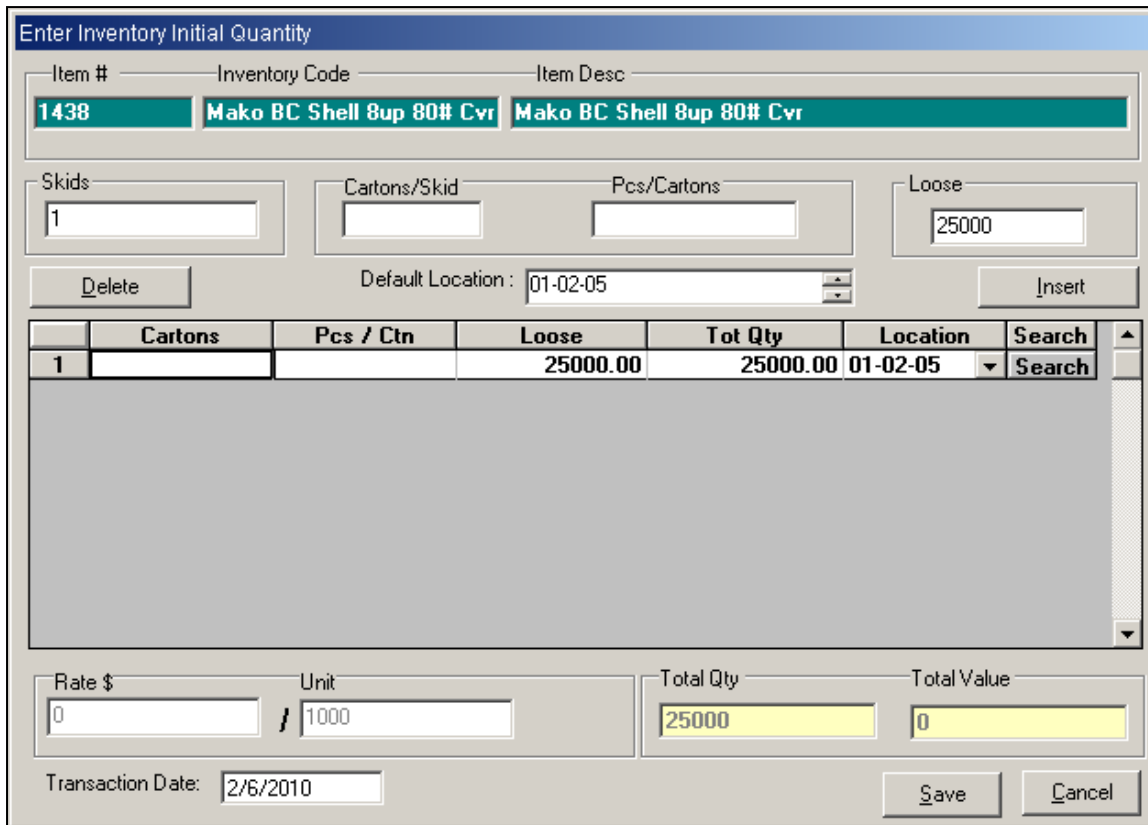


Yes to enter initial quantity for this item.



A small dialog box titled "New Inventory Item" with a question mark icon. It asks "Do you want to enter initial quantity?" and has two buttons: "Yes" and "No".

Enter 1 skid and number of loose pieces, select location and **Insert** and **Save**. If a Finished Goods item you can enter the Rate \$ per Unit.



The "Enter Inventory Initial Quantity" form contains the following fields and controls:

- Item #**: 1438
- Inventory Code**: Mako BC Shell 8up 80# Cvr
- Item Desc**: Mako BC Shell 8up 80# Cvr
- Skids**: 1
- Cartons/Skid**: (empty)
- Pcs/Cartons**: (empty)
- Loose**: 25000
- Delete** button
- Default Location**: 01-02-05
- Insert** button
- Table**:
 

	Cartons	Pcs / Ctn	Loose	Tot Qty	Location	Search
1			25000.00	25000.00	01-02-05	Search
- Rate \$**: 0
- Unit**: 1000
- Total Qty**: 25000
- Total Value**: 0
- Transaction Date**: 2/6/2010
- Save** and **Cancel** buttons

You must now open this Inventory Item in .Net Masters Files Inventory finish the setup of this Item.  
Enter the **Layout Across** and **Layout Around**.

Master File Inventory

File Manage Option Help

Item # 1438 Inv Code Mako BC Shell Sup 80# ... Rev. #

Select Inventory Type

☒ Customer ☐ Finished Goods ☐ Paper ☐ Raw Material

Item # 1438 Inventory Code Mako BC Shell Sup 80# Cvr Revision Code   ☒ IsActive

Main Information Rules / Settings Item Links Extra Information Printing Specifications Current Quantities

Paper

Paper PrePrinted BC 80# Cvr^0100

Color Pre-Printed

Size 8 1/2 x 11

Inventory Description

Description Mako BC Shell Sup 80# Cvr

Teal

8 1/2 x 11

Inventory Details

Unit Of Measure  Unit Conversion 0

Expiry Date  Created Date 2/6/2010

Layout Across 4 Layout Around 2 Number Up 8

Pricing

Sell Method Use Cost 0

Costing Method Average Cost

Declared Value Fixed Value 0

Unit Of Cost 1000 Average Cost 0

Others

Inventory Classification Others Tracking Type

This information is needed to correctly select the Press Sheet and corresponds to the Layout selected on the Print Template for this printed component.

Template 'BC 8up K/0' - Review Only

Title: BC 8up K/0 0100\*Mail & Print Plant

☒ Text  
☐ Cover

Pages: 2 Number Of Pages for QL: 0  
Bind as: 1 Number Of Sheets for QL: 0

Finish(Trim): 2 x 3 1/2

Size:  
☐ Work and Turn  
☐ Work and Tumble  
☐ Work and Twist

Paper:  
Name:  ...  
Color:  ...

Grain Direction:  
☐ With Grain  
☐ Cross Grain  
☒ None

Pre-cut:  
☐ Yes  
☐ No  
☒ Auto

Ink:  
Double-click on cell to set ink color.  
Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:	Light Coverage	
Ink 1:	Black	
Ink 2:		
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing:  
Double-click on cell to select section finishing process.  
Press DEL key to remove a section finishing process.

Section Finishing	
Final Trim 01	

< Qty	Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
	1st dim.	2nd dim.	1st dim.	2nd dim.						
99,999,999	0	0	0	0	8	Metal	<input type="checkbox"/>	0	4 x 2	
							<input type="checkbox"/>			
							<input type="checkbox"/>			
							<input type="checkbox"/>			

Gripper: 0 Top Margin: 0 Bottom Margin: 0 Left Margin: 0 Right Margin: 0 Vertical Gutters: 0 Horizontal Gutters: 0

Press Format: All

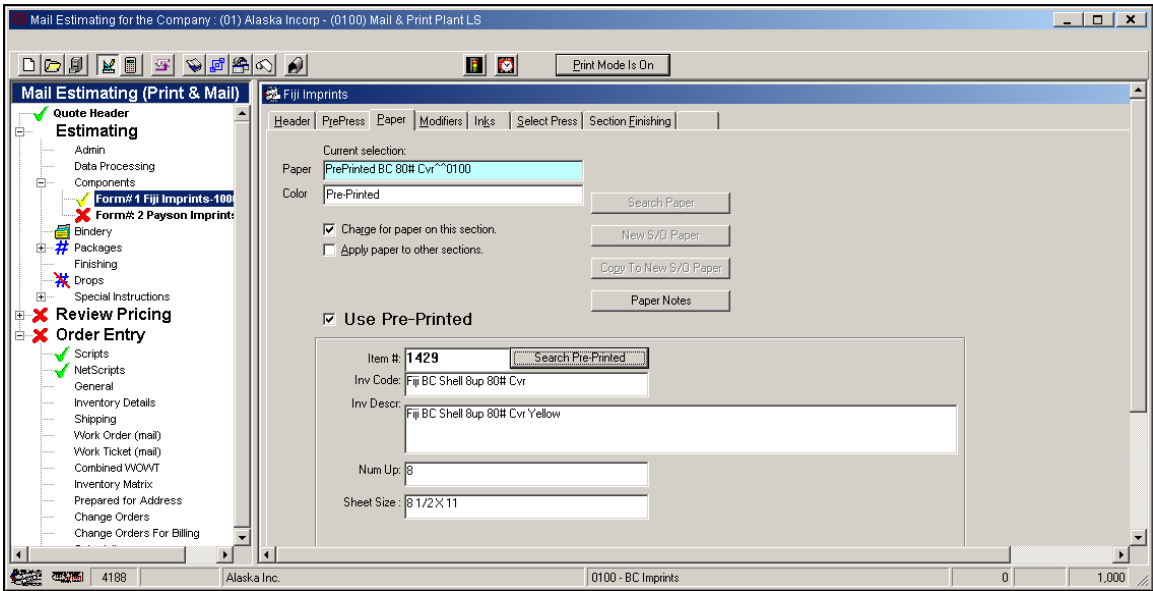
☒ Save as Permanent Template

OK Cancel

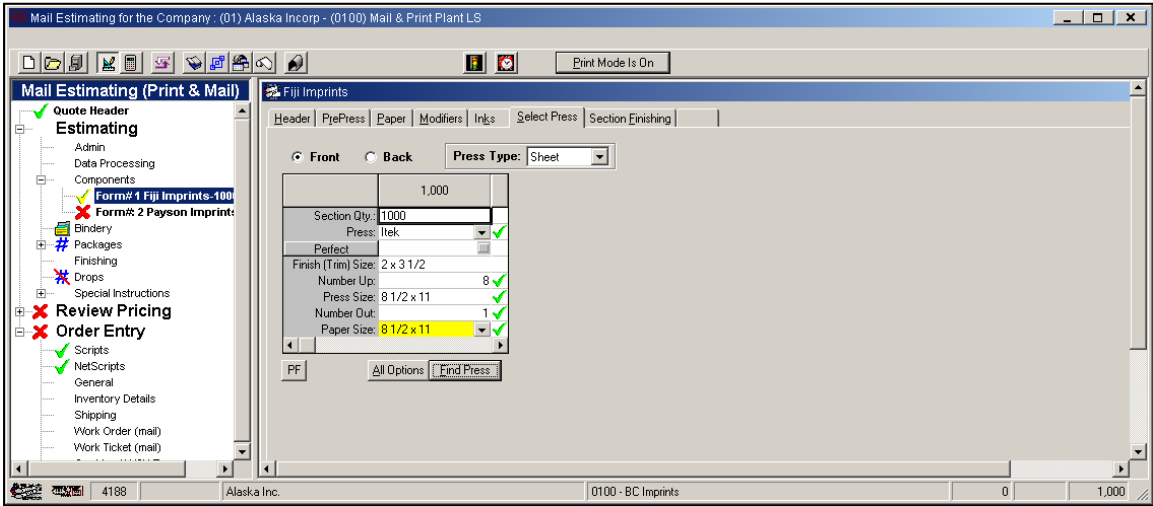
Now in Print and Mail Estimating, the user can process preprinted shells.

Component #1 - Imprint Bus Cards 8up on a Customer Owned Preprinted Shell 8.5" x 11" with no cost

**Paper** tab selection - Check **Use Pre-Printed** and select **Search Pre-Printed** to find the Pre-Printed Inventory Shell.



Select the **Press** tab and **Find Press**.



**Component #2** - Imprint Bus Cards 8up on a Finished Goods PrePrinted Shell 8.5" x 11" at \$25.00/M.

**Paper** tab selection - Check **Use Pre-Printed** and select **Search Pre-Printed** to find the Pre-Printed Inventory Shell.

Mail Estimating for the Company: (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header  
Estimating

Admin  
Data Processing  
Components  
Form# 1 Fiji Imprints-100  
Form# 2 Payson Imprints

Bindery  
Packages  
Finishing  
Drops  
Special Instructions

Review Pricing  
Order Entry

Scripts  
NetScripts  
General  
Inventory Details  
Shipping  
Work Order (mail)  
Work Ticket (mail)  
Combined WOWT  
Inventory Matrix  
Prepared for Address  
Change Orders

Payson Imprints

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Current selection:  
Paper: PrePrinted BC 80# Cvr 0100  
Color: Pre-Printed

Charge for paper on this section.  
Apply paper to other sections.

Use Pre-Printed

Item #: 1431  
Inv Code: Payson BC Shells 8up 80# Cvr  
Inv Descr: Payson BC Shells 8up 80# Cvr Green

Num Up: 8  
Sheet Size: 8 1/2 X 11

4188 Alaska Inc. 0100 - BC Imprints 0 1,000

Select the **Press** tab and **Find Press**.

Mail Estimating for the Company: (01) Alaska Incorp - (0100) Mail & Print Plant LS

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header  
Estimating

Admin  
Data Processing  
Components  
Form# 1 Fiji Imprints-100  
Form# 2 Payson Imprints

Bindery  
Packages  
Finishing  
Drops  
Special Instructions

Review Pricing  
Order Entry

Scripts  
NetScripts  
General  
Inventory Details  
Shipping  
Work Order (mail)

Payson Imprints

Header | PrePress | Paper | Modifiers | Inks | Select Press | Section Finishing

Front Back Press Type: Sheet

Section Qty: 1,000  
Press: Itek  
Perfect  
Finish (Trim) Size: 2 x 3 1/2  
Number Up: 8  
Press Size: 8 1/2 x 11  
Number Out: 1  
Paper Size: 8 1/2 x 11

PF All Options Find Press

4188 Alaska Inc. 0100 - BC Imprints 0 1,000

Calculate Quote - Review Paper screen

Review Papers															
Quantity: 1,000															
Notes	State	Section	PrePrinted Shell	Paper	Weight	Size	Color	Quantity	M Weight	Pounds	Cw/T Price	Rate/M	Rate Units	Charge	Total
✓	Main Run	Fiji Imprints	Fiji BC Shell 8up 80# Cvr	PrePrinted BC 80# Cvr^01	80	8 1/2 x 11	Pre-Printed	226 shts	28.76	6.49976	\$0.03	\$0.01 /1000 shts	Yes	\$0.00	
✓	Main Run	Payson Imprints	Payson BC Shells 8up 80# Cvr	PrePrinted BC 80# Cvr^01	80	8 1/2 x 11	Pre-Printed	226 shts	28.76	6.49976	\$86.93	\$25.00 /1000 shts	Yes	\$5.65	
								452							
Refresh Recalc Close															

Convert to Job - Paper Reservation screen

File

Reservation

Sheeting Information

Section	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required	Create PO	Order	Qty Reserved	Inv. Code	Inv. Cod
Form#:1 Fiji Imprints	PrePrinted BC 80# Cvr^0100	8 1/2 x 11	8 1/2 x 11	Pre-Printed	226 shts	7 lbs.					
	Fiji BC Shell 8up 80# Cvr		Yellow						226	1429	
Form#:2 Payson Imprints	PrePrinted BC 80# Cvr^0100	8 1/2 x 11	8 1/2 x 11	Pre-Printed	226 shts	7 lbs.					
	Payson BC Shells 8up 80# Cvr		Green						226	1431	

Materials and Outside work

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched Dt	Recvd	Rcvd Qty
------	-----	---------	------	------	--------	-----------	------	----------	-------	----------

Reservation

Purchasing

Select Inventory Paper for Fiji Imprints

Item #:

Inv. Code:

Description:

Paper:

Color:

On Hand:

Commit:

Size:

On Order:

Avail:

Select

Clear

Color Legend

- Inventory Paper Doesn't Exist

- Inventory Paper Exists

- Inventory Paper Reserved

- Inventory Non-Paper

- Inventory Non-Paper Reserved

Cancel

Reserve

## Printers Quote Letter - Uses the estimated paper names


Document1 (Preview) - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

100% Close

1 2 3 4 5 6 7

**estimate** 

**Sally Samster**  
Alaska Inc.  
123 West Main  
Suite 7  
Provo, UT 84601  
Tel: 801.555.0133, Fax: 801.555.1038

**Quotation # 4188.99**  
February 06, 2010

*Description* **BC Imprints**

*Material Furnished by Customer* You are to furnish electronic files with images and artwork in position.

*Prepress* We are to process your files and generate plates.

*Proofs* We are to provide proofread Spinjet and composite color proofs.

**Fiji Imprints**

*Size* 2 x 3 1/2

*Stock* PrePrinted BC 80# Cvr Pre-Printed

*Press Work* Printed Black side one;  
Black Ink Only on side two

*Finishing* Trim

**Payson Imprints**

*Size* 2 x 3 1/2

*Stock* PrePrinted BC 80# Cvr Pre-Printed

*Press Work* Printed Black side one;  
Black Ink Only on side two

*Finishing* Trim

*Bindery* Up to 10% will be shipped and invoiced unless specified otherwise.

*Delivery* Normal production time, 8 working days, exclusive of client proof holding time.

Page 1 Sec 1 1/2 At 1.1" Ln 1 Col 1 REC TRK EXT OVR

## Print Work Ticket - For Individual Components uses Inventory Paper Name

**Preview/Print Work Ticket**

Work Ticket Selection

☐ Complete

☐ Pre-Press

☐ Production

☐ Finish And Bindery

☐ Shipping

☒ For Individual Sections

☐ Book System Complete

Select Sections

☒ Fiji Imprints

☒ Payson Imprints

Change Order Report

☒ Don't Include

☐ Last Revision

☐ All Revisions

☐ Include Activities Section

☐ Include Bar Codes

☐ Designate This Work Ticket As a New Revision

Preview Cancel

**Work Order**

Printed: 2/6/2010 5:29:09PM Page 1 of 2

**Job#: 7200 WORK ORDER Rev. 1 Due: 2/6/2010**

**1000 Fiji Imprints**

Client: **Alaska Inc.** Quote#: **4188.99**

Ac. No: **ALASKA** P/O#:

Address: **123 West Main** Third Party P/O#:

**Suite 7** P/N:

**Provo, UT 84601** Finished Size: **2 x 3 1/2**

Contact: **Sally Samster**

Phone: **801555 0133** Fax: **801555 1038**

Quantity: **1,000 of BC Imprints**

Job Description	Estimator Notes	Other Notes

Order Date	CSR	Salesrep	Wrk With	New	Exact Repeat	Prev.	PrePress	Film File	Unders	Overs
2/6/2010	Sue Smith	House Account		Yes	Yes		Art/Film		Yes	Yes

**Pre - Press**

Section	Process	Category	Quantity

**Papers**

Section	Paper Qty	M Weight	Mill Size	Weight	Paper Type	Color	Out	Cut To	Vendor	Rate	Inventory #
Fiji Imprints	226		8 1/2 x 11		Fiji BC Shell 8up 80# Cvr		1	8 1/2 x 11		0.00	Item# 1429 Inv. Code Fiji BC Shell 8up 80

**Ink Colors**

Section	Side	Ink Colors
Fiji Imprints	Front	8 Ink
	Back	

**Press**

Section	Qty	Side	Runs	Up Method	Press	Plates	Run Qty	Run Waste	Run Out
Fiji Imprints	1000	Front	1	8 S/W	Rek Flat Size : 2X3 1/2 Flat Size : 2X3 1/2 Caliper : .0008 Press Check Required=No	1 Metal	226	89	137

**Finish & Bindery**

Section	Side	Up	Process	Run Qty	Waste	Run Out
Fiji Imprints		8	Final Trim 01	137	12	125



Work Order

Printed: 2/6/2010 5:29:10PM Page 2 of 2

**Job#: 7200 WORK ORDER Rev. 1 Due: 2/6/2010**

**1000 Payson Imprints**

Client: **Alaska Inc.** Quote#: **4188.99**  
 Ac. No: **ALASKA** P/O#:  
 Address: **123 West Main** Third Party P/O#:  
 Suite 7 P/N:  
 Provo, UT 84601 Finished Size: **2 x 3 1/2**  
 Contact: **Sally Samster**  
 Phone: **801555 0133** Fax: **801555 1038**  
 Quantity: **1,000 of BC Imprints**

Job Description	Estimator Notes	Other Notes

Order Date	CSR	Salesrep	Wrk With	New	Exact Repeat	Prev.	PrePress	Film File	Unders	Overs
2/6/2010	Sue Smith	House Account		Yes	Yes		Art/Film		Yes	Yes

**Pre - Press**

Section	Process	Category	Quantity

**Papers**

Section	Paper Qty	M Weight	Mill Size	Weight	Paper Type	Color	Out	Cut To	Vendor	Rate	Inventory #
Payson Imprints	226		8 1/2 x 11		Payson BC Shells 8up 80# Cvr		1	8 1/2 x 11		25.00	Item# 1431 Inv.Code Payson BC Shells 8up

**Ink Colors**

Section	Side	Ink Colors
Payson Imprints	Front Back	Black

**Press**

Section	Qty	Side	Runs	Up Method	Press	Plates	Run Qty	Run Waste	Run Out
Payson Imprints	1000	Front	1	8 S/W	Hel Flat Size : 2X3 1/2 Flt Size : 2X3 1/2 Caliper : 0.008 Press Check Required=No	1 Metal	226	89	137

**Finish & Bindery**

Section	Side	Up	Process	Run Qty	Waste	Run Out
Payson Imprints		8	Final Trim 01	137	12	125

## Combo WT - Uses Inventory Paper Name

## Job Summary

## Components

No.	Component Name/Version	Order Items	Quantity	Component Type	Flat Size	Finished Size	Item #/Code	Leftovers to.../Comment / Insert Notes
1	<b>Fiji Imprints</b>		1,000	Printed	2 x 3.5	2 x 3.5	1429	
	1 forms x 2 pgs, 8up One side, 1/0, Ittek/, Final Trim 01						Fiji BC Shell 8up 80# Cvr	
2	<b>Payson Imprints</b>		1,000	Printed	2 x 3.5	2 x 3.5	1431	
	1 forms x 2 pgs, 8up One side, 1/0, Ittek/, Final Trim 01						Payson BC Shells 8up 80# Cvr	

## Papers

#	Component	Material Description / Color	Basis Wt	M Wt	Item #/Code	Sheets/ Feet	Pounds	Parent Size	Out to	Out	Vendor ACC# /Name	Price/Per
1	Fiji Imprints <b>Run Seq #1</b>	Fiji BC Shell 8up 80# Cvr Pre-Printed(Coated Cover)	80	28.92	1429 Fiji BC Shell 8up 80# Cvr	226	7	8.5 x 11	8.5 x 11	1		0.01 /1000 sheets
2	Payson Imprints <b>Run Seq #2</b>	Payson BC Shells 8up 80# Cvr Pre-Printed(Coated Cover)	80	28.92	1431 Payson BC Shells 8up 80# Cvr	226	7	8.5 x 11	8.5 x 11	1		25.00 /1000 sheets

## Job Details

## Print Components

## Press Notes

#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size
1	<b>Fiji Imprints</b>		1,000	Printed	2 x 3.5	2 x 3.5
<b>1 forms x 2 pgs, 8up One side, 1/0, Ittek/, Final Trim 01</b>						
Paper/ Material Description - (Vendor Product Code:)		Inventory ID	Material Qty	Parent Size	Out To	#Out Source
Fiji BC Shell 8up 80# Cvr		Fiji BC Shell 8up 80# Cvr	226	8.5 x 11	8.5 x 11	1
Press	Imposition	#Up				
Ittek	One side	8				
#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size
2	<b>Payson Imprints</b>		1,000	Printed	2 x 3.5	2 x 3.5
<b>1 forms x 2 pgs, 8up One side, 1/0, Ittek/, Final Trim 01</b>						
Paper/ Material Description - (Vendor Product Code:)		Inventory ID	Material Qty	Parent Size	Out To	#Out Source
Payson BC Shells 8up 80# Cvr		Payson BC Shells 8up 80# Cvr	226	8.5 x 11	8.5 x 11	1
Press	Imposition	#Up				
Ittek	One side	8				

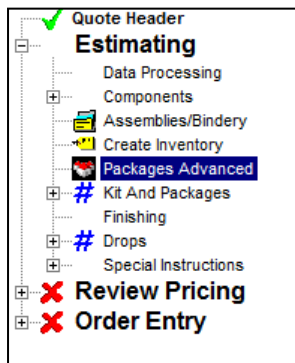
## Packages Advanced Feature

This is new .NET Programming that allows users to set-up Packages, link Components and Processes all within one user-friendly screen. This takes the place of entering each package within an estimate/job and selecting the **P** button to link processes.

We have also included additional fields: Weight, Size, Thickness and Aspect Ratio that will calculate **Postal Qualification**. This option will allow the user to identify if the piece qualifies as Postcard, Letter or Flats and automation as well. For example a customer could provide piece specs for a printed item. The client service representative can set-up the information in Packages Advanced and right away determine automation compatibility. This could potentially save the customer additional postage by redesigning the mail piece.

## Procedures and Usage

The Packages Advanced program is located in the Estimating Branch. This will require your assigned support representative to activate.



Selecting Packages Advanced will display the following screen.

Packages (Quote Number: 4644)

Package Maintenance

Package List

Package Name

Package Specs

Pkg Number

Pkg ID

Package Name

Type

Quantity

# of Pieces in Pkg

Notes

Production Status

Production Status

Counts Confirmed

Pkg Status

Mail 100%

Presort Wizard

Entry Point Name

Entry Point Zip

Package Size

 X  Aspect Ratio

Piece Weight

 Pkg Thickness  Pkg Tare Weight

Flap Opening Edge

 Address Format

Mailing Scheme

Postal Qualification

Package Components

Component	Qty	Insert	Outer Envelop	Personal	Flies the	Insertion	Affix To	Notes
Click here to add a new row								

Package Components

Package Processes

User has options to select the icons when creating, saving, deleting or printing packages.

Packages (Quote Number: 4642.99)

New

Save

Delete

Print

Package Wizard

Package Processes

Pkg Finishing Processes

## Create a Package



- Select **New** icon.
- Package Number – Auto populates
- Package ID – Auto Populates
- Enter Package Name
- Select Package Type (User has option to create package samples)
- Enter Quantity
- # of Pieces in PKG. – Auto populates based on Components selected for the package.
- Notes – User define

The screenshot shows the 'Packages (Quote Number: 4644)' window. The 'Add new package' dialog box is open, allowing the user to enter details for a new package. The dialog includes fields for Package Name, Type, Quantity, and # of Pieces in Pkg. The 'Package Components' section at the bottom shows a table with columns for Component, Qty, Insert, Outer Envelop, Personal, Files, Insertion, Affix To, and Notes. The 'Package Specs' section on the right includes fields for Production Status, Pkg Status, Entry Point Zip, Aspect Ratio, Pkg Tare Weight, and Format.

The screenshot shows the 'Packages (Quote Number: 4644)' window with the 'Summer Flyer' package selected. The 'Package Specs' section is highlighted with a red box, showing the following details:

- Pkg Number: 1
- Pkg ID: 72466
- Package Name: Summer Flyer
- Type: Mailing
- Quantity: 10000
- # of Pieces in Pkg: (auto-populated)
- Notes: (empty text area)

The 'Package Components' section at the bottom shows a table with columns for Component, Qty, Insert, Outer Envelop, Personal, Files, Insertion, Affix To, and Notes. The 'Package Specs' section on the right includes fields for Production Status, Pkg Status, Entry Point Name, Entry Point Zip, Package Size, Piece Weight, Pkg Thickness, Pkg Tare Weight, Flap Opening Edge, Address Format, and Mailing Scheme.

## Production Status

- New –New Package
- **OK** to Release to Customer – Is package ok to be released to the customer for approval?
- Customer Approved – Customer approved Package.
- Customer approved with changes- Customer has approved package but with changes.
- Presorted – is this a presorted package?
- Pkg. Status – Unlocked/Locked –User has the option to Lock or Unlock package information. When status is changed and **Saved** the fields cannot be edited unless package is Unlocked.
- Counts Confirmed – YES/NO
- Mail 100% - YES/NO – For example the customer may or may not require spoilage to be re-printed and mailed.

**Packages (Quote Number: 4644)**

Package Maintenance

Package List

Package Name  
Summer Flyer

Package Specs

Pkg Number: 1  
Pkg ID: 72466  
Package Name: Summer Flyer  
Type: Mailing  
Quantity: 10000  
# of Pieces in Pkg: 5  
Notes:

**Production Status**

Production Status: New  
Pkg Status: Unlocked  
Counts Confirmed:   
Mail 100%:   
Presort Wizard

Entry Point Name:   
Entry Point Zip:   
Package Size: X Aspect Ratio:   
Piece Weight: Pkg Thickness: Pkg Tare Weight:   
Flap Opening Edge: Address Format:   
Mailing Scheme:   
Postal Qualification:

Package Components

Component	Qty	Insert	Outer Envelop	Personal	Files the	Insertion	Affix To	Notes
BRE	10000	0						
Post It Note	10000	0						

Package Components | Package Processes

## Presort Wizard

- Entry Point Name - Postal facility at which mail enters the postal delivery system.
- Entry Point Zip – Zip Code of the Entry Point Postal facility.
- Package Size – Height x Length
- Aspect Ratio -the dimension of a mail piece expressed as a ratio of length divided by height (for letters and cards, length is the dimension parallel to the address as read). For example, a #10 Envelope 4 1/8 inches long by 9 1/2 inches high has an aspect ratio of 2.30. An aspect ratio between 1.3 and 2.5, inclusive, is required for automation compatibility.
- Piece Weight – Total weight of pieces in package.
- Package Thickness – Thickness of pieces within package.
- Package Tare Weight-Actual, computed, or estimated weight of the container and/or packaging.
- Flap Opening Edge – long edge (length of envelope, parallel to the address block) or edge (perpendicular to the address block) on a typical #10 envelope.
- Address Format – Across Long Edge (address appears on the long dimension of the envelope) or Across Short Edge (address appears on the short dimension of the envelope).
- Mailing Scheme – How mail is being prepared, example –First Class, Carrier Route, Presort....

**Package Maintenance**

**Package List**

Package Name: Summer PKG

**Package Specs**

Pkg Number: 1  
Pkg ID: 72410  
Package Name: Summer PKG  
Type: Mailing  
Quantity: 10000  
# of Pieces in Pkg: 5  
Notes: PKG Notes

**Production Status**

Production Status: Customer approved  
Counts Confirmed: Yes  
Pkg Status: Unlocked  
Mail 100%: Yes

**Presort Wizard**

Entry Point Name: Huntsville AL  
Entry Point Zip: 35805  
Package Size: 4.125 X 9.5  
Aspect Ratio: 2.3  
Piece Weight: 0.08  
Pkg Thickness: 0.122  
Pkg Tare Weight: 0  
Flap Opening Edge: Long Edge  
Address Format: Across Long Edge  
Mailing Scheme: carrier route  
Postal Qualification

**Package Components**

Component	Qty	Insert Seq.	Outer Envelope	Personalize	Flies the Package	Insertion Direction	Affix To	Notes
Letter	10000	1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Faces Face		Letter Component N...
Post It from Inv	10000	4		<input type="checkbox"/>	<input type="checkbox"/>		BRE	
BRE	10000	3		<input type="checkbox"/>	<input type="checkbox"/>			
Summer Coupon	10000	2		<input type="checkbox"/>	<input type="checkbox"/>			
#10 Window	10000	0		<input type="checkbox"/>	<input type="checkbox"/>			

Package Components | Package Processes

## Postal Qualification

Select this option after entering Package Size, Piece Weight and Package Thickness. This will allow the user to identify the postal qualification of the piece.

In this example based on the package specs this piece qualifies as **Letter Auto**.

Postal Qualification

Physical Dimensions

Dimension

Width

9.5

Height

4.125

Thickness

0.122

Weight

Weight

0.08

Square Check

Linear Inches

27.25

Automation Test

Aspect Ratio

2.303

Qualify

Postal Qualification - Physical Dimensions Checklist

	P/Card	Letter	Flat
Machinable	Non-Machinable	Auto	Non-Machinable
Dimensions and Thickness			
Min Height	Ok	Ok	0.875" Too Short
Max Height	Ok	Ok	Ok
Min Width	Ok	Ok	Ok
Max Width	3.500" Too wide	Ok	Ok
Min Thickness	Ok	Ok	Ok
Max Thickness	Ok	Ok	Ok
Weight & Size			
Min Weight	Ok	Ok	Ok
Max Weight	Ok	Ok	Ok
Min Square Size	Ok	Ok	Ok
Max Linear Inches	Ok	Ok	Ok
Aspect Ratio			
Min Aspect Ratio	Ok	Ok	Ok
Max Aspect Ratio	Ok	Ok	Ok

Show Specifications in the result

Print



Postal Qualification

Physical Dimensions

Dimension	
Width	9.5
Height	4.125
Thickness	0.122
Weight	
Weight	0.08
Square Check	
Linear Inches	27.25
Automation Test	
Aspect Ratio	2.303

Qualify

Postal Qualification - Physical Dimensions Checklist

	P/Card	Letter	Flat
Machinable	Non-Machinable	Auto	Non-Machinable
Dimensions and Thickness			
Min Height	OK (3.500)	OK (3.500)	0.875" Too Short (5.000)
Max Height	OK (4.250)	OK (6.125)	OK (12.000)
Min Width	OK (5.000)	OK (5.000)	OK (6.000)
Max Width	3.500" Too wide (6.000)	OK (11.500)	OK (15.000)
Min Thickness	OK (0.009)	OK (0.009)	OK (0.009)
Max Thickness	OK (0.250)	OK (0.250)	OK (0.750)
Weight & Size			
Min Weight	OK	OK	OK
Max Weight	OK (3.500)	OK (3.500)	OK (13.000)
Min Square Size	Ok	Ok (5.000 x 5.000)	Ok
Max Linear Inches	Ok	Ok	Ok (108 x 108)
Aspect Ratio			
Min Aspect Ratio	OK (1.300)	OK (1.300)	OK (1.300)
Max Aspect Ratio	OK (2.500)	OK (2.500)	OK (2.500)

Print

☒ Show Specifications in the result

- Physical Dimensions- can be edited in the screen, upon making changes select Qualify to review new results.
- Show Specifications in the result – This option displays postal qualification specs in each field.
- Print – User has option to print this document.

## Link Components to Package

Select Package Components.

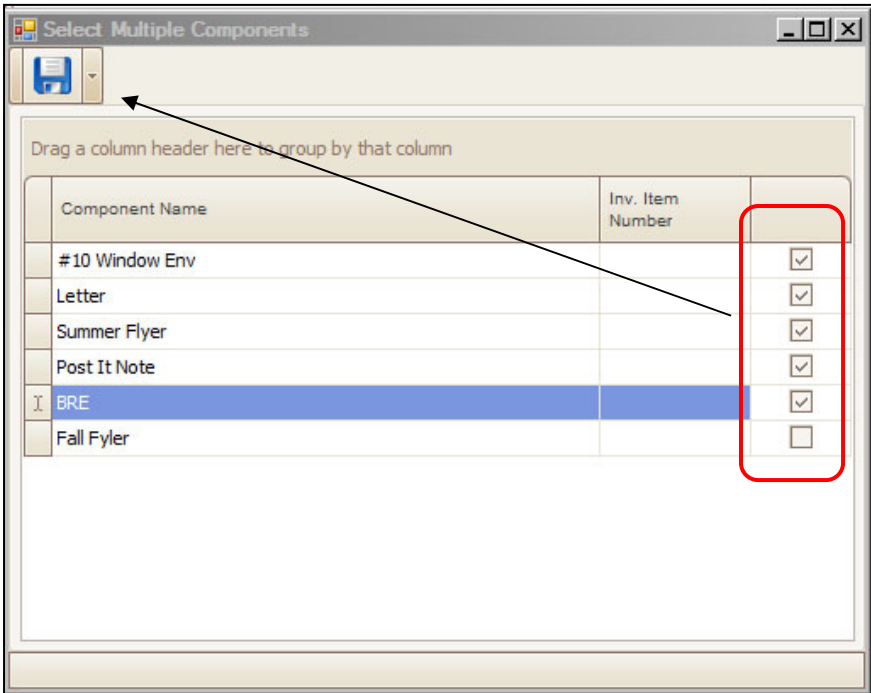
The screenshot shows the 'Packages (Quote Number: 4644)' window. The 'Package List' on the left shows 'Summer Flyer' selected. The 'Package Specs' section on the right contains various fields for package details. At the bottom, the 'Package Components' section is visible, featuring a table with columns: Component, Qty, Insert Seq., Outer Envelope, Personalize, Flies the Package, Insertion Direction, Affix To, and Notes. A red box highlights the drop-down arrow in the 'Component' column of the first row.

Components can be added to the package using the drop-down in the Component column or right-clicking and adding multiple components.

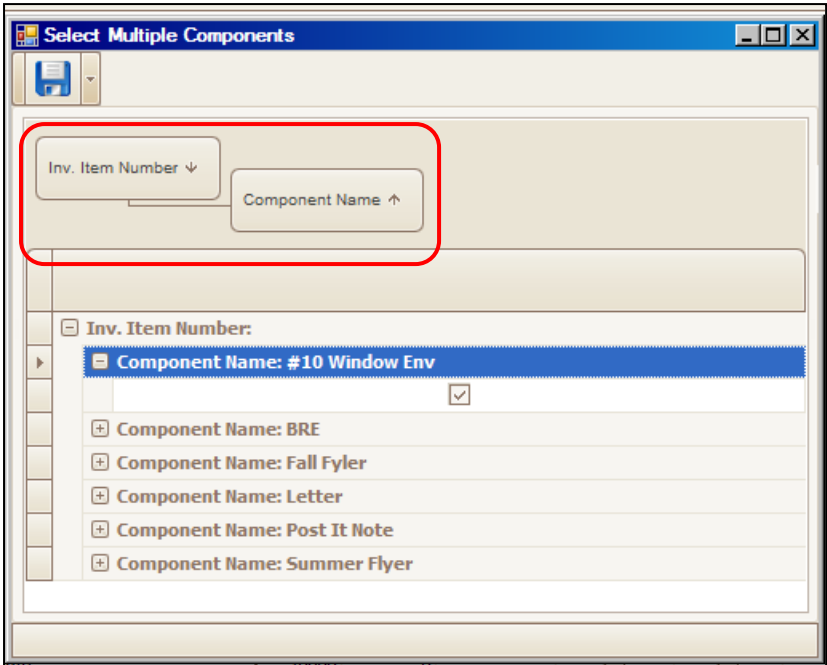
This screenshot shows the same window with the 'Component Name' selection menu open. The menu lists components: #10 Window Env, Letter, Summer Flyer, Post It Note, BRE, and Fall Flyer. The 'Qty' column of the 'Package Components' table has a red box around the first row, indicating where to enter the quantity for the selected component.



Place a check for the components that are required for the package and **Save**.

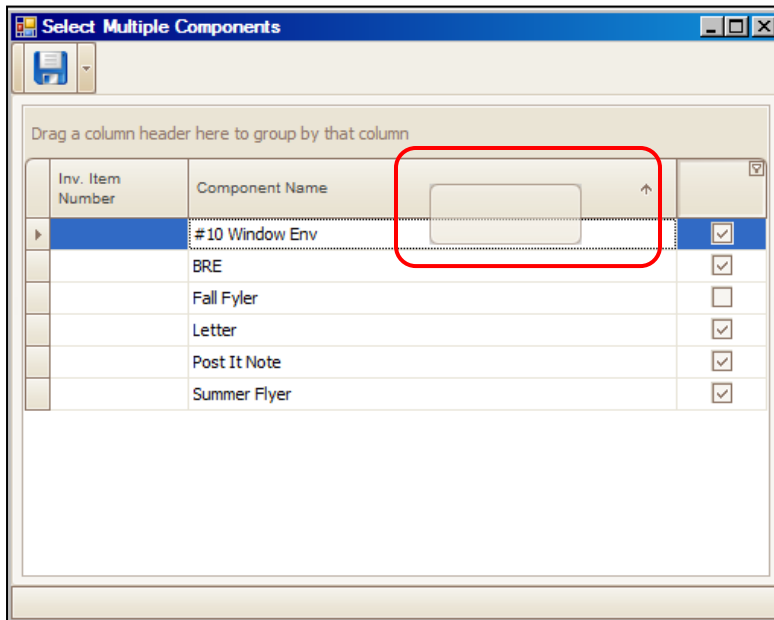


Many of our .NET programs provide the user the ability to Drag Columns for grouping this allows columns to be sorted.

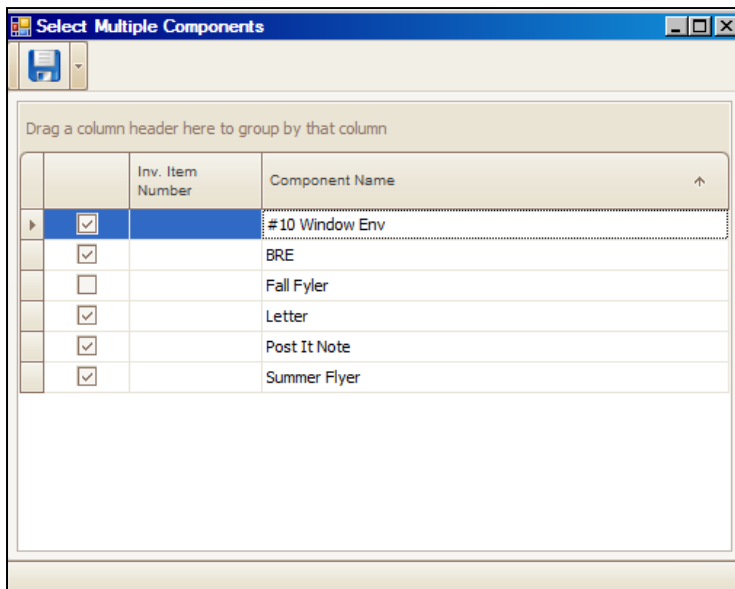


User also has the ability to move columns.

Select Column and drag to re-order display.



In the example below I placed the component selection (Check Box) to display first.



Components linked to the package.

The screenshot shows the 'Package Maintenance' window. The 'Package List' pane on the left has 'Summer Flyer' selected. The 'Package Specs' pane on the right displays the following information:

- Pkg Number: 1
- Pkg ID: 72466
- Package Name: Summer Flyer
- Type: Mailing
- Quantity: 10000
- # of Pieces in Pkg: 5
- Notes: (empty)

The 'Package Components' pane at the bottom shows a table of components linked to the package. The table has the following columns: Component, Qty, Insert Seq., Outer Envelope, Personalize, Flies the Package, Insertion Direction, Affix To, and Notes. The 'Summer Flyer' component is highlighted in blue.

Component	Qty	Insert Seq.	Outer Envelope	Personalize	Flies the Package	Insertion Direction	Affix To	Notes
Summer Flyer	10000	0		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Post It Note	10000	0		<input type="checkbox"/>	<input type="checkbox"/>			
Letter	10000	0		<input type="checkbox"/>	<input type="checkbox"/>			
BRE	10000	0		<input type="checkbox"/>	<input type="checkbox"/>			
#10 Window Env	10000	0		<input type="checkbox"/>	<input type="checkbox"/>			

Component	Qty	Insert Seq.	Outer Envelope	Personalize	Flies the Package	Insertion Direction	Affix To	Notes
-----------	-----	-------------	----------------	-------------	-------------------	---------------------	----------	-------

- Component – Piece linked to the package.
- Qty. – Component package qty. This can be edited for each component.
- Insert Seq. – Order in which package is put together.
- Outer Envelope –Yes/No – Drop-down selection
- Personalize – Is the component a personalized letter. Place Check mark for selection.
- Flies the Package – Which component contains the addressed piece. For example, Personalize letter into window envelope, letter will fly the package. Inkjet closed face envelope that contains generic letter, Envelope will fly the package.
- Insert Direction – Multiple Choice, (Faces Flap or Faces Face)
- Affix To – Allows the component to be affixed to another component. For example a Post It Note can be affix to the letter in the package. Choose component and click in the (Affix To) column a list of package components will display for selection.
- Notes – Free Flow field.

## Link Processes to Packages

After Package Components have been completed, select the **Package Processes** tab. This will allow processes to be selected and linked to the package.

Package Maintenance

Package List

Package Name

Summer Flyer

Package Specs

Pkg Number: 1

Pkg ID: 72466

Package Name: Summer Flyer

Type: Mailing

Quantity: 10000

# of Pieces in Pkg: 5

Notes

Production Status

Production Status: New

Pkg Status: Unlocked

Counts Confirmed

Mail 100%

Presort Wizard

Entry Point Name

Entry Point Zip

Package Size

Aspect Ratio

Piece Weight

Pkg Thickness

Pkg Tare Weight

Flap Opening Edge

Address Format

Mailing Scheme

Postal Qualification

Package Processes

Process	Quantity	Component	Process Type

Package Components

Package Processes

Same rules apply as Package Components. Processes can be linked using the drop-down in the process column (One at A Time) or right-clicking in the blank column under Process (Multi Process Selection).

Package Maintenance

Package List

Package Name

Summer Flyer

Package Specs

Pkg Number: 1

Pkg ID: 72466

Package Name: Summer Flyer

Type: Mailing

Quantity: 10000

# of Pieces in Pkg: 5

Notes

Production Status

Production Status: New

Pkg Status: Unlocked

Counts Confirmed

Mail 100%

Presort Wizard

Entry Point Name

Entry Point Zip

Package Size

Aspect Ratio

Piece Weight

Pkg Thickness

Pkg Tare Weight

Flap Opening Edge

Address Format

Mailing Scheme

Postal Qualification

Package Processes

Process	Quantity	Component	Process Type

Package Components

Package Processes

Remove Process From Package

Multi-Process Selection

Select Processes for the package and **Save**.

MultiSelect Process

Drag a column header here to group by that column

Process	Component	Inv. Item	Process Type	Selected
ADDRESS STANDARDIZATION			DP	<input checked="" type="checkbox"/>
BARCODE QUALIFY			DP	<input checked="" type="checkbox"/>
DP SET UP			DP	<input checked="" type="checkbox"/>
DELIVER TO POST OFFICE			Finish	<input checked="" type="checkbox"/>
INSERT, METER, SORT #10 3pcs			Finish	<input checked="" type="checkbox"/>

Save Package.

Package Maintenance

Package List

Package Specs

Package Processes

Package Name

Summer Flyer

Pkg Number

1

Pkg ID

72466

Package Name

Summer Flyer

Type

Mailing

Quantity

10000

# of Pieces in Pkg

5

Notes

Production Status

New

Counts Confirmed

Pkg Status

Unlocked

Mail 100%

Presort Wizard

Entry Point Name

Entry Point Zip

Package Size

 X  Aspect Ratio

Piece Weight

 Pkg Thickness  Pkg Tare Weight

Flap Opening Edge

 Address Format

Mailing Scheme

Postal Qualification

Process

Quantity

Component

Process Type

DP SET UP

10000

DP

ADDRESS STANDARDIZATION

10000

DP

BARCODE QUALIFY

10000

DP

INSERT, METER, SORT #10 3pcs

10000

Finish

DELIVER TO POST OFFICE

1

Finish



Additional Options – Right-click the package or within blank space and list of options will display. This is another option to Add, Delete, Copy, or create Sample Packages. Users may elect to use this method rather than selecting from the Icons.

The screenshot shows the 'Package Maintenance' window. The 'Package List' pane on the left has a right-click context menu open. The menu options are:

- Add a Package
- Delete a Package
- Copy a Package
- Add Dupe Lives
- Add John Q
- Add Sample Kit
- Add Live Samples
- Add Other

The 'Package Specs' pane on the right shows details for package 1:

- Pkg Number: 1
- Pkg ID: 72472
- Package Name: Summer
- Type: Mailing
- Quantity: 10000
- Pieces in Pkg: 5
- Production Status: New
- Pkg Status: Unlocked
- Mail 100%: Yes
- Presort Wizard: Huntsville AL, Entry Point Zip 35805
- Package Size: 4.125 X 9.5, Aspect Ratio 2.3
- Piece Weight: 0.008, Pkg Thickness: 0.122, Pkg Tare Weight: 0
- Flap Opening Edge: Long Edge, Address Format: Across Long Edge
- Mailing Scheme: CR-RTS

The 'Package Components' pane at the bottom shows a table of components:

Component	Qty	Insert Seq.	Outer Envelope	Personalize	Flies the Package	Insertion Direction	Affix To	Notes
Summer Flyer	10000	2	No	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Faces Flap		
BRE	10000	4	No	<input type="checkbox"/>	<input type="checkbox"/>	Faces Flap		
Post It Note	10000	3	No	<input type="checkbox"/>	<input type="checkbox"/>	Faces Flap	Letter	
Letter	10000	1	No	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Faces Face		
#10 Window Env	10000	0	Yes	<input type="checkbox"/>	<input type="checkbox"/>	Faces Flap		

## End Results

Example of Package created using **Packages Advanced/ Package Components** tab.

Package Components

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [All Packages]

Hide

Mail Estimating (Print & Mail)

Quote Header

Estimating

Data Processing

Components

#10 Window Env-20,000

Letter-20,000

Summer Flyer-20,000

Fall Flyer-20,000

BRE-20,000

Post It Note-20,000

Assemblies/Bindery

Create Inventory

Packages Advanced

Kit And Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

All Pkg. Total: 10,000

Number: 1

Job# 0

Summer Fall Strada

Strada Cycle: Description: Summer

Job Qty 20000

Mail Dates 7/20/2010

Quantity: 10,000

Component Inv. Code Item # Version Ver. Qty Ver. Balance

#10 Window Env Common 20,000 10,000 10,000 0

Letter Common 20,000 10,000 10,000 1

Summer Flyer Common 20,000 10,000 10,000 2

Fall Flyer Common 20,000 20,000

BRE Common 20,000 10,000 10,000 4

Post It Note Common 20,000 10,000 10,000 3

Processes are linked to the Package- This is achieved by the **Package Process** tab in Packages Advanced.

Package Processes

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LS - [Data Processing]

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

Mail Estimating (Print & Mail)

Quote Header

Estimating

Data Processing

Components

#10 Window Env-20,000

Letter-20,000

Summer Flyer-20,000

Fall Flyer-20,000

BRE-20,000

Post It Note-20,000

Assemblies/Bindery

Create Inventory

Packages Advanced

Kit And Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Get Data

Output

Get Data- PS

Programming-PS

OutPut-PS

Programming

Process Description	Quantity	Qty Lock	Cycle Base d	Quoted Price		All Pkgs	Sort
DP SET UP	1			\$0.50	\$ N	<input checked="" type="checkbox"/>	P 3150
ADDRESS STANDARDIZATION	20,000			\$180.00	\$ N	<input checked="" type="checkbox"/>	P 3200
BARCODE QUALIFY	20,000			\$180.00	\$ N	<input checked="" type="checkbox"/>	P 3460

Assign 'DP SET UP' To Packages

☐ Synchronize process quantity with quantity of all packages this process is assigned to

Proportionally divide process quantity between all packages this process is assigned to

Pkg#	Package Name	Pkg Qty	Process Qty
1	Summer	10,000	10,000

Total Qty of all Packages you have selected for this Process 10,000

Total Process Qty (based on Qty you selected for each Package) 10,000

Variance Between Process Qty and Qty of Selected Packages 0

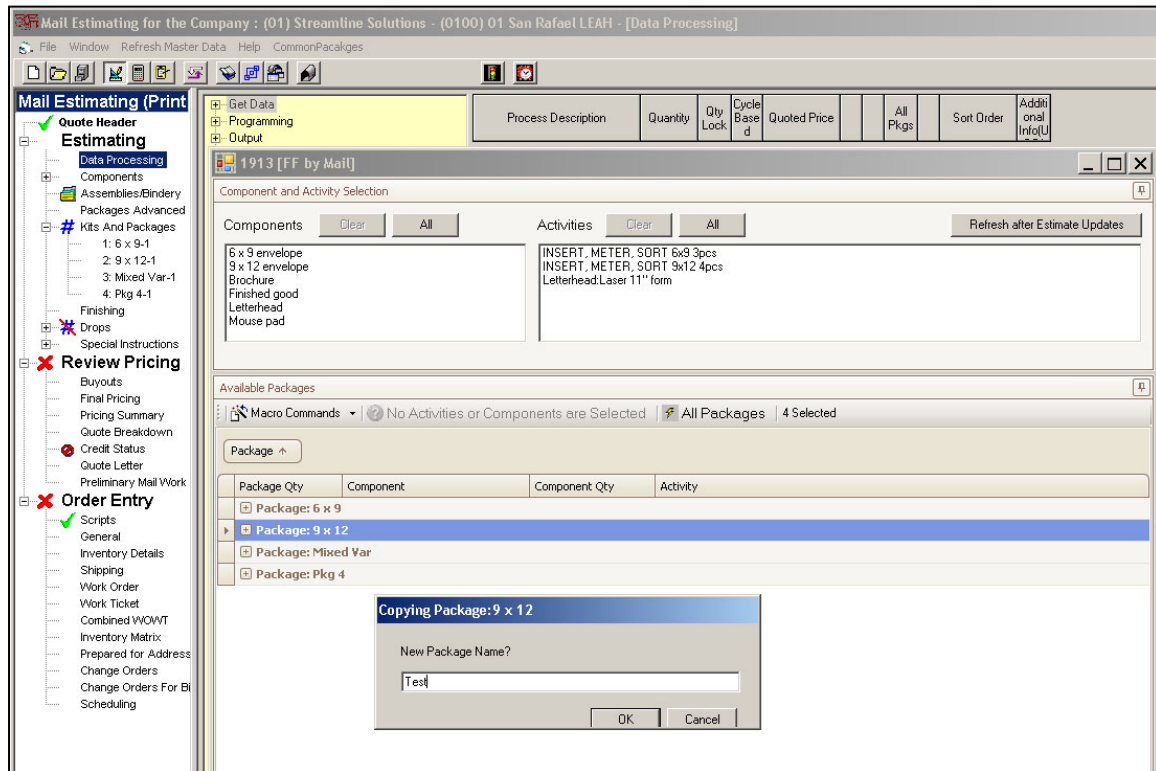
☐ Check as Linked to Every Package

Cancel Close Save

## Refresh Package Option after Calling an External Application

There are currently 2 external application available that allows packages to be created within the Mail Estimating and Print and Mail Estimating modules.

This .net screen is for POD templates. In the POD template when in edit mode, go to File and select Run Package Masters. Once the Package Master screen displays you can right-click and copy an existing package.



After creating your new package you will see that the package is available when viewing in Packages but the tree node does not display the 5<sup>th</sup> package. To have it refresh without having to close estimating, right-click Packages and select Refresh Package Listing. Note that this option is only available when in edit mode.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [All Packages]

Hide

Mail Estimating (Print)

Quote Header  
**Estimating**  
 Data Processing  
 Components  
 Assemblies/Bindery  
 Packages Advanced  
**# Kits And Packages** Refresh Packages Listing (see Pad)  
 1: 6 x 9  
 2: 9 x 12-1  
 3: Mixed Var-1  
 4: Pkg 4-1  
 Finishing  
 Drops  
 Special Instructions

All Pkg. Total:				5		Number:		1		2		3		4		5		6	
Job#	Job Qty	FF by Mail	Mail Dates	50045	Need a New	Description:	6 x 9	9 x 12	Mixed Var	Pkg 4	Test								
Component	Inv. Code	Item #	Version	Var. Qty.	Var. Balance														
Brochure	61360		Common	3	-1			1.1		1.1		1.1							
6 x 9 envelope	6 x 9 env	61361	Common	2	0		1.1			1.4									
9 x 12 envelope	9 x 12 env	61362	Common	2	-1			1.3			1.2		1.3						
Letterhead	Letterhead	61364	Common	4	-1			1.2	1.6		1.7	1.3		1.6					

The tree node to the left will now be refreshed.

Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH - [All Packages]

Hide

Mail Estimating (Print)

Quote Header  
**Estimating**

Data Processing Components

Assemblies/Bindery Packages Advanced

**Kits And Packages**

1: 6 x 9-1  
 2: 9 x 12-1  
 3: Mixed Var-1  
 4: Pkg 4-1  
 5: Test-1

All Pkg. Total:	5					Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity	Seq	Quantity
Job#	0	FF by Mail	50045	Need a New	Number Description:	6 x 9	1	2		3		4		5		
Job Qty	4	Mail Dates			Quantity:	1		9 x 12	1	Mixed Var	1	Pkg 4	1	Test	1	
Component	Inv. Code	Item #	Version	Ver. Qty.	Ver. Balance											
Brochure	Brochures	61960	Common	3	-1			1	1	1		1	1		1	1
6 x 9 envelope	6 x 9 envel	61961	Common	2	0	1	1			1	4					
9 x 12 envelope	9 x 12 envel	61962	Common	2	-1			1	3			1	2		1	3
Mouse pad	Mouse Pad	61963	Common	3	-1	1	1	1	4	1	5				1	4
Finished good	Something	61965	Common	2	-1	1	1	1	5	1	6				1	5
Letterhead	Letterhead	61964	Common	4	-1	1	2	1	6	1	7	1	3		1	6

Another new .net application is a Package Advance screen. Again, once you have your packages defined, right-click **Packages** when in edit mode to refresh the tree.

**Mail Estimating for the Company : (01) Streamline Solutions - (0100) 01 San Rafael LEAH**

File Window Changes Refresh Master Data Help CommonPackages

Print Mode Is Off

**Mail Estimating (Print)**

- Quote Header
- Estimating
  - Data Processing
  - Components
  - Assemblies/Bindery
  - Packages Advanced
  - Kits And Packages
    - 1: Ltr 1-10,000
    - 2: Ltr 2-10,000
    - 3: Ltr 1-John Q-11
    - 4: Ltr 2-Live Samp
  - Finishing
  - Drops
  - Special Instructions
- Review Pricing
  - Buyouts
  - Final Pricing
  - Pricing Summary
  - Quote Breakdown
  - Credit Status
  - Quote Letter
  - Preliminary Mail Work
- Order Entry
  - Scripts
  - General
  - Inventory Details
  - Shipping
  - Work Order (mail)
  - Work Ticket (mail)
  - Combined WOVVT
  - Inventory Matrix
  - Prepared for Address
  - Change Orders
  - Change Orders For B
  - Scheduling

**Packages (Quote Number: 3890.99)**

Package Maintenance

Package List

- Ltr 1
  - Ltr 1-John Q
- Ltr 2
  - Ltr 2-Live Samples

Package Specs

Pkg Number: 1

Pkg ID: 63309

Pkg Name: Ltr 1

Type: Mailing

Quantity: 10000

# of Pieces in Pkg: 2

Notes

Default Package

Production Status: New

Counts Confirmed: No

Pkg Status: Unlocked

Presort Wizard

Entry Point Name:

Entry Point Zip:

Mail 100%:

Package Size: X

Piece Weight:

Pkg Thickness:

Flap Opening Edge:

Address Format:

Mailing Scheme:

Package Components

Component	Qty	Insert Seq.	Outer Envelope	Person alize	Flies the Package	Insertion Direction	Affix To	Notes
env	10000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
ltr	10000		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Faces Flap		testing old 21664

Click here to add a new row

Package Components | Package Processes

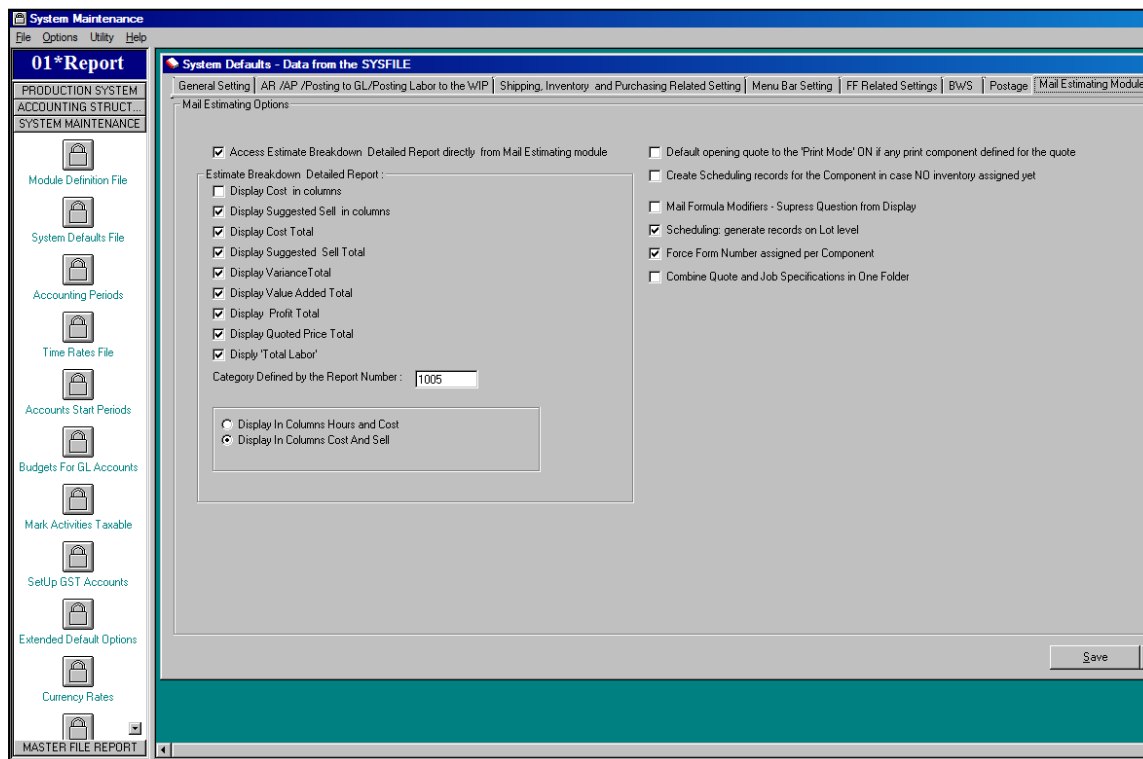
## .Net Quote Breakdown (Quote Breakdown Detailed)

The new .Net Quote Breakdown (Quote Breakdown Detailed) report has many user defined variables. These variables allow you to create a custom report based on the information that you want to see displayed on the report.

### Setup


This area requires the assistance of your Printstream Production support person.

Setup Location = Master Files Reports > System Maintenance > System Defaults File > Mail Estimating Module.



The following areas are directly tied to the Quote Breakdown Report:

- **Access Estimate Breakdown** – checking this option activates the report so that it can be run directly from the Print and Mail program.
- **Display Cost in Columns** – this setting works with the setting below which says “Display in Columns Hours and Cost”. If this setting is checked along with the setting mentioned the report shows costs in both the summary area and under the details for each quote. The selling price will only be displayed in the summary area of the report but not in any of the detail.
- **Display Suggested Sell in columns** – this setting works with the setting below which says “Display in Columns Cost and Sell”. With both of these options checked in the Summary area of the report you will see both cost and sell for each category defined and in the detail area you will only see selling prices for all details. If only the selling is desired in the summary area also then select the option that says “Display in Columns Hours and Cost” with this option.
- **Display Cost Total** – selecting this option adds a total cost field to the summary area of the report. If this is not selected the total cost field will not appear on the report.
- **Display Suggested Sell Total** – selecting this option adds the total selling price to the summary area of the report. If this is not selected the total sell price will not appear on the report.

- 
- **Display Variance Total** – selecting this option will show the variance amount in the summary area of the report. The variance amount represents the difference between the suggested selling price and the actual sell price indicated. This only happens when the suggested selling price on the quote has been manually overridden so it is different than the suggested sell price.
  - **Display Value Added Total** – selecting this option will include the total value added amount in the summary area of the report. Value added represents the suggested or actual sell price minus material costs and buyout costs. If this option is not selected it will not appear on the report.
  - **Display Profit Total** – selecting this option will include the total profit amount in the summary area of the report. Profit is calculated by taking the suggested or actual sell price and subtracting the labor, material, and buyout costs on the estimate.
  - **Display Total Labor** – selecting this option will include the total labor cost for each quantity in the estimate in the summary area of the report. If this option is not selected the total labor cost will not be displayed on the report. If this option is checked and you have the Display Cost and Sell option also checked you will see both cost and sell for labor on the report.
-

## Setup Options to control and define Cost/Sell Totals

There are two new Setup Options in Master Files Reports-System Defaults-Mail Estimating Module which have been created to allow the totals to reflect either Cost or Sell and also to include options for Cost, Sell, Variance, Value Added Profit and Quoted Price in the Totals.

System Defaults - Data from the SYSFILE

General Setting | AR /AP /Posting to GL/Posting Labor to the WIP | Shipping, Inventory and Purchasing Related Setting | Menu Bar Setting | FF Related Settings | BWS | Postage | Mail Estimating Module

Mail Estimating Options

- ☒ Access Estimate Breakdown Detailed Report directly from Mail Estimating module
- ☒ Estimate Breakdown Detailed Report : in columns display Cost
- ☐ Estimate Breakdown Detailed Report : in columns display Suggested Sell
- ☒ Estimate Breakdown Detailed Report : Display Cost Total
- ☒ Estimate Breakdown Detailed Report : Display Suggested Sell Total
- ☒ Estimate Breakdown Detailed Report : Display VarianceTotal
- ☒ Estimate Breakdown Detailed Report : Display Value Added Total
- ☒ Estimate Breakdown Detailed Report : Display Profit Total
- ☒ Estimate Breakdown Detailed Report : Display Quoted Price Total
- ☐ Mail Formula Modifiers - Supress Question from Display
- ☒ Scheduling: generate records on Lot level

**Option 1** drives the value appearing in columns as being either **COST** or **SELL**.

### Cost Setting:

System Defaults - Data from the SYSFILE

General Setting | AR /AP /Posting to GL/Posting Labor to the WIP | Shipping, Inventory and Purchasing Related Setting | Menu Bar Setting | FF Related Settings | BWS | Postage | Mail Estimating Module

Mail Estimating Options

- ☒ Access Estimate Breakdown Detailed Report directly from Mail Estimating module
- ☒ Estimate Breakdown Detailed Report : in columns display Cost
- ☐ Estimate Breakdown Detailed Report : in columns display Suggested Sell
- ☒ Estimate Breakdown Detailed Report : Display Cost Total
- ☒ Estimate Breakdown Detailed Report : Display Suggested Sell Total
- ☒ Estimate Breakdown Detailed Report : Display VarianceTotal
- ☒ Estimate Breakdown Detailed Report : Display Value Added Total
- ☒ Estimate Breakdown Detailed Report : Display Profit Total
- ☒ Estimate Breakdown Detailed Report : Display Quoted Price Total
- ☐ Mail Formula Modifiers - Supress Question from Display
- ☒ Scheduling: generate records on Lot level



## Estimate Summary

10,000		
	Hours	Cost
LABOR	50.31%	\$2,540.32
MATERIALS	27.97%	\$202.28
BUYOUTS	0.00%	\$0.00
FREIGHT	0.00%	\$0.00
POSTAGE	0.00%	\$0.00
PAPER	20.00%	\$2,295.00
CLICK CHARGE	0.00%	\$0.00
Test	0.00%	\$0.00
<b>Total Print</b>	<b>35.61%</b>	<b>\$5,037.60</b>
DP	0.00%	\$0.00
Component Finishing	0.00%	\$1,298.81
Finishing	0.00%	\$0.00
Inventory	0.00%	\$0.00
Subcontracts	0.00%	\$0.00
<b>Total Mail</b>	<b>-35.13%</b>	<b>\$1,298.81</b>
<b>Total Cost</b>	<b>0.00%</b>	<b>\$6,336.41</b>
<b>=Standard Price</b>	<b>0.00%</b>	<b>\$7,673.82</b>
<b>Variance</b>	<b>0.00%</b>	<b>\$0.00</b>
<b>=Quoted Price</b>	<b>0.00%</b>	<b>\$7,673.82</b>
<b>Price Per M</b>	<b>0.00%</b>	<b>\$767.38</b>
<b>Additional 1000's</b>	<b>0.00%</b>	<b>\$527.72</b>

Suggested Sell Setting:

System Defaults - Data from the SYSFILE

General Setting

AR /AP /Posting to GL/Posting Labor to the WIP

Shipping, Inventory and Purchasing Related Setting

Menu Bar Setting

FF Related Settings

BWS

Postage

Mail Estimating Module

Mail Estimating Options

☒ Access Estimate Breakdown Detailed Report directly from Mail Estimating module

☐ Estimate Breakdown Detailed Report : in columns display Cost

☒ Estimate Breakdown Detailed Report : in columns display Suggested Sell

☒ Estimate Breakdown Detailed Report : Display Cost Total

☒ Estimate Breakdown Detailed Report : Display Suggested Sell Total

☒ Estimate Breakdown Detailed Report : Display VarianceTotal

☒ Estimate Breakdown Detailed Report : Display Value Added Total

☒ Estimate Breakdown Detailed Report : Display Profit Total

☒ Estimate Breakdown Detailed Report : Display Quoted Price Total

☐ Mail Formula Modifiers - Supress Question from Display

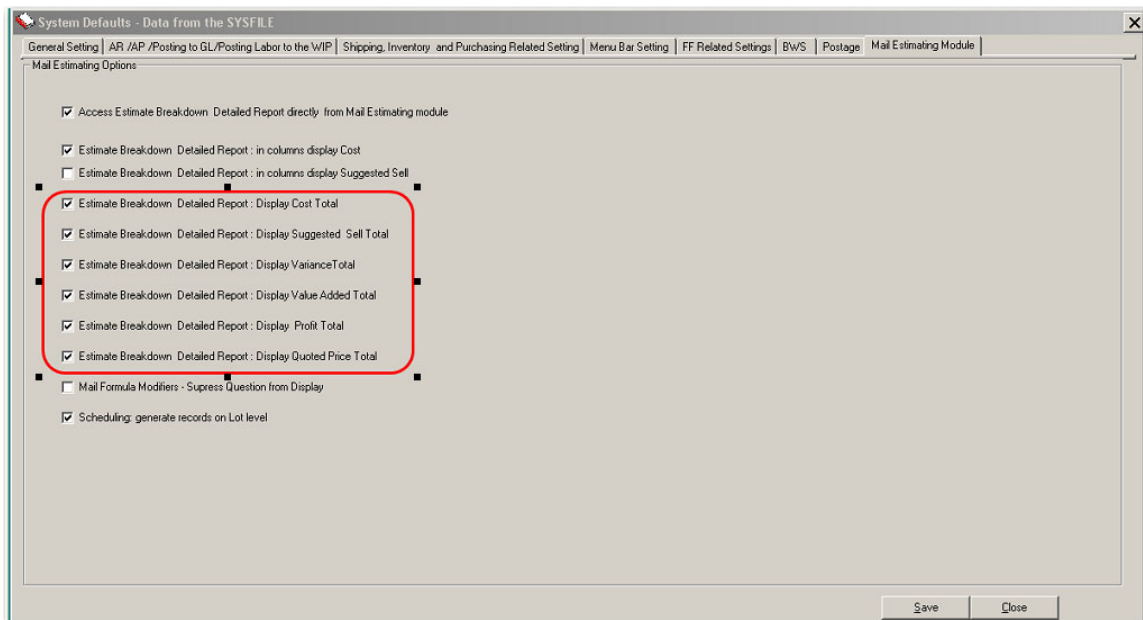
☒ Scheduling: generate records on Lot level

Estimate Summary		
10,000		
	Hours	Sell
LABOR	0.00%	\$3,818.47
MATERIALS	0.00%	\$258.85
BUYOUTS	0.00%	\$0.00
FREIGHT	0.00%	\$0.00
POSTAGE	0.00%	\$0.00
PAPER	0.00%	\$2,754.00
CLICK CHARGE	0.00%	\$0.00
Test	0.00%	\$0.00
Total Print	0.00%	\$6,831.32
DP	0.00%	\$0.00
Component Finishing	0.00%	\$842.50
Finishing	0.00%	\$0.00
Inventory	0.00%	\$0.00
Subcontracts	0.00%	\$0.00
Total Mail	0.00%	\$842.50
Total Cost	0.00%	\$6,336.41
=Standard Price	0.00%	\$7,673.82
Variance	0.00%	\$0.00
=Quoted Price	0.00%	\$7,673.82
Price Per M	0.00%	\$767.38
Additional 1000's	0.00%	\$527.72

**Option 2** drives totals definition on Summary Page

Selections allow including or excluding the following values in the Totals:

- Suggested Sell Price
- Variance
- Value Added
- Profit
- Quoted Price
- Total Cost



## Category Defined by the Report Number

This option allows you to define the report that you want to use for the categories that appear in the summary area of the quote breakdown report. By default this report uses the categories as defined in report 1000 which is the Standard Markups report. If these categories are sufficient then no other setup is required here. The Standard Markup report which is used for marking the costs up by category to arrive at a suggested sell price has very strict linking rules. For example if I have a line for Prepress on the report and it is flagged as a Labor line, only labor activities can be linked to that line. Creating a new report here gives you the ability to have different activity code types linked to the same line so in the example above I can have a Prepress line but can have all prepress activity costs including Labor, Material and buyouts linked to the same line. Here are the steps that need to be followed to setup a new report:

1. Master Files Reports > Master File Report (Tab) > Master File Report.

The screenshot shows the 'System Maintenance' window with the '01\*Report' tab selected. The 'Report Headings' dialog box is open, displaying the following fields and buttons:

- Report Name:** (Empty text box)
- Description:** (Empty text box)
- Labor Start:** (Empty text box)
- Labor End:** (Empty text box)
- Mat Start:** (Empty text box)
- Mat End:** (Empty text box)
- Report to select total items from:** (Dropdown menu)
- Report to link to:** (Dropdown menu)
- Buttons:** Add, Edit, Delete, Cancel, Save, Details, Close.

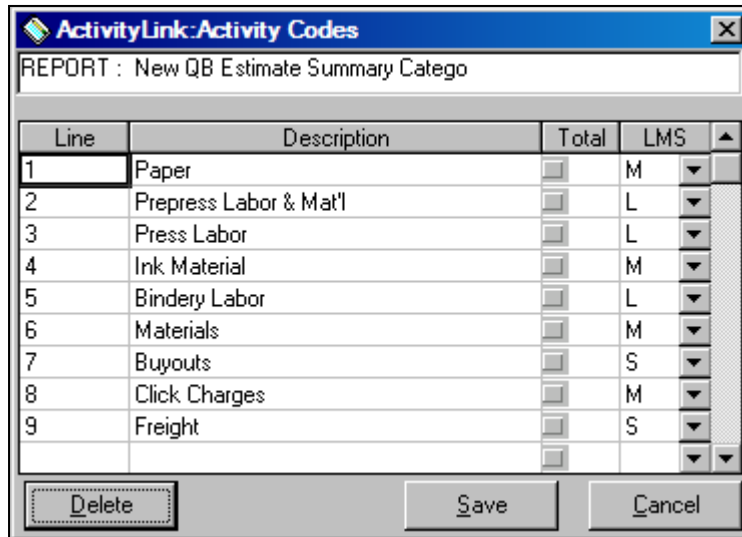
Click the **Add** button. In the Report Name field, enter **1005**. In the field to the right, enter **New QB Estimate Summary Categories**. In the **Description** field, enter **Quote Breakdown Estimate Summary Categories**. In **Report to link to**, select **A Activity Codes**, then click the **Save** button.

Your screen should look something like this.

The screenshot shows the 'System Maintenance' window with the '01\*Report' tab selected. The 'Report Headings' dialog box is open, displaying the following fields and buttons:

- Report Name:** 1005
- Description:** New QB Estimate Summary Categories
- Labor Start:** 0
- Labor End:** 0
- Mat Start:** 0
- Mat End:** 0
- Report to select total items from:** 0
- Report to link to:** A Activity Codes
- Buttons:** Add, Edit, Delete, Cancel, Save, Details, Close.

2. Click the **Details** button. Enter the line number, description and activity type for the line here. You can have as many categories as you wish but our recommendation is that you keep it to ten or under. The LMS column which stands for Labor, Material, or Subcontract represents the type of activity codes that will link to this line. As mentioned earlier in this report, a line can be flagged as "L" for labor but will still allow other activity codes to be linked to it. Even though this is the case make sure you select a default activity type for each line.



ActivityLink: Activity Codes

REPORT : New QB Estimate Summary Catego

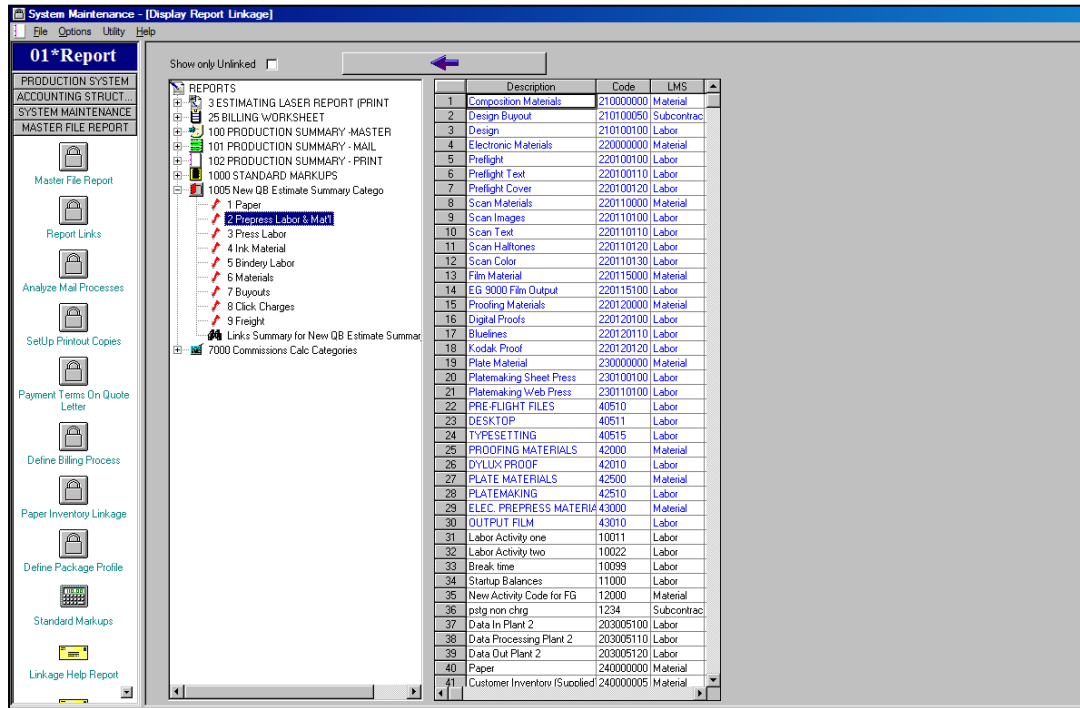
Line	Description	Total	LMS	
1	Paper		M	
2	Prepress Labor & Mat'l		L	
3	Press Labor		L	
4	Ink Material		M	
5	Bindery Labor		L	
6	Materials		M	
7	Buyouts		S	
8	Click Charges		M	
9	Freight		S	

Buttons: Delete, Save, Cancel

Each activity code can only be lined to one line in the report. When you have finished the report click **Save** to save your lines.

- Link the activity codes to the new report you created. Go to Master Files Reports > Master Files Report > Report Links. Double-click the word REPORTS and you should see report 1005 in the list of reports. Click the "+" in front of report 1005 so you can see the lines on the report.

Click a line in the report so that it is highlighted then click the number in front of the activity code or codes that you want to link to the highlighted line in the report. Click the button with the arrow pointing to the left and the highlighted activity codes will be linked the highlighted line. When the line is highlighted the activity codes that are linked to it will appear in blue. Continue linking until you have linked all of the print related activity codes to one of the lines you have defined. This report only deals with print related activities so it is not necessary to link mail activities to the report.



- After you have finished linking the report go back to Master Files Reports > System Maintenance > System Defaults File. You will need to have your Printstream Production Support Representative get you back into this area. Enter report 1005 under **Mail Estimating Module** tab under **Category Defined by the Report Number** field. This completes the setup for the user defined report categories.

## Markup Markdown Chart

This option is completely optional. It allows you to add a Markup/Markdown chart to the existing report. The markup/markdown chart uses the existing suggested sell price and either applies a user defined markup to the suggested sell or in the case of a markdown takes out the cost of material and buyouts from the suggested sell price before applying a markdown. It then adds the material and buyout cost back in to show the total markdown value. In this case the markdown is only applied to the labor part of the estimate.

### To setup the Markup/Markdown chart

1. Using the same instructions as above for creating report 1005 only create a new report, report 32 called "List of Markup/Markdown %" with a description of "Markup Percentages for QB Markup/Markdown Chart". The "Report to link to" needs to be set to "Categories And Codes" for this report. See sample screen below.

The screenshot shows the 'System Maintenance' application window. On the left is a vertical menu titled '01\*Report' with the following options: PRODUCTION SYSTEM, ACCOUNTING STRUCT., SYSTEM MAINTENANCE, MASTER FILE REPORT, Master File Report, Report Links, Analyze Mail Processes, SetUp Printout Copies, Payment Terms On Quote Letter, Define Billing Process, Paper Inventory Linkage, Define Package Profile, Standard Markups, and Linkage Help Report. The 'Report Links' option is highlighted. A 'Report Headings' dialog box is open in the center, containing the following fields and buttons:

- Report Name: 32 LIST OF MARKUP/MARKDOWN % (Buttons: Add, Edit, Delete, Cancel, Save)
- Description: Markup Percentages for QB Markup/Markdown Chart
- Labor Start: 0 Labor End: 0
- Mat Start: 0 Mat End: 0
- Report to select total items from: 0
- Report to link to: Categories And Codes (Dropdown menu)
- Buttons: Details, Close

- Click the **Details** button and enter the Line number, Markup or Markdown description, and the amount of markup expressed as a positive number or a markdown expressed as a negative number. Between the Markup and Markdown lines you can add a line which represents the suggested sell price enter "0" for the Code on this line.

**Activity link : Categories And Codes**

Report: LIST OF MARKUP/MARKDOWN % No 32

Line	Description	Code
1	Markup 30	30
2	Markup 25	25
3	Markup 20	20
4	Markup 15	15
5	Markup 10	10
6	Markup 5	5
7	Suggested Sell Price	0
8	Markdown 5	-5
9	Markdown 10	-10
10	Markdown 15	-15

Delete Save Cancel

- Save** when you are done. After completing this step when you run the Quote Breakdown Report you will see this chart added to report.

**Preview**

File View Background

100%

**Estimate Breakdown**

Estimate #	3519.99	Estimate Title	Copy of Travel Guides	Page #	1/8
Customer #	ALASKA	Customer Name	Alaska Inc.	Printed	5/17/2010 3:00:33 PM
Estimate Date	4/28/2010	Customer Contact	Sally Samster	Status	
Job #		Salesrep	House Account	Estimator	Rob Hales

Description	Print Notes	Mail Notes
48 pg plus cover travel guide		

**Markup/Markdown Chart**

10000

Mark Up%	30	25	20	15	10	5	0	-5	-10	-15	-20	-25	-30	-35	-40
	28,732.09	27,627.01	26,521.93	25,416.85	24,311.77	23,206.69	22,101.61	21,374.76	20,647.92	19,921.07	19,194.22	18,467.38	17,740.53	17,013.68	16,286.84
	77.31%	76.41%	75.42%	74.36%	73.19%	71.91%	70.51%	69.51%	68.43%	67.28%	66.04%	64.70%	63.26%	61.69%	59.98%
	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Estimate Summary**

Page 1 of 8



# Print Work Order or Work Ticket

## Stand-Alone Module

The Print Work Order or Work Ticket is a stand-alone module used to Preview or Print Work Orders or Work Tickets for Print or Mail jobs.



To Print or Preview a Print Work Order enter a job number in the job number field and select the **Print WT/WO** button. You can also use the up/down arrow keys to search for a job number.

A screenshot of the "Print Work Order/Work Ticket" dialog box. It has a menu bar with "File" and a "Report Options" button. Below the menu bar, there is a "Job#:" field with a dropdown menu showing "1381" and a "DOP Test" button. Under the "Print Production Document" section, there is a "Print WT/WO" button. Under the "Mail Production Documents" section, there are two radio buttons: "Work Order" (selected) and "Work Ticket". At the bottom right, there is a "Selection Form ..." button.

The Preview/Print Work Ticket screen opens. Choose the Work Ticket selections and select the **Preview** button.

A screenshot of the "Preview/Print Work Ticket" dialog box. It has a menu bar with a close button. On the left, under "Work Ticket Selection", there are radio buttons: "Complete" (selected), "Pre-Press", "Production", "Finish And Bindery", "Shipping", "For Individual Subjobs", and "BookSystem Complete". Below this is a "Change Order Report" section with radio buttons: "Don't Include", "Last Revision", and "All Revisions" (selected). On the right, under "Select Subjobs", there is a list box showing "1909-1". Below the list box, there are three checkboxes: "Include Activities Section", "Include Bar Codes", and "Designate This Work Ticket As a New Revision". At the bottom, there are "Preview" and "Cancel" buttons.

The Print Work Order opens.

ork Order

1 of 3100%00 of 0

Printed: 8/3/2009 9:37:29AMPage 1 of 3

Job#: 1381

WORK ORDER Rev. 0

Due: 7/25/2008

Client: Alaska Inc.

Ac. No: ALASKA

Address: 123 West Main Suite 7 Watertown, UT 84601

Contact: Sally Samster

Phone: 801555 0133

Quantity: 2,000 of DOP Text

Quote#: 1909

P/O#:

Third Party P/O#:

P/N:

Finished Size: 8 1/2" x 11" (8.5" x 11")

Fax: 801555 1038

Job Description	Estimator Notes	Other Notes
	Betty White: Estimator Notes Test	Other Notes Test

Order Date	CSR	Salesrep	Wrk With	New	Exact Repeat	Prev.	PrePress	Film File	Unders	Overs
7/15/2008	Sue Smith	House Account		No	No				0 %	0 %

Activity	Time	Activity	Time	Activity	Time	Activity	Time

Pre - Press

Prep Notes Test

Process	Category	Quantity

Papers

Pages	Paper Qty	M Weight	Mill Size	Weight	Paper Type	Color	Cut To	Vendor	Rate	Inventory #
2	600	68.00	17 1/2 x 23	80.00	Carnival Text	white	8 3/4 x 11 1/2	500	75	

Ink Colors

Sect. Type	Total Pages	Side	Ink Colors
Text	2		Proc Black, Proc Cyan, Proc Yellow, Variskit, Proc Mag

Press

Pages	Qty	Side	Runs	Method	Press	Plates	Run Qty	Run Waste	Run Out
2		Front	1	S/W	Itk	4 Metal	2,397	0	2,397
					Press Check Required= No				
		Back	1	S/W	Itk	4 Metal	2,397	0	2,397
					Press Check Required= No				

Finish & Bindery

Section	Side	Up	Process	Run Qty
1909-1		1	Final Trim D1	2,397
1909-1		1	Test Q test b1? = No MBO Fold D1	2,363
			Perf/Fold? = No	

Unders 0 % ; Overs 0 %  
Bind Notes Test

To Print or Preview a Mail Work Order enter a job number in the job number field and select the **Work Order** radio button and choose the **Selection Form** button. You can also use the up/down arrow keys to search for a job number.

Print Work Order/Work Ticket

File

Report Options

Job#: 1315 Ltr, Env, Outer Env

Print Production Document

Print WT/WO

Mail Production Documents

☒ Work Order ☐ Work Ticket

Selection Form ...

The Mail Work Order screen opens. Choose the Work Order selections and select either the **Preview** or **Print** button.

Mail Work Order

(Current Revision: 0) ☐ Designate as new Revision

Copies	Set	Document to Print
	<input checked="" type="checkbox"/>	MAIL WORK ORDERS - EVERYTHING
	<input type="checkbox"/>	MAIL WORK ORDERS - DP
	<input type="checkbox"/>	MAIL WORK ORDERS - LETTERSHOP
	<input type="checkbox"/>	Plant 200 Work Order
	<input type="checkbox"/>	Plant 100 Work Order

Clear

Packages: 1 Thru: 2 All Packages & Drops

Drop: Thru: Load Pkg's And Drops

#	Package Description	#	Drop Description
<input checked="" type="checkbox"/>	1 Pkg A	<input checked="" type="checkbox"/>	ALL
<input checked="" type="checkbox"/>	2 Pkg B	<input checked="" type="checkbox"/>	ALL

☒ Print By Package For All Drops

Preview Print

The Mail Work Order opens.

Print Work Order/Work Ticket - [Work Order]


File

1 of 1+


100%


Total:2 100% 2 of 2

Rev.



PRODUCTION COPY



<b>ALL DEPARTMENTS</b> <small>Department Work Order</small>		<b>1315</b> <small>Job#</small>	<b>Rev. 0</b> <small>Work Order Rev.</small>	<b>8/3/2009</b> <small>Print Date</small>
<b>50,000</b> <small>Drop Quantity</small>		<b>1</b> <small>Package#</small>	<b>Pkg A</b> <small>Package Name</small>	
<b>9/1/2008</b> <small>Die Date</small>		<b>ALL</b> <small>Drop#</small>	<b>All Drops</b> <small>Drop Name</small>	
<b>Botsch &amp; Company</b> <small>Customer (Account#: 50016)</small>			<b>House Account</b> <small>Sales Rep</small> <b>Michelle</b> <b>Monika Rynkiewicz</b> <b>Sue Smith</b> <b>Rob Hales</b> <small>CSR</small> <b>Betty White</b> <small>Estimator</small>	
<b>Ltr, Env, Outer Env Qty: 100000</b>				
<small>Job Name (Part of Project):</small>				

Components

Component/Version	Item #	Inventory Code/Description/Comments	Quantity	Insert Note	Overs To
<b>Letter/ Common</b>			50,000		
Finish Size : 8 1/2X3 2/3					
Flat Size : 8 1/2X11					
Caliper : 0.002					
Pc Weight : 0.04					
Bundle Qty : 50					
<b>Outer Envelope/ Common</b>			50,000		
Finish Size : 9X12					
Flat Size : 9X12					
Caliper : 0.02					
Pc Weight : 0.05					
Bundle Qty : 20					

Work Order And Work Ticket

8/3/2009 9:44 AM



The Mail Work Ticket will display.

Print Work Order/Work Ticket - [Work Order]

File

1 of 1+ 100% Total:1 100% 1 of 1

C:\DOCUMENTS\1\dev\LOCALS~1\Temp\SP\efi\stream\WTHMailn\_UDD.rpt

Alaska Incomp

WORK TICKET

PRODUCTION COPY JOB: 1315

Customer: 50016 Botsch & Company  
100 Smith Ranch Road  
San Rafael, CA 94118

Contact: Chris Botsch  
Phone: 415-462-7228  
Fax: 415-499-7677

Overs To: Botsch & Company  
100 Smith Ranch Road  
San Rafael, CA 94118

Attention: Chris Botsch

Bill To: Botsch & Company  
100 Smith Ranch Road  
San Rafael, CA 94118

Attention: Chris Botsch

Quantity: 100,000

Ltr, Env, Outer Env

Test

1st Mail: 9/1/2008

Last Mail: 10/1/2008

Revision #: (Rev. 0)

Printed on: 8/3/2009

CSR: Sue Smith  
Rob Hales

Salesrep: House Account  
Michelle  
Monika Rynkiewicz

Estimator: Betty White

Quote Num: 2009.99

Est. Services: \$ 30,950.00

Est. Postage: \$ 0.00

Postage Rcvd: \$ 0.00

Order Date: 6/24/2008 New Job

Cost P/O:

Prev. Job:

Components

Component Name	Item #	Inventory Code	Quantity	Insert Note	Due Date	Overs To	Notes
Letter			100,000				Finish Size : 8 1/2X3 2/3 Flat Size : 8 1/2X11 Caliper : .002 Pc Weight : .04 Bundle Qty : 50
Envelope			50,000				Finish Size : 4 1/8X9 1/2 Flat Size : 4 1/8X9 1/2 Caliper : .03 Pc Weight : .2 Bundle Qty : 25
Outer Envelope			100,000				Finish Size : 9X12 Flat Size : 9X12 Caliper : .02 Pc Weight : .05 Bundle Qty : 20

Order And Work Ticket

8/3/2009

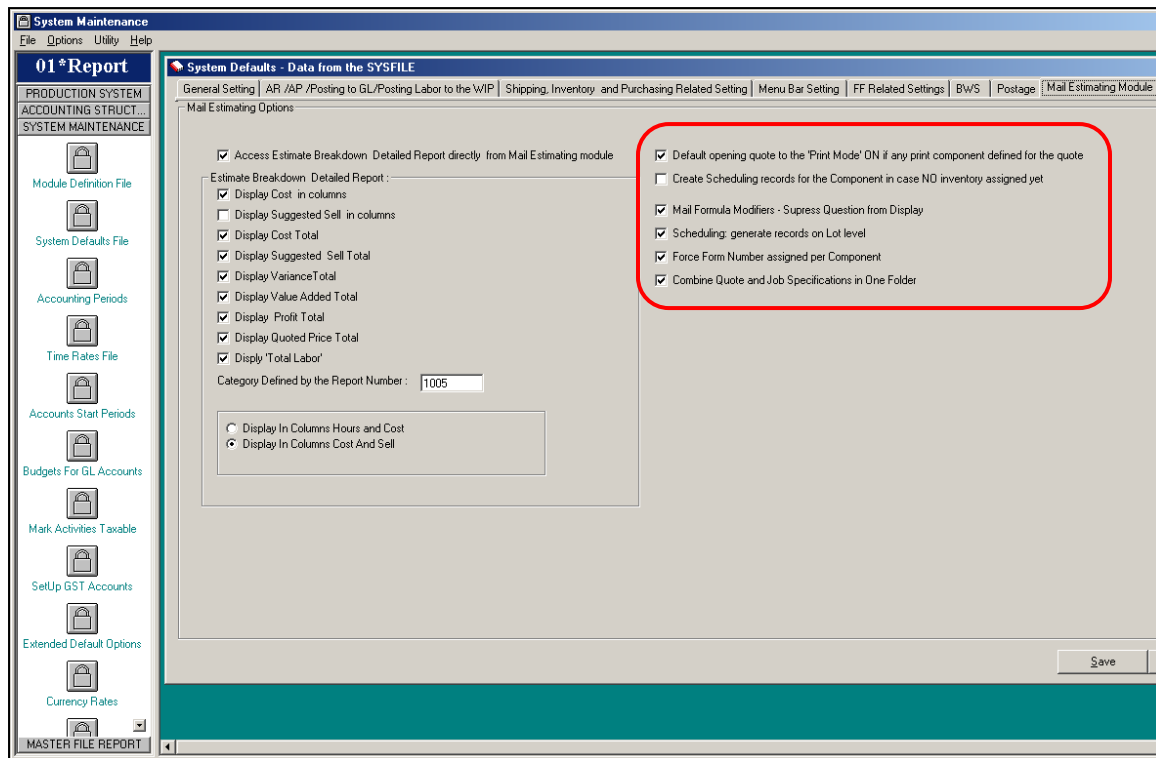
9:47 AM

# Scheduling of Individual Signatures

## Setup

The following setting needs to be activated by your PrintStream Support Representative.

Master Files Reports > System Maintenance > System Defaults > Mail Estimating Module. The option to check is called “Scheduling: generate records on Lot level”.



## Creating Individual Signatures in Estimating/ Order Entry

### To create individual signature in estimating/ order entry

1. Add a component in estimating and select the template that you will be using for that component and for the additional signatures. For example if you were estimating a 48 page plus cover book to be printed as 3-16 page signatures you would add a component for the text to the estimate and select the appropriate print template for a 16 page signature.

Custom Component Name	Standard Form (for Waste Calc)	Print Template
Cover 5/0 + Aqu	Print InHouse	Cover 8.5x11 2up
48 pg Text	Print InHouse	16pg Sht 8.5x11
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	
	Print InHouse	

For estimating purposes, you don't really need to break the signature runs out separately, this is only really needed during order entry. For estimating you can just change the **No. Runs** field from 1 to 3.

Mail Estimating for the Company : (01) Alaska Incomp - (0100) Mail & Print Plant LS

Print Mode Is On

Mail Estimating (Print & Mail)

Quote Header

Estimating

Section Title: 48 pg Text

Template: 16pg Sht 8.5x11

No. Runs: 3 Bound as 11 sigs.

Number Of Pages: 0

Number Of Sheets: 0

Form Number: 2

Section Qty:

	10,000	15,000	20,000
Section Qty:	10000	15000	20000

Lock Quantity

This is a Combo Run (Ganged)

5133 AAA Insurance 0100 - Rates Update 0

2. When the estimate is converted to a job do the following, first open the job up and go to the component that you want to add the additional signature runs to. Make sure you are in the EDIT mode. Open the



print screens and go to the Header screen, change the field for “No. Runs” from whatever is in their back to 1.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left is a tree view with components like 'Quote Header', 'Estimating', 'Admin', 'Data Processing', 'Components', 'Form#1 Cover 5.0 - Aqu-10000', 'Form#2 48 pg Text-10000', 'Bindery', 'Create Inventory', 'Packages Advanced', 'Use Matrix Interface', 'Finishing', 'Drops', 'Special Instructions', 'Review Pricing', and 'Order Entry'. The main area displays the '48 pg Text' section with the following details:

- Section Title: 48 pg Text
- Template: 16pg Shx 8.5x11
- No. Runs: 1, Bound as: 1 sigs.
- Finish(Tam)Size: 8 1/2 x 11
- Flat Size: 8 1/2 x 11
- Number Of Pages: 0
- Number Of Sheets: 0
- Form Number: 2

Below these fields is a table with columns for '10,000', '15,000', and '20,000'. The 'Section Dttc' row shows values of 10000, 15000, and 20000. At the bottom, there are checkboxes for 'Lock Quantity' and 'This is a Combo Run (Ganged)'. A 'Cancel' button is in the bottom right corner.

Then right-click this component in the tree and select option from Pop Up box which says **Create Additional Signature Run from this Template**.

This screenshot shows the same software interface as the previous one, but with a right-click context menu open over the 'Form#2 48 pg Text' component in the tree. The menu options are:

- Create Lots
- Create Lots (No Prep or Finishing)
- Create Lots From Spread
- Create Binding/Packages Default Schema for Component
- Create Additional Signature Run from this Template
- Delete Component
- Copy Component

The main area of the window remains the same, showing the details for the '48 pg Text' section.

You will be prompted to enter the number of total signatures that you are going to run. You must include the original component as one of these runs, so in our example where I'm printing 3-16 page signatures you would enter a 3 here.

Number Of Runs (1 - 150)

How many Runs do you want to create from the selected template?

OK

Cancel

3

If you have the Form Number Logic turned on it will also prompt you to enter the starting form number that you want for the first signature. It will then automatically assign the form number for each additional signature based on the starting number.

Form Number

What is the Form Number to begin with do you want to create?

OK

Cancel

2

Under the original component in the tree you will see each of the individual signatures.

Mail Estimating for the Company - [01] Alaska Incomp - [0100] Mail & Print Plant L5

Print Mode is On

Mail Estimating (Print & Mail)

Quote Header

Estimating

Admin

Data Processing

Components

Form# 1 Cover 5/0 - Aqu-10,000

Form# 2 48 pg Text-10,000

Form# 3 48 pg Text-10,000

Form# 4 48 pg Text-10,000

Bindery

Create Inventory

Packages Advanced

Use Matrix Interface

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Header

PrePress

Paper

Modifiers

Inks

Select Press

Section Enriching

Section Title: 48 pg Text

Template: 16pg SHt 8.5x11

No. Runs: 1

Bound as: 1

sig.

Finish(Trim)Size: 8 1/2 x 11

Flat Size: 8 1/2 x 11

Section Qty:

10,000

15,000

20,000

Number Of Pages: 0

Number Of Sheets: 0

Form Number: 2

Lock Quantity

This is a Combo Run (Ganged)

Cancel

5133

AAA Insurance

0100 - Rates Update

0

10,000

Make sure you edit the bound component after creating the additional signature runs so they will be included in the bindery.

Mail Estimating (Print & Mail)

Quote Header

Admin

Data Processing

Components

Form# 1 Cover 5/0 - Aqu-10,000

Form# 2 48 pg Text-10,000

Form# 3 48 pg Text-10,000

Form# 4 48 pg Text-10,000

Bindery

New Bound Component-10,000

Create Inventory

Packages Advanced

Use Metric Interface

Packages

Finishing

Drops

Special Instructions

Review Pricing

Order Entry

Bound Component Name: New Bound Component

Quantity: 10000 15000 20000

Lock Quantity

Component Name	Seq	Process Name	Valid Data	Process Name	Process	Lock QTY	Assigned to Common Bind Run
1 Cover 5/0 - Aqu-10,000	1	Bindery Bugout 01					
2 48 pg Text Common	2	Book Trimming					
3 48 pg Text Common	3	Carton Pack 01					
4 48 pg Text Common	4	Delivery Local 01					
		Freight 01					
		Paperback Binding					
		Perfect Bind (B/D Waste)					
		Saddlestitch 01					
		Shrinkwrap 01					
		Shrinkwrap-Chipboard 01					
		Truck Freight 01					

5133 AAA Insurance 0100 - Rates Update 6 10,000

When the individual signature option is turned on the default rule is that in scheduling, purchasing, and shop floor all signatures are broken out.

If you look at the Paper Reservation screen you will see that each signature is now listed separately.

Paper/Material Reservation For Job 7734

File

Reservation					Sheeting	
Form#	Paper	Press Sheet Size	Paper Size	Color	Qty Required	Qty Required
Form# 1 Cover 5/0	Springhill 10pt C1s Cover~0100	20 x 26	20 x 26	White	7,126 shts	1,141 lbs.
Form# 2 16 pg Sig	Centura Gloss Bk 60#	23 x 35	23 x 35	White	10,750 shts	1,079 lbs.
Form# 3 16 pg Sig	Centura Gloss Bk 60#	23 x 35	23 x 35	White	10,750 shts	1,079 lbs.
Form# 4 16 pg Sig	Centura Gloss Bk 60#	23 x 35	23 x 35	White	10,750 shts	1,079 lbs.
Carton Pack 01	300					0 Car

Materials and Outside work

Icon	Qty	Details	Size	Part	Vendor	Create PO	PO #	Sched

Reservation

Select Inventory Paper for Cover 5/0 + Aqu

Item #:

Inv. Code:

Description:

Paper:

Color:

On Hand:

Commit:

Size:

On Order:

Avail:

Select

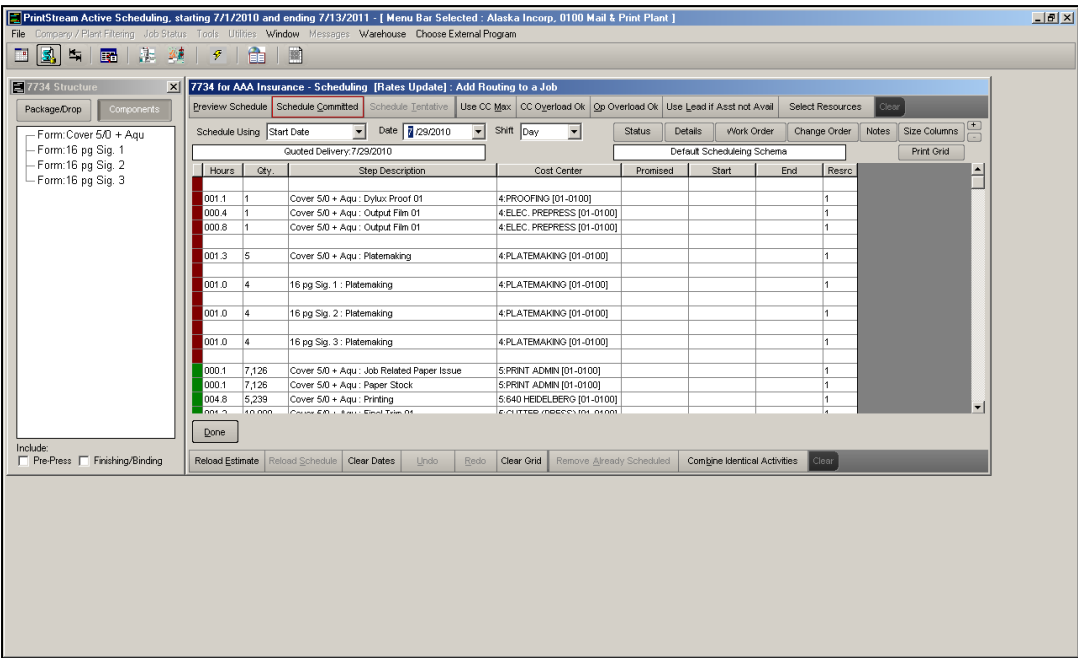
Clear

Color Legend

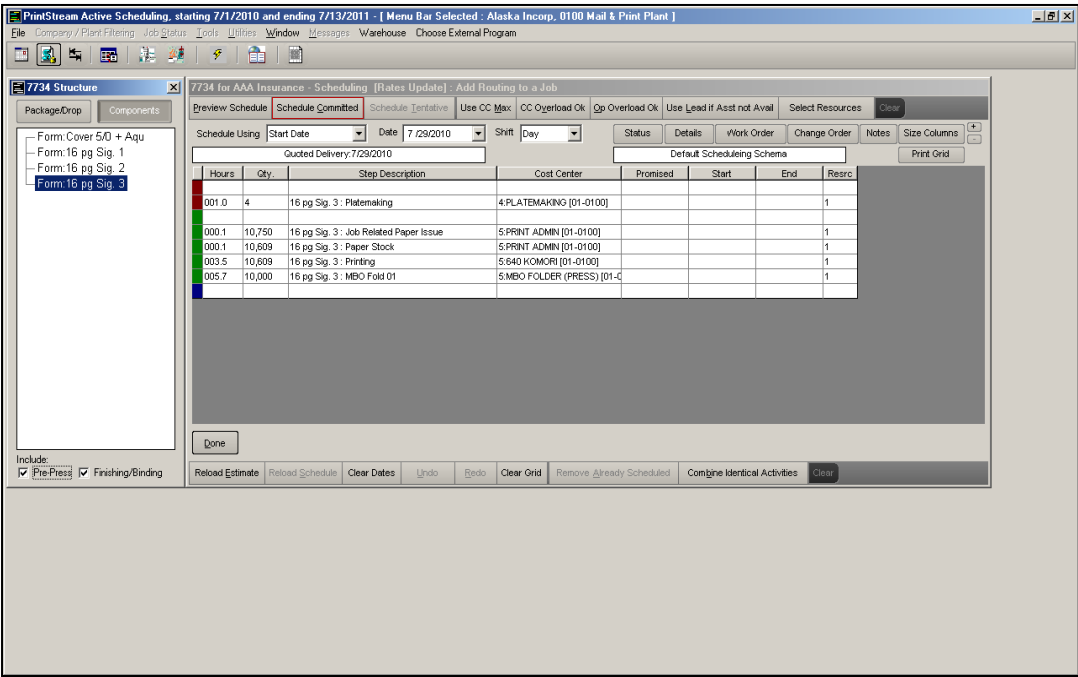
- Inventory Paper Doesn't Exist
- Inventory Paper Exists
- Inventory Paper Reserved
- Inventory Non-Paper
- Inventory Non-Paper Reserved

Cancel Reserve

If you open the job in MR Scheduler under Bucket Scheduling you will see under the Structure area for the job that there is a button for COMPONENTS when this is selected it shows each of the signatures individually.



If you click an individual signature in this listing and then right-click and select from the Pop Up Screen "Apply Selection to Grid" you will see that it updates the schedule so that only the scheduled tasks for that signature appear.



You can then schedule the selected signature and create a scheduled routing for it.

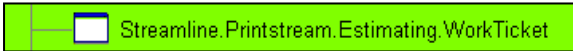
Select Routing for job : 7734:Rates Update

<Add New Route>		
001 : Form:16 pg Sig. 3	Complete: 7/30/2010	Type: User Selected

Buttons: Cancel, Ok, Hold Route, Create Standard Routes, Un-Schedule Job, Set Job Complete, Job Status

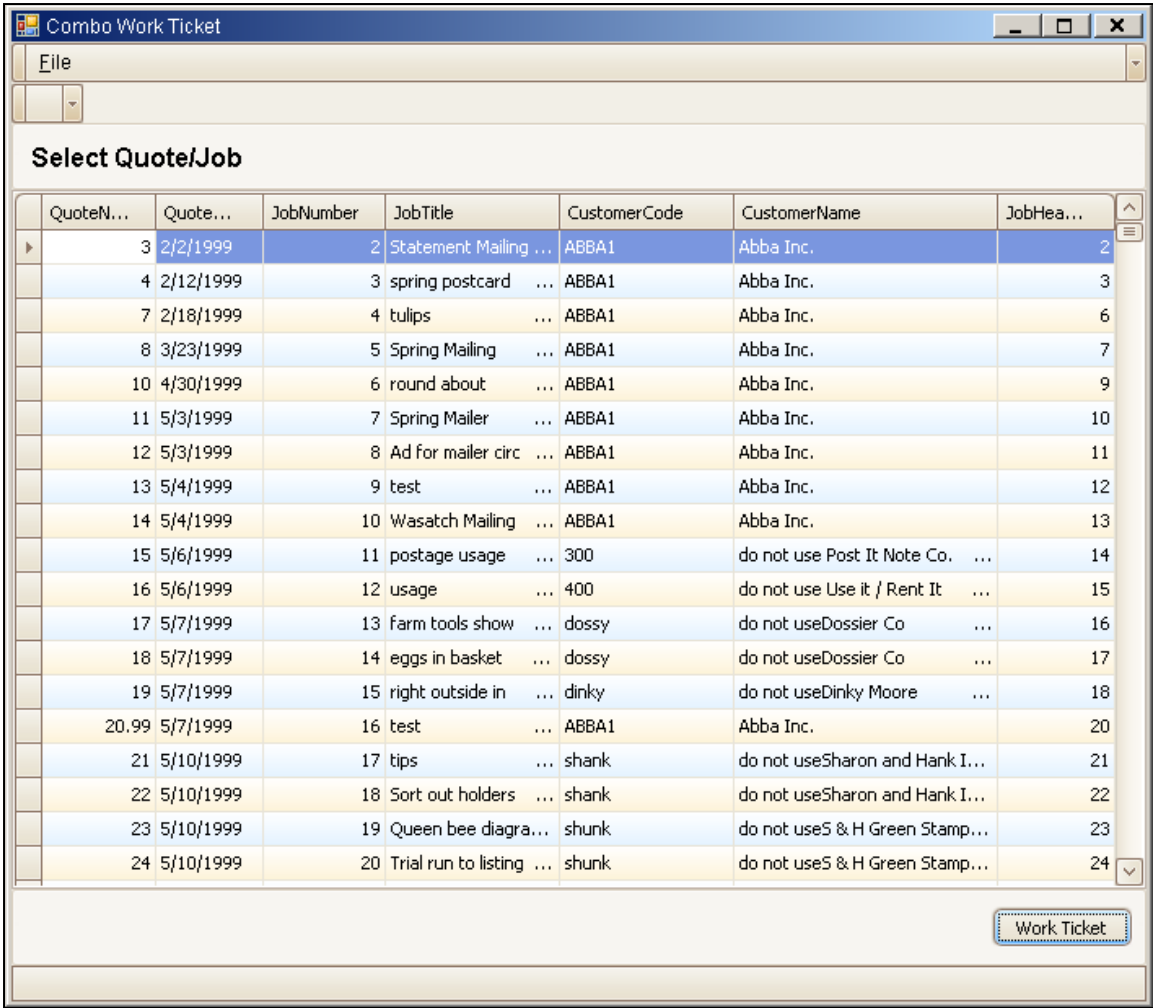
# .Net Combo Work Ticket

The .Net Work Ticket - also referred to as the Combo Work Ticket because it combines both Print and Mail processes and activities into a single document. It can be accessed from the stand-alone module or directly from within Print and Mail Estimating/Order Entry.



## Stand-Alone Version

If accessing the .Net Work Ticket from the stand-alone module, the user will first see this screen.



To select a Job Number, click the small **V** mark in the Job Number column and select **Custom**.

The screenshot shows the 'Combo Work Ticket' application window. It contains a table with the following columns: QuoteN..., Quote..., JobNumber, JobTitle, CustomerCode, CustomerName, and JobHea... The table lists various jobs with their respective dates and codes. A dropdown menu is open for the JobNumber column, showing options: (Custom), (blanks), and (Non blanks). The 'Custom' option is highlighted.

QuoteN...	Quote...	JobNumber	JobTitle	CustomerCode	CustomerName	JobHea...
3	2/2/1999	(Custom)		ABBA1	Abba Inc.	2
4	2/12/1999	(blanks)		ABBA1	Abba Inc.	3
7	2/18/1999	(Non blanks)		ABBA1	Abba Inc.	6
8	3/23/1999	2		ABBA1	Abba Inc.	7
10	4/30/1999	3		ABBA1	Abba Inc.	9
11	5/3/1999	4		ABBA1	Abba Inc.	10
12	5/3/1999	5		ABBA1	Abba Inc.	11
13	5/4/1999	6		ABBA1	Abba Inc.	12
14	5/4/1999	7		ABBA1	Abba Inc.	13
15	5/6/1999	8		300	do not use Post It Note Co.	14
16	5/6/1999	9		400	do not use Use it / Rent It	15
17	5/7/1999	10		dossy	do not useDossier Co	16
18	5/7/1999	11		dossy	do not useDossier Co	17
19	5/7/1999	12		dinky	do not useDinky Moore	18
20.99	5/7/1999	13		ABBA1	Abba Inc.	20
21	5/10/1999	14		shank	do not useSharon and Hank I...	21
22	5/10/1999	15	Sort out holders	shank	do not useSharon and Hank I...	22
23	5/10/1999	16	Queen bee diagra...	shunk	do not useS & H Green Stamp...	23
24	5/10/1999	17	Trial run to listing	shunk	do not useS & H Green Stamp...	24

Type in the Job Number in this field and select **OK**.

The screenshot shows the 'Custom AutoFilter' dialog box. The 'Show rows where:' section is active. The 'JobNumber' field is set to 'equals' and the value '978' is entered in the adjacent text box. The 'And' radio button is selected.

The Job Number has been identified. Select the **Work Ticket** button to proceed.

Combo Work Ticket

File

Select Quote/Job

QuoteN...	Quote...	JobNumber	JobTitle	CustomerCode	CustomerName	JobHea...
1319.99	8/2/2006	978	Fall Brochures II ...	1222	Black Angus Doggie Day Care ...	1547

[JobNumber] = '978'

Edit Filter

Work Ticket

The Report Options screen appears and the user can select/deselect the report sections to display on the .Net Work Ticket.

Select Report Options

Quote No: 1319.99

Job No: 978

Job Qty: 10000

Select Components

Components

Select Report Sections

Summary

☒ Components

☒ Assembly and Packaging

☒ Bound Components

☒ Buyout Summary

☒ Paper and Material

Detail

☒ Data Processing

☒ Assembly and Packaging

☒ Pre-Press

☒ Packages

☒ Print Components

☒ Drops

☒ Other Components/Buyouts

☒ Postage

☒ Shipping

Other Options

☒ Print Bar Codes

☒ Print First & Last Mail Date

☒ Print Scripts

☒ Print Shipping Notes

☒ Print Modifiers

Design Report

☐ View DataSet

Print Ticket

View Ticket

Cancel




## .Net Work Ticket

Preview

File View Background

100%

Job # **978** Job #  **Work Ticket** Rev # Job # **978**

Page 1 of 2

Previous Job #		Customer	<b>Black Angus Doggie Day Care</b>	Revision	
Exact Repeat	Yes		1222 East 5300 South	Printed	8/3/2009 10:04:37 AM
Quote #	<b>1319.99</b>			1st Mail	8/7/2006
Quote Amount	<b>\$2,800.00</b>		Murray, UT 84123	Last Mail	8/7/2006
Custom PO #		Contact	Monika Rynkiewicz	Part Number	
Overs/Unders		Phone #	801-555-7380	Order Date	8/2/2006 New Job

Sales person	CSR	Estimator	Planner
Rob Hales	New Rep	Betty White	

Job Title **Fall Brochures II**

Job Details

**Job Summary**

**Assembly and Packaging**

Assembly and Packaging: Activity Description	Details	NetQty	Hours
INSERT, METER, SORT #10 6pcs		10,000	14.50
SORTING-3/5 DIGIT		10,000	29.40
AFFIX TWO TABS, WHITE		10,000	3.27

**Buyouts - Summary**

#	Component	Buyout Description	Qty	Vendor	Vendor Info
1		DATA ENTRY (Buyout)	1		
2		PROGRAMMING (Buyout)	1		

**Job Details**

**Data Processing**

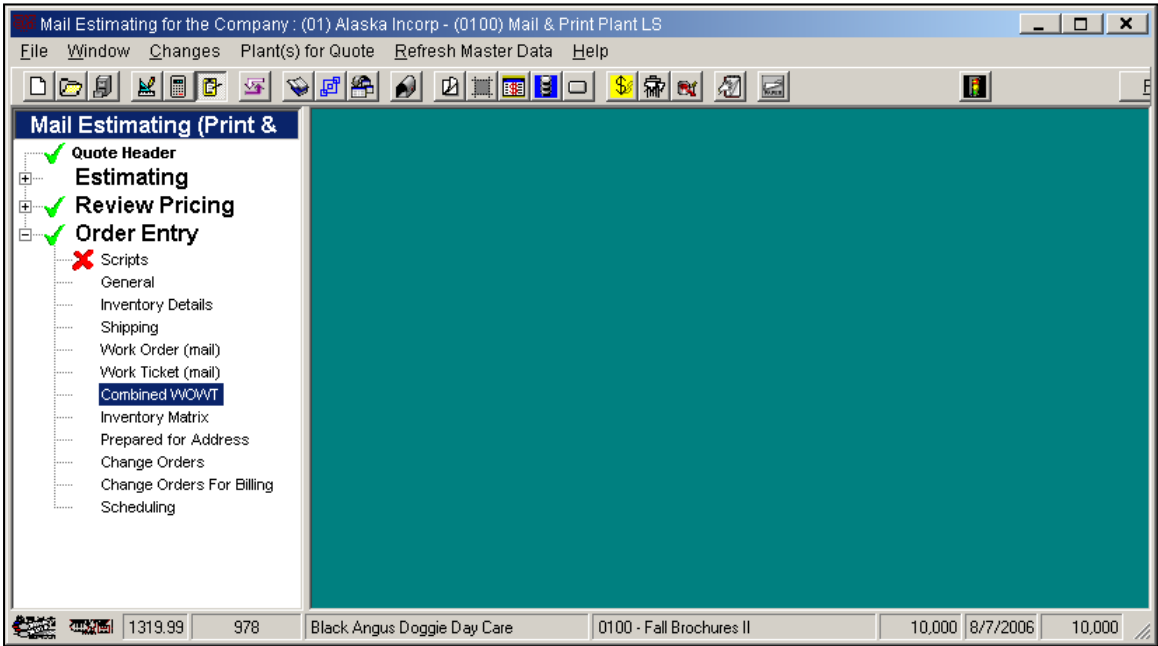
DP Notes

#	Data Processing: Activity Description	Packages	Quantity	Hours	Activity Code / Task ID	Task Barcode
---	---------------------------------------	----------	----------	-------	-------------------------	--------------

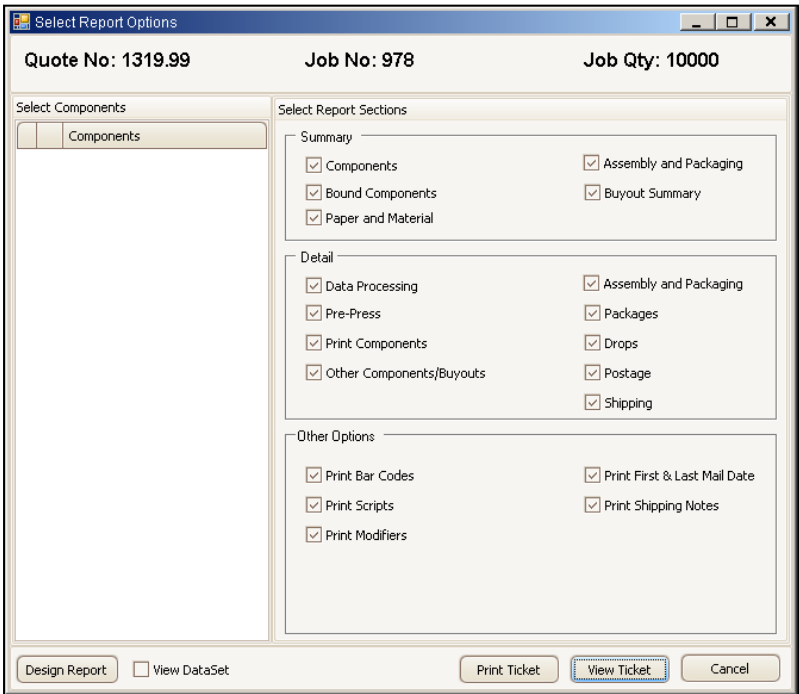
Page 1 of 2 Zoom Factor: 1

## Combined WOWT

To access the .Net Work Ticket from within Print and Mail Estimating/Order Entry, click the 'Combined WOWT' in the Mail Estimating Tree.



The Report Options screen appears and the user can select/deselect the report sections to display on the .Net Work Ticket.




## .Net Work Ticket

Preview

File View Background

100%

Job # **978** Job #  **Work Ticket** Rev # Job # **978**

Page 1 of 2

Previous Job #		Customer	<b>Black Angus Doggie Day Care</b>	Revision	
Exact Repeat	Yes		1222 East 5300 South	Printed	8/3/2009 10:04:37 AM
Quote #	<b>1319.99</b>			1st Mail	8/7/2006
Quote Amount	<b>\$2,800.00</b>		Murray, UT 84123	Last Mail	8/7/2006
Custom PO #		Contact	Monika Rynkiewicz	Part Number	
Overs/Unders		Phone #	801-555-7380	Order Date	8/2/2006 New Job

Sales person	CSR	Estimator	Planner
Rob Hales	New Rep	Betty White	

Job Title **Fall Brochures II**

Job Details

**Job Summary**

**Assembly and Packaging**

Assembly and Packaging: Activity Description	Details	NetQty	Hours
INSERT, METER, SORT #10 6pcs		10,000	14.50
SORTING-3/5 DIGIT		10,000	29.40
AFFIX TWO TABS, WHITE		10,000	3.27

**Buyouts - Summary**

#	Component	Buyout Description	Qty	Vendor	Vendor Info
1		DATA ENTRY (Buyout)	1		
2		PROGRAMMING (Buyout)	1		

**Job Details**

**Data Processing**

DP Notes

#	Data Processing: Activity Description	Packages	Quantity	Hours	Activity Code / Task ID	Task Barcode
---	---------------------------------------	----------	----------	-------	-------------------------	--------------

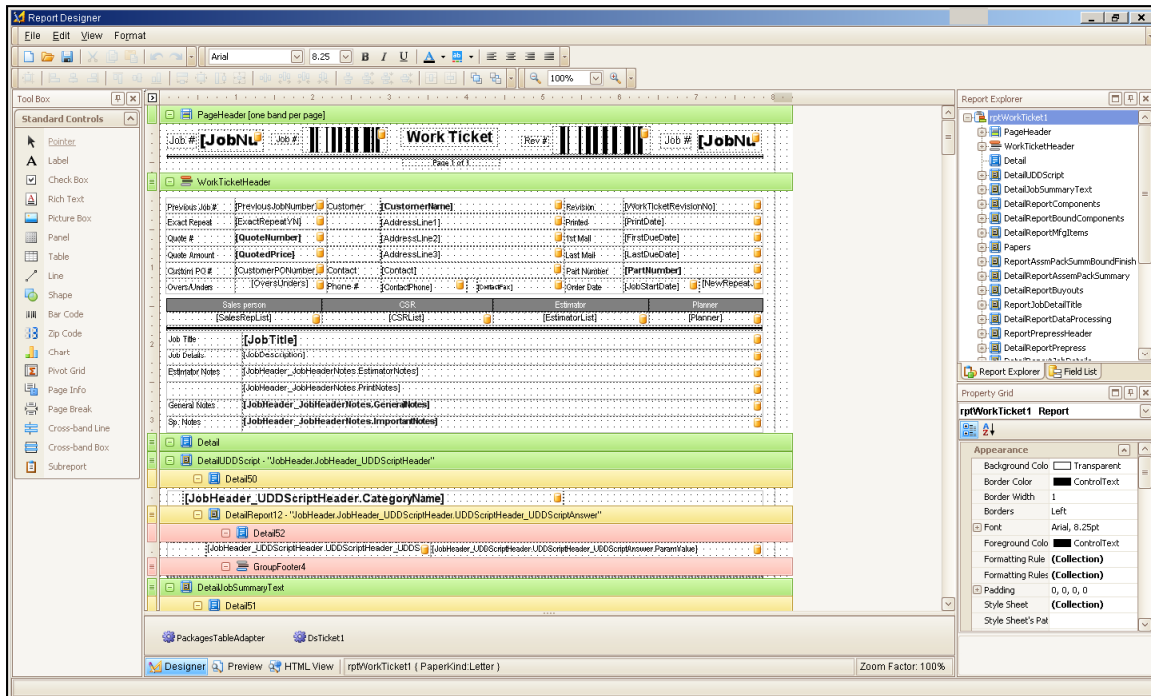
Page 1 of 2 Zoom Factor:

## Report Designer

At the bottom of the Report Options screen select the **Design Report** button to access the Report Designer for the .Net Work Ticket.

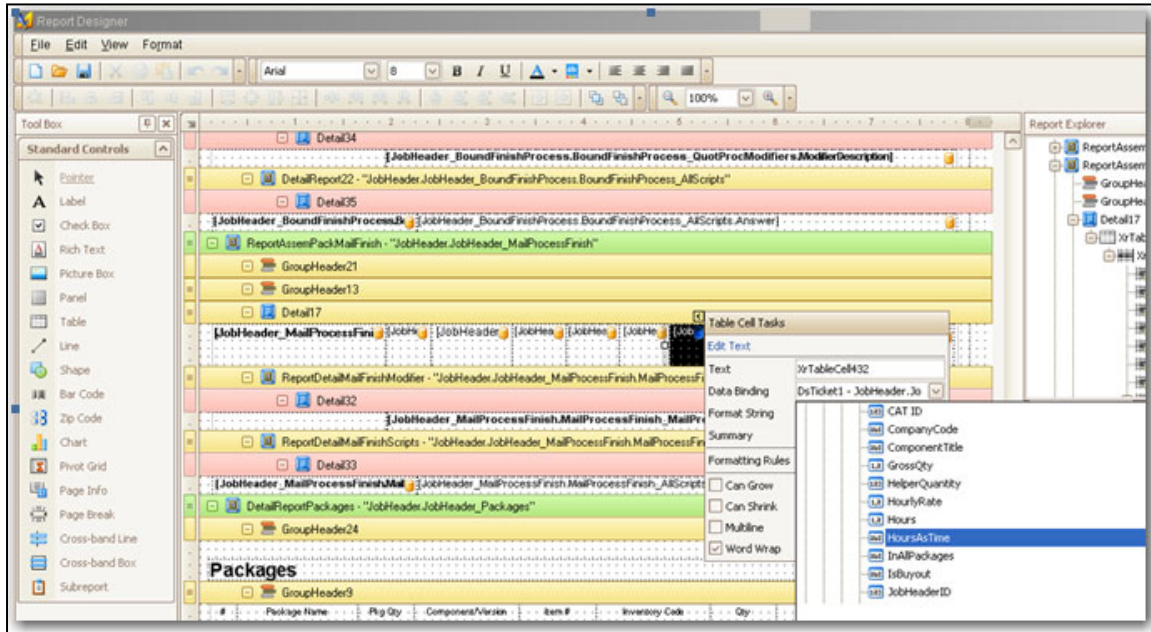


This will open the Report Designer screen. The user can edit and save changes to the .Net Combo Work Order.



## Display Time in Hours and Minutes Option

Time displayed on the work ticket can now display in Hours and Minutes instead of Hours with Decimal by simply making a change in the Report Designer to select instead of Hours to be HoursAsTime.



A few examples are shown below for the press area and section finishing from the mail activity code.

**240 Heidelberg**

Number:  Press Name:  ☒ Active

Special M/Rs		Ink Factors		Job Cost Links		
Basic	Press Hourly Rates	Platemaking	Press Speed	Run Waste	Press M/R	
Ink W/U (Minutes):	<input type="text" value="15"/>					
Ink W/U Cost (\$'s):	<input type="text" value="\$37.50"/>					
Webs	Colors	Job M/R 1st (Min.s)	Subs. Job M/R (Mins)	Plate M/R 1st (Min.s)	Subs. Plate M/R (Mins)	
1	1	30.00	0.00	10.00	10.00	
1	2	30.00	0.00	10.00	10.00	

Front:	Black,PMS 1											
Back:	Black,PMS 1											
Side	Form s	Page s	#Up	Plate s	Gross Qty	MR Waste	Run Waste	Net Qty	M/R Hrs	Run Hrs	W/U Hrs	PM Hrs
Front	1	16	1	2	1,538	225	63	1,250	0:50	0:26	0:15	0:30

Maintain Processes							
Description		Activity Links	Pricing	Process Standards			
	Short Code	Plant Code	Make Ready Mins	Number of Operators	Default Qty	Qty1	Speed1
1	LETTER	0100	25.00	0.00	0	10,000	4,000
2	11X17	0100	0.00	0.00	0	10,000	4,000
3	11X17	0100	0.00	0.00	0	10,000	4,000
4	FLD	0100	30.00	0.00	0	10,000	10,000

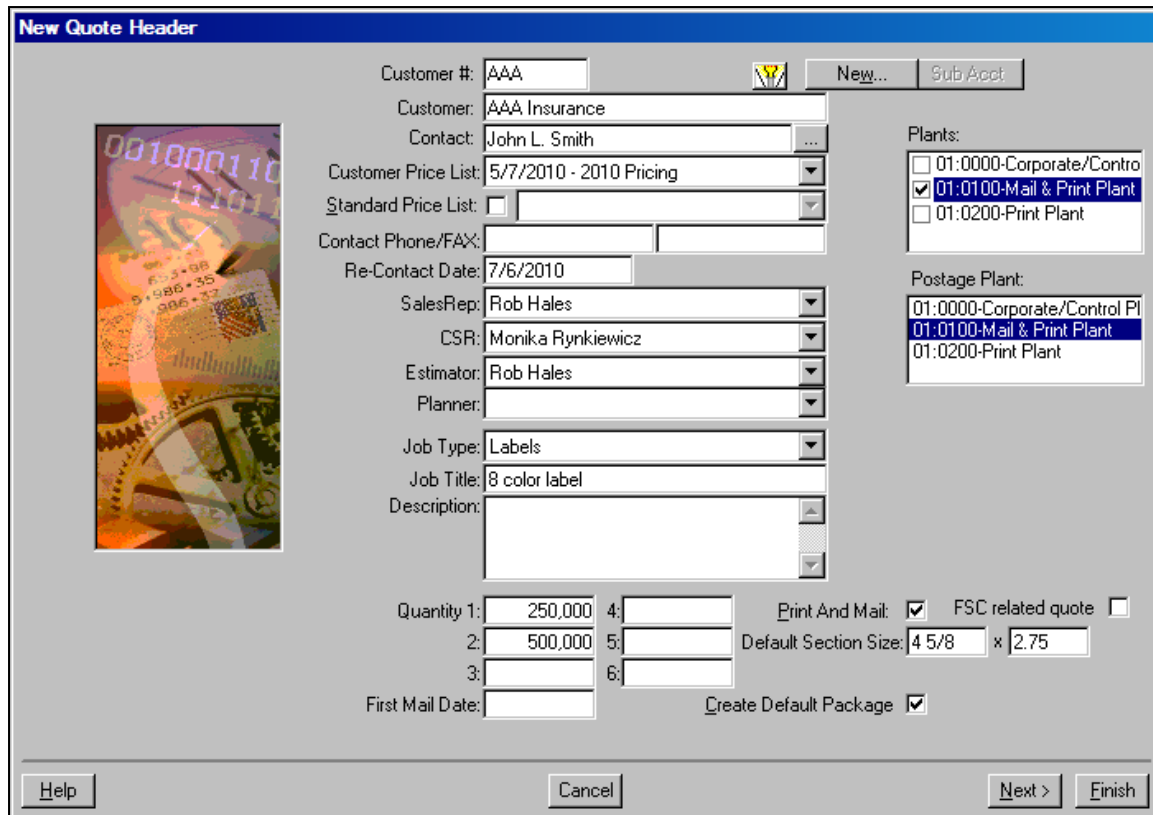
Section Finishing						
Section Finishing/Activity Description	Other Information	Gross Qty	Waste	Net Qty	Hours	Activity / Task ID
FOLDING	1 Up	10,000	0	10,000	1:30	74010 #:187653

## Flexo Press Estimating


This is special programming. The following details the use of the flexo press in Print and Mail Estimating. For setup refer to the Master File Print documentation in [2015 Master Files](#).

### Quote Header Screen

The "Default Section Size" represents the individual label size, the label dimension that is running across the web width is entered first followed by the label size running around the repeat.



**New Quote Header**

Customer #: AAA  New... Sub Acct

Customer: AAA Insurance

Contact: John L. Smith ...

Customer Price List: 5/7/2010 - 2010 Pricing

Standard Price List: ☐ ...

Contact Phone/FAX:

Re-Contact Date: 7/6/2010

SalesRep: Rob Hales

CSR: Monika Rynkiewicz

Estimator: Rob Hales

Planner:

Job Type: Labels

Job Title: 8 color label

Description:

Quantity 1: 250,000 4:

2: 500,000 5:

3: 6:

First Mail Date:

Plants:

- ☐ 01:0000-Corporate/Contro
- ☒ 01:0100-Mail & Print Plant
- ☐ 01:0200-Print Plant

Postage Plant:

- 01:0000-Corporate/Control Pl
- 01:0100-Mail & Print Plant
- 01:0200-Print Plant

Print And Mail: ☒ FSC related quote ☐

Default Section Size: 4 5/8 x 2.75

Create Default Package ☒

Help Cancel Next > Finish

## Components Screen

In the component screen you want to select the FLEXO template that was setup as part of the estimating template setup step.

**Select Components**

Custom Components		POD Components	
Custom Component Name	Standard Form (for Waste Calc)		Print Template
Label 8 color		▼ Print InHouse	Flexo
		▼ Print InHouse	
		▼ Print InHouse	
		▼ Print InHouse	
		▼ Print InHouse	
		▼ Print InHouse	
		▼ Print InHouse	
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		▼ Print InHouse	
		▼ Print InHouse	
		▼ Print InHouse	

**Finish**

**Template "Flexo" - Review Only**

Title: Flexo 0100\*Mail & Print Plant

Pages: 2 Number Of Pages for QL 0

Bind as: 1 Number Of Sheets for QL 0

Finish(Trim) Size: 1 x 1

Paper

Name: ...

Color: ...

Grain Direction: ☐ With Grain ☐ Cross Grain ☐ None

Precut: ☐ Yes ☐ No ☐ Auto

Inks

Double-click on cell to set ink color.

Press DEL key to remove an ink.

	Inks Front	Inks Back
Coverage:		
Ink 1:		
Ink 2:		
Ink 3:		
Ink 4:		
Ink 5:		
Ink 6:		
Ink 7:		
Ink 8:		
Ink 9:		
Ink 10:		

Section Finishing

Double-click on cell to select section finishing process.

Press DEL key to remove a section finishing process.

Without Bleeds		With Bleeds		# Up	Plate Type	Perfect	Cutoff(Web)	Layout	Grain
< Qty.	1st dim.	2nd dim.	1st dim.						
99,999,999	0	0	0	0	1 Metal	<input type="checkbox"/>	0	1 x 1	
						<input type="checkbox"/>			
						<input type="checkbox"/>			
						<input type="checkbox"/>			

Gripper Top Margin Bottom Margin Left Margin Right Margin Vertical Gutters Horizontal Gutters

0 0 0 5/16 5/16 0 0

Press Format Flexo

☒ Save as Permanent Template

OK Cancel



After you select the template and save the components if you go in the estimating tree under components and click the component you should see this header screen when you are in the Print Mode of the estimate.

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. The title bar reads 'Mail Estimating for the Company - (01) Alaska Incorp - (0100) Mail & Print Plant LS'. The interface includes a toolbar at the top, a left-hand navigation pane, and a main content area.

**Left-hand navigation pane:**

- Quote Header
- Estimating
  - Components
    - Form# 1 8 Color Label: 250,000 (selected)
    - Bindery
    - Create Inventory
    - Packages
  - Review Pricing
  - Order Entry

**Main content area:**

Section Title: 8 Color Label

Template: Flexo

No. Runs: 1 Bound as 1 sigs.

Finish (Trim) Size: 1 x 1

Flat Size: 1 x 1

Number Of Pages: 0

Number Of Sheets: 0

Form Number: 1

Section Qty.: 250,000 500,000

Section Qty.: 250,000 500,000

☐ Lock Quantity

☐ This is a Combo Run (Ganged)

**Buttons:** View, Change Template, Notes, Die File

**Status Bar:** 3553 AAA Insurance 0100 - 8 color label 0

The component on the tree always represents the base layer of the label. A label can have many different layers which are always added to the base layer. A default die must always be associated with the base layer of the label. To access the die file, click the **Die File** button.

The screenshot shows the 'Die File' software interface. The title bar reads 'Die File'. The interface includes a toolbar at the top, a 'Die List' section, and a table of die data.

**Die List:**

Drag a column header here to group by that column

	Primary Die	Press Pass	Die #	Die Type	Copy Position	Size Across	Total Size Around	Size Around	Teeth	Pitch	Temporary Die
<input type="checkbox"/>	<input type="checkbox"/>	0	N20	Flatbed	1.Out Top	4.625	17.25	2.75	138	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	D07	Flatbed	1.Out Top	5.3125	13.5	3.25	108	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	P59	Rota...	1.Out Top	2.375	16.5	4	132	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	C37	Rota...	2.Out Bott...	3.5	10.25	5	82	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	D00125	Flatbed	3.Out Right	4	15	14.75	120	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	NP227	Rota...	T.See Spe...	2.75	12.252	5.938	98	0.125	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	0	N15	Flatbed	T.Special	4.75	12.5	3	100	0.125	<input type="checkbox"/>

**Buttons:** Die List, Die Details

The die file includes a listing of all the dies setup in the Die Master File. If you want to see additional information for a die in this listing click the die line so it is highlighted then click the **Die Details** tab at the bottom of the screen and it will open a screen with specific die details for viewing.

**Die File**

Die Number: N20 Die Sort: 2 Die Type: Flatbed Temporary: ☐ Active: ☒

Details 1 Details 2 Die Image

Shape: Dome Copy Position: 1.Out Top

Teeth: 138

Across	Size	#	Space	Total
	4.625	2	.125	9.375
Around	2.75	6	0.125	17.25

Pitch: .125 Circumferential: ☒

Cylinder Teeth: 138

Matching Die:

Liner Weight: 60

Customer:

Image #:

Stagger %: 0

Corner Radius: .125

Location: Die Bin 24

Qty Run: 2456

Qty Since Sharpened: 0

Qty Between Sharpening: 100000

Last Sharpened:

Die List Die Details

To select a die for the base layer you can either click the first box for the die that you want to select, then click the second box for Primary Die and enter a “1” under the Press Passes column.

**Note** You must always enter a “1” on the Press Pass column for the primary die.

**Die File**

Die List

Drag a column header here to group by that column

		Primary Die	Press Pass	Die #	Die Type	Copy Position	Size Across	Total Size Around	Size Around	Teeth	Pitch	Tempor y Die
X	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	N20	Flatbed	1.Out Top	4.625	17.25	2.75	138	0.125	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 D07	Flatbed	1.Out Top	5.3125	13.5	3.25	108	0.125	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 P59	Rota...	1.Out Top	2.375	16.5	4	132	0.125	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 C37	Rota...	2.Out Bott...	3.5	10.25	5	82	0.125	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 D00125	Flatbed	3.Out Right	4	15	14.75	120	0.125	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 NP227	Rota...	T.See Spe...	2.75	12.252	5.938	98	0.125	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>		0 N15	Flatbed	T.Special	4.75	12.5	3	100	0.125	<input type="checkbox"/>

Die List Die Details

If you are using additional dies you can simply select the first box for each additional die that you want to add. You should not check Primary Die or put anything in Press Pass for these additional dies. All Dies both the Primary Die and additional dies have to be selected on the base layer. If the Die that you want to select is a custom die and is not in the list, then you can create a new die by clicking the **White Paper** icon and entering in the die specifications.

**Die File**

Die Details

Die Number  Die Sort  Die Type  ☒ Temporary ☒ Active ☒

Details 1 Details 2 Die Image

Shape  Copy Position

Teeth

Across	Size	#	Space	Total
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
Around	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Pitch

Cylinder Teeth

Matching Die

Liner Weight

Customer

Image #

Stagger %

Corner Radius

Location

Qty Run

Qty Since Sharpened

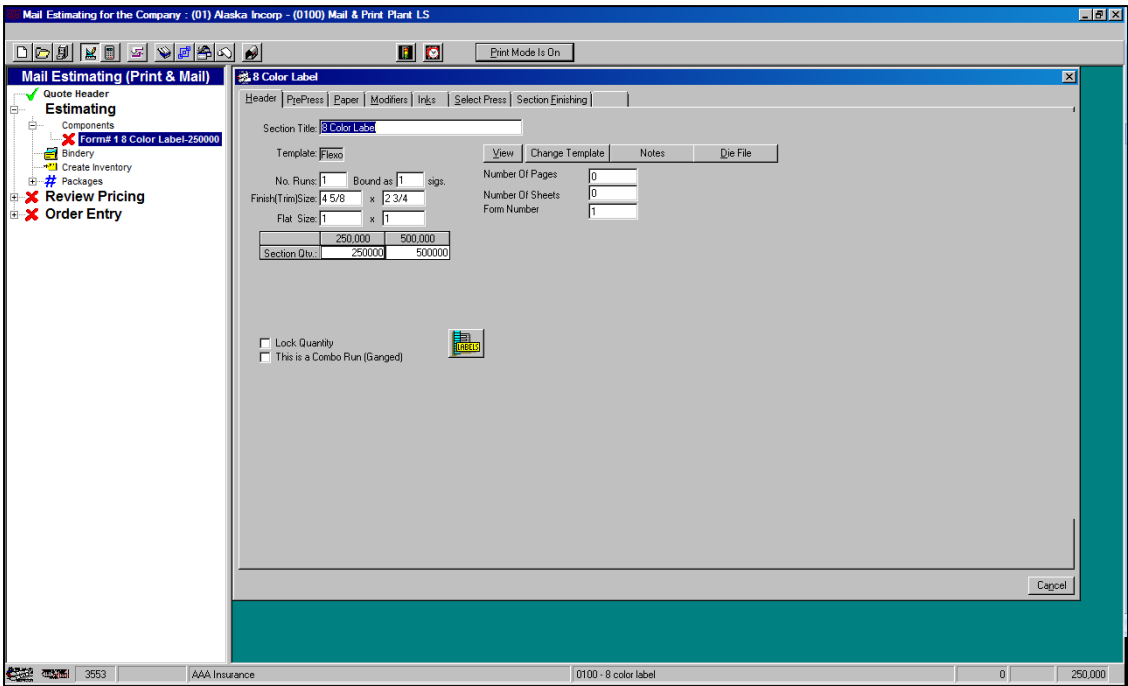
Qty Between Sharpening

Last Sharpened

Die List Die Details

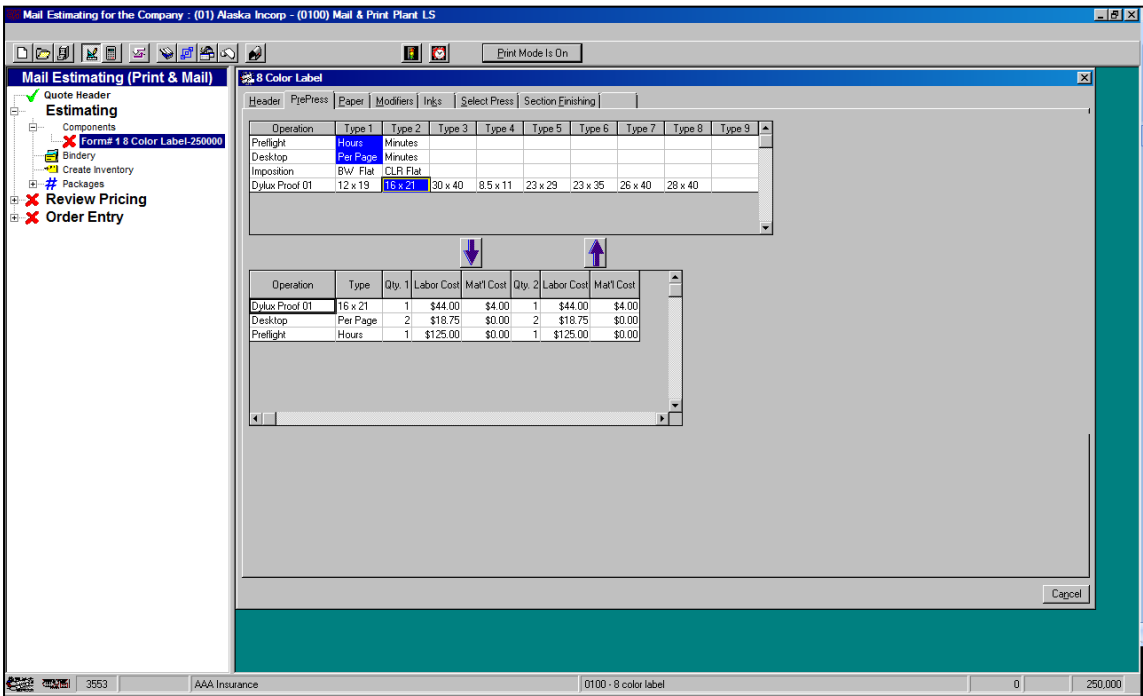
All dies entered through the estimate program will be saved as Temporary dies. If you wish to make a temporary die permanent you must go to the Die Master File and un-check the Temporary box then save the die information. Even though the die added is a temporary die, it will be available for use on other quotes once it has been entered, so there is no need to make it permanent unless you actually purchase the die for a job. Whether you create a new die or simply choose an existing die after you have chosen the die you must click the green Check Mark on the tool bar to select that die for the estimate. After you click the green check mark you can close this screen down by clicking the "X" in the upper right hand corner.

When the die screen closes down you will notice that the label dimensions from the die that was selected as the primary die will fill in the Finish Trim Size Fields. If you don't see this a die was not selected and you must go back into the Die File and reselect the die.



## Prepress

Next click the **Prepress** tab and add any prepress that is needed.



## Paper

Click the **Paper** tab and either search for an existing paper or create a new special order paper. Sample Paper Search Listing:

**Paper Search**

Floor Stock: Yes  
 Type: Flexo  
 Category:   
 Sub Category:   
 Basis Type:   
 Basis Weight:   
 PPI:   
 Caliper:   
 Name Like: Flexo  
 Descr Like:   
 Vendor:   
☐ Show Inactive

Inventory Clear All Select Stop

	Plant Code	Name	Description	Sizes	Colors	Floor Stock	Category	Subcateg
1	0100	Clone of Clone of Coated Flexo Stoc	Coated Labe	9	White	Yes	B-Coated Tex	
2	0100	Clone of Coated Flexo Stock^0100	Coated Labe	9	White	Yes	B-Coated Tex	
3	0100	Coated Flexo Stock^0100	Coated Labe	9	White	Yes	B-Coated Tex	
4	0100	Flexo - Gold Foil^0100	Gold Foil	5	Gold	Yes	I-Speciality	

Print Out Loaded 4 records. Click 'Continue' to load 300 Continue Search Close

New Special Order paper screen:

**Special Order Paper (New Paper)**

Paper:   
 Description:   
**Parameters**  
 Category:   
 Subcategory:   
 Type:   
 Perfect:   
 Charge By:   
 Min Buy Qty:   
 In Packs Of:   
 Ink Factor:   
 Press Speed: %  
 Case Making Speed: %  
 Sheets Per Lift:   
 Core Waste: %  
 Pages Per Inch:   
 Caliper:   
 Use Caliper:   
**Weights**  
 Basis Type:   
 Basis Weight:   
 Pounds:   
 OR   
 Per:   
 Sq. "  
**Job Cost Links**  
 Supplier:   
 Activity Code: 50000 M PAPER 01 0100  
**Linked Markup Template :**

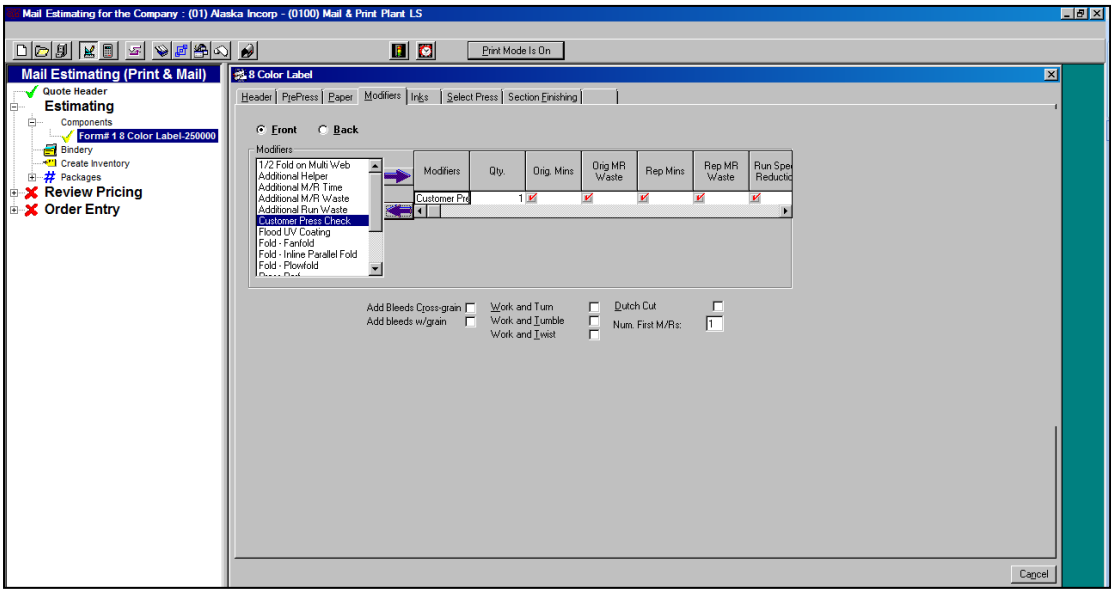
Used	Template	For Paper 'Charge By'	Defined as ....
<input type="checkbox"/>	Flexo Paper Markup	Inches	100 - 50% ; 250
<input type="checkbox"/>	COATED COVER (SHEETS)	Sheets	5000 - 15% ; 250
<input type="checkbox"/>	COATED TEXT (SHEETS)	Sheets	25000 - 20% ; 50
<input type="checkbox"/>	Sheetfed Template	Sheets	99999999 - 15%
<input type="checkbox"/>	TEST	Sheets	5000 - 50% ; 100
<input type="checkbox"/>	UNCOATED COVER(SHEETS)	Sheets	1000 - 60% ; 100
<input type="checkbox"/>	UNCOATED TEXT(SHEETS)	Sheets	5000 - 30% ; 100

Cancel Save

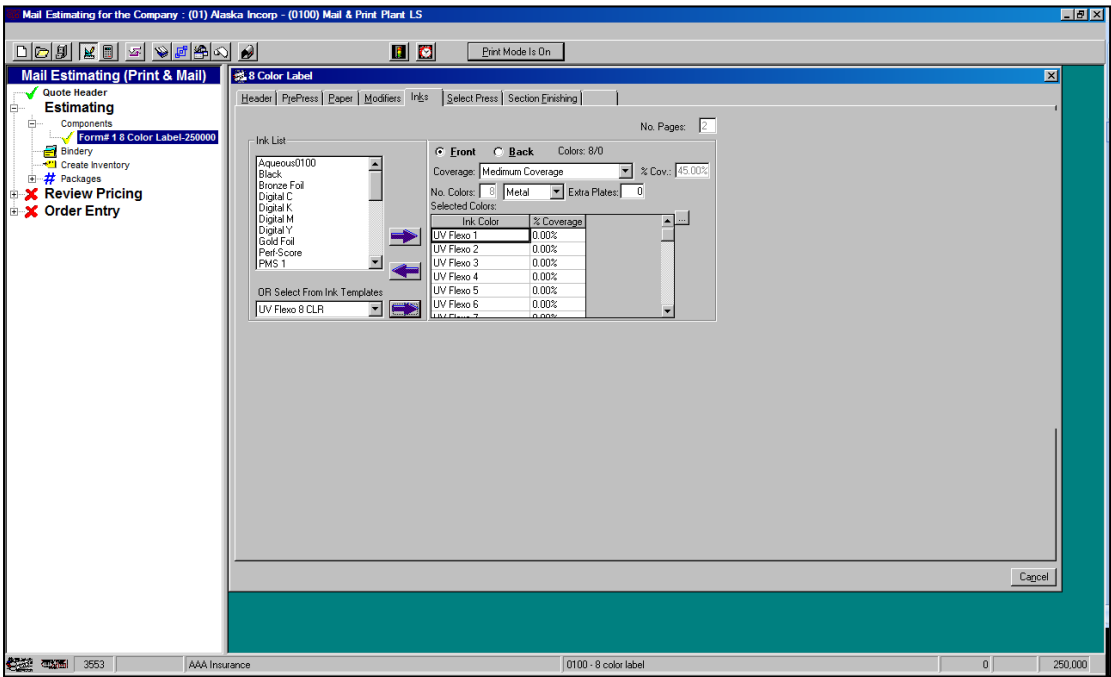
Rules for special order papers are the same as for house paper setup as discussed in the setup area. All Flexo papers should have the **Charge By** set to **Inches**, also the PER needs to be set to 1000.

# Modifiers

Select any applicable press modifiers from the listing.



Select the inks, coverage, plate type, and any extra plates for plate changes on the base layer.

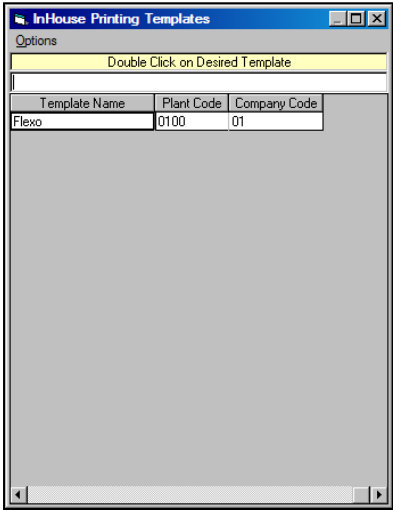


## Select Press

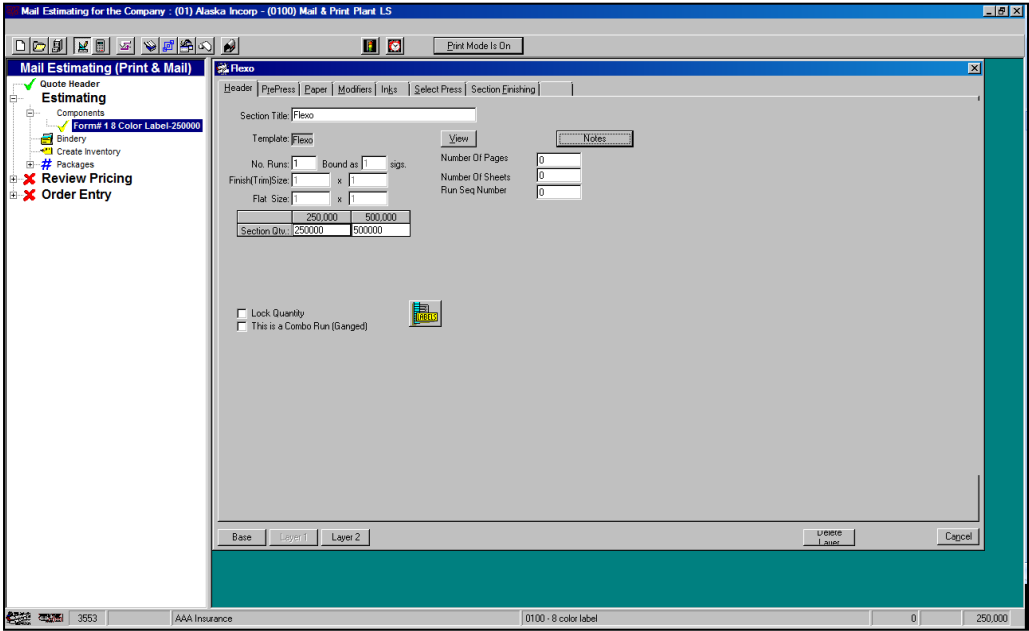
Click find press to select the flexo press and calculate the press sheet size based on the layout for the primary die that was chosen.

If you want to change either the left or right outside margin which will affect the overall roll width selected you can do this by clicking the **All Options** button and changing either the left or right margin values at the bottom of the screen. You will also see that the vertical and horizontal gutters are displayed here as well, this is coming from the spacing between the labels setup in the die itself; you can also manually override these numbers here as well.

Both the Paper Size and Press Size can be manually overridden in the select press screen, but you should never select find press when you do this or it will default back to the default die file size. If you have additional substrate layers that you want to add you can now do that. Each additional layer is added by clicking the **Paper Roll** icon on the tool bar which is the 10<sup>th</sup> icon from the left side of the tool bar. When you click that icon you will see a screen like this.

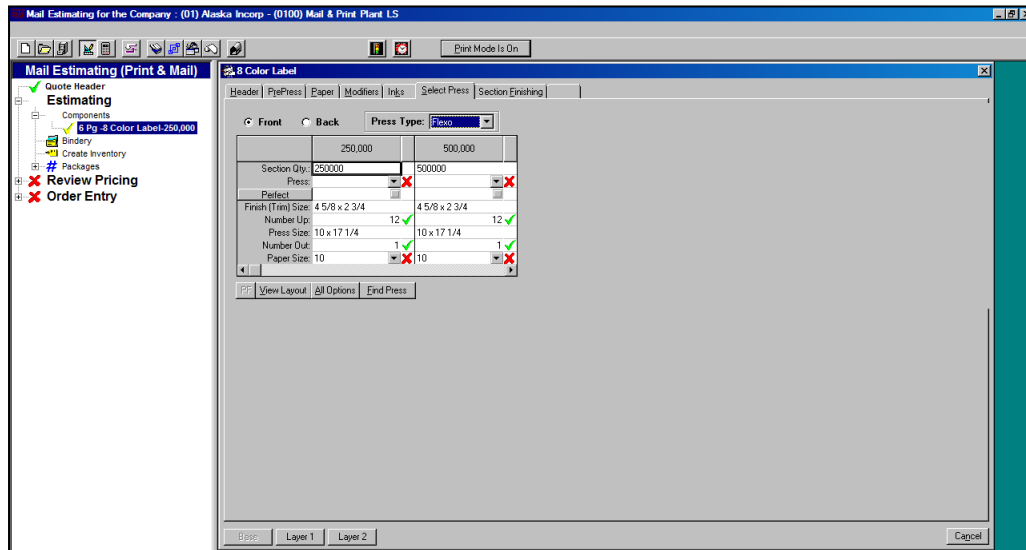


It will only show templates that are flagged as FLEXP types. Double-click the template for each additional layer that you wish to add to the estimate. After you have finished clicking the template to add additional layers, click the “X” in the top right corner to close the template screen down. You should see one layer button for each layer you have added at the bottom of the print screens.

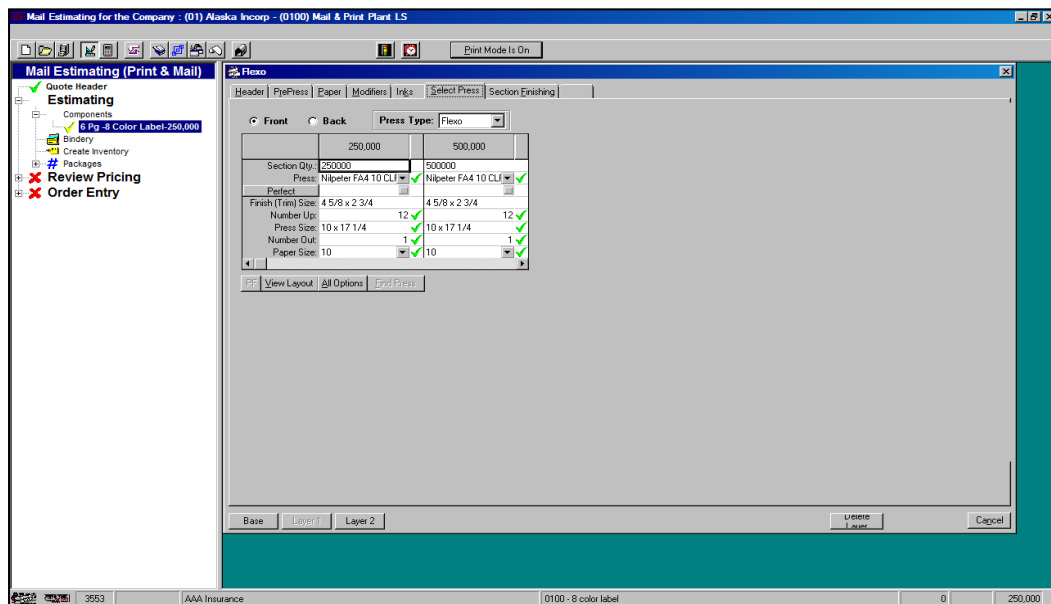




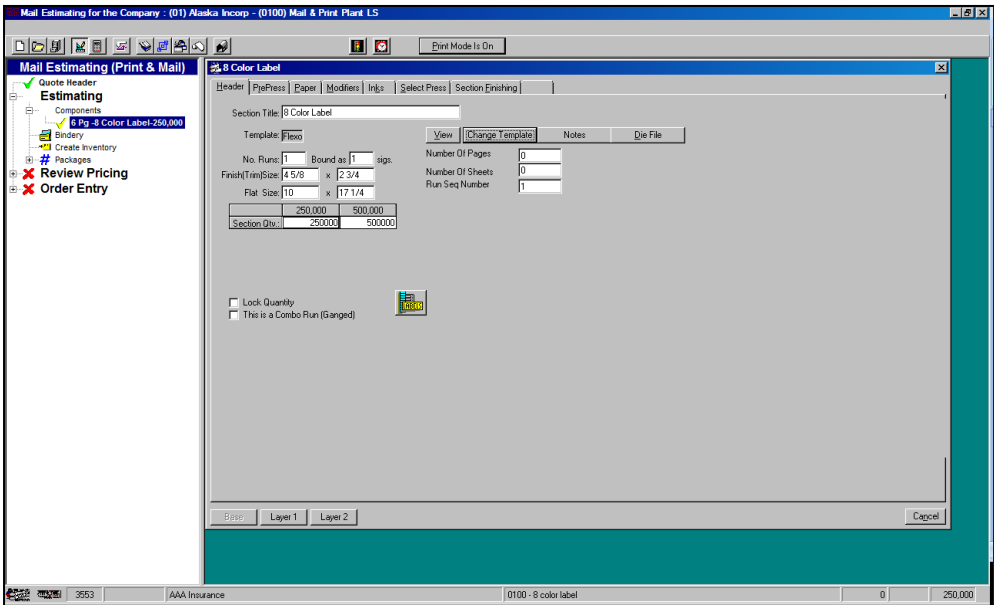
The base button represents the base layer and then you will see a button for each additional layer that you have added. When you select one of the additional layers by clicking its button all of the print screens displayed are then for that layer so you can go and add any pre-press, paper, modifiers, and inks for that layer. If you click the select the **Press** tab after adding the additional layers whether you are on the base layer or one of the extra layers, you will notice that the press is no longer selected. When the additional layers were added the press selection is no longer valid since it was based on the base layer only. You will need to add the Papers, Inks, and Modifiers for all layers before you can try to find the press again.



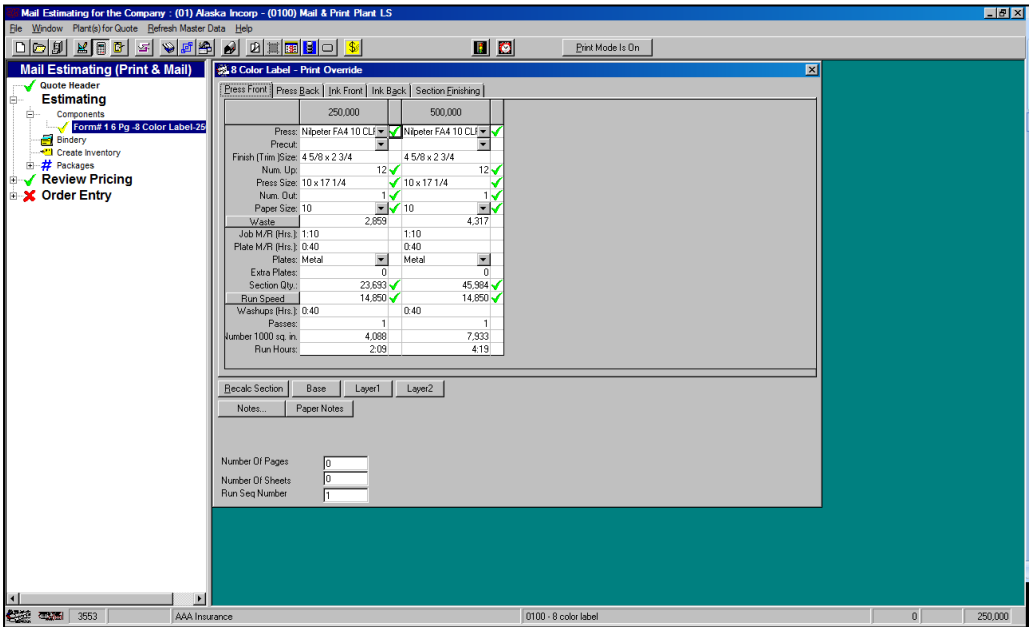
The press can only be found when you are on the base layer of a multi layer label, once you have add the substrates for the other layers you can go back to the **Base** button and click **Find Press** again. Assuming that the press will run the rolls and ink combination it should find the Flexo press again.



Under the **Header print** tab there is a field called “Run Seq Number” by default this will be set to “1” on the base layer and “1” on every additional layer that was added. This controls which press pass each of the substrate layers is run on. The default of one on the base and each layer means that by default they will all be run on the same press pass. If all the Run Sequence Numbers are the same when you calculate the estimate and then review the press details you will see that the press run hours only appear on the details for the base layer the other layers will not have any press run time because they are being run with the base material.



Calculated estimate shows press run hours on base but not on subsequent layers

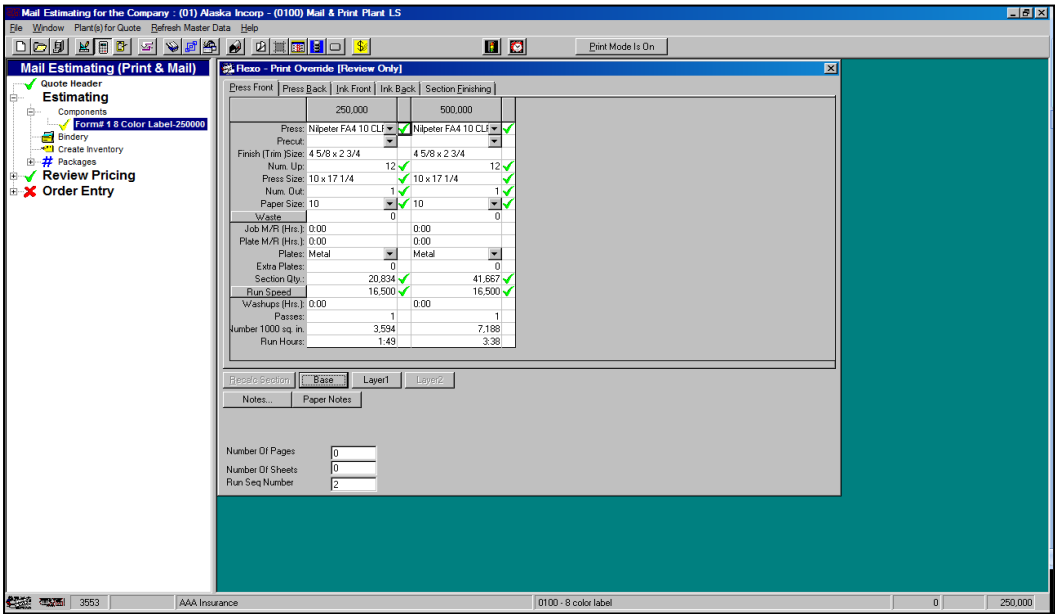


Subsequent layers do not show any press run hours if they are on the same run sequence number.

	250,000	500,000
Press:	Nipeter FA4 10 CL	Nipeter FA4 10 CL
Preset:		
Finish (Trim) Size:	4 5/8 x 2 3/4	4 5/8 x 2 3/4
Num. Up:	12	12
Press Size:	10 x 17 1/4	10 x 17 1/4
Num. Out:	1	1
Paper Size:	10	10
Waste:	2,859	4,317
Job M/R (Hrs.):	0.00	0.00
Plate M/R (Hrs.):		
Plates:	Metal	Metal
Extra Plates:	0	0
Section Qty.:	23,693	45,984
Run Speed:	0	0
Washups (Hrs.):		
Paint:	1	1
Number 1000 sq. in.:	4,088	7,933
Run Hours:		

If one or more of the substrate layers are being run as a separate pass on the press then you can set this up by clicking the layer or layers that are being run on separate press passes and change the Run Sequence Number. In this example if the base layer and the 1<sup>st</sup> layer were being run on one press pass together and the 2<sup>nd</sup> layer was being run on a separate press pass then I would click the **Layer 2** button and change the Run Sequence number from 1 to 2. When the estimate is then calculated and you review the press details you will see that the second layer now has press running hours because it is being run as a separate pass.

When the estimate is calculated the press details for Layer 2 are reviewed you will see that it is calculating press hours on that layer.



If you are printing multiple inks on the base layer that require multiple passes when you add the ink colors to the base layer if there are more inks than can be run in a single pass, the estimating program will automatically calculate the number of press passes required on the base. The number of press passes will be displayed in the press detail information after the estimate is calculated.

## Adding Rewinding

The rewind processes are setup as Section Finishing processes as noted earlier in this document. If you have a multi layer label the rewind process should be added to the last layer. Click the appropriate **layer** button then click the **Section Finishing** tab. You should see the re-winding processes that were setup in the Master File. Choose the appropriate type based on the customers specification either Labels per roll, Feet per roll, or Outside roll diameter. Based on the option you choose the program will prompt you to enter either Labels per roll, Feet per roll, or Outside roll diameter. Key in the appropriate value, this screen will also show a box which has the estimate quantities the starting number up and the end number up. In the example below the die for the label selected is running 2 across and 6 around or 12 up total. If the label was being split into 2 streams of 1 across and 6 around then you would leave the start number up as 12 and change the end number up to be 6. The program divides the start number up by end number up to calculate the number of streams. If it was being re-wound as a single stream 2 up then the starting and ending number would be 12.

The screenshot shows the 'Mail Estimating (Print & Mail)' software interface. The 'Section Finishing' tab is active, displaying a list of available processes on the left and a selected process on the right. The selected process is 'Tracker - Roll OD'. Below this, a table shows the 'Roll Diameter' as 12. A table at the bottom shows the 'Tracker - Roll OD' process with quantities of 250,000 and 500,000. The 'Run Quantity' is 250,000. The 'Start # Up' is 12 and the 'End # Up' is 6. The 'End # Up' is 6.

Available SF Processes:	Description	Selected Section Finishing Process	Lock QTY	S/D
Pre-Slit 01	Pre-Slit 01	Tracker - Roll OD		
Pre-Trim 01	Pre-Trim 01			
Roller Score/Perf OffLine	Roller Score/Perf OffLine			
Tracker - Feet Per Roll	Tracker - Feet Per Roll			
Tracker - Labels Per Roll	Tracker - Labels Per Roll			
Tracker - Roll OD	Tracker - Roll OD			
UDF Final Trim	UDF Final Trim			
Waste Section Finishing	Waste Section Finishing			

Roll Diameter	Value
Roll Diameter	12

Tracker - Roll OD	250,000	500,000
Run Quantity:	250,000	500,000
Start # Up:	12	12
End # Up:	6	6

Base Layer 1 Layer 2 Delete Layer

3553 AAA Insurance 0100 - 8 color label 0

The label can be packaged by adding a bound component, selecting carton packing and then selecting the correct box for the labels to be packaged in.

The screenshot shows the 'Mail Estimating (Print & Mail)' window. On the left is a navigation pane with 'Estimating' selected. The main area has a 'Bound Component Name' field set to 'Packing' and a 'Quantity' field with '250000' and '500000' options. Below this is a table with columns: Component Name, Seq, Process Name, Valid Data, Process Name, Process, Lock QTY, and Assigned to Common Bind Run. The table contains one row for '8 Color Label Common' with sequence '1' and process 'Carton Pack 01'. A list of processes is shown in the center, including 'Bindery Buyout 01', 'Book Trimming', 'Carton Pack 01', 'Delivery Local 01', 'Freight 01', 'Perfect Bind (B/O Waste)', 'Saddlестitch 01', 'Shrinkwrap 01', and 'Truck Freight 01'. The bottom status bar shows '3553', 'AAA Insurance', '0100 - 8 color label', and '0'.

When you calculate the estimate you can review the press details and also the paper information. The paper information for flexo papers shows the number of 1000 inch units used for pricing as well as the total number of feet needed to run the label

The screenshot shows the 'Review Papers' window with a table of paper specifications. The table has columns: Nol, State, Section, PrePrinted Shell, Paper, Weight, Size, Color, Quantity, Feet, M Weight, Pounds, CWT Price, Rate/M, Rate Units, and Charge. The table lists three items: 'Main Run 8 Color Label', 'Reel Flexo', and 'Reel Flexo'. The 'Reel Flexo' items show 'FAS 8104 Lw/ PHARM LIT' and 'FAS Ultraclear Laminate' with various specifications. The bottom of the window has 'Refresh', 'Recalc', and 'Close' buttons.

Nol	State	Section	PrePrinted Shell	Paper	Weight	Size	Color	Quantity	Feet	M Weight	Pounds	CWT Price	Rate/M	Rate Units	Charge
✓		Main Run	8 Color Label	FAS 8104 Lw/ PHARM LIT	100	10 x 17 1/4	White	4,052 1000 sq. in.	33,766	36.32	852.9752	\$0.00	\$0.25 /1000 sq. in.	Yes	\$1
✓		Reel	Flexo	Flexo - Gold Foil™ 0100	60	10 x 17 1/4	Gold	4,052 1000 sq. in.	33,766	55.34	1299.6599	\$0.00	\$0.50 /1000 sq. in.	Yes	\$2
✓		Reel	Flexo	FAS Ultraclear Laminate™	60	10 x 17 1/4	Clear	3,594 1000 sq. in.	29,949	21.78	453.76452	\$0.00	\$0.72 /1000 sq. in.	Yes	\$2
									11,698						

The following values can be overridden on this screen, the number of 1000 inch units used for pricing, the number of feet needed, and or the rate per 1000 inches. If values like the number of feet are overridden here it will update the estimate price based on the number of overridden feet but the press does not increase the run quantity, this should only be done in cases where you have a special order quantity that needs to be ordered regardless of the press run requirement.

## Quote Breakdown Detailed Report

The new quote breakdown report has been updated to include all the die information for the dies selected on the quote as well as the information based on each substrate that is used on the estimate.

background

100%

### Cylinders & Dies

<b>8 Color Label</b>	Cylinder # Around:	6	Cylinder Teeth:	138
Cylinder #	Cylinder Repeat:	17.25	Distortion:	
Cylinder Location	Copy Position:	1.Out Top		
Die #	Location:	Die Bin 24	Die Teeth:	138
Shape:	Size Around:	2.75	Pitch:	0.125 C
Size Across:	Space Around:	0.125	Corner Radius:	0.125
Space Across:	Number Around:	6	Label Repeat:	2.875
Number Across:	Total Repeat:	17.25		
Width Across:				

### Estimate Breakdown

Estimate #	3553	Estimate Title	8 color label	Page #	3/6
------------	------	----------------	---------------	--------	-----

### Print

**8 Color Label - 1 Forms x 2 Pages (2pgs), 4.625 X 2.75 - Printed 8/0**

Printed Component	250,000	500,000	Hours	Sell	Hours	Sell	Hours	Sell	Hours	Sell	Hours	Sell
Prepress	Preflight/Hours	1:00	\$143.75	1:00	\$143.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Quantity	1	\$0.00	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Prepress	Desktop, Per Page	0:15	\$21.56	0:15	\$21.56	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Quantity	2	\$0.00	2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Prepress	Dylux Proof 01, 16 x 21	1:06	\$62.60	1:06	\$62.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Quantity	1	\$0.00	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Plates	Plates	2:00	\$792.00	2:00	\$792.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Zoom Factor: 100%

## Combo Work Ticket

The combo work ticket also displays the primary die and secondary die information for the label.

background

100%

### Print Components

Press Notes

#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size
1	8 Color Label-Main Web		250,000	Printed	10 x 17.25	4.625 x 2.75

1 forms x 2 pgs, 12up One side, 8/0 - Preflight, Desktop, Dylux Proof 01, Nilpeter FA4 10 CLR/

Paper/ Material Description - (Vendor Product Code)

Inventory ID	Feet	Parent Size	Cut To	#Out	Source
FAS 8104 LW PHARM LITHO**0100	33,766	10	10 x 17.25	1	

Press

Imposition	#Up
One side	12

Nilpeter FA4 10 CLR

Front:

UV Flexo 1, UV Flexo 2, UV Flexo 3, UV Flexo 4, UV Flexo 5, UV Flexo 6, UV Flexo 7, UV Flexo 8																														
<table border="1"> <thead> <tr> <th>Size</th> <th>Forms</th> <th>Pages</th> <th>#Up</th> <th>Plates</th> <th>Gross Qty</th> <th>UV Waste</th> <th>Run Waste</th> <th>Net Qty</th> <th>UV HS</th> <th>Run HS</th> <th>W/U HS</th> <th>PAI HS</th> <th>Plate Making</th> <th>Printing</th> </tr> </thead> <tbody> <tr> <td>Front</td> <td>1</td> <td>2</td> <td>12</td> <td>8</td> <td>33,760</td> <td>2,013</td> <td>1,797</td> <td>29,949</td> <td>1:40</td> <td>2:8</td> <td>0:40</td> <td>2</td> <td></td> <td></td> </tr> </tbody> </table>	Size	Forms	Pages	#Up	Plates	Gross Qty	UV Waste	Run Waste	Net Qty	UV HS	Run HS	W/U HS	PAI HS	Plate Making	Printing	Front	1	2	12	8	33,760	2,013	1,797	29,949	1:40	2:8	0:40	2		
Size	Forms	Pages	#Up	Plates	Gross Qty	UV Waste	Run Waste	Net Qty	UV HS	Run HS	W/U HS	PAI HS	Plate Making	Printing																
Front	1	2	12	8	33,760	2,013	1,797	29,949	1:40	2:8	0:40	2																		

Modifiers

1 - Customer Press Check
# of Passes
1

### Cylinder & Dies

Cylinder #	Cylinder # Around:	6	Cylinder Teeth:	138
Cylinder Location	Cylinder Repeat:	17.25	Distortion:	
Die #	Copy Position:	1.Out Top		
Shape:	Location:	Die Bin 24	Die Teeth:	138
Size Across:	Size Around:	2.75	Pitch:	0.125 C
Space Across:	Space Around:	0.125	Corner Radius:	0.125
Number Across:	Number Around:	6	Label Repeat:	2.875
Width Across:	Total Repeat:	17.25		

#	Component Name	Order Items	Qty	Type	Flat Size	Finished Size
1	Flexo		250,000	Printed	10 x 17.25	4.625 x 2.75

1 forms x 2 pgs, 12up 0/0, Nilpeter FA4 10 CLR/

Paper/ Material Description - (Vendor Product Code)

Inventory ID	Feet	Parent Size	Cut To	#Out	Source
Flexo - Gold Foil**0100	23,485	10	10 x 17.25	1	

Zoom Factor: 100%

# Overhead Markups

## Setup and Use

MF Reports - System Maintenance > Features to Purchase > Print and Mail Estimating > Split Variation:

Default Initial Bound Options to

No Bound Components

Split Variation : Additional Calculation

☒

Save

Close

MF Customer - Use Variance and Value %:

Customers List for the 01 Alaska Incomp

File Modules Utility Window Help

Master Files Custom

A

A company

A very important

AAA Insurance

Abba Inc.

Abba Sub Custom

ABC Company

ABC company

AC/DC

Access for Dumm

add cust on the fl

Alaska Inc.

Alta Ski Resort

Anderson Direct &

Angels Among Us

Apply Yourself

ASIAN ART MUSE

Avon Company

B

C

D

Customer

Account No

ALASKA

Auto

Name

Alaska Inc.

Address:

123 West Main

Suite 711

Zip:

84020

City:

DRAPER CITY SOUTH

County:

UTAH CO

State:

UT

Country:

USA

Salesrep:

House Account

CSR:

Sue Smith

Manager:

Collector:

Search:

☒ By Code

☐ By Group

☐ By Industry

SIC Code:

9999 - miscellaneous -

Group:

miscellaneous

Industry:

D/B Ref:

DB56456455

Contact:

Sally Samster

Phone:

801555 0133

Fax:

801555 1038

Monthly sale:

\$0.00

Acct Status:

A - User Defined Terms

Payment Days:

100

Since:

9/1/1998

Terms:

Net 20 termsvcvcbvcvcbvcvb

Remarks:

Tax Code:

00 0% non taxable

Cred Limit:

\$99,999,999.00

Currency:

USA

Cred Ref:

Internal Customer:

☒

Service Charge:

☒

Tax enforced:

☐

Short Remarks:

Store/Franchise

Reporting Grouping

Marketing So

Suppress Statements:

☐

Active Access:

☒

Bypass Credit Check:

☐

Use Var:

☒

Value:

3.6



MF Reports > Accounting Structure > GL Chart of Accounts:

	Active	Number	Description	Type	Normal Bal	Keep Trans	External GL Chart Code
30	<input checked="" type="checkbox"/>	4016	OHM - Sales Expense	Income	Credit	Forever	
31	<input checked="" type="checkbox"/>	4017	OHM - No Overs Markup	Income	Credit	Forever	
32	<input checked="" type="checkbox"/>	4018	OHM - Overall Project Markup	Income	Credit	Forever	
33	<input checked="" type="checkbox"/>	4019	OHM - Overall Customer Markup	Income	Credit	Forever	

Print and Mail Estimating - File > Setup > Setup for the Variation Groups/Categories:

Add Group, then add variation Categories. Examples are shown below.

Group - Overhead Markups:

Category - Sales Expenses at 1%:

Variance Setup

Setup

Variance Based on: Total Cost

Pricing Adjust Group Name: Overhead Adjustment

Pricing Adjust Category Name: Adjustment

Groups & Categories

DataName

Overhead Markups

Sales Expenses

No Overs Markups

Overall Project Markup

Overall Customer Markup

Category Name: Sales Expenses

Category #: 1

Default %: 1

GL Chart: Rev: OHM : Sales Expenses

Commissionable?

Customer Specific

Add Group

Add Category

Save

Category - No Overs Markup 0.7%:

Variance Setup

Setup

Variance Based on: Total Cost

Pricing Adjust Group Name: Overhead Adjustment

Pricing Adjust Category Name: Adjustment

Groups & Categories

DataName

Overhead Markups

Sales Expenses

No Overs Markups

Overall Project Markup

Overall Customer Markup

Category Name: No Overs Markups

Category #: 2

Default %: 0.7

GL Chart: Rev: OHM : No Overs Markup

Commissionable?

Customer Specific

Add Group

Add Category

Save

Category - Overall Project Markup 0.6%:

The screenshot shows the 'Variance Setup' dialog box. In the 'Setup' section, 'Variance Based on:' is set to 'Total Cost', 'Pricing Adjust Group Name:' is 'Overhead Adjustment', and 'Pricing Adjust Category Name:' is 'Adjustment'. In the 'Groups & Categories' section, the 'DataName' list on the left has 'Overall Project Markup' selected. On the right, 'Category Name:' is 'Overall Project Markup', 'Category #:' is '3', 'Default %:' is '0.6', and 'GL Chart:' is 'Rev: OHM :Overall Project Markup'. The 'Commissionable?' checkbox is unchecked, and the 'Customer Specific' checkbox is also unchecked. At the bottom right are buttons for 'Add Group', 'Add Category', and 'Save'.

Category - Overall Customer Markup at 1.3%:

The screenshot shows the 'Variance Setup' dialog box. In the 'Setup' section, 'Variance Based on:' is set to 'Total Cost', 'Pricing Adjust Group Name:' is 'Overhead Adjustment', and 'Pricing Adjust Category Name:' is 'Adjustment'. In the 'Groups & Categories' section, the 'DataName' list on the left has 'Overall Customer Markup' selected. On the right, 'Category Name:' is 'Overall Customer Markup', 'Category #:' is '4', 'Default %:' is '1.3', and 'GL Chart:' is 'Rev: OHM :Overall Customer Markup'. The 'Commissionable?' checkbox is unchecked, and the 'Customer Specific' checkbox is checked. At the bottom right are buttons for 'Add Group', 'Add Category', and 'Save'.

**Note** The Customer Specific box is checked. This will allow the Customer Variance % to be used if populated in MF Customer. If not, it will use 1.3%.

Print and Mail Estimating - Pricing Summary click grey box to open Split Variance screen:

Mail Estimating (Print & Estimating)

Quote Header

Quote # 6201 ; Customer Acct#: ALASKA ; (0100) Mail & Print Plant LS - [Quote Pricing]

File Window Refresh Master Data Help

Print Mode Is On

1,000 2,000 3,000 4,000 5,000 6,000

\$	Quote # 6201 ; Customer Acct#: ALASKA	Total Cost \$	Non Value Added Cost \$	Basic Markup %	Basic Markup \$	Basic Sell \$	Overhead Markup %	Overhead Markup \$ Amt	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing
	THING 1	2,308.04	704.29	17.98	414.94	2,722.99	5.90	136.17	23.88	551.12	2,859.16	0.00	0.00	2,859.16
	TOTAL PRINT	2,308.04	704.29	0.00	0.00	0.00	0.00	0.00	23.88	551.12	2,859.16	0.00	0.00	2,859.16
	QUOTED TOTAL	2,308.04	704.29	17.98	414.94	2,722.99	5.90	136.17	23.88	551.12	2,859.16	0.00	0.00	2,859.16
	Admin Price													405.5099

Admin Price

Refresh PrintOut Markup Bulk Save Cancel

Hide Decimals

6201 Alaska Inc. 0100 - Split Variance Test 0 1,000

**Note** Total Cost = \$2308.04, Suggested Sell = \$2859.16, and QL Price = \$2859.16

Overhead Variance screen - Note: Overall Customer Markup is 3.6% from MF Customer setting.

Overhead Variance % Entry											
For Quote: 6201											
	Qty1	Qty2	Qty3	Qty4	Qty5						
Current Suggested Sell	2859.16	3331.39	3723.43	4121.08	4431.46						
Total Cost	2308.04	2697.67	3019.87762	3345.58	3603.30						
Variance Detail	%	\$	%	\$	%	\$	%	\$	%	\$	%
<b>Overhead Markups</b>											
Sales Expenses	1	23.08	1	26.98	1	30.20	1	33.46	1	36.03	
No Overs Markup	0.7	16.16	0.7	18.88	0.7	21.14	0.7	23.42	0.7	25.22	0.
Overall Project Markup	0.6	13.85	0.6	16.19	0.6	18.12	0.6	20.07	0.6	21.62	0.
Overall Customer Markup	3.6	83.09	3.6	97.12	3.6	108.72	3.6	120.44	3.6	129.72	3.
Amount Of Overhead Planned		136.17		159.16		178.17		197.39		212.59	
New Suggested Sell	2859.16	3331.39	3723.43	4121.08	4431.46						

Change variance for Qty #1 as shown below and **Save** and **Exit**.

Overhead Variance % Entry										
For Quote: 6201										
		Qty1		Qty2		Qty3		Qty4		Qty5
Current Suggested Sell		2859.16		3331.39		3723.43		4121.08		4431.46
Total Cost		2308.04		2697.67		3019.87762		3345.58		3603.30
Variance Detail	%	\$	%	\$	%	\$	%	\$	%	\$
Overhead Markups										
Sales Expenses	2	46.16	1	26.98	1	30.20	1	33.46	1	36.03
No Overs Markups	3	69.24	0.7	18.88	0.7	21.14	0.7	23.42	0.7	25.22
Overall Project Markup	4	92.32	0.6	16.19	0.6	18.12	0.6	20.07	0.6	21.62
Overall Customer Markup	5	115.40	3.6	97.12	3.6	108.72	3.6	120.44	3.6	129.72
Amount Of Overhead Planned		323.13		159.16		178.17		197.39		212.59
New Suggested Sell		3046.11		3331.39		3723.43		4121.08		4431.46

Total Cost = \$2308.04, Suggested Sell = \$3046.13, and QL Price = \$3046.13:

Mail Estimating for the Company - (0100) Mail & Print Plant LS - (Quote Pricing)

FileWindowChangesPlant(s) for QuoteRefresh Master DataHelp

Print Mode Is On

Mail Estimating (Print & Estimating)

Quote Header

Estimating

Review Pricing

Buyouts

Final Pricing

Pricing Summary

Graphed Pricing Summary

Quote Breakdown

Quote Breakdown Detailed

Credit Status

Quote Letter

Preliminary Mail Work Ticket

Preliminary Combined WOVN

Order Entry

Final Pricing

Job#	Quote #	Customer Account	Total Cost	Non Value Added Cost	Basic Markup %	Basic Markup \$	Basic Sell \$	Overhead Markup %	Overhead Markup \$ Amt	Markup %	Markup \$	Suggested Sell \$	Variance %	Variance \$	QL Pricing	
THING 1			2,308.04	704.29	17.98	414.96	2,723.01	14.00	323.13	31.98	738.09	3,046.13	0.00	0.00	3,046.13	
TOTAL PRINT			2,308.04	704.29	0.00	0.00	0.00	0.00	31.98	738.09	3,046.13	0.00	0.00		3,046.13	
			QUOTED TOTAL	2,308.04	704.29	17.98	414.96	2,723.01	14.00	323.13	31.98	738.09	3,046.13	0.00	0.00	3,046.13
			AddM Price												859.2917	

BeFresh

PrintOut

Latest Change Order Allocations

Markup Bulk

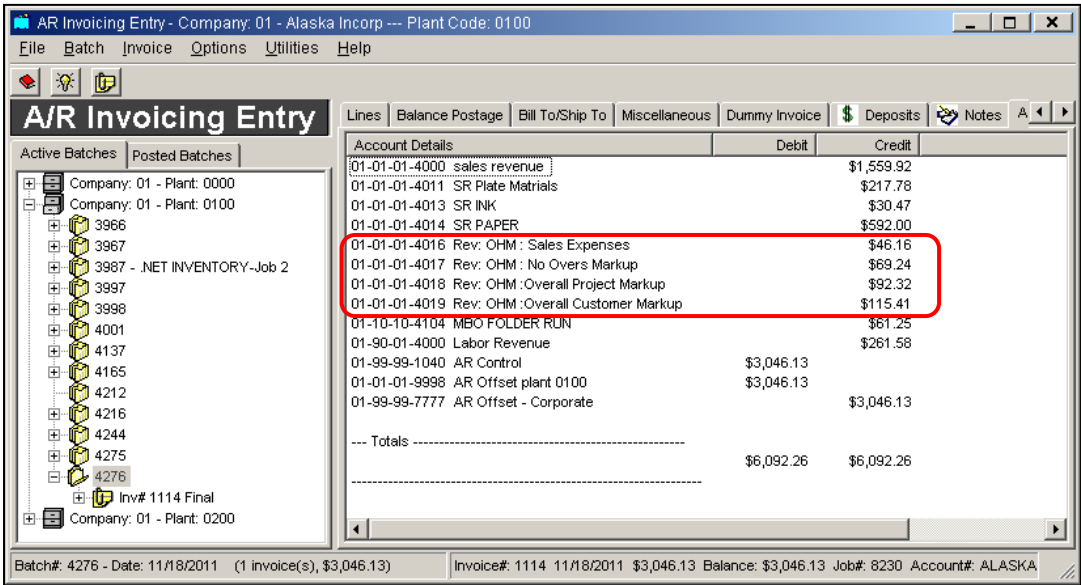
Hide Decimals

Save

Close

Alaska Inc.0100 - Split Variance Test011/18/20111.000

AR Invoice shows Split Variance Overhead markups as Credit to GL Account:



The screenshot shows the 'AR Invoicing Entry' window for Company 01 - Alaska Incorp, Plant Code 0100. The window has a menu bar (File, Batch, Invoice, Options, Utilities, Help) and a toolbar. On the left is a tree view of 'Active Batches' and 'Posted Batches'. The main area is titled 'Account Details' and contains a table with columns for 'Debit' and 'Credit'. A red box highlights four lines in the table: '01-01-01-4016 Rev: OHM : Sales Expenses', '01-01-01-4017 Rev: OHM : No Overs Markup', '01-01-01-4018 Rev: OHM : Overall Project Markup', and '01-01-01-4019 Rev: OHM : Overall Customer Markup'. The bottom status bar shows 'Batch#: 4276 - Date: 11/18/2011 (1 invoice(s), \$3,046.13)' and 'Invoice#: 1114 11/18/2011 \$3,046.13 Balance: \$3,046.13 Job#: 8230 Account#: ALASKA'.

Account Details	Debit	Credit
01-01-01-4000 sales revenue		\$1,559.92
01-01-01-4011 SR Plate Matrlals		\$217.78
01-01-01-4013 SR INK		\$30.47
01-01-01-4014 SR PAPER		\$592.00
01-01-01-4016 Rev: OHM : Sales Expenses		\$46.16
01-01-01-4017 Rev: OHM : No Overs Markup		\$69.24
01-01-01-4018 Rev: OHM : Overall Project Markup		\$92.32
01-01-01-4019 Rev: OHM : Overall Customer Markup		\$115.41
01-10-10-4104 MBO FOLDER RUN		\$61.25
01-90-01-4000 Labor Revenue		\$261.58
01-99-99-1040 AR Control	\$3,046.13	
01-01-01-9998 AR Offset plant 0100	\$3,046.13	
01-99-99-7777 AR Offset - Corporate		\$3,046.13
--- Totals ---	\$6,092.26	\$6,092.26

**Note** Quotes/Jobs currently in the system will be hard to manage as those quotes will not have initial data. Presumably if you activate the feature then recalculate Quote/Job and SUBMIT values to the categories on the quote, it should work.