Connect 2007
8th ANNUAL USER'S CONFERENCE

PrintSmith Session Handouts

Preferences

Session Topics

System Defaults

Setting the system defaults should be completed first since these defaults are used throughout PrintSmith. After defining the system defaults, the remaining set up steps can be completed in any order.

PrintSmith has several global variables you will need to define. Since a new installation of PrintSmith has several of these defaults set up for you, you may only need to review the settings. In other case you may need to change or define the settings that match you business practices.

You will find the system defaults under the Admin and Pricing menus. These system defaults reside in several places within the PrintSmith Folder.

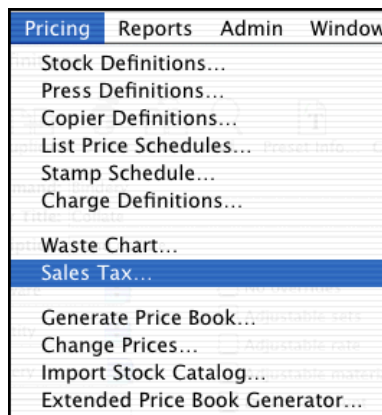### Sales Tax Or Value Added Tax (VAT)

In order to properly calculate and report your sales taxes, you need to define your tax rates within PrintSmith. If you do not charge and collect sales tax, you should review the settings to ensure they are set to collect no tax (zero).

This section covers defining standard/default sales tax set up, creating new tax tables to handle multiple tax jurisdictions, and addressing international and other tax issues.

Defining Standard/Default Sales Tax

The standard/default tax table can apply to everyone. Typically, the standard sales tax set up is all that you will need to complete. However, if your business uses multiple tax jurisdictions or is international, you will need to define these additional tax set ups.

1. Select **Sales Tax** from the Pricing menu.

The Sales Tax window is displayed. The table that appears when you select the Sales Tax command from the Pricing menu is the Default tax table. All taxable invoices and customers will use the Default table's rate unless another tax table is assigned to an account, invoice, or estimate.

The Tax Table drop down field provides a list of all defined tax tables. When the window is first opened, the Default tax table is selected.

The Tax Table ID field is a two character tax table identifier for the Tax Table selected in the Tax Table drop down field.

The Description field is the explanation of tax items, which is displayed when the Show button is enabled.

A Minimum Taxable Amount can be defined.

Sales Tax Window

The Show checkboxes determine whether the line in the table is to be shown separately on an invoice or estimate.

Total Effective Tax Rate for this table is calculated using the line items.

2.   Verify that the Default tax table is selected in the **Tax Table** drop down in the Sales Tax window. The Default tax table has no ID. Since the Default tax table is selected when the window first opens, the Tax Table ID field will be empty.

> **Notes:** The default tax table is used whenever tax needs to be calculated and a special tax table is not specified. The default tax table will be the most commonly used tax rate. You attach special tax tables in a customer's account record and in the Document Totals window of an open document.

3.   Check the **Tax Shipping** option if the shipping amount entered in the Document Totals command in the taxable subtotal should be taxed. This setting does not apply to charge definitions used for shipping charges. For these charges, you can indicate when they are taxable using the Taxable button in the charge definition screen.

4.   Check the **Tax on Tax** option if your tax district taxes other taxes. Normally, PrintSmith adds the rates in the tax table together to come up with the effective tax rate. If you check this option, PrintSmith will calculate each of the tax rates. For example if the first rate were 6% and the second rate were 5%, the effective rate would be 11.3% as PrintSmith would add 0.3% which is 5% of 6% (the first rate).

5.   Check the **Build Tax In Price** option if you want to hide tax in the price for items and never show it separately. Enabling this option is one part of this set up – it tells PrintSmith to calculate and include the sales tax in each price of a price list.

6.   Enter up to five line items that are used to calculate the Effective Tax Rate. You can breakdown each tax table into five line items, such as City, State, County, Special Assessment, etc. Each line item consists of a **Description**, **Tax Rate**, and whether or not to **Show** the item on the invoice or estimate.

> **Notes:** Consider adding a small charge for chemicals and materials used, the same way an automobile company charges for small miscellaneous materials. Consider collecting a charitable donation on each sale.

7. Verify the **Effective Tax Rate**. This rate is calculated based on the line items defined. If this rate is not correct, adjustments must be made to the line items.

8. Set the **Minimum Taxable Amount**.

Notes: A tax details report is available for any time period. Enter each differing tax you want to track separately.

Creating New Tax Tables To Handle Multiple Tax Jurisdictions

If you have more than one tax structure, you will need to create additional tax tables. For each customer account with special tax requirements, a special tax table can be created and assigned to that account. You can also change the default tax table on any invoice or estimate to reflect special requirements.

Notes: There is a practical limit of tax tables that is around 40 depending on other files added to the Prices folder.

Example: A business in California has taxable and non taxable customers. Some of these taxable customers have differing tax rates due to their government status or other special circumstances. The business is based in Los Angeles and when it delivers jobs to customers in Orange County, a different rate must be charged. Using different tax rates can be accomplished by adding an OC (Orange County) tax table. This tax table can be assigned to customers in Orange County. This tax table will also be available to assign to an invoice or estimate for walk in customers who reside in Orange County.

To add a new Tax Table:

1. In the Sales Tax window, enter a two (2) character name in the **Tax Table ID** field for the Tax Table to be added. The name of a Tax Table must be unique. Therefore, the new name entered cannot match any of the other existing Tax Table names.

2. Press the **Enter** key on the keyboard. The system will search for a Tax Table with the name entered. If no table exists, a prompt is displayed.

3. Click the **OK** button. The new Tax Table will be created.

4. Enter the necessary tax information.

5. Click the **OK** button when complete.

Once the new tax table is created, assign the tax table to each customer who uses this tax rate in the customer's account record or in the actual document. To do this, you would enter the Tax ID in the Tax Table ID text box in the Accounts window and/or the Tax Table field in the Document Totals window. For information on how to assign a tax table to a customer account, refer to the Settings section in the Customer Accounts chapter.

Using Tax Codes To Track Differing Groups With Similar Rates

If you find that you have several taxes that are the same rate but for differing institutions, counties or other organizations, consider assigning tax codes in customer accounts and documents to track the differing groups.

Example: You might have three counties in your state that all collect 8% tax. You could create one tax table at 8% and enter differing tax codes for the three counties for each customer and or document. Using different codes would present a report showing the amount of sales tax collected for the 8% rate and sub total for each tax code. For more information on how to add a tax code to a customer account, refer to the Settings section in the Customer Accounts chapter.

Addressing International and Other Tax Issues

Because PrintSmith is used throughout the world, there are many different options as to how tax is calculated, reported, and displayed. International customers may require tax on tax and variable tax rates. Some Canadian customers need to calculate PST and then add GST on top of that tax. Chile also has special tax verification procedures. Currently, you must create a separate tax table for each different tax rate.

Notes: In simple tax situations, all of the check boxes are disabled, which is the norm throughout most of the United States.

Using A Tax Rate Of Zero

It is not recommended that you set up tax tables with tax rates of 0% to handle tax exempt accounts or documents. Instead, use the No Tax button in the document totals area of the document or enable the Tax Exempt feature in the customer's account. However, if you want to track a certain category of sales, you can use a tax table or tax code, which is assigned in the customer account or on individual documents.

Notes: If you set up a 0% tax rate, the amounts will still be considered taxable although no tax will be calculated. This approach complicates the figuring of sales tax, as these sales are considered taxable with a zero rate tax.

Showing More Than One Tax Rate on A Document

When indicating more than one tax rate on a document, check the Show button for each separate tax you wish to display. Electing this option also applies to receipts printed with the optional receipt printer. If there are additional taxes that are not marked as shown, they are grouped together in the standard tax amount.

Multiple tax lines are computed for each document when the document is printed, and are not saved with the document, meaning that if you print an old locked document and the tax rate is different from when the document was last printed, the tax amounts for each line will not be correct although the total amount of tax will be.

Showing Taxes With Different Names

In Document Preferences, there is a Print Tax Name From Table button in the Page panel. This prints the table's description name on the document where Tax is normally displayed. Enable this feature to print the descriptions from the tax table.

Printing the Tax Rate On Documents

To display the actual percentage on a document, type the tax rate in as part of the description.

Hiding Taxes in Prices

If you decide to hide tax, make sure that you only have one tax table (PrintSmith has not been tested using multiple tax tables and hidden tax). You must enable the Build Tax In Price option so that prices are consistently shown with tax. In document preferences, you must:

- Enable the Remove Tax Line option in the Page panel.

- Enable the Hide Tax In Line Items option in the Body panel.

In Preferences > POS > Receipts, you must also enable the Hide Tax In Line Items option so the receipt printer also hides tax in prices when it prints.

Canadian Shipping Taxes

Some provinces in Canada tax shipping differently. To support this, a special Canadian Shipping check box has been added to the tax table. Since it is somewhat unusual, it only appears if you hold down the <option> or <Alt> key when clicking Sales Tax on the Pricing menu. You must also select Tax Shipping in the Sales Tax window to use the tax. The first tax line is then added to the shipping cost.

Preferences

The Preferences panel is where default rules are established. Preferences define: pricing, customer provided stock, blank stock, global paper markups, quantities for price lists, international settings (currency and numbers), etc. Preferences also includes many other system defaults. It is recommended that you review all of the Preferences before you start using PrintSmith. Not all preferences are applicable to your business. However, you should consider each preference and its effects on your PrintSmith system. Preferences can be changed anytime.

Note: Some preferences are global while others are local preferences. This differentiation is only relevant in multi-user systems. Global preferences affect the master and all connected workstations. Local preferences can be modified and impact individual workstations.

To open the Preferences window, select **Admin > Preferences** from the main menu. Preferences are grouped into the following four areas: System, POS, Estimator, and Accounting.

Defining System Preferences

These system defaults establish rules about behavior, networking, company information, numbers, alternate currency, and international settings.

Appearance

The Appearance preference panel controls font usage and other aspects of PrintSmith's overall appearance.
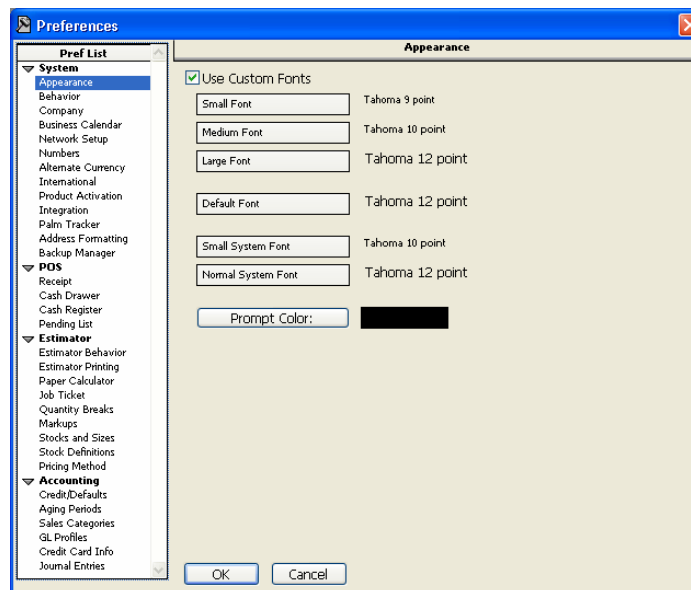
Some customization of PrintSmith's general appearance is possible by selecting the fonts and colors used. In some countries, it is desirable to use fonts other than the standards in order to provide characters or alphabets that are not supported by the underlying operating system.

To reset the Appearance window to its initial settings, hold down the <alt/option> and <shift> keys when clicking on the Appearance item.

The following guidelines have been established for what you can do safely within this window:

• Change the prompts on some edit fields to a different color.

• Change the background color of the Account Info window when it's opened with a Prospect Account selected.

• Change any of the fonts to a different font of the same size.

What you should **NOT** do:

• Change a small font so it is bigger than a larger one. (Same size is OK.)

• Change fonts to much larger sizes, (e.g. changing the Small Font to 18 points).

• Make dramatic changes to fonts while other windows are open.

Behavior

In the Behavior panel, you can automatically invoke the User Log In command to sign people off the system in either a timed increment or upon execution of a Post command (cash register posting). Elimination of some warning messages is suggested after you have used PrintSmith for a while and no longer need these messages.

Note: Having PrintSmith quit at a certain time, ensures that a complete backup is performed on a Windows master.
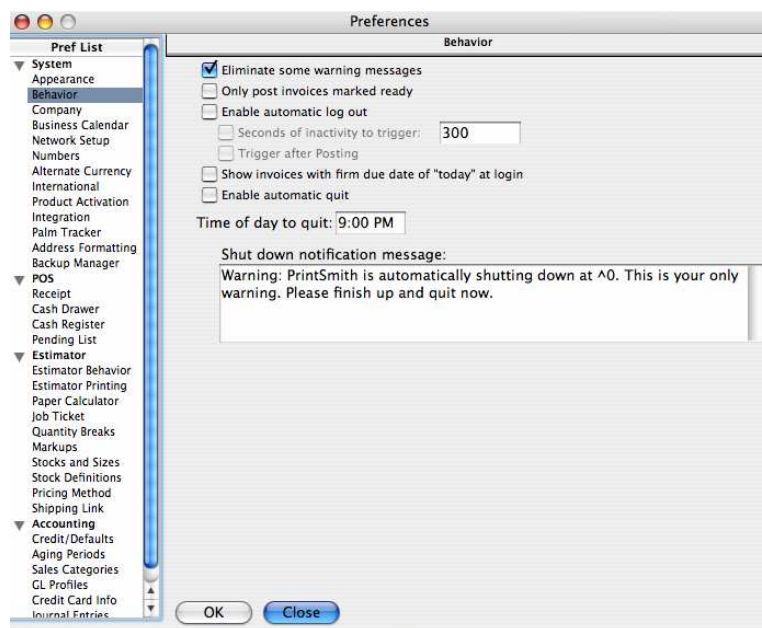
Only Post Invoices Marked Ready

When this option is selected, only invoices that are marked "ready for pick up or delivery" in the location window can be picked up.

Eliminate Some Warning Messages

Warning messages that are useful when first using PrintSmith may become unnecessary in time. Enabling this feature eliminates the following most common messages:

- Warnings at start-up about dates and doing daily closeouts.

- Warning that documents and job tickets have already been printed.

- Warning that the document is locked.

- Asking if you want to print job tickets for invoice level charges (it always prints them).

Initialize Printer Before Each Use

This option resets the printer settings between items to be printed. If it is not enabled, the printer setting remains from the last item printed.

Note: This option applies to PC only.

Enable Automatic Sign On

This option ensures that everyone is signing in and that only the appropriate people have access to Admin functions (based on user security set up). When enabled, there are two features:

- **Seconds Of Inactivity To Trigger** - This option sets an inactivity timer. Enter the number of seconds for the timer to run. If the timer expires without any activity (even moving the mouse), the Log In window displays. The standard value is 300, giving 5 minutes of inactivity. You can change it to anything greater than 4 seconds.

- **Trigger After Posting** - This option opens the Log In window after a transaction is posted in the Cash Register. This is useful for ensuring that each counter person logs in with his/her own user ID for each transaction.

Show invoices with firm due date of "today" at login

If this option is selected, the Work In Progress report is displayed upon login when there are pending items that have firm due dates that are the same as the date you are logging into PrintSmith.   All pending items with Firm Due Dates are displayed in chronological order.

Enable Automatic Quit

The Enable Automatic Quit option is useful as a safety feature to prevent access to the system after business hours and ensures that backups are always complete. We have found that on Windows, many backup programs are unable to back up all files if PrintSmith is running. Enabling automatic quit with a shut down time solves this problem.

Time of Day to Quit

Enter the time of day for the system to shut down. Prior to shutting down, all users are notified of the impending shut down and given time to save their work.

Shut Down Notification Message

Enter the text of the message you want sent when PrintSmith is shut down. The standard text contains two characters "^0" which are replaced by the shut down time entered in the Time Of Day To Quit field. You can enter characters in as many times as necessary or leave them out entirely.

Note: Shut Down Notification is a local preference.

Company

The Company panel is used to enter your company information. PrintSmith uses some of this information as the remittance address in the statement generator. It is also used as the *From* address in the Delivery Ticket.

Note: Company is a global preference that is established at the master only.

Business Calendar

The Business Calendar panel allows for a fiscal year or a calendar year. Additionally, work days can be set.
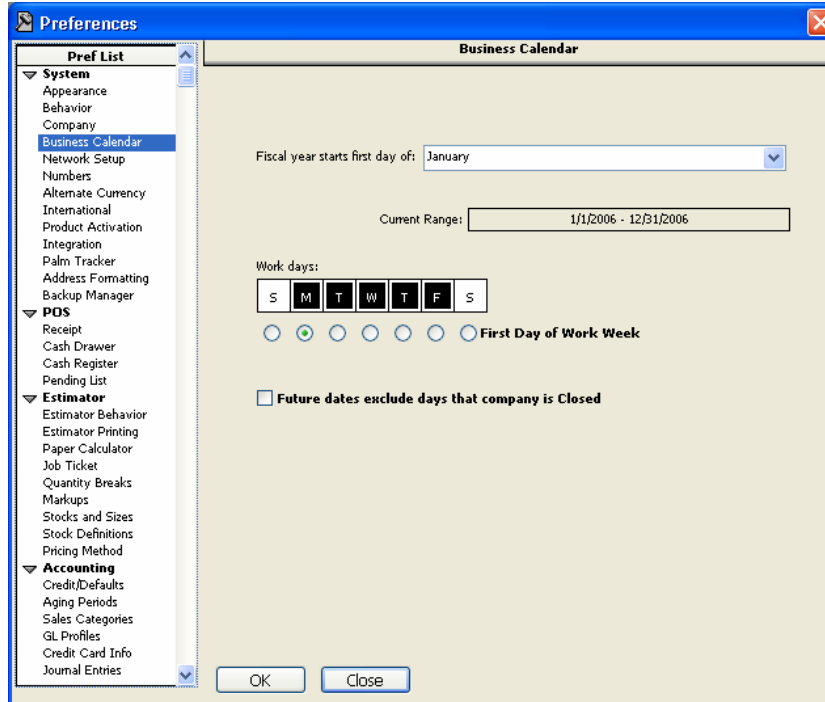
Fiscal year starts first day of

Select a month from the dropdown list. This sets the current range of the fiscal year.

Current Range

Based on the month selected, the range for the fiscal year is displayed.

Work Days

Select work days by clicking on the days of the week. Selected work days are displayed in black.

First Day of Work Week

Use these buttons to set which day is the first day of the work week for your organization. This option has future localization implications.

Future dates exclude days that company is Closed

Select this option to have job time estimates calculated based only on work days.

Network Setup

The Network Setup panel determines how your WorkStations communicate over the network. See the *Installation Guide* on networking for more detail on which protocol would be best for your operation. In a stand alone environment, select the Disable Networking option.
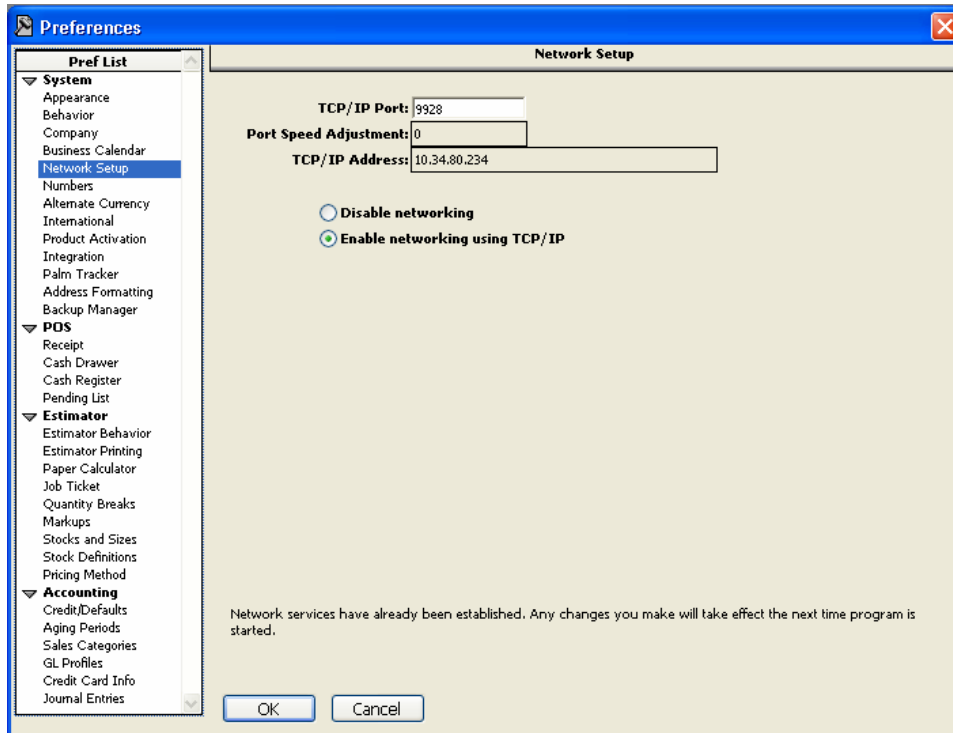

By default, the number in **TCP/IP Port** is the same as your PrintSmith serial number. If you receive a message on startup about a port conflict, you can change the port number in this text box. Port numbers can be in the range of 1 through 65535. An edited port number will appear on this panel as underlined italic.

Note: Network Setup is a local preference.

Numbers

Unless you are outside of the United States, you most likely do not need to make any changes to these variables. If you need to make changes, please refer to the *PrintSmith Reference Guide*.

Generally, the Always Round Down and Round Tax Up settings are off.
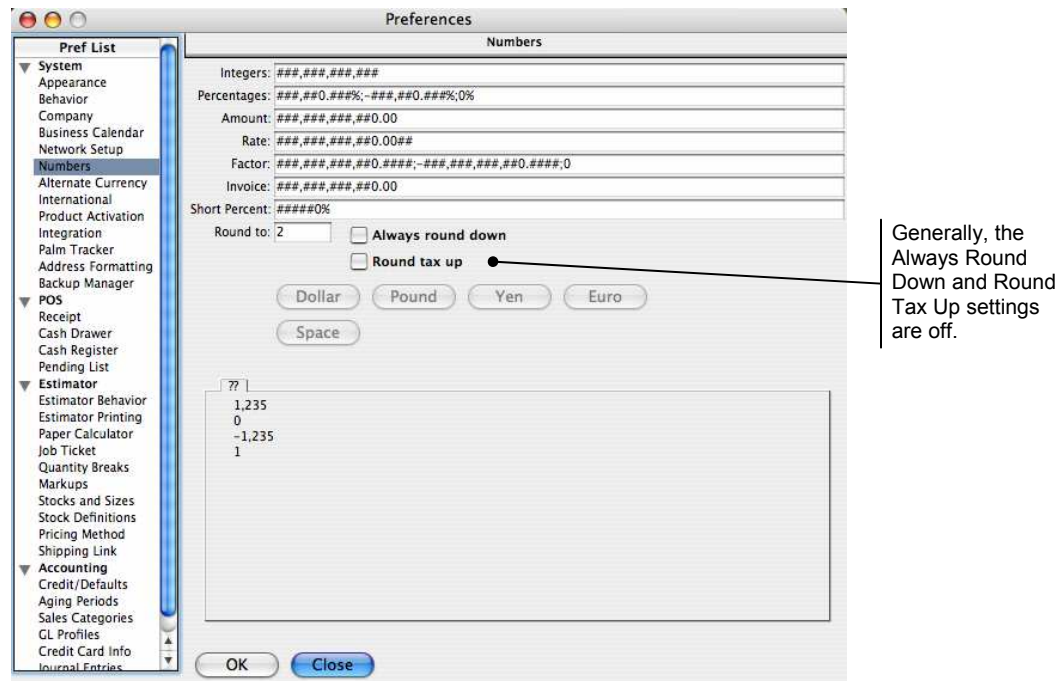
There is an option to **Round tax up**. Generally, this option should remain off. The only case where we recommend enabling this option is in the state of Florida, where they have implemented a sales taxing system that can not be calculated by a formula but must use a table to look up actual tax amounts. The closest we could get to exactly matching their system by formula (based on the State of Florida tax departments' unofficial recommendation) is to round all taxes up.

Note: Numbers is a global preference that is established at the master only.

Alternate Currency

The Alternate Currency panel allows you to set up and use another currency system. It was created primarily to support the European Common Market currency standard, the Euro. The alternate currency system affects invoices, estimates, statements and receipts printed with the receipt printer.

Unless you are in the European Community, you most likely do not need to make any changes to the default variables.
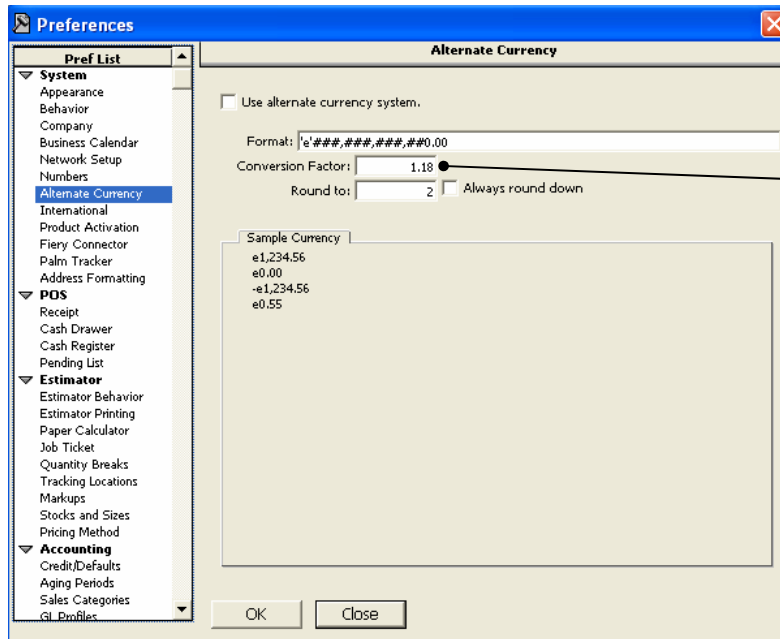
Enter the conversion factor to ensure your system is reporting published conversion rates.

Use Alternate Currency System

When enabled, all receipts and amounts on invoices, estimates, and statements display the base currency amount and the alternate currency amount. For receipts, the alternate amount is always printed below the base currency. For documents, you can place the alternate currency in to a separate column or use the same method as the receipt printer.

Format

In order for the alternate currency to make sense, it must be formatted properly. In the example above, the Euro dollar sign (e) was added to the beginning of the format.

Note: The Euro sign is surrounded by single quotes. As long as the symbol is surrounded by single quotes, it can be placed any where in the format text.

Conversion Factor

The conversion factor is a simple multiplier. The base currency amount is multiplied by this exchange rate to generate the alternate currency amount.

Round To

If the base currency varies widely from the alternate currency (a very large exchange rate), you may wish to change rounding for the alternate currency. To change rounding for the alternate currency, enter the number of decimal places to round to. A negative number rounds up from the decimal point. For example, "-2" rounds to the nearest 100 units.

Always Round Down

Enable this feature if you always round down (removes excess digits and replaces them with a zero). For example, if rounding to 2 decimal places with this option on, 1.991 and 1.999 both round to 1.99. Whereas if the option off, they would round to 1.99 and 2.00.

Note: Alternate Currency is a global preference that is established at the master only.

International

The International panel is used for countries other than the United States of America.
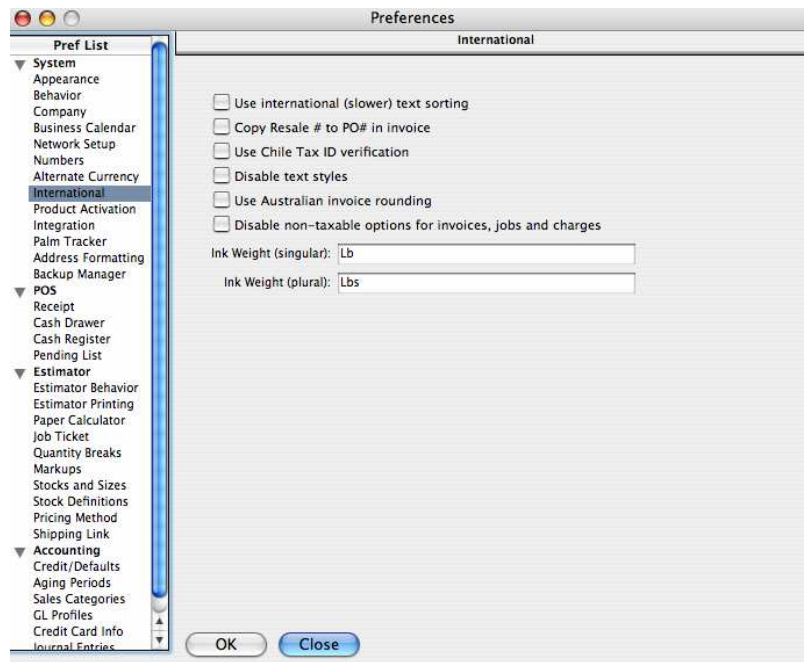
Use International Text Sorting

The Use International Text Sorting option enables a sorting method that considers diacritical marks and other language specific constructs and glyphs when sorting. Although more accurate, it is much slower and should only be enabled when needed.

Copy Resale # to PO# in Invoice

The Copy Resale Number to Purchase Order Number in Invoice feature could be useful as a tool for storing contract numbers or long standing purchase orders in the customer account and automatically displaying them on invoices and estimates.

Use Chile Tax ID Verification

In order for PrintSmith to be used in Chile, it must verify tax numbers, which are required on all invoices. When the Use Chile Tax ID Verification is enabled, PrintSmith enforces a specific format for the Resale ID and performs a special Modulo verification. PrintSmith reports the results of the Resale number entry as a good or bad Modulo.

Note: Use Chile Tax ID Verification is a global preference that is established at the master only.

Disable Text Styles

In order to support languages such as Portuguese, Polish, Japanese, Chinese, and Korean, where text styles such as bold and italics can render text unreadable (especially in smaller fonts), an international preferences panel is available. This preference panel disables all text styling in PrintSmith. When enabled, all text styling instructions are ignored. This includes user definable font settings. Select the Disable Text Styles option to disable styles such as bold and italics.

Note: The Disable Text Style is a global preference that is established at the master only.

Use Australian invoice rounding

Select this option to round to the nearest nickel for cash transactions. Checks and credit card charges will remain in pennies.

Disable non-taxable options for invoices, jobs, charges

Selecting this preference disables the taxable checkbox in the Invoice, Estimate, and Charge windows. This option is not intended for domestic use.

Product Activation

The Product Activation panel is used to activate optional PrintSmith products like Integrated Credit Card Processing and the Tracker Module.
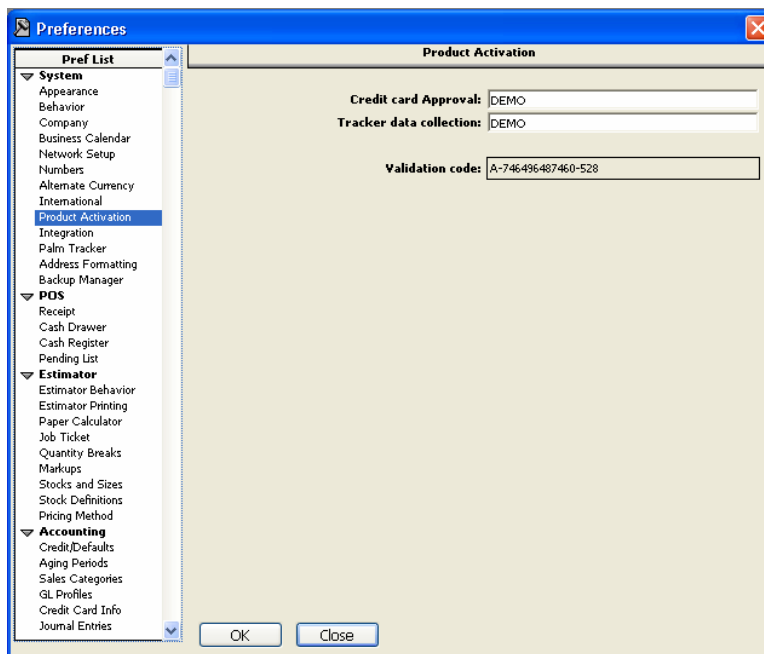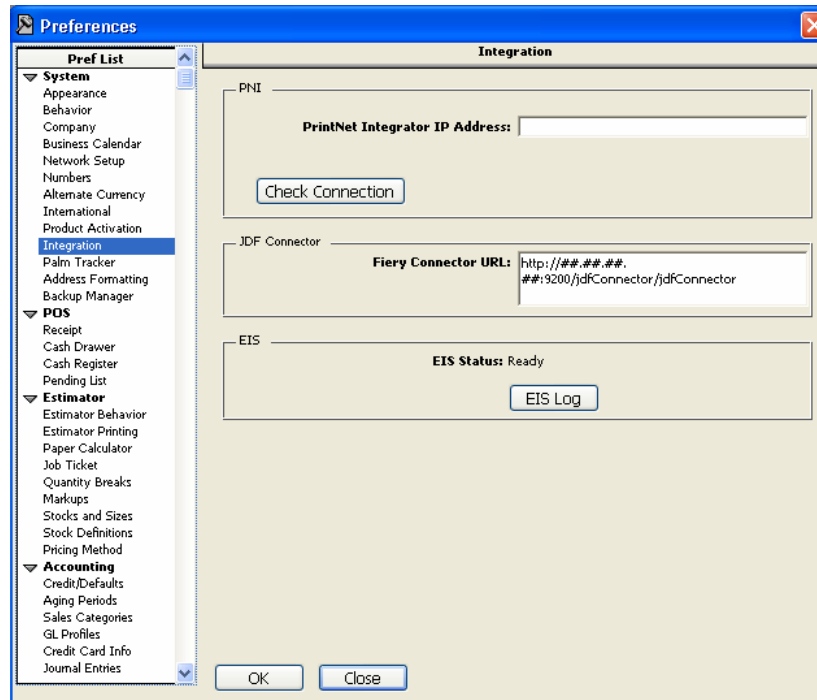
Integration

The Integration panel supports the EFI integrations, including the Enterprise Information System (EIS) application, the PrintNet Integrator (PNI) and JDF Connector integration.

EIS is a tool for graphically visualizing and interacting with your print MIS data. If EIS integration is configured, the EIS Status will be Ready.

PrintNet Integrator IP Address

This is the IP address of the machine on which the PrintNet Integrator has been installed for your shop. Do not include the port # in the field.

Fiery Connector URL

This is the address to which all Fiery messages are sent. Use this format:

http://##.##.##.##:9200/jdfConnector/jdfConnector

EIS Log

EIS pools PrintSmith for database updates. Click to view a history of items imported from PrintSmith.

Note: PrintSmith must be restarted for the Fiery Connector settings to take effect. Verify communication with the PNI in **EFPLA_Log.txt** in the root or archive directory.

Palm Tracker

The Palm Tracker panel supports the Symbol Palm Pilot with integrated bar code scanner in PrintSmith for updating the locations of jobs. To use it, you should install the Palm Desktop (or at least the HotSync manager portion) on a computer with either the PrintSmith Master or WorkStation. It could also be installed on a machine without PrintSmith as long as this location is available on the desktop of a machine with PrintSmith.
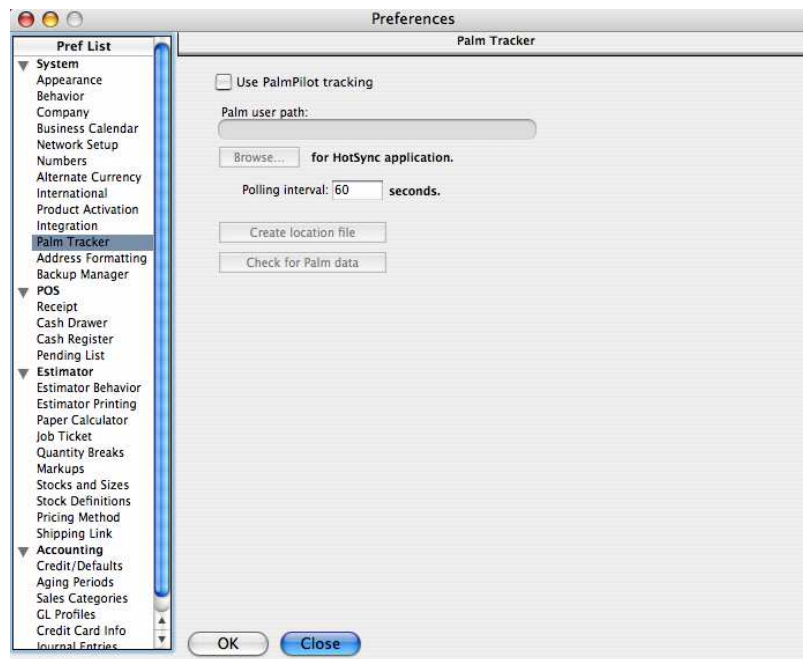
This window specifies the location of the HotSync files and the frequency with which you want PrintSmith to check for changes. Once a schedule has been set, it is automatic; any time you perform a HotSync, the scan data is loaded into the location you specify, PrintSmith reads it automatically and updates the pending list with the new location information.

Use Palm Pilot Tracking

This checkbox has no direct affect on whether you can use your Palm units. It controls whether PrintSmith checks for any HotSync data.

Palm User Path

The Palm User Path field shows the location that PrintSmith checks for HotSync Data. It must be set after you have installed the Palm Desktop software.

Browse

Use the Browse button to locate the HotSync Application. PrintSmith uses this location to find HotSync data used to update job locations.

Polling Interval

This value is the time (in seconds) that PrintSmith should wait before checking for HotSync data. We recommend a minute as the minimum value. Setting it too low can seriously degrade network responsiveness and overall system performance.

Create Location File

If you want your Palm units to display the location of the job, you need to transfer the location information to each of them. This button prepares a file and sets it up to be transferred to each Palm unit the next time a HotSync is performed.

Check for Palm Data

PrintSmith checks for Palm data at the polling interval you have specified. Clicking this button immediately checks for new data regardless of polling interval.

Location Log

When a location is updated, a log entry is made which records the new location along with the date and time of the change. Report Writer is required to generate reports using this information file.
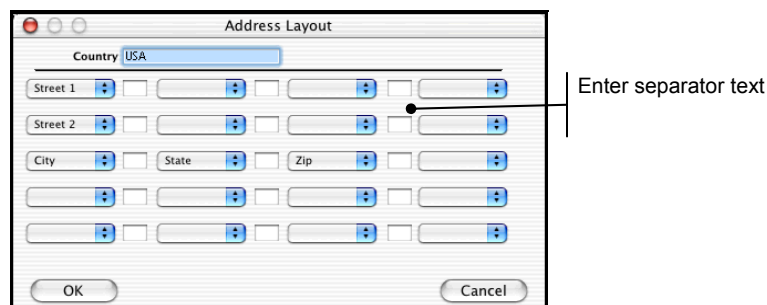
Address Formatting

The Address Formatting panel is used to control the format of addresses.
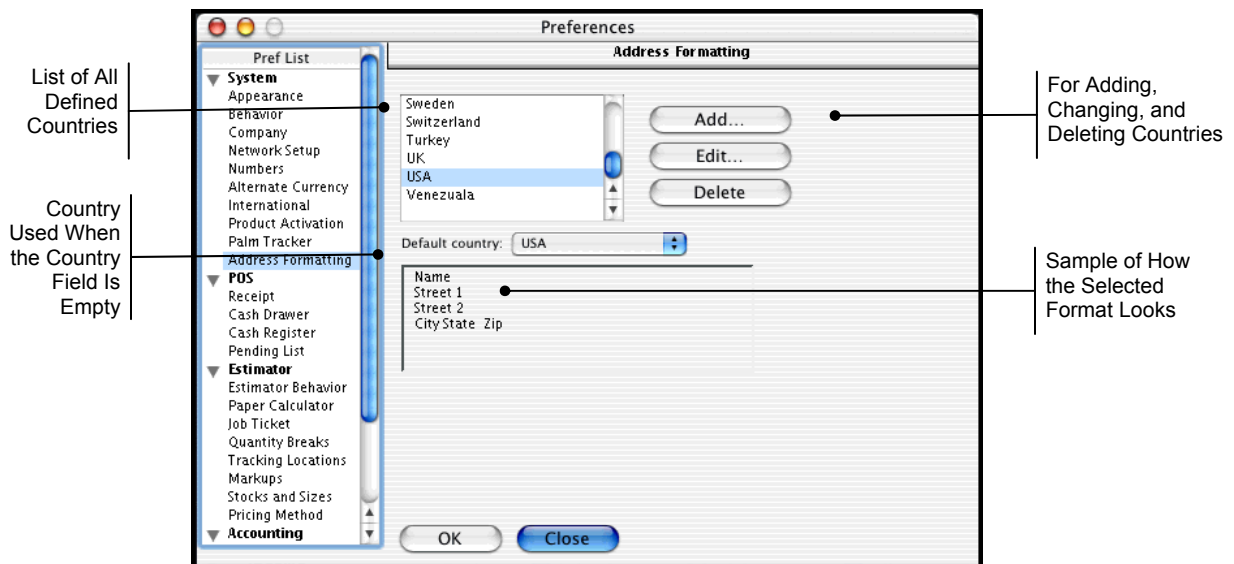
The data in this window is stored in the Country table and can be modified to some degree in the Table Editor. Since this is based on a table, there can be at least 100 separate country definitions. Each country has an address layout, which is controlled using this layout editor.

To use the layout editor, click the **Add** or **Edit** button. The Address Layout window opens.

Each **row** represents a possible address line. Each **column** represents address elements that can be placed on each line. Between each column is an edit field where you can enter up to 2 characters of separator text such as a space or a comma with a space. If you do not enter any separator between address elements on the same line, there will not be any separation.

All of the toggle switches have the same pop up menu containing an empty entry, followed by entries for all the possible address elements: Street1, Street2, City, State, Zip, and Country. All fields are optional. You need only specify the ones you want used in the address format. Separators are only used when there is at least one adjacent element being used. Each address element can be specified only once - if you choose an element that has already been selected, the new selection is accepted. The rest of the layout displays only one of each address element.

Backup Manager

The Backup Manager performs automatic or on-demand product backups while PrintSmith is running. It is recommended that you back up to a hard drive on your PrintSmith computer or network then perform a tape or CD backup of that drive or directory.

To schedule automatic backups:

1. Select **Admin > Preferences Backup Manager**. The Backup Manager panel opens.
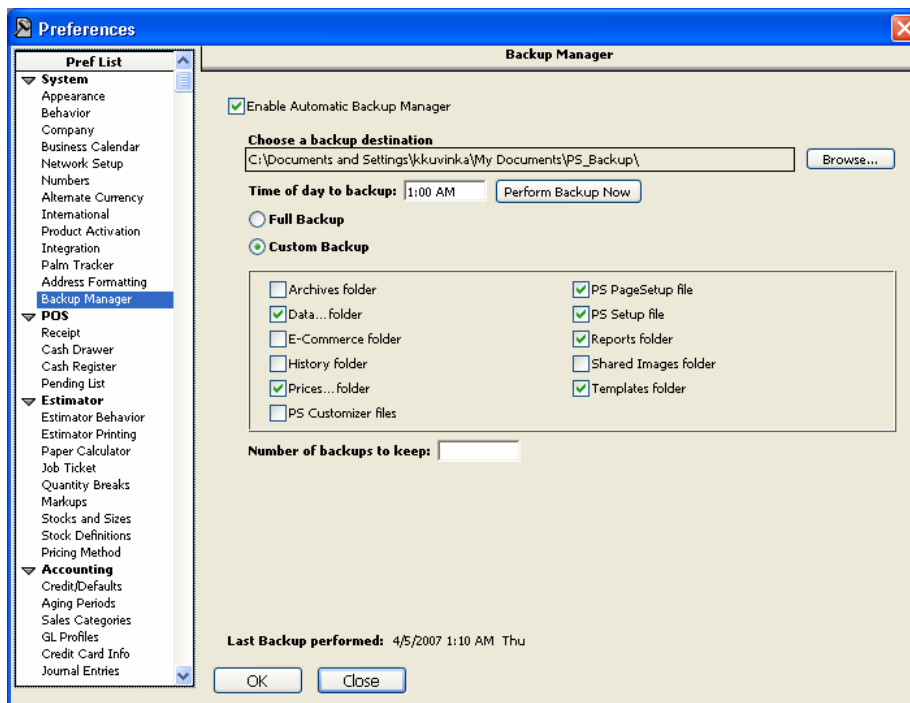
2. Select **Enable Automatic Backup Manager**.

3. Click **Browse** to set the drive and directory. PrintSmith automatically adds a PS_Backup subdirectory to the directory you choose.

4. Enter the **Time of day to back up**, and type **AM** or **PM** (military time is automatically converted).

5. Select **Full Backup** or **Essentials Backup**. *We recommend that you always perform a full backup*. However, for essential backups, at the minimum you must select **Data folder**, **Prices folder**, and **PS Setup file** (which contains your security information).

6. Enter the **Number of backups to keep**. PrintSmith will save this many backups before it starts deleting them.

7. To perform an on-demand backup, click **Perform Backup Now**. PrintSmith must be running, but no activity is permitted. Users logged in at installations other than the Master will be locked out of the product in ten minutes. You can stop this from the Master Workstation. However, if a user has an open document open that has not been saved, the backup will not occur until the user performs a Save, Don't Save, or Cancel. The backup then happens immediately.

> **Note:** Last Backup performed information appears at the bottom of the panel.

> **Note**: Always contact PrintSmith Support personnel before attempting to restore your PrintSmith data.

Defining Point of Sale (POS) Preferences

POS or Point of Sale functions are controlled by the following preferences.

Receipt

The Receipt panel defines the message text and numbering sequence for the optional receipt printer. Enter your specific customer information if you are planning on using PrintSmith's optional receipt printer. This panel is used to set the header and footer messages and where you set up receipt numbering and tax options.
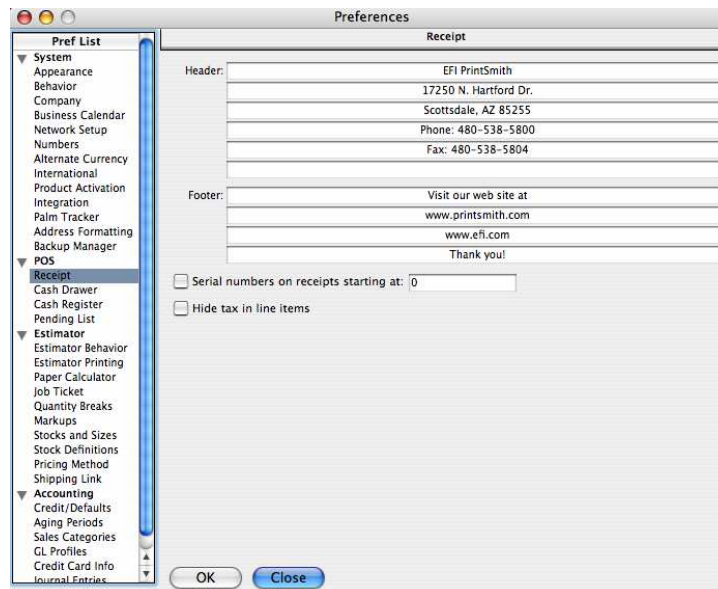
Header

Enter the text to print at the beginning of each receipt.

Footer

Enter the text to print at the end of each receipt.

Serial Numbers on Receipts Starting At

Enabling this feature prints a serial number on the receipt. The edit field at the end of this function shows the serial number last used to print a receipt. Changing it starts a new sequence.

Hide Tax in Line Items

Enable the Hide Tax in Line Items option only if you are setting up the entire system to include tax as part of the price instead of showing tax separately.

Note: The Hide Tax in Line Items is a global preference that is established at the master only.

Cash Drawer

If you have the optional receipt printer and/or cash drawer, the Cash Drawer panel is where they are enabled. Additionally, you can set these options locally at each computer enabling local preferences as necessary.
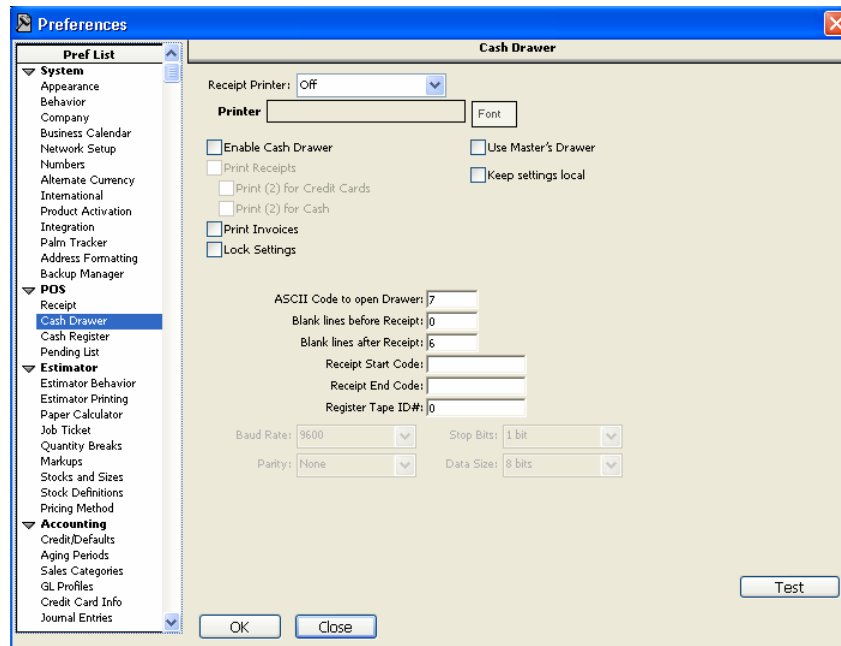
If you have a cash drawer and receipt printer attached to a computer, you must select a *Receipt Printer* option from the dropdown list and check the *Enable Cash Drawer* option.

Selecting the *Print Receipts* and *Print Invoices* options sets the default in the cash register to print either document.

If these devices are connected to a workstation, select the *Keep Settings Local* option because the settings may change during a pricing update.

All other options should work as set by default.

Note: This is a local preference established at each workstation, if the option is enabled. If a Cash Drawer and Receipt Printer are connected to the workstation then the Keep Settings Local option is recommended.

Cash Register

The nine department keys in the Cash Register window are defined in the Cash Register Preference panel. Enter a name, followed by the sales category in which you would like to track those sales. The Rate field is designed for a flat rate. This rate is a default which can be overridden when the sale is entered in the Cash Register. Only one flat rate can be entered.
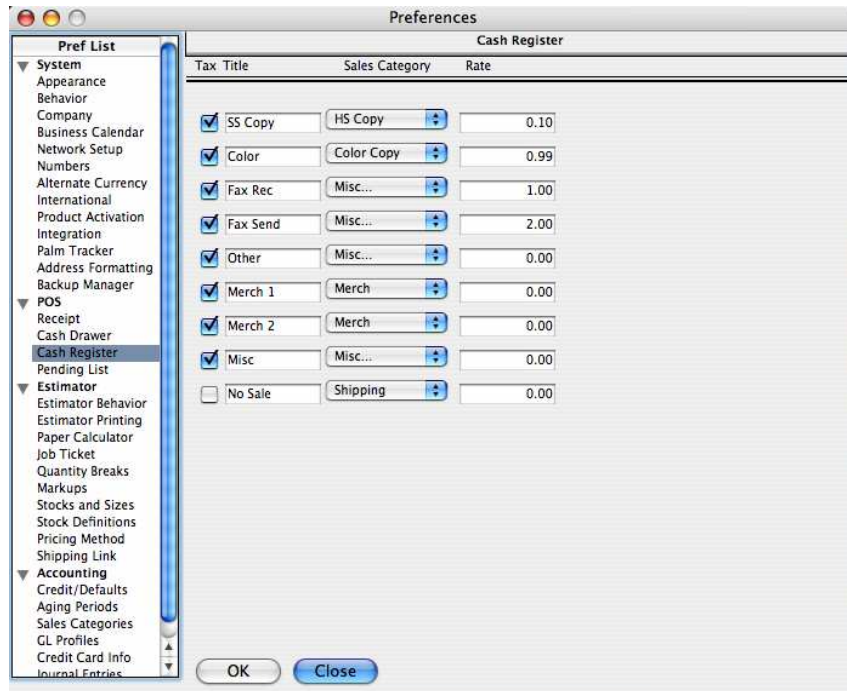
Note: The Cash Register is a global preference that is established at the master only.

Pending List

The Pending List panel is used to customize the appearance of the pending list as it displays in the Pending Document window. You can experiment with these settings as much as you want; however, they are only updated when the Pending Document window is re-opened. Before changing these settings, be sure to close the Pending Document window.
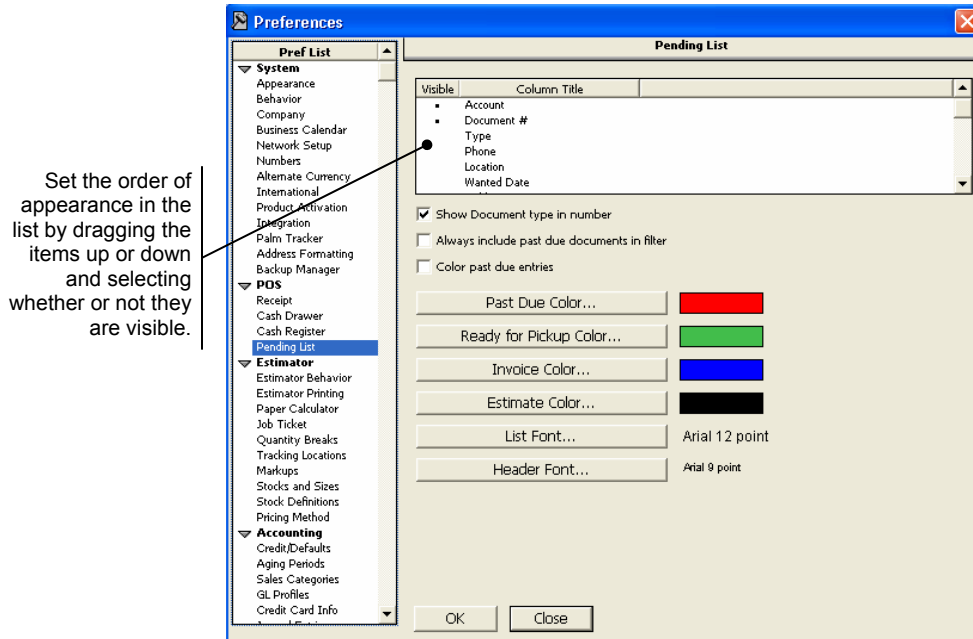
Set the order of appearance in the list by dragging the items up or down and selecting whether or not they are visible.

Column Setup

You can change the order in which the pending list columns display:

- Change the column order in the list by drag and dropping the items
- Double-click to change items from visible to not visible

Show Document Type in Number

Enabling this option includes "E#" as part of the document number for Estimates. If this option is disabled, the only way to determine the document type is to show the Type icon or note the color of the item. Invoices are shown in blue unless *Past Due* or *Ready for Pickup* coloring is on.

Always Include Past Due Documents in Filter

Enabling this option shows past due jobs in varying filters.

Color Past Due Entries

Enabling this option displays all late documents in the selected color. Those are documents where the Wanted By date and time have expired, unless marked ready for pick up or delivery in the Location function.

Past Due Color

Change the color for displaying past due items.

Ready for Pickup Color

Change the color for displaying items ready for pickup.

Invoice Color

Change the color for displaying Invoices on the pending list.

Estimate Color

Change the color for displaying Estimates (Estimate Color) on the pending list.

List Font

Change the font specification for the pending list display here.

Header Font

Change the font specification of the column titles in the pending list window here.

Note: The Pending List is a local preference, meaning every computer can have a different looking pending list on a multi-user system.

Defining Estimator Preferences

This group of preferences focuses on how the Estimating engine manages sizes, defines product codes, organizes stock listings, and displays quantities.

Estimator Behavior

The Estimator Behavior panel determines such things as whether or not to close the source document after copying, and whether or not the paper calculator will open prior to the job menu on all printing, copying, and blank jobs.
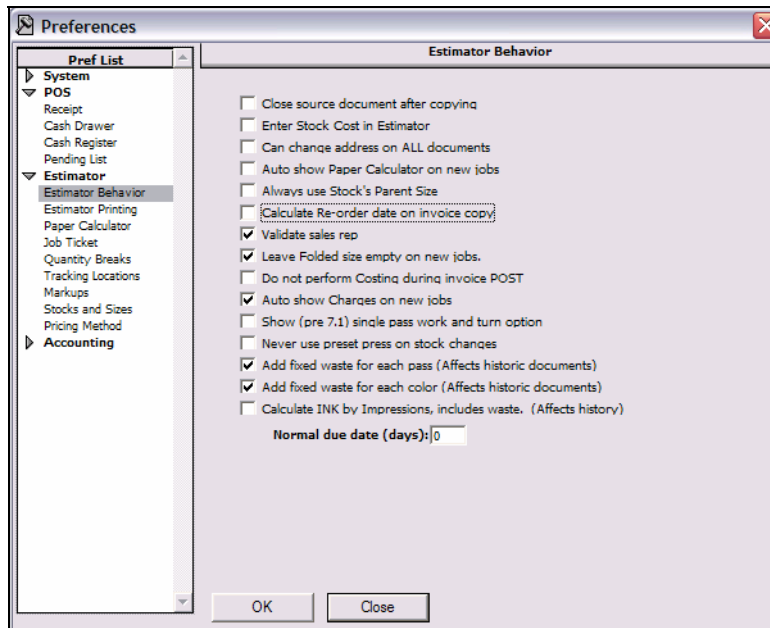
Close source document after copying

Since multiple document windows can be opened at one time, you have the option to have the original document close after is has been copied, allowing you to work with the newly created document. To enable this option, check the Close Source Document After Copying box.

Enter Stock Cost in Estimator

When enabled, the job window displays fields for the stock cost and units when using the Special Order and Customer Stock pricing methods. If the option is turned off, the stock cost and units fields are not shown in the Special Order job window.

Can change address on ALL documents

When you select the account, the customer name and address field is editable in order to enter the customer's information. This option allows you to change the customer name and address on all documents. When the document is filed, the pending list displays the actual company name from the selected account. When it is printed the invoice address displays the information you have entered or changed.

To use this effectively, set up your documents to display 2 addresses, the Invoice and Statement addresses. In effect, the Invoice address in the document becomes a shipping address and the Statement address in the customer account is used as the billing address. If statements are sent to a third address, create another customer account with the correct statement address and use it as a Master Billing account for statement generation and posting payments.

Auto show Paper Calculator on new jobs

When checked, the Paper Calculator opens after the stock is selected if the job method is printing, copying, blank stock, or list.

Always use Stock's Parent Size

When this setting is enabled, the Parent Size field is locked on jobs where stock is selected from the stock database. Generally, we recommend enabling this setting to prevent the changing of the stock's parent size without changing the cost of the stock.

Although PrintSmith handles changing the Parent Size as an override, it makes sense to use the defined stock size if one is available for stock ordering. Otherwise, you could end up with a stock order report with multiple sizes for the same stock number.

Calculate Re-Order date on invoice copy

When this setting is enabled, PrintSmith looks for an invoice from history that is identical to the new invoice and calculates a date based upon the time elapsed between the new invoice and the invoice from history. This date is placed in the reorder field on the new invoice. Typically, this date is used to reorder every thirty days, sixty days, or ninety days, and so on.

Validate sales rep

When enabled, this setting notifies the user when a document, which contains a sales rep that has been removed from the system, is copied to a new document. You are prompted to select a Taken By name.

Leave Folded size empty on new jobs

When enabled the folded size is not entered in a job. When disabled, the folded size defaults to the finish size.

Do not perform Costing during invoice POST

Generally, this option is disabled to provide for automatic costing at pickup. If enabled, then only costed documents have costing information. Costing can always be updated or changed on any document.

Auto show Charges on new jobs

Auto Show Charges option allows you to have the Charges window automatically displayed to the user after they tab off of the description field the second time. This feature is designed for new users who may forget to view the charges.

Show (pre 7.1) single pass work and turn option

Enable this option to show the single pass work and turn option.

Never use preset press on stock changes

Enable this option to never use preset press in Stock Definitions on stock changes.

Add fixed waste for each pass (Affects historic documents)

Enabling this option adds fixed waste for each pass.

Add fixed waste for each color (Affects historic documents)

Enabling this option adds fixed waste for each color.

Calculate INK by Impressions, includes waste. (Affects history)

When enabled, ink is calculated by impressions with waste included.

Note: Please be aware that any changes to the previous three options affects historical documents.

Normal due date (days)

PrintSmith calculates an automatic due date if the number of future days from the date of the order is entered in this field. This feature is also valuable as an automatic follow-up date for estimates. If you add 5 days in this field and the 5th day lands on Saturday, PrintSmith sets the due date to the following Monday.

Note: The Normal Due Date is a global preference.

Estimator Printing

The Estimator Printing panel determines if the invoice will close after the job tickets are printed, what the default invoice and estimate will be, and how the payment due date should be calculated.
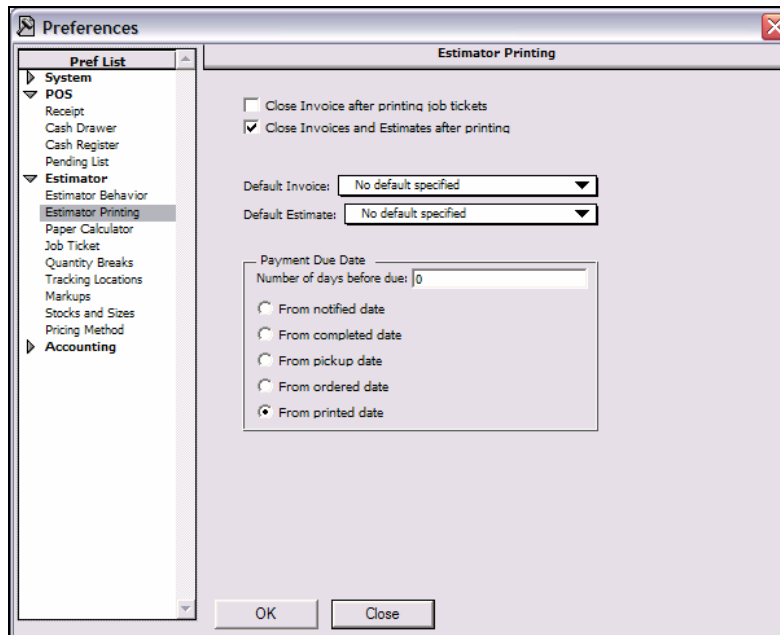
Close Invoice after printing job tickets

Check this box to close the invoice window after the Tickets button has been selected to print job tickets.

Close Invoices and Estimates after printing

This setting determines whether or not an invoice or estimate will remain open after printing. If you want a document to remain open after printing it, uncheck this box.

Default Invoice

Select a document format to use when printing an invoice. If the customer account assigned to the document has a default format selection, the customer setting overrides the system setting.

Default Estimate

Select a document format to use when printing an estimate. If the customer assigned to the document has a default format selection, the customer setting overrides the system setting.

Note: Default Invoice and Default Estimate are local preferences to accommodate differing print drivers, printers, and platforms.

Payment Due Date

Set the default Payment Due Date to be from a number of days before due, from notified date, from completed date, from pickup date, from ordered date, from printed date. The Payment Due Date appears at the bottom of the Invoice under the Total.

Paper Calculator

The Paper Calculator is used in conjunction with pricing methods that require stock. The Paper Calculator panel allows you to enter default settings for using the paper calculator. These defaults can be overridden when working in the paper calculator itself.
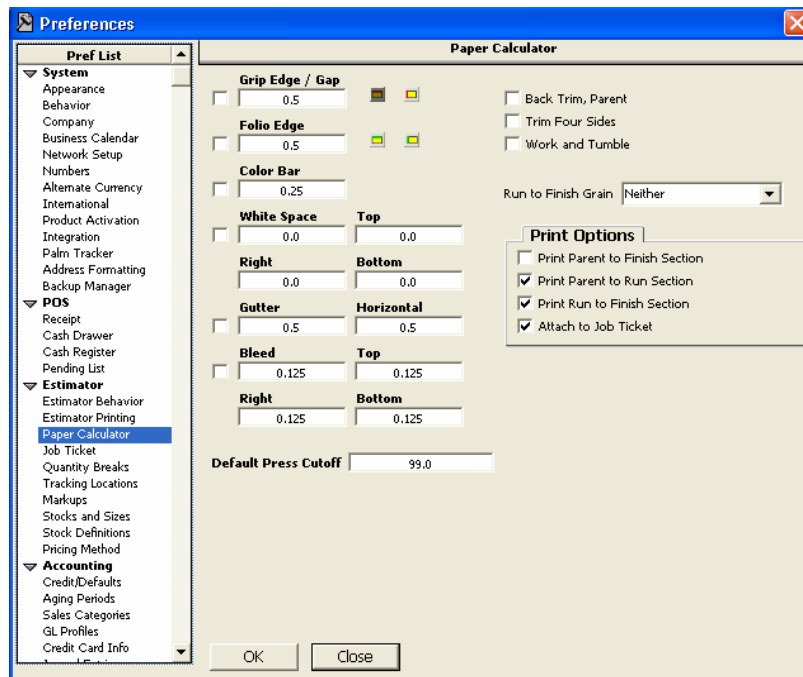
Grip Edge/Gap

This value is the amount of space required on one feed edge of the run sheet for the press to pick up the paper. It may be possible to ignore this due to the placement of the image on the page. So, this option should be enabled whenever needed. The size of the gripper edge normally comes from the Press Definition. If not specified there, the Paper Calculator preference panel is used. This amount can be changed on an individual job in the Paper Calculator window.

Folio Edge

This is the amount of space reserved on an edge of the run sheet for a booklet maker. It is used when folding signatures to offset the imposed image leaving one edge of the folded signature overhanging the other.

The standard size of this edge is specified in this Preference panel but can be changed for any job in the actual paper calculator.

Gutter

This is the space between multiple images on a sheet. The first value is the vertical gutter; the second is the horizontal value. A gutter is most often used to add space in a folded piece.

Bleed

A bleed is a specification that requires an oversize run sheet so that the ink can run off the edge of the final sheet. It generally increases the number of cuts, since the bleed must be trimmed off each finished sheet in addition to cuts needed to separate each image. You can specify the required bleed differently for each edge.

Note: Bleed is a global preference that is established at the master only.

Default Press Cutoff

The maximum value that can be accepted as cutoff length for a printed sheet, Will be used if the press cutoff and stock cutoff definitions are not known. Because the units are also unknown, we recommend that you enter a large value in this field

White Space

The White Space field allows you to define the unused part of the run sheet when the image area is smaller than the run size.

Color Bar Width

A color bar can be added to the to the cut diagram. The Color Bar Width field is used to specify the width to use for the color bar. You can control the edge used for the color bar even if you do not need or want to change the space for a gripper edge. After a job is filed, the settings default back to the Paper Calculator Preferences panel.

Note: This is the only place this value is set. It cannot be adjusted in the Paper Calculator.

Back Trim, Parent

If you plan to trim the edges from all four sizes of the parent sheet, enable the Back Trim, Parent option. It adds four cuts to the parent cut and centers the run sheet in the parent sheet.

Trim 4 Sides

The Trim 4 Sides option is similar to a back trim, except that it is applied to the run sheet. Frequently on large format presses, the entire image is centered on the plate in order to obtain the best ink coverage. After printing, the press sheet is trimmed down to remove the edges and ensures that the sheet is square before any other finishing is performed.

Work and Tumble

Enabling this option changes the cut out diagram for tumbling by showing two gripper edges and by changing the title of the Work & Turn option in the job window to read Work & Tumble. Should the other job specifications support Work & Tumble, that feature is manually selected in the job window.

Except for a possible change in the number of sheets out due to the additional gripper edge, no other change to pricing is made as a result of this. If the other job specifications support Work & Turn, the option can be enabled in the job window to change the way the job is estimated from Sheetwise to Work & Tumble (or Work & Turn if this button is disabled.)

Grain Direction Options

Grain Direction Options

Options	Effect
Neither	Grain direction is ignored and a best fit strategy is utilized without considering the possibility of rotating any sheets.
Match Grain	Grain direction is matched by forcing the calculation to base the sheets out on the order in which length and width are specified. Sheets are never rotated to improve the number of sheets out.
Swing / Combination	This uses a best fit strategy where sheets may be rotated in differing alignments to maximize the number of sheets that may be cut out.

While the accuracy of the diagram and the number of cuts for each sheet is generally quite high, it may not be exactly correct in all circumstances. It is often possible to cut a particular sheet in many different ways to obtain the same results. The paper calculator shows only one way for each combination of sheet sizes and option settings. No allowance is made for the size and capability of the cutter, the operator, the length of the job, or the required precision. Therefore, the number of cuts for the run and finish size sheets should be considered proposals. If you wish, you can change the number of cuts for each sheet by overriding the number of cuts in this window.

Note: The number of cuts calculated in the paper calculator is used for both pre-press and bindery cutting charges. Overriding the number of cuts affects the cutting charges.

Print Options

Change the selections in **Print Options** if you do not want the cut diagram attached to the job ticket, or you want to change what is on the cut diagram. By default, these options are selected:

- **Print Parent to Run Section**

- **Print Run to Finish Section**

- **Attach to Job Ticket**

These options are also selected when you upgrade from a previous PrintSmith version, as this is what was normally printed on the job ticket. **Print Parent to Finish Section** is another option now available to you.

Crouser or List Pricing

When the Crouser or List pricing method is used, the Paper Calculator displays when you pick a stock. The Auto Show Paper Calculator On New Jobs option must be enabled in the Estimator Behavior preference panel for the Paper Calculator to automatically display.
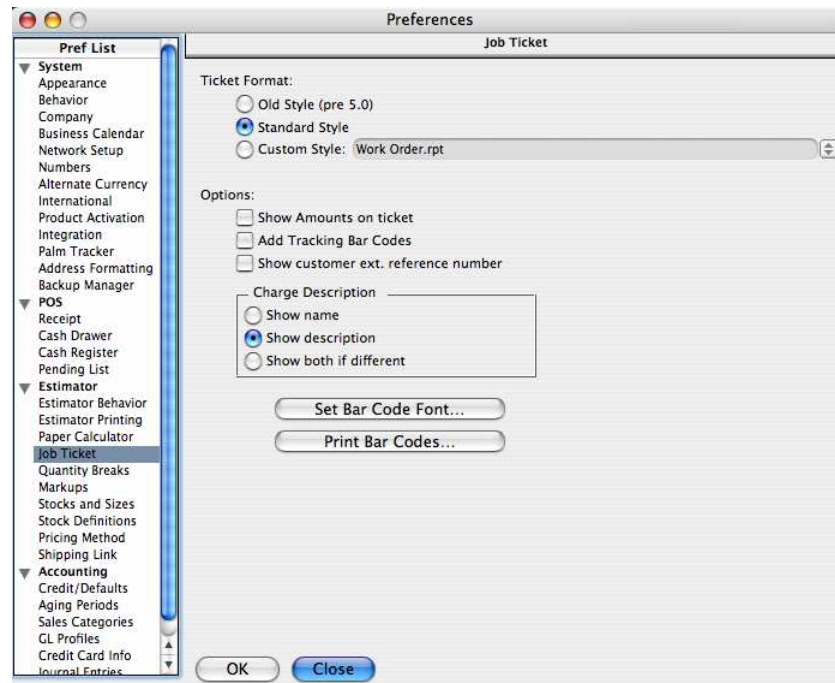
Job Ticket

The Job Ticket panel allows you select your job ticket preferences. You can use either the old style, the standard style, or customize your job ticket.

In order to customize your job ticket, the optional Report Writer must be purchased. Report Writer is the tool used to perform the customizing, as well as to print the custom ticket.

Determine if you want prices to show on your job tickets. You can use the optional bar code tracking system if you have purchased a bar code reader and set a special font.


Custom Style

This window assumes that a custom ticket has already been developed. One of the standard Report Writer reports is a customizable job ticket that is almost exactly the same as the current Standard Style ticket. To use this format as your job ticket, select the Custom Style option, and then select the applicable report.

A list of registered reports opens. Select the Job Ticket report (Job Ticket.rpt).
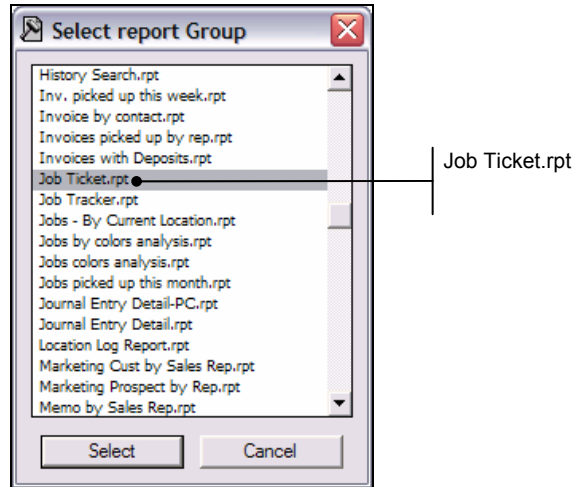
Job Ticket.rpt

Show Amounts on Tickets

When enabled, this feature prints the dollar amounts on the job ticket. When disabled, no prices are shown on the standard job ticket.

Add Tracking Bar Codes

If using the optional bar code reader, you need to enable this option to print the bar code on the standard job ticket. You also need to specify the font in Set Bar Code Font. The optional bar code tracking system allows you to update the status / location of every job in your shop.

Show Customer External Reference Number

This option displays the external reference number in the job ticket header. An external reference number might be an artwork file, an old account number, or any number entered in the customer account.

Charge Description

Charge Description Options

Option	Meaning
Show Name	When enabled shows the Name of the charge on the job ticket.
Show Description	When enabled shows the description of the charge on the job ticket. Users can easily change the description.
Show Both If Different	Shows both name and description if they are different.

Note: Charge Description is a global preference that is established at the master only.

Quantity Breaks

Quantity breaks are a great marketing tool. The quantities entered are used in generating price lists on screen and for printing. You can generate a price list, for any job, with up to 40 quantities. The price list can be presented with price per each or price per thousand. Either way, it is a great tool to up-sell the customer by quoting a lower price per unit. Enter in your favorite quantities. Numbers preceded by a (-) minus sign have a divisional line above them in the price list. A zero in any field ends the list.
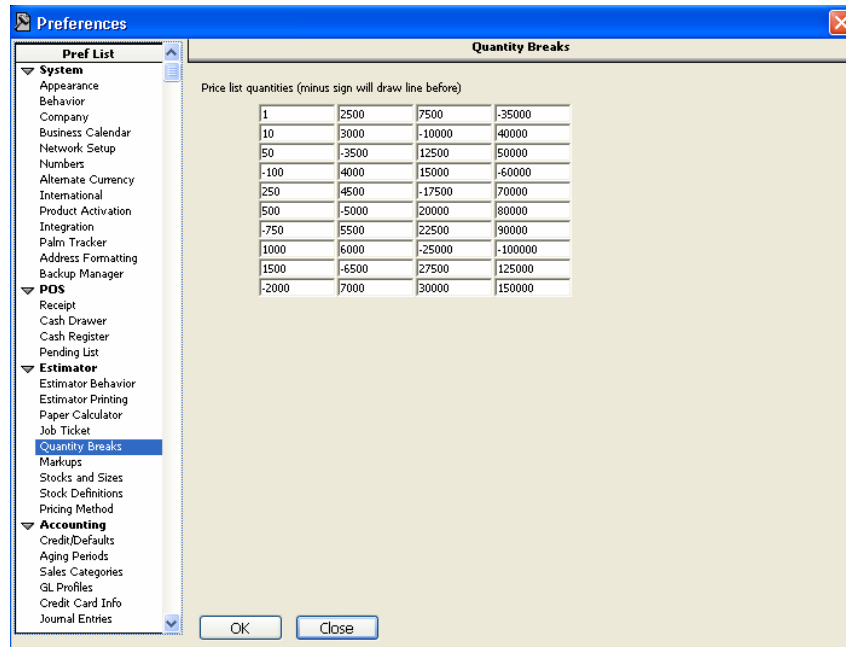

Note: Quantity Breaks is a global preference that is established at the master only.
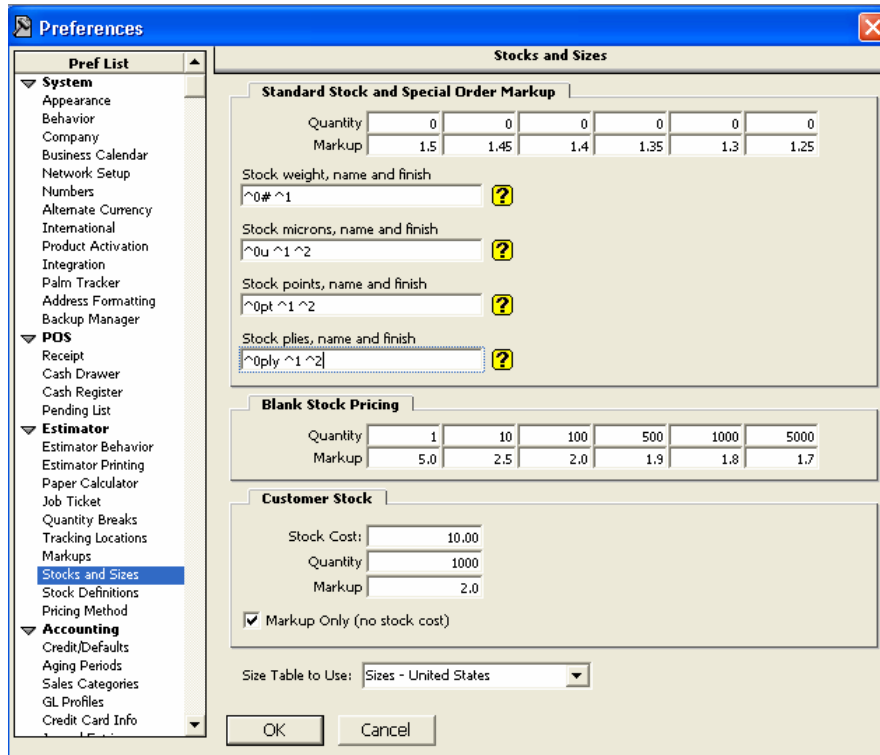
Markups

Markups are variables used in the estimating system. The Outside Services and Merchandise markups are used when in the respective pricing methods. Markups are based on stepped cost amounts. The first amount covers from zero to the specified cost, and the last amount covers anything above the last set cost.
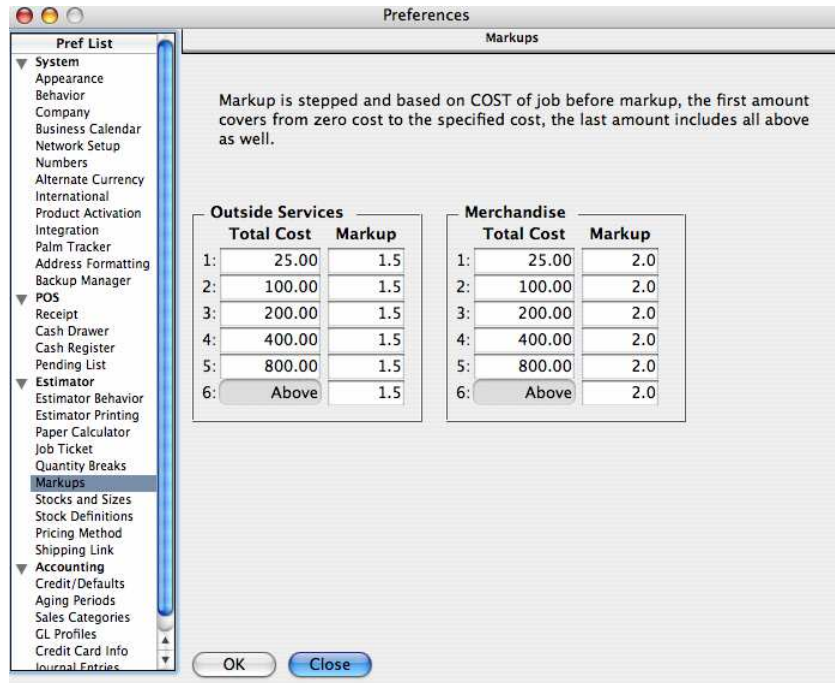
Note: Markups is a global preference that is established at the master only.

Stocks and Sizes

The Stocks and Sizes panel contains settings for In Stock, Special Order, and Customer Stock, as well as blank stock markup and formatting instructions.

Quantity

Use to add default quantity breaks for each default markup used for sheet stock. You can override the quantity breaks in an individual stock definition in the Stock Definitions window.

Stock Markup

The Stock Markup is the default markup used for all stocks unless you specifically override the markup in an individual stock definition. A markup has a greater effect on high priced stocks than low priced stocks.

Blank Stock Pricing

Set your markups for selling blank stock using the Blank pricing method. These quantities display in each new stock definition. However, changing them here only effects new stock definitions and not existing definitions. Existing definitions can be updated manually in each record to reflect new defaults entered or globally using Pricing > Change prices command from the main menu. This command updates the markup and resets the quantity breaks when the Re-Calculate Blank Prices option is enabled in Change Prices and Auto Calculate Blank stock is enabled in the respective stock definitions.

Customer Stock

Enter in default stock cost, stock markup, and in units of for customer provided stock. These defaults can be overridden when entering a job in the estimator.

Size Table to Use

This drop down lists size tables that can be customized in the Table Editor under the Admin menu. These options include metric and conversion tables.

Note:	This is a global preference that is established at the master only.

Stock weight, name & finish

This field allows you to format and display the stock name and weight. This field is based on a concept of a block of text with placeholders for name, weight, and finish. These placeholders are replaced with actual weight, name, or finish when stock is displayed:

- ^0 is the weight of the stock
- ^1 is the name of the stock
- ^2 is the finish of the stock

You have complete control over the contents of the text block. Click the question mark button at the end of the field to see a list of sample formats. Selecting one of the samples inserts the format text into the field.

For example, for 50 pound offset stock, using a weight, pound sign and name format, enter the following:

> *Format:* ^0# ^1
> *Result:* 50# Offset

> Other possibilities:

Format:	^1 ^0# ^2		Format:	^0gsm ^1
Result:	Offset 50# Vellum	**OR**	Result:	50gsm Offset

The resulting format appears on invoices, estimates, and stock order reports.

Stock points, name & finish

This field allows you to format and display the stock name and weight differently for stocks defined by points. This field is based on a concept of a block of text with placeholders for name, weight, and finish. These placeholders are replaced with actual weight, name, or finish when stock is displayed:

- ^0 is the point size of the stock
- ^1 is the name of the stock
- ^2 is the finish of the stock

You have complete control over the contents of the text block. Click the question mark button at the end of the field to see a list of sample formats. Selecting one of the samples inserts the format text into the field.

Stock microns, name and finish

This field allows you to format and display the stock name and size for stocks defined by microns, where:

- ^0 is the size of the stock in microns

- ^1 is the name of the stock

- ^2 is the finish of the stock

You do not need to enter a value for each parameter, and you can use the parameters in any order. Examples of micron stock:

- ^0 μ ^1 = 45 μ Holographic

- ^1 ^2 ^0 μ = Poster Matte 150 μ

Stock plies, name and finish

This filed allows you to format and display the stock name and weight for stocks defined by plies, where:

- ^0 is the ply of the stock

- ^1 is the name of the stock

- ^2 is the finish of the stock

You do not need to enter a value for each parameter, and you can use the parameters in any order. Examples of ply stock:

- ^0ply ^1 = 2ply Acid-Free

- ^0ply ^2 ^1 = 4ply Smooth Posterboard

You have complete control over the contents of the text block. Click the question mark button at the end of the field to see a list of sample formats. Selecting one of the samples inserts the format text into the field.

Stock Definitions

The PrintSmith Stock Picker gives you the option to search for and select a paper stock The Stock Picker is customizable using the Preferences Stock Definitions panel.
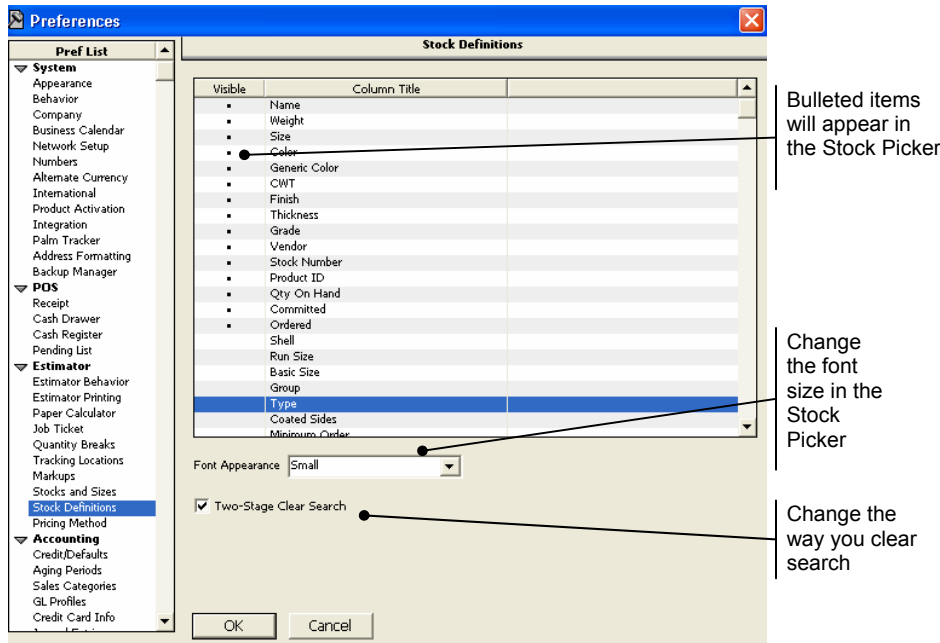
Column Title

The items under Column Title are the columns that can appear in your Stock Picker window.

Visible

A bullet in the Visible column indicates that the column will appear. Click on this area to toggle the availability of the column in the Stock Picker.

Font Appearance

Use the Font Appearance list to choose the font size of the items in the picker.

Two-Stage Clear Search

Previously, to start a new stock index search, you would click Reset List on the Stock Picker window—clearing all search fields. Now you can save some effort by selecting the Two-Stage Clear Search option on the Stock Definitions panel.

When Two-Stage Clear Search is selected, you click the new Stock Picker Clear Search button the first time, and all search fields are cleared except for the Group name. This is useful if you are searching for several similar items. Click Clear Search a second time if you want to clear the Group name also.

Pricing Method

The Pricing Method panel allows you to change the name and default sales category of the job pricing method. However, the way the pricing method calculates remains the same. For example, you could change the title of the first method to "whatever" and set the sales category to "other" but the method still calculates based on a combination of press and stock definitions, which is unchangeable.
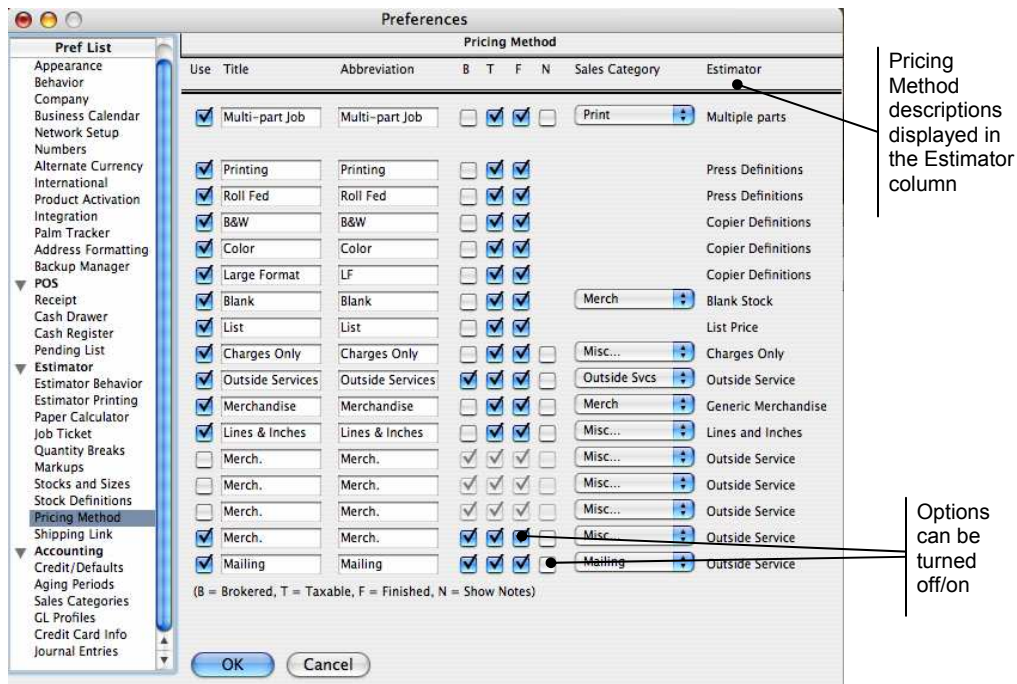
**Note:** Pricing Method is a global preference established at the master only.

Defining Accounting Preferences

The following six preferences establish accounting sales categories, general ledger profiles, aging periods, customer default credit limits, credit card info, and journal entry defaults.

Credit/Defaults

The credit limit field sets a default limit for ALL customers. Set this limit to your standard, most often used, lower credit limit. A credit limit of zero provides unlimited credit. Each customer account you create can have its own unique credit limit.

Note: Credit limits unique to the customer account are set in the Credit Control panel of the Customer window.
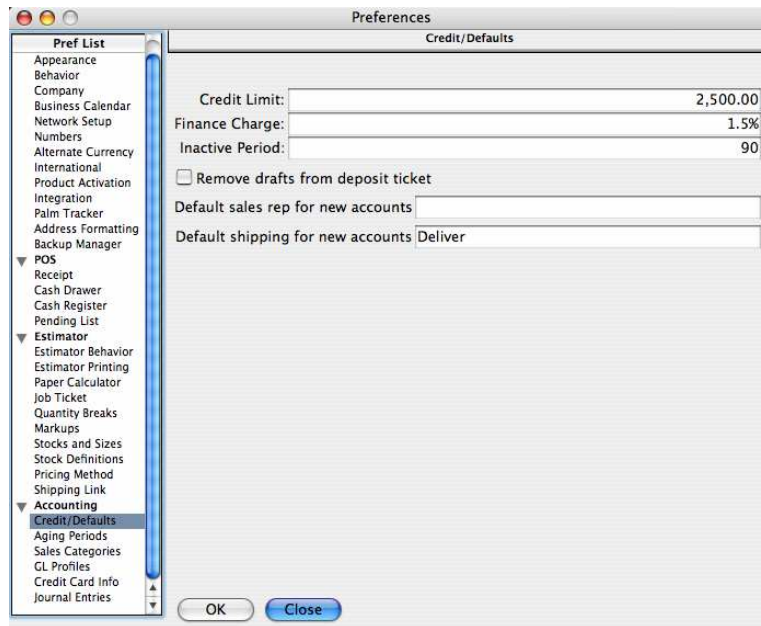
Credit Limit

The credit limit field sets a default limit for ALL customers. Set this to your standard, most often used, lower credit limit. A credit limit of zero provides unlimited credit. Each customer account can have its own unique credit limit.

Note: Credit limits unique to the customer account are set in the Credit Control panel of the Customer window.

Finance Charge

This is applied each time you generate statements and select the option to *Calculate Finance Charge*. Use this feature on a monthly basis; setting the finance charge to the amount you want to charge per month. For example: 1.5% per month = 18% annually.

Inactive Period

Marks an account inactive based on the time specified here. The inactive tool is great for keeping in touch with good customers. Set it to the number of calendar days of inactivity you would like to track. Then, Select Mark inactive accounts in the AR > Accounts Aging window and the accounts will be marked inactive when you run an aging report.

Remove drafts from deposit ticket

If you have money wired to you or you accept bank drafts you may want to select this to more accurately reflect the deposit.

**Default sales rep for new accounts**

Select the default sales rep for new accounts from the dropdown list.

Default shipping for new accounts

Select the default shipping method for new accounts from the dropdown list.

Aging Periods

Set your account aging periods in ascending order. Change the message to fit your business practices. These messages can appear on statements for each customer depending on their account status and whether you have selected it as an option when you generate statements (the *Show Reminders* option in Generate Statements function).
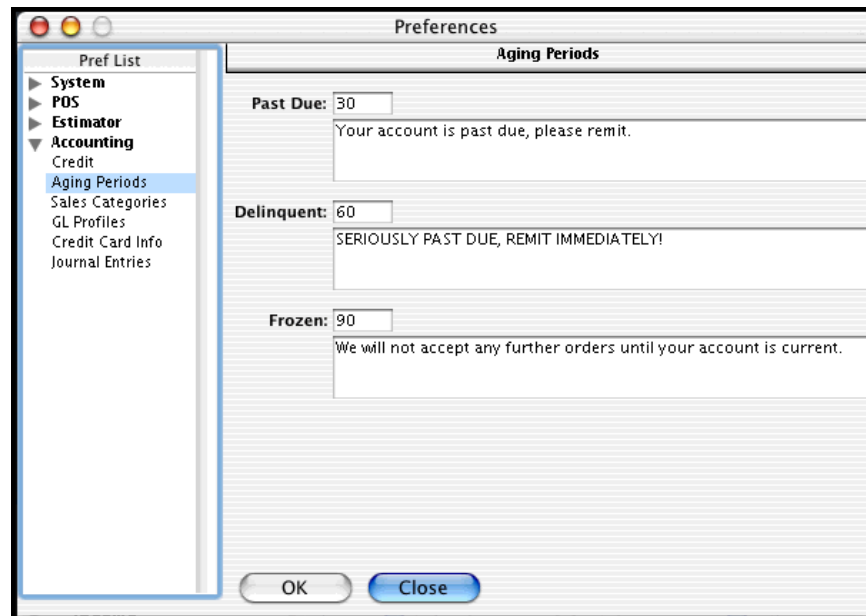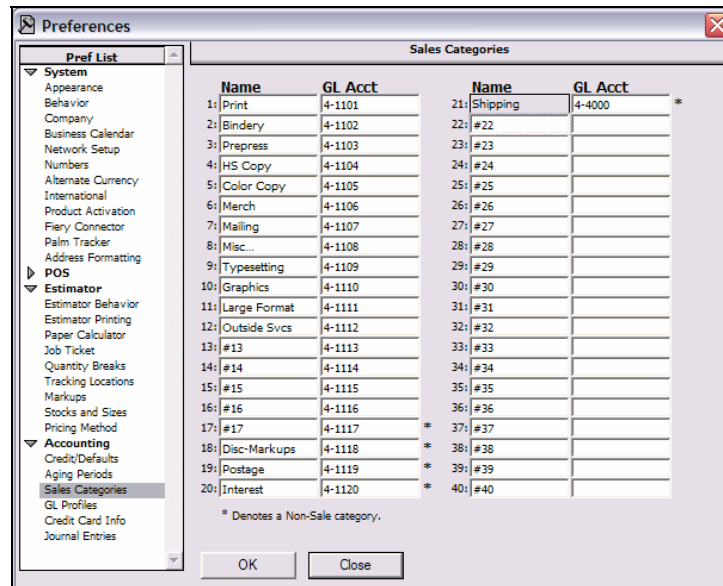
Sales Categories

Sales categories are defined in the Sales Categories panel and PrintSmith always understands them by field number or position. If you elect to change the name of a sales category, all sales for that category remain in the respective numeric position. Select categories carefully and leave room for future expansion. PrintSmith has 40 customizable sales categories. You can change the names and what goes into each category. Once sales are recorded in a category, they stay in that numbered category.

Sales categories 17 through 21 are shown as *Other Sales* in the daily sales report, so you can differentiate not-for-profit items from other items. Sales category 20, labeled *Interest*, is used by the statement generator to separately track finance charges.

If you need more detail you can create sub-categories with Product Codes in jobs and on charges. Even further detail can be extracted from PrintSmith with Report Writer. Add a GL account number that matches your chart of accounts and/or your accounting software. PrintSmith exports a file that when imported into your accounting software transfers over sales and receivable information necessary for complete financial information. It also prints a sales ledger journal entry based on entered GL account numbers.
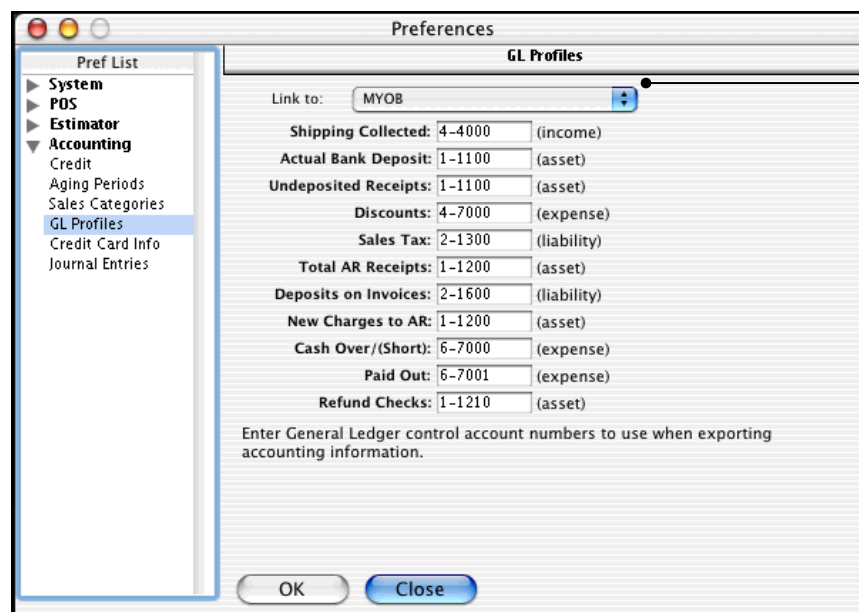
Note: Sales Categories is a global preference that is established at the master only.

GL Profiles

The GL Profiles panel is used to define a link to the selected accounting package, as well as defining specific GL Account numbers that relate to the target accounting package. Enter in your matching general ledger account numbers.


Select your accounting system from a list of supported packages.

Note: GL Profiles is a global preference that is established at the master only.

Credit Card Info

The Credit Card Info panel is used to set up credit cards for use as a payment type in both the cash register and posting payments. Define each card you accept; as a result your daily closeout figures match your credit card system batch report.
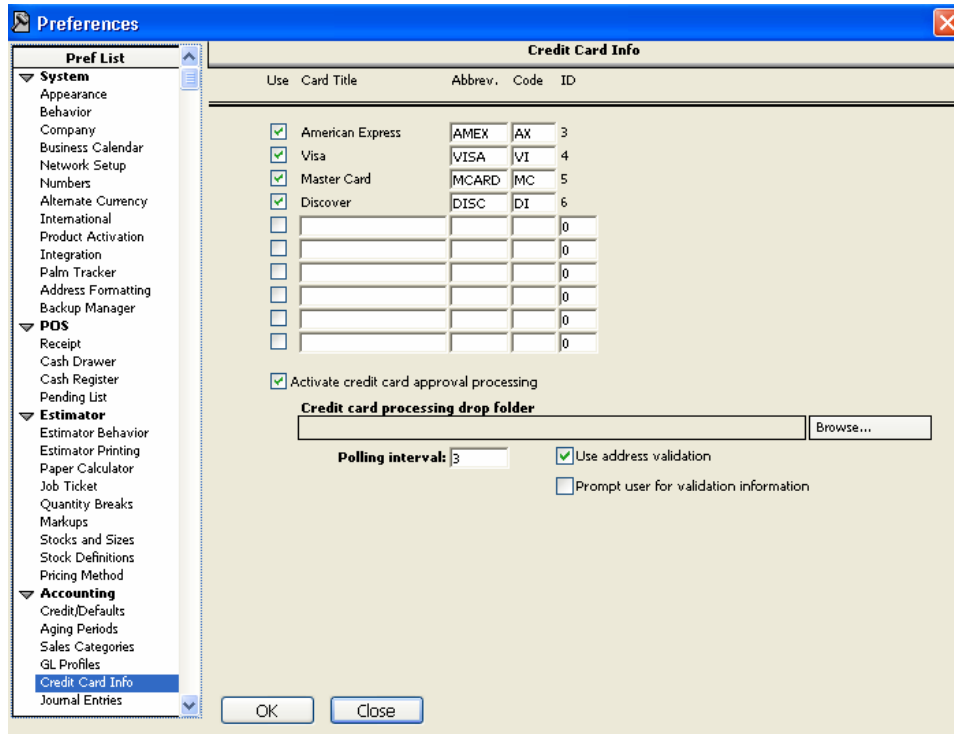
There are 10 possible credit card definitions. The first four are pre-defined and can only be changed in a limited way.

Use

Check this column to recognize the card in PrintSmith. Only those card definitions, which have been enabled, are included in the Credit Card menu used to enter payments.

Card Title

The Credit Card Title is the full name of the credit card. You cannot change the name of the first four cards.

Abbrev.

This field is the abbreviation of the credit card. It is used to identify the type of card.

Code

The Code field is a 2 character code used in the reference number field in Post Payments and the Cash Register to select the card in the credit card menu without using the mouse. It should be unique for each card.

ID

The ID field is a number from 1 to 99 that must be unique for each card. It is used internally to identify the card type. It should always be the same number used by electronic credit card systems

to identify the card. The first four IDs cannot be changed and are set to the correct value for the cards listed.

Activate Credit Card Approval Processing

When this product is activated or purchased, this option enables the credit card integration features in PrintSmith.

Note: Credit Card Info is a global preference that is established at the master only.

Journal Entries

Journal entries use a document preference to define their appearance. Select the document format that best fits your needs or create a unique one for Memos. Enabling the **Print Document** option sets the default option to print a copy of the memo, which is recommended.
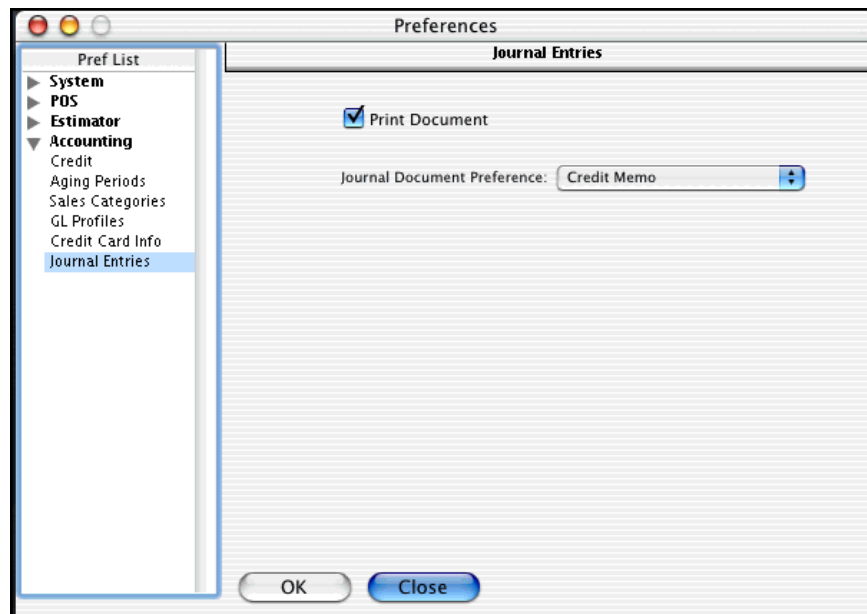

Note: Journal Entries is a global preference that is established at the master only.

Table Editor

Tables add the ability to customize important parts of the PrintSmith user interface and expand other capabilities in a simple, easy to understand manner. Some of the most common uses for tables are quick fill fields, pop up lists, and pop up menus. The Table Editor is a tool designed to manage the contents of these tables and control how they are used.

Select Table Editor from the Admin menu. Select the Job Title table.
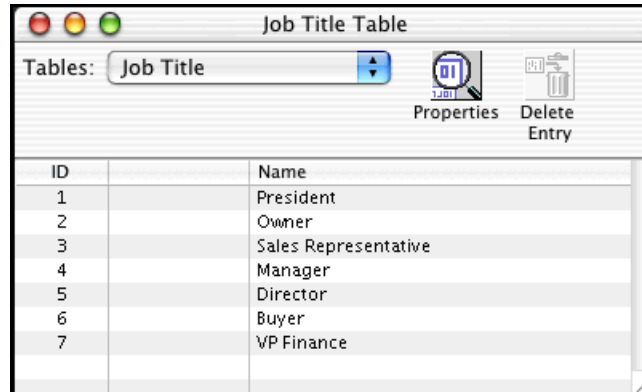
The title of the window includes the name of the table currently being edited. The Tables field is a pop up menu containing a list of all the defined tables from which to select. In this list, disabled tables are in italics and the active size table is underlined. Next to the menu is a Properties icon used to change how a table is applied.

The bottom area of the window contains the table data. The actual data displayed varies somewhat with the type of the table (a predefined property discussed below) but shares some features:

- Each table can contain at least 100 lines; some tables as many as 25,000 lines (also referred to as table elements).

- All tables have an ID column. Each table element has a unique, non-editable, sequentially assigned ID, which permanently identifies the item. This ID is important because it is often stored in other parts of the PrintSmith database instead of the text in the name. Not only is this more efficient, it also allows changing the item to instantly affect everywhere it is used.

- Tables can be sorted by clicking on one of the column headers. You can also drag items with the mouse to position items exactly as you wish. This feature is very useful for QuickFill fields because elements at the beginning are preferred over items at the bottom of a table.
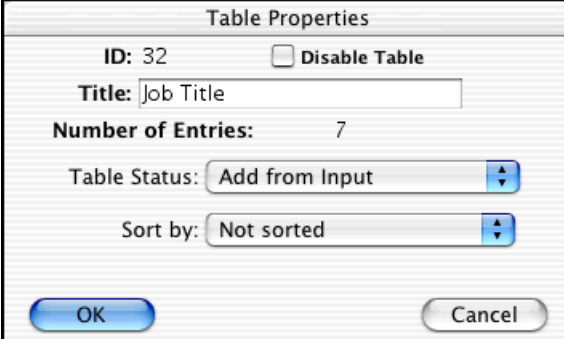
Clicking on an editable element opens an edit field. You can also navigate around on the keyboard using <tab>, <return>, or an up or down arrow key.

New items can only be added immediately after the last defined element in the table.

To delete items, click on their ID number in the ID column and press the <delete> key or backspace (Windows).

Defining Table Properties

The properties associated with a table are: the table ID (a unique identifier for the entire table), the table type, table title, whether the table can be used, and how the table is used.

```
                    Table Properties
     ID: 32              ☐ Disable Table
   Title: Job Title
   Number of Entries:         7
   Table Status: [ Add from Input      ▲▼ ]
       Sort by: [ Not sorted           ▲▼ ]

   (    OK    )                ( Cancel )
```

ID

This number is a unique ID for the entire table. For the most part you need not be concerned with table IDs. However, since you can change the name of any table, the ID serves as a constant reference.

Disable Table

You can disable a table that is used for QuickFill fields or pop up lists if you do not want it to be used. This option changes all edit fields that use the table into standard edit fields. Table driven pop up menus cannot be disabled.

Enable Size Translation

This button is only used with Size tables that can be selected as the active size table. This option enables size translation for this table if and when it is the active size table.

Title

All tables have titles that can be up to 48 characters long. You can change the title of any table. Mostly this only affects how the table is listed in the table editor; however, there are a number of tables where this title is actually the title of a pop up menu or the prompt on an edit field. For example, the Sales Rep table title is also the prompt on all the fields that use this table - even if the table is disabled.

Number of Entries

This field indicates the number of defined entries in the table. Tables can hold a minimum of 100 entries and some can hold up to 25,000.

Table Status

The table status pop up menu contains 5 settings:

Table Status

Setting	Definition
Editable	Most tables are marked as editable. There's nothing special about this setting.
Locked	A Locked table does not allow additional entries to be added or its status to be altered. Existing items in the table can still be changed. An example of a locked table is the "Phone Tags Table". There are only 4 numbers that can be tagged so the table has 4 entries and is locked.
Add Edit Command	This setting adds an edit menu to the bottom of all pop menus and pop up lists that use this table. Selecting the edit command opens the table editor in a special mode just for editing that table.
Add From Input	This setting is useful only for pop up lists and QuickFill fields. It tells the system to add a new item to the table if the user types an entry into the edit field that isn't in the list. PrintSmith asks before adding the item to a pop up list. Normally, this is the best setting for a QuickFill table if you want it to "learn" from user input.
Add Fm Input & Edit	This setting combines both an Edit command and the ability to add items based on user input.

Sort By

The functions in this menu are identical to those available by clicking on the column headers in the Table Editor window.

Defining Table Type

There are three basic types of tables: Keyed Tables, Size Tables, and Standard Tables. Keyed Tables have a Key column where additional data can be entered. Size Tables contain a size column (middle column) that expects sheet sizes for data entry. Standard Tables are composed of an ID and a Name only. The middle column is left blank.

Table Usage

ID	Name	Usage
14	Basic Sizes	Size Table – not usable as an active size table. Shows the basic size for each of the paper types in the United States.
15	Business Type	Pop Up list used in marketing panels.
30	City	QuickFill Table for address editor.
19	Common Interest	QuickFill Table for address/contact/prospect editor.
27	Contact Name Prefixes	QuickFill Table for contact editor.
28	Contact Name Suffixes	QuickFill Table for contact editor.
35	Country	QuickFill Table for contact editor and also used to control addresses is formatted in each country. Do not add entries to the Country table in the Table Editor - use the Address Format preference window to do this.

ID	Name	Usage
60	CTP Substrate	QuickFill Table for using a computer-to-plate (CTP) device with the FieryG for Charge Definitions.
59	Driver	Pop-up menu to add the in-house delivery truck driver name to your Delivery Tickets.
6	Generic Colors	QuickFill Table for stock picker window.
42	Hold State	QuickFill Table for pending document window/account info screen.
39	Ink Color	QuickFill Table for ink colors in job window.
32	Job Title	QuickFill Table for contact editor.
17	Lead Source	Marketing tables used as pop up lists in Customer and Contact marketing panels.
26	Mailer Type	QuickFill Table for address/contact/prospect editor.
16	Marketing Date Labels	Marketing tables used as prompts for dates in Customer and Contact marketing panels.
36	Phone Tags	Prompts for phone number fields in contact editor.
57	Production Copiers	Supports the new *Machine Name* field in the Copier Definitions window. Copier names should be entered as the actual hardware names that identify your equipment. For example: *Docutech, Canon CLC 5000*. Copier names are also used in the Employee Production Filter to determine which jobs will be seen in the Tracker Console.
41	Production Dates	Location list used in the production data window.
58	Production Exceptions	Supports the Exception code field in the Stop Tracker Step window. Exception codes are customizable to your facility and should be used as standard exception reasons, for example: *static in paper*, *bad plate*. A quick and uniform way to gather information from production personnel without requiring a hand-typed note.
54	Production Facilities	Default Production Facility has been set as *In House*. The Production Facility is the physical location where production machinery is run and operated. You can edit the name of the Production Facility to better accommodate your internal referencing. If all your jobs are processed within one building, there is no need to add additional Production Facilities.
50	Production Locations	A Production Location is the name of a process that indicates what stage a job is at in the overall production process. Production Locations can be customized based on your internal referencing system. For example, when a job is in the printing stage that Production Location could be: *Press*, *On Press*, *In Printing*. For a copy job, when the job is actually being copied you could set the Production Location as: *Copy*, *Being Copied*, *In Copying*.

ID	Name	Usage
56	Production Presses	The Production Presses table supports the new *Machine Name* field in the Press Definitions window. Press names should be entered as the actual hardware. For example: *Komori* or *Heidelberg*. Press names are also used in the Employee Production Filter to determine which jobs will be seen in the Tracker Console.
52	Production Priority	A Production Priority is set based on your internal language referencing jobs that should take precedence. Example Production Priority levels are: *Normal*, *Priority 1*, *Priority 2*, *Red*, *Blue*, *Yellow*. Production Priorities are defined in the Table Editor and can be assigned to a job in the Tracker Production window.
53	Production Stations	A Production Station is the computer terminal where PrintSmith is running. These Production Stations or computer terminals should be given logical names based on your internal referencing so that you know where the data collection is occurring and so that filters within Tracker will only display jobs that are in the vicinity of the workstation. Example Production Station names: *Press Station One*, *Supervisor Station*, *Folding Station*, *and Shipping Station*.
40	Products	Product list used as pop up menu in jobs.
37	Report Categories	Pop up menu in Report Manager for categorizing reports.
33	Sales Rep	Used everywhere a Sales Rep is entered - usually as a pop up list.
34	Ship Via	Pop Up list for selecting shipping method. Fields using this pop up list do not allow user entry of data - it must come from list.
3	Sizes – Metric CM	Size Table. Metric paper sizes in centimeters.
2	Sizes – Metric MM	Size Table. Metric paper sizes in millimeters.
4	Sizes – Metric IN	Size Table. Metric paper sizes in inches.
1	Sizes – United States	Size Table. US sizes plus metric sizes in inches.
20	Sport Interest	QuickFill Table for address/contact/prospect editor.
29	State	QuickFill Table for address editor.
8	Stock Colors	QuickFill Table for Job and Stock Definitions.
7	Stock Finish	QuickFill Table for Stock Picker and Stock Definitions.
9	Stock Grade	QuickFill Table for Stock Picker and Stock Definitions.
10	Stock Group	QuickFill Table for Stock Picker and Stock Definitions.

ID	Name	Usage
14	Stock Type	Size Table – not usable as an active size table. Shows the basic size for each of the paper types in the United States.
25	Type of Work	QuickFill Table for address/contact/prospect editor.
19-26	User 1- User 8	Marketing tables used as a pop up list in Customer and Contact marketing windows.
38	Vendor	QuickFill Table for Stock Definitions.
31	Zip	QuickFill for address editor.

Understanding Table Sizes

PrintSmith can include many sizes - the list can hold 32,000 definitions. This method was introduced primarily for metric based systems (A4, A3, SRA2, etc.) but also has many uses on an imperial based system.

Enter in a size to translate and then enter a name or text to use. The size to translate must be the same as the base system (e.g. If it is Metric Based in millimeters, all sizes to translate should be MM. x MM.). When enabled the size can be entered either way. This feature is a helpful tool for certain sizes like Business Cards that may not be easily remembered.

Products

Product names can be assigned to any job. You can define 25,000 products to track. This information is available only with the Report Writer or DownLoader (optional products). If you would like to track the number of reruns for example you would simply mark those jobs and then use the DownLoader to extract that information for reporting as you desire. Refer to the Report Writer Guide for more information about this powerful utility.

Production Management

Default Waste Chart

When estimating printing, you need to estimate waste. The default waste chart is used by press definitions when generating a price unless specified otherwise.

Open the default Waste Chart by selecting it under the Pricing menu.
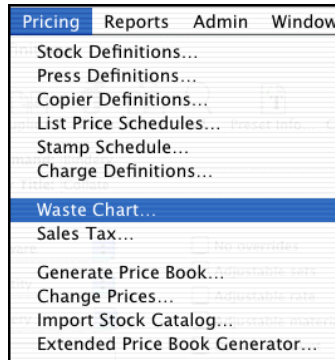
You can have as many waste charts as you like but only one system default. Enter in your standard (default) waste assumptions by dragging the points on the line or by clicking the Enter Data button and typing the information into the table.
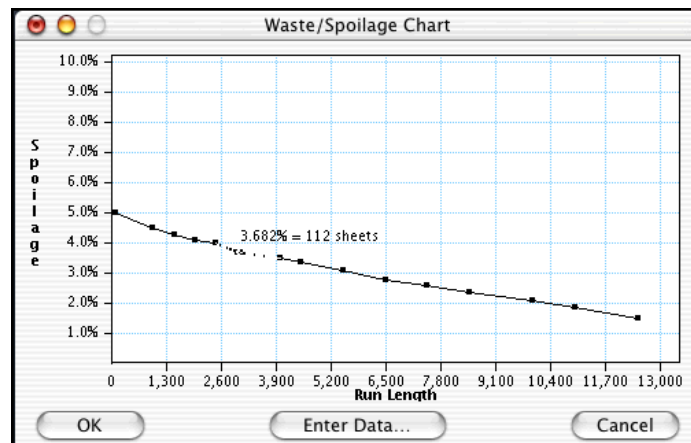
This chart defines the waste amount for each printing job, unless the press has another waste chart assigned. When creating press definitions you can select different waste charts for each press. Note that PrintSmith will display the number of sheets wasted and the percentage of waste at each point on the graph when you click on a point with the mouse.

Set the waste assumptions to your normal waste. Do not include run up or fixed waste, that information will be defined in Press Definitions. Click the OK button to save the data and close the Waste Chart.

Pending Documents

The Pending Documents window is a powerful tool for managing documents. This is a list of "live" documents. In a multi-user environment, actions at all Work Stations will update this list as you look at it.
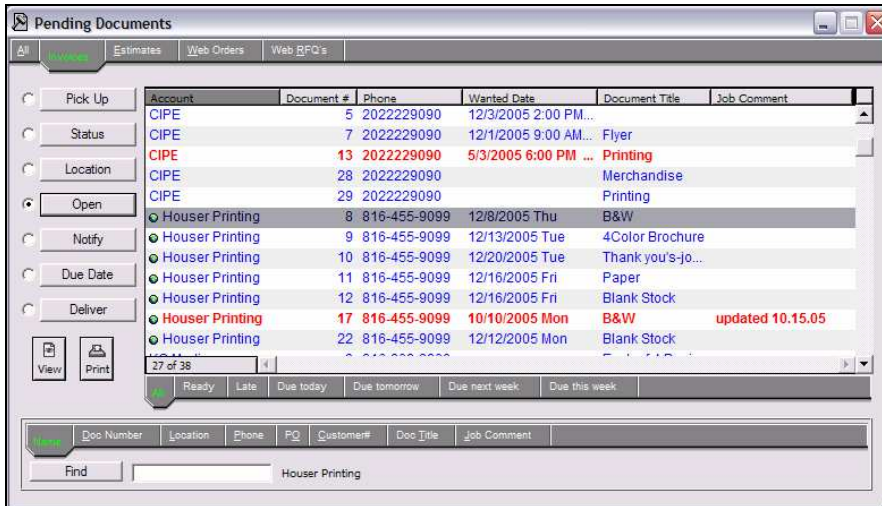
The Pending Documents List contains all of the invoices in production or waiting to be picked up and all estimates that have not been cancelled, cleared, or converted to invoices.

Pending Document Color Key Table

Color	Definition
Green	Ready For Pickup
Blue	Invoice
Black	Estimate
Red	Past Due Wanted By Date

Pending Document Window Type Field Icon Key Table

Icon	Definition
	Estimate item on the pending list
	Invoice item on the pending list
	Invoice that is ready for pick up or delivery

Filtering the Pending List by Document Types

The drop tabs let you select the type of documents to be displayed. For example, clicking the Invoice drop tab displays only invoices. Another drop tab is used to select documents based on their due date or completion status. For example, the Ready tab shows all documents marked ready for pickup or delivery. These two controls quickly fine tune the contents of the list. For a list of all estimates, which are overdue for a follow-up call, click the Estimates tab and Late in the bottom control.

Notes: Web Orders and Web RFQs tabs are only displayed if PrintSmith Site is enabled. Web Orders and Web RFQs are denoted by a globe 🌐 icon to the left of the Account in the Pending Documents List.

Customizing the Pending Document Lists

The Pending Documents List can be customized (Admin Preferences Pending List). When you close the Pending Documents Window, PrintSmith remembers the column settings, drop tab states, the default action button as well as the size and location of the window. To return to the default settings, hold down the <option> key while opening the window.

Finding Items in the Pending Documents List

In addition to searching alphabetically, you can perform searches for text embedded in names, phone numbers, PO Numbers, and other data using the search tool at the bottom of the window.

Select the drop tab for the data you want to look for, enter the text in the text box, and click the "Find" button. The drop tab is used to select the data to search for, but can also be used to examine data for the selected item because it displays that data to the right of the search text entry field. When searching for data, PrintSmith looks for any instance that matches and it searches the list in its currently sorted order. Searching for "Inc." in "Name" will find the first item with the letters "inc." anywhere in the name.

Using the Action Buttons

Select documents in the Pending List by pointing to them and clicking. To select a group of documents from the same account, shift click (hold down the <shift> button while clicking with the mouse). When an item is selected in the Pending List, you can use the Action buttons along the left side of the window to perform actions on the selected item(s).

Each of the action buttons: Pickup, Status, etc. is associated with a command in Security Setup. This gives you the ability to prevent individual users from picking up and posting invoices. Another useful command is the ability to restrict access to the "Location" button, which also affects bar code scanning.

Except for Pick Up, repeatedly clicking the buttons (such as Status) will perform the requested function sequentially on each of the selected documents. For example, if you click on the first item in the list and then press the <shift> key while clicking the third item on the list, the first 3 items will be selected. Clicking the Status button will display the status of the first item; clicking Status again will show the second item and so on. The Pick Up action attempts to pick up the entire selected list as a group.

If you click a different button, PrintSmith uses the same item. For example, clicking the Status button, then the Open button will display the status of the document and then open the same document.

When you press <return> or double-click on an item, the default action is performed. You can change the default action button by clicking the radio button to the left of the desired default action. PrintSmith remembers your selection when you close the window.

Pickup

The terms "Pickup", "Pick Up", "picking up", "picked up" are used frequently in this manual. It is an important concept that must be understood to use PrintSmith effectively. In general, "picking up" refers to the process of posting orders to accounts receivable as charges or paid invoices. PrintSmith considers the point at which a document is picked up to be the sale. It assumes that a document is picked up when the order or service is handed over to the customer. At this point, the work is done and the invoice is final. Prior to pickup, a pending invoice is considered a "Work Order" that is subject to change. Once the customer has the work, the invoice must accurately describe the work performed and the price charged for the work. Invoices that have been picked up are removed from the Pending List and added to the Account History. The invoice is locked and can no longer be changed although it can be copied to new invoice or estimate.

The Pickup function is one of the most important functions in the POS module. Use the Pickup button to tell PrintSmith an order has been given to the customer. As far as the accounting system is concerned this is the point at which the customer is obligated to pay for the order. Only invoices can be "picked up". You can select and pick up a group of invoices; but they must all be for the same customer account.

All of the selected invoices are added to the current POS transaction (a new transaction is started if necessary) and the Cash Register window reflects the total of these invoices. The transaction is "Accepted" and the payment method and amount are entered (you have to click the Payment and/or Post button). Before any invoices are added to the current transaction, they should be checked thoroughly for the following:

- Only Invoices can be picked up.

- All Invoices must be assigned to a valid account.

- All invoices in a single transaction must be for the same account.

- Invoices cannot have credit balances (deposits larger than the amount due).

- Invoice must be marked complete if using the option to Only Post Invoices Marked Ready.

When invoice pick ups are posted, those invoices are removed from the Pending Documents list and added to the end of the customer's Account History. The invoice is locked at this point and may no longer be changed (you can still open it and make a copy of it).

Notes: When an invoice is picked up, PrintSmith checks to see if the tax rate on the document matches the current tax rate. If it has changed since the document was last opened it will warn you that the tax is incorrect. If you receive such a warning you should open the document, check the tax (which is recalculated when the document opens), and file it before picking it up. You can ignore the warning and pick up the document, but sales tax will be incorrectly tracked.

Status

This function lets you check any document in the Pending Invoice list to determine when it is due, how much it was for, if it is finished, and whether the customer has been notified of this.

Location

The location function is used to track the current location of a document or to review the location of individual jobs in a document. When an invoice is ready for pickup, use this function to mark it as finished and make a notation as to where to find the finished order.

The location of individual jobs can also be tracked using our optional bar code system. When this system is in use, the last update of any job in the document is displayed in this window.

The Location window, which can be accessed from the Pending Documents window or the Job window, has been updated to include a Document Location field and Comment field.

The Document Location is auto-populated from the Production Locations table.

Comments entered (up to 149 characters) are displayed in the Pending Document window and in the Work in Progress Report

Location Window

Clicking the OK button records the current location, the document completed state, and the date and time the location was last updated. The date and time that the OK button is clicked is saved with the invoice and displayed in the status window. This function is designed to track both finished work and the current location of work in progress.

Hold State

Hold State indicates the reason that production or quoting is delayed. This pull-down menu listing hold options is updated through the location and Account Info screens. A Hold State column in the Pending Document Window displays this information. The Hold State table can be edited in the Table Editor. To deleted a hold entry, use the <delete> (Macintosh) or <back space> (Windows) keys.

Ready for Pickup/Delivery

The button is used in the Pending display and the Work In Progress report to indicate which orders are completed. This button must also be turned on in order to pick up a document if Only Post Invoices Marked Ready item in the System / Behavior preference panel is enabled.

Open

Use this as a quick way to open any document in the Pending Document list. This function can also be invoked by selecting the Open command in the File menu, which usually is a keyboard shortcut of <command>+<O>.

Notify

The Notify function opens a window displaying the person to contact and their phone number. If you enter any text for the customer account log, an entry is made in the log for this account. Use the AR Account command to review the log.

Notify Customer Window
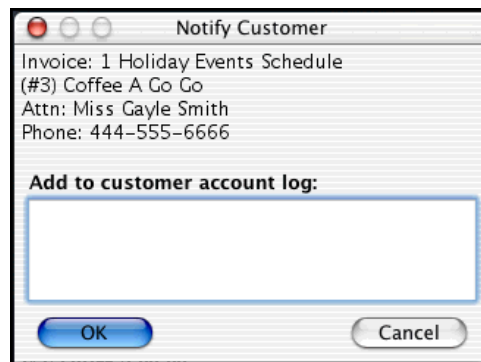
Clicking the OK button in this window stores the date and time of notification in the invoice and saves it. This information is also shown in the status window.

Due Date

Modify the date wanted on any invoice without opening the document. You can use this to adjust your production schedule. Select a group of pending invoices, by holding the <shift> key and selecting a range. Then select this command to cycle through each document in the group.

Due Date Window
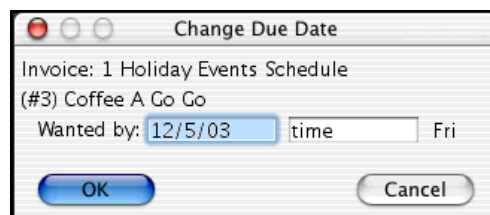
When selected, a window showing the invoice number, title and customer account name is displayed as shown above. If there is already a date in the Wanted By field, this date will also be shown. Pressing <return> or clicking the OK button saves the date and time shown in the text boxes. You cannot update the due date with this command if the document is already open.

View / Print

These optional buttons are present if Report Writer is enabled. See Report Writer manual for details on how to use these buttons.

Status

This window will show the current cash drawer status, the totals for the last transaction and the status of any document in the PrintSmith data base. It is strictly for display, you cannot change any information shown in the window. When you perform an operation in the Cash Register or Pending Documents window, which involves an invoice or estimate, the status of that document is displayed in the Status Window.

Status Window
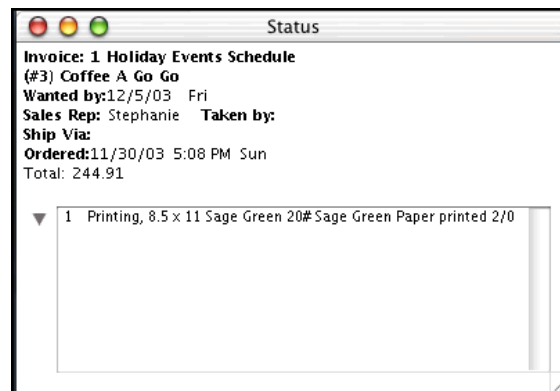
When a transaction is posted, the status window is used to display a summary of the last transaction. This is a helpful reminder if you need to make change on the transaction.

Finally the window is used to display the cash drawer status when you select the Cash Drawer Status command in the POS menu.

Work In Progress Reports

Work in Progress provides a variety of reports useful in controlling the orders being worked on, assisting with production scheduling, and managing your outstanding quotes.

Work In Progress Report
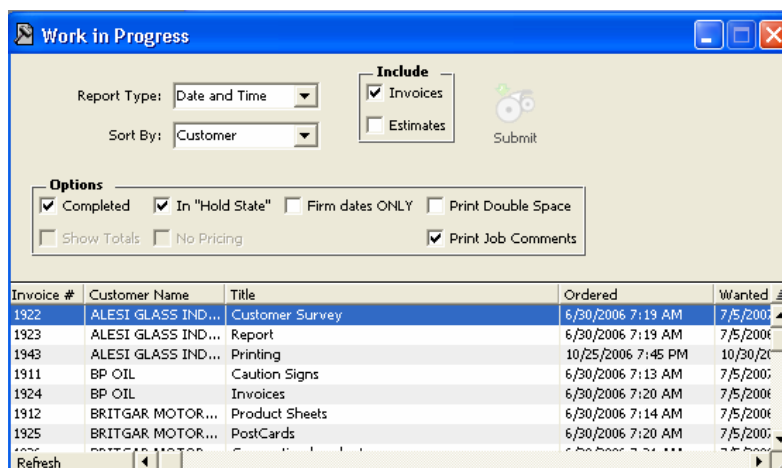
- You select the report you want by selecting the report type from the Report Type menu. Each report has a different format. You select the order in which you want the report from the Sort By menu. You indicate whether you want just Invoices, just Estimates, or both. As you change the report type, sorting order, and content buttons, the report is immediately updated to show the change. To see the entire report, use the scroll bar at the side of the window. Report columns are resizable.

- An asterisk next to the invoice number indicates the job is marked Ready for Pickup or Delivery. Control the presence of completed documents by enabling the Completed button. Use the Location button in the Pending Document window to mark individual items as completed.

- Documents that have an On Hold status display in red. Use this to track invoices that are holding and not actually in production. Use the Location button in the Pending Document window to update the Hold State.

- In previous PrintSmith versions, job comments appeared by default. Now they appear unless you clear the Print Job Comments check box to turn job comments off. This option is selected by default for all new and upgraded installations.

- Selecting the Show Totals button will show subtotals and a grand total. The subtotals depend on the Sort By selection. For example, sorting by Due Date generates a report with a subtotal for each day. Sorting by customer or invoice number does not generate any subtotals. In addition to the subtotal, PrintSmith separates each subtotal group by a double line across the page. The grand total has a bold double line. The Date & Time report does not have document totals so although a line is drawn across the page, there are no subtotal amounts and there is no grand total. In the Weekly Schedule, only a grand total is displayed. The Show Totals button is ignored in the Press Schedule report.

- Selecting the No Pricing button will hide the Pricing information.

- Selecting the Firm dates ONLY button will only show Estimates or Invoices with firm dates.

  Notes: Double-click on any line in the report to open the document.

To print the report, select the Print command in the File menu. The printed report is identical to the displayed version. The last report viewed on screen is remembered. The next time this report is opened, that report type and sort by will display.

Standard

This report shows the basic information about an order you need to identify it. The items in the Sort By menu should be pretty much self explanatory except for Location. Use this option to sort the list according to the location of the order. You enter the location using the Location button in the Pending Document Window of the POS module or the job tracking bar code system.

Date & Time

This report is essentially the same as the standard report except that instead of showing the amount due of the document, it displays time in addition to the date.

Location

The location report is often used to track the current location of each order. The location is entered using the Location function in the Pending Document Window.

Weekly Schedule

The weekly schedule report is best used as a way to get a quick idea of the number and type of orders due for the week. PrintSmith automatically selects the next Monday as the starting point of the report. Holding down the <shift> key will generate a report starting from today's date.

Press Schedule

The press schedule report breaks each Invoice down into individual jobs. It is extremely useful for determining your work load for each copier and press according the date and time wanted and the machine it will be run on.

This report includes only invoices (regardless of the buttons selected in the Work In Progress window). It can be sorted by press name, press name and ink color, by the machine ID in each definition, or by location. When sorting by press & ink, the jobs are sorted by the press first, then by the day, then by the ink color.

Often, it is necessary to create more than one definition for a single machine. By assigning these definitions the same machine ID, you tell PrintSmith that they are the same machine even though they have a different definition. The machine ID method of sorting lets you group work by the actual machine being used. You set this up when using the copier definition command and press definition command in the pricing menu.

Notes: Changes made to machine definitions and jobs will not appear in the report while the report window is open. If you change a machine ID for a particular machine, you must close the work in progress report window and open it again in order to see those changes.

Job Location Schedule

This report is used in conjunction with the bar code tracking system to generate a list of all jobs in progress and their current location in your shop. As in all the other work in progress reports, changes made to jobs after the report has been generated are not reflected in the sorted order of the items in the report. To update the report, just close the window and open it again.

Sorting by Location is used with the bar code Job Tracking system to generate up to the minute reports showing each job's location.

Press Schedule

The press schedule report breaks each Invoice down into individual jobs. It is extremely useful for determining your work load for each copier and press according the date and time wanted and the machine it will be run on.

This report includes only invoices (regardless of the buttons selected in the Work In Progress window). It can be sorted by press name, press name and ink color, by the machine ID in each definition, or by location. When sorting by press & ink, the jobs are sorted by the press first, then by the day, then by the ink color.

Often, it is necessary to create more than one definition for a single machine. By assigning these definitions the same machine ID, you tell PrintSmith that they are the same machine even though they have a different definition. The machine ID method of sorting lets you group work by the actual machine being used. You set this up when using the copier definition command and press definition command in the pricing menu.

Note: Changes made to machine definitions and jobs will not appear in the report while the report window is open. If you change a machine ID for a particular machine, you must close the work in progress report window and open it again in order to see those changes.

Integrated Schedule

Used in conjunction with integrated devices. When viewing this report type, a Submit button is displayed, which allows submission of the job to the Fiery.


Device ID

Submit button
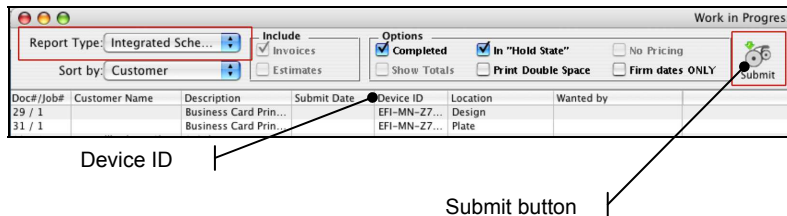
Carton Labels

Creating Carton Labels

You can create Carton Labels to affix to the containers holding the finished job. It is roughly based on the Mailing Label command and, in fact, Carton Labels and Mailing Labels share the same label definitions. To create carton labels:

1. Click the Carton Labels icon or select the Carton Labels command from the hierarchical tree, The Carton Labels window is displayed.

Carton Labels Window
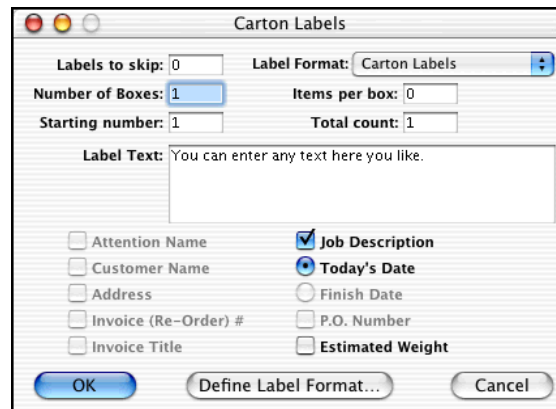
2. Enter the number of **Labels to Skip** if you have a partial sheet of labels and you need to skip over them to the first good label.

3. Change the **Label Format**, if necessary. Carton Labels is automatically selected as the Label Format. Label Formats can be created and edited by clicking the Define Label Format button.

4. Enter the **Number of Boxes** for which you want to print labels. Typically, this is the only number you will have to specify in this window.

5. Enter the number of **Items per box**.

6. Enter a **Starting Number**, if something other than 1.

7. Enter a **Total Qty**. The **Odd Last Qty**. field will display the number of items in a partially filled box.

8. Enter any additional information you would like printed on the label in the **Label Text** field.

9. Check any additional content options that you would like printed on the label. Carton label content options include: Job Description, Today's Date, and Estimated Weight.

10. Click the **OK** button once all carton label information has been specified. The Carton Label window is closed and the active job window is displayed.

Defining Label Format

Label formats can be created, edited, and deleted.

1. Click the **Define Label Format** button in the Carton Labels window. The Define Label Format window is displayed.

2. Select <new format> from the Existing Formats list to create a new label format.

Define Label Format Window

3. Enter a Format Name.

4. Specify label details.

5. Click OK . The newly defined carton label will be listed in the Existing Formats drop down list.

To edit or delete an existing format:

1. Click the **Define Label Format** button in the Carton Labels window. The Define Label Format window is displayed.

2. Select the label format to be edited or deleted from the list of Existing Formats.

Editing Existing Labels Example

Production Data Window

The Production Data window was designed primarily for the Printing pricing method although it is sometimes useful for other pricing methods. You can use this to tailor production information on a specific job. The information displayed in this window varies somewhat depending on the pricing method. To view production data, click the Production icon in the Job window.

Production Data Window Field Definitions Table

Field Name	Definition
Parent Size	Size of the sheet you purchased. Taken from the parent size of the selected or from the run size for special order and customer stock.
Run Size	The size of the sheet you will be running on the press.
Out	The number of Run Size sheets that you can get out of a given Parent Size sheet. You can override this number, but PrintSmith will not be able to generate a cutout diagram if you do.
Parent Costs	Your price for the Parent Size sheet per the number of parent sheets you bought at the Parent Cost price.
Markup	This is used to mark up the stock component of the job price. You can consider this your gross profit on the stock. You can change this for the entire system using the Pricing Preferences command in the Admin menu, for an individual stock in the Stock Definitions, or change it here for a particular job.
	Notes: The Markup field is note available for Blank Pricing Method Production Data.
Production Run	The number of impressions for each run. It is the same number as "Imp/Run" in the job window.
	Notes: The Production Run field is note available for Blank Pricing Method Production Data.
Requires	The total number of parent sheets you need to run this order.
Sheets Purchased	The number of sheets purchased for the job. If the stock definition specifies a minimum order quantity, this number may be higher than the actual sheets required for the job. The cost of this additional paper is included in the job if the stock is marked to charge customer for entire order; however, the extra stock is not included in the production charge.
Price Breakdown	Shows the stock and labor components of the price broken down into cost, markup and the resulting price.
Itemized Markups	Markups are calculated separately after all other charges are calculated so they are based on the most current prices. The total of all markups charges attached to the job is shown in this text field. This does not include invoice level charges or customer discounts.
Other Charges	All charges attached to the job that are not markups are totaled and shown in this field.
Production	This shows the total charged for wash-up charges as well as any vendor cutting charge that is defined in the stock definition. You can override the production total by entering an amount in this box. It is added to the job price.
Target Adjust	If target pricing is enabled for the attached press definition, the amount of the adjustment is shown in this field.
Setup Time	This is the calculated time to set up the press based on the minimum labor and the number of heads indicated in the press definition.
	Notes: The Setup Time field is note available for Blank Pricing Method Production Data.

Field Name	Definition
Run Time	This is the calculated run time of the job based on the labor, markup, speed table, and or average impressions per hour designated in the press definition. **Notes:** The Run Time field is note available for Blank Pricing Method Production Data.
Total Time	This is both run and setup times combined. **Notes:** The Total Time field is note available for Blank Pricing Method Production Data.
Job Price	This is the job price, which is usually the total of all the prices shown in the window. It may differ from the itemized breakdown under the following conditions: • The job price has been overridden. • A "Plate Fee" was defined in the press definition used for the job.
Due Date and Time Fields	These new date and time fields were added for use with the Report Writer to create customized schedules by area. This information is added directly to the job and accessed via a Report Writer custom report. The 16 field titles can be changed in the Production Dates table in the Table Editor. All pricing methods support this type of scheduling: from Rubber Stamps to Outside Services.

Printing Pricing Method Production Data

Changing anything but the size of the stock is an override, this includes Setup Time, Run time and Out. The Show Cutout button generates a graphic display of how the Run Size sheets can be cut from the Parent Size. Most of the time, you can add up all the numbers under Price and they will equal the Job Price. There are some situations in which the Job Price is not the sum of these numbers:

- If you have defined a Plate Fee in a press definition the plate fee is added to the job price. This is *not* the recommended way to add plates.

- It is possible that stock and labor totals in the production data window will be different from job total due to rounding (differences of ±0.01).

Printing Job Production Data

Printing Production Data Window Field Definitions Table

Field Name	Definition
Press	The name of the selected press. This always matches the name of a press definition. You cannot change the press selection here, but you can modify the press production factors and the setup time.
Press Speed	The average impressions per hour at which you will be running the press for this job. It is taken from the press definition, but you can override it here. PrintSmith uses this to figure out how long it will take to run the job after it is set up. **Notes:** If you set up the press to use a variable speed table, the speed of the press changes with the length of the run. In this case, PrintSmith shows the impression rate for the current quantity taken from the table. Overriding the press speed disables this feature.
Labor Rate	This is the rate for labor used with this press. It should not include a profit margin, as the Labor Markup will do this for you.
Labor Markup	Your Labor Markup. Like the Stock Markup, you can consider this your gross profit margin. Please note that your actual profit for each job will vary considerably as these markups, the press speed and to some extent, the labor rate are generally little more than educated guesses or a statistical average. To generate a factor for a desired gross profit margin, the following formula may be useful: 1 ÷ (1 - desired markup) = markup factor

Copier Pricing Method Production Data

Because there are several different styles of copier pricing, many of the factors in this window do not apply to the job price unless you are using the Cost Plus style of copier pricing. You can change the stock cost and units in all pricing styles, but the stock markup shown in this window is the standard stock markup and is only used in the Cost Plus pricing style.

The time and labor are calculated from the copier definition attached to the job. However, this is not used to generate the price.

Notes: Generally, the information in this window is best used as a guide and you should avoid changing it. Depending on how the copier definition is set up, changing a value in this window may not affect the job price at all.

Copier Job Production Data

Blank Pricing Method Production Data

The production data window is useful primarily for changing the stock cost and overriding the markup.

Notes: Stock prices shown do not reflect blank pricing and markup. It shows the standard stock price and standard markup for reference. Changing the stock price or parent size forces PrintSmith to calculate the blank stock using the entered price and the blank stock markups defined in the Stocks and Sizes Preference panel.

The Markup field on Blank stock is empty unless someone has entered an override. Once you have told PrintSmith to calculate the cost of the stock by specifying a markup, it continues to calculate the actual stock cost and the specified markup. Canceling the override on the markup replaces the markup you entered with the default blank stock markup. Most of the time, this is the same as the standard blank stock price. However, if the stock price or the default blank stock markups are changed without updating blank stock pricing, cancel-ling the override will generate a different price.

To summarize, there are three different types of blank stock price calculations:
- Pricing from blank stock section of the stock definition - the normal case.

- Using a user entered override to mark up actual stock cost.

- Using default blank stock override to mark up actual stock cost. This is used when you cancel the override of the markup.

Blank Job Production Data

List Pricing Method Production Data

The production data window is almost identical to the Printing version. One difference is the addition of the Schedule field. This is the name of the price schedule used with the job. In the Estimator Behavior preference window, the setting Always Use Stock's Parent Size can be set so that PrintSmith "locks" the parent size when it comes from a stock definition so that it cannot be changed in the window below.

Because this pricing method is entirely based on a retail price list and the quantity ordered, none of the factors in this window are used for pricing. Changing the press speed will change the time

allotted for the job, but will not change the price. For this pricing method, even changing the parent size will not affect the price.

Notes: Until you enter a quantity, the schedule name will not be displayed.

List Job Production Data

Unlike the Printing Pricing Method, List Pricing Production Data Includes Schedule Field

List Production Data Window Field Definitions Table

Field Name	Definition
Press	The name of the selected press. This always matches the name of a press definition. You cannot change the press selection here, but you can modify the press production factors and the setup time.
Press Speed	The average impressions per hour at which you will be running the press for this job. It is taken from the press definition, but you can override it here. PrintSmith uses this to figure out how long it will take to run the job after it is set up.
	Notes: If you set up the press to use a variable speed table, the speed of the press changes with the length of the run. In this case, PrintSmith shows the impression rate for the current quantity taken from the table. Overriding the press speed disables this feature.
Labor Rate	This is the rate for labor used with this press. It should not include a profit margin, as the Labor Markup will do this for you.
Labor Markup	Your Labor Markup. Like the Stock Markup, you can consider this your gross profit margin. Please note that your actual profit for each job will vary considerably as these markups, the press speed and to some extent, the labor rate are generally little more than educated guesses or a statistical average.
	To generate a factor for a desired gross profit margin, the following formula may be useful: 1 ÷ (1 - desired markup) = markup factor

Power Tips, Security Setup, and Backup Procedures

Managing Templates

PrintSmith supports an additional document type called a template. A template is a document containing a complete specification of a job or a complete order. You can create a template from any open invoice, estimate, or job by selecting Save As in the File menu.

Templates are stored in individual files with names assigned by you. PrintSmith normally stores them in the Templates folder inside your PrintSmith Folder, but you can put them anywhere you want.

There are two types of templates: document templates and job templates. A document template consists of an entire document. It includes everything in the document except dates and customer account information. A job template consists of a single job and all of the charges for pre press and bindery on that job. A job template can also be created for multi-part jobs. This type of template contains the multi-part job, its charges, and all of the parts of the book and their charges.

When a template is first opened, PrintSmith will ask if you want to update the template with current prices from your pricing database. Any prices that you have manually overridden will remain unchanged even if you reload the prices. Even if you do not reload pricing, PrintSmith will recalculate a job template and this can sometimes result in a change in the price due to changes you may have made in tables, new tax rates and so on.

Notes: On multi-user systems, you can avoid copying templates to each Workstation by setting up an alias to the Templates folder in the PrintSmith Master and copying that alias into the templates folder of each Workstation. Selecting the alias opens the template folder on the PrintSmith Master and you will be able to create new templates and open existing ones on the PrintSmith Master. This requires that you enable File Sharing on the PrintSmith Master.

Document Templates

A document template is an easy way to pre-define a common order. Say, for example, that you want to offer a special promotion featuring letterhead, envelopes, and business cards at a special price. You could create a document for the special promotion and override the prices to reflect the sale price, and then save it as a document template with everything, including the price overrides, preset. Each time you sell one of these special offers, you simply open the template, copy it to an invoice, and enter the customer information.

Creating a document template is easy. First, create a complete document (you can use any existing document including other templates). Instead of filing the document, select the Save As command in the File menu. PrintSmith automatically opens the Templates folder and asks you to name the template. Use a name such as "Fall Special Offer" or "Businessman's Special" so it'll be easy to find later. When you click the Save button, PrintSmith will create a file in the Templates folder that contains the complete order except for the customer information.

Selecting Open > Template from the menu, opens a list containing all of the document templates stored in the Templates folder. Select the desired template and a document window opens which contains all of the specifications you saved when the template was created.

Select the customer account the order is for and then use either the Copy to new Invoice or Copy to new Estimate command in the Invoice menu.

To edit a template, use the Save command to update the contents of the template file. You can save complete customer information in a document template by holding down the <control> key when saving the template. This is useful when restoring from backups where you want to save work done since last backup. When using this method to preserve data in preparation for a restoration from backups and the document is for a new customer (one created after the last backup), change the account to the "Walk-In" account before saving the template. After restoring, you can use the account information in the template to re-create the customer account with the Create Cust Acct fm Document command.

Archiving Document from the Pending Documents Window

When an estimate is selected in the Pending Documents window, the Pick Up button changes to an Archive button. This feature allows you to archive individual estimates. To archive an estimate:

1. Select **POS > Pending Documents** from the menu. The Pending Documents window is displayed.
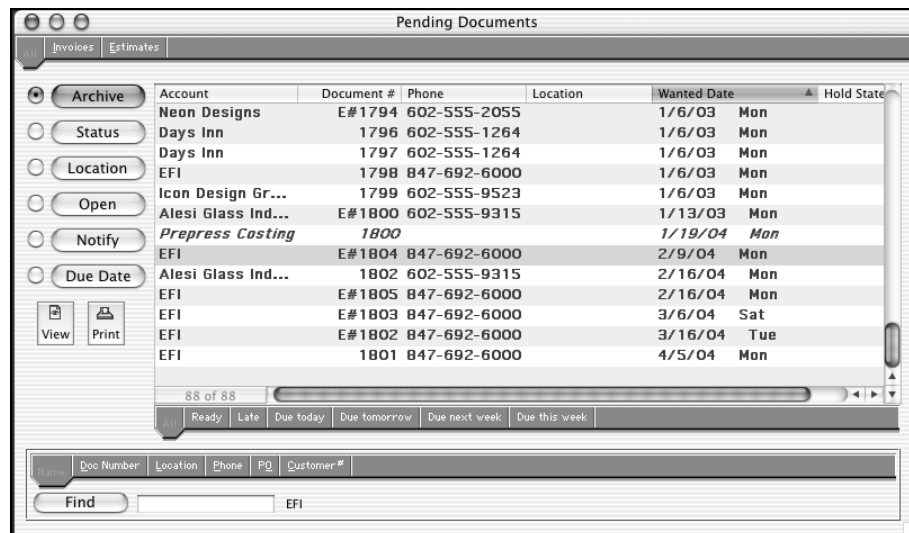
2. Select the applicable estimate from the list. The Pick Up button will read Archive and be selected.

3. Click the **Archive** button.

Creating New Contacts from the Account Info Window

New contacts can be added from the Account Info window. To create a new contact while creating a new Invoice:

1. Select **Invoice > Create Invoice** from the menu. The Account Picker window is displayed.

2. Select the applicable *Account* and click the **Select** button. The Account Info window is displayed containing the selected account's information.

3. Select the **File > New** from the menu while the Account Info window is open. The Edit Contact window is displayed.

4. Enter the new contact's information.

5. Close the Edit Contact window. The Contact List drop down will read **New Contact**. The new contact will be added permanently to the account when saved.

Using Dates / Time Fields

To expedite date inputs, there are several short cuts which you can use.

Date Fields

- Enter **+10** in the field and PrintSmith will compute the calendar date which is ten days from today's date. If the calculated date lands on a weekend, it increases to the next Monday.

- Enter an abbreviated day name (i.e. Mon) and PrintSmith will find that next kind of day.

- Enter only the day number and PrintSmith will convert it to a date with the current month and year. For example: Enter *25* and 6/25/04 will be the results.

- Enter a partial month name (i.e. Jan) and a middle of the month date will result (i.e. 1/15/04).

Time Fields

- Enter **noon** and PrintSmith will insert 12:00 PM.

- Enter **L** and PrintSmith will insert 5:00 PM.

- Enter **A** and PrintSmith will insert 9:00 AM.

- Enter partial numbers and PrintSmith will use that hour. For example: enter **5** and the result will be 5:00 PM. Entering a **7** anytime after 7 AM will result in a time for the next day.

- Enter **PM** and PrintSmith will insert 1:00 PM.

Creating Customer Accounts On The Fly Using Walk-In

If the invoice is created using the "Walk-In" account, you can create a new account with the information already provided in the address fields, by selecting **Invoice > Create Account Fm Document**.

Copying Jobs from One Invoice To Another

Since multiple documents can be opened at one time, Jobs can be moved/copied from one invoice to another by dragging and dropping the item.
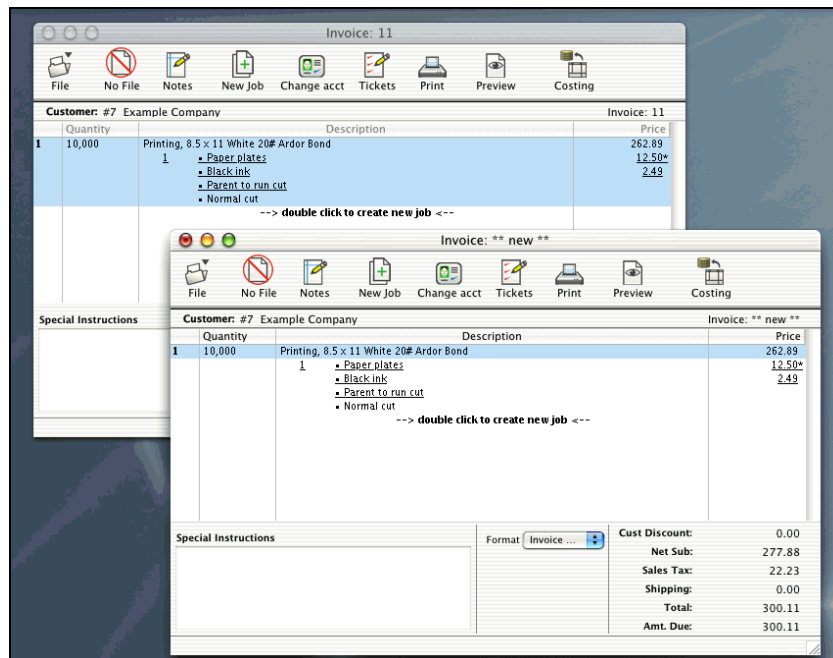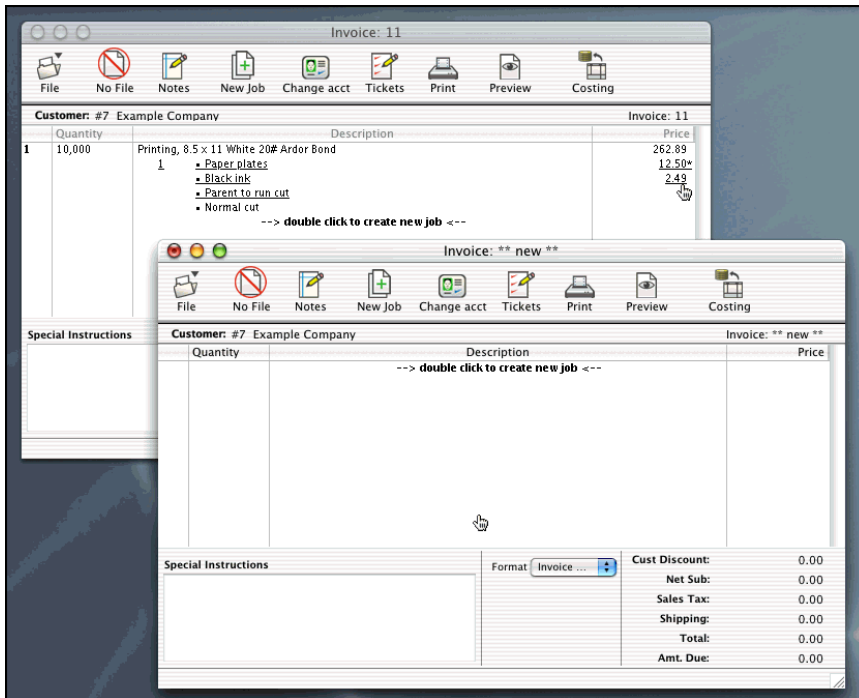
Unlocking a Single Charge On An Invoice

When the document is Price Locked, you can click on the small lock icon next to the price and PrintSmith will temporarily allow a change to that single line item.

1. Open the Invoice.

2. Click the lock icon for the line item to unlocked and altered. The lock icon changes to an unlocked icon.

3. Make the necessary changes to the line item.

4. Relock the line item by clicking on the unlocked lock icon.

5. Save the Invoice.

Converting Estimates

When changing an estimate to an invoice, you should use the Convert option, rather than the copy function, as it will automatically place the Estimate in history and set its status as a WIN.

1. Open the estimate.

2. Select **Invoice > Convert To Invoice** from the menu.

3. Recalculate the total, if applicable.

4. Confirm the Account Info by clicking the **OK** button. The Invoice window is displayed with the copies estimate information.

5. Click the **File** icon to save, file, and close the invoice.

Converted estimates have a status of WON which can be seen in the Estimate History window. Open the Estimate History window by selecting **Reports > Estimate History** from the menu.

Created	Estimate#	Title	Total	Status	Invoice#	Off Pending
5/16/02	1687	Proposals Part I	278.73	Won	1795	12/31/02
10/10/02	1752	Special Mailer E...	176.74	Won	1783	12/19/02
9/30/02	1749	Sales Mailer	3,205.00	Won	1765	11/29/02
5/16/02	1698	Letterhead	346.20	Won	1764	11/29/02
5/16/02	1711	Color Copy Broc...	1,439.64	Won	1750	10/21/02
5/16/02	1674	Business cards ...	136.10	Won	1743	10/10/02
4/8/02	1635	Financial Report	14,264.17	Won	1694	8/1/02
4/8/02	1622	New Model Phot...	1,209.60	Won	1690	7/31/02
3/15/02	1569	Recipe Book	4,317.60	Won	1683	7/5/02
3/15/02	1559	Posters	8,752.27	Won	1682	7/5/02
4/19/02	1656	Annual Fund Rai...	8,100.00	Won	1680	6/28/02
3/8/02	1532	New Employee ...	3,249.19	Won	1679	6/28/02
2/7/02	1530	Cover	2,714.26	Won	1656	5/24/02
4/8/02	1611	Lease Forms	475.44	Won	1636	5/16/02
2/7/02	1513	New Employee ...	3,375.23	Won	1635	5/16/02
4/8/02	1599	Doorhangers	643.26	Won	1617	4/19/02
2/7/02	1512	Cover	2,714.26	Won	1606	4/9/02
4/5/02	1575	Sales Slicks	2,488.06	Won	1593	4/8/02
4/8/02	1587	PostCards	145.85	Won	1575	4/8/02
1/3/02	1506	Recipe Book	4,317.60	Won	1569	3/29/02
3/8/02	1546	School Survey	427.68	Won	1550	3/8/02

Estimate History: #6 Britgar Motors, Inc.

Showing Note Pad When Invoice Opens

The Notes window has been around for a long time, but it was easy to miss. Now, you are able to specify that the Estimator's Note Pad be displayed when a document opens.
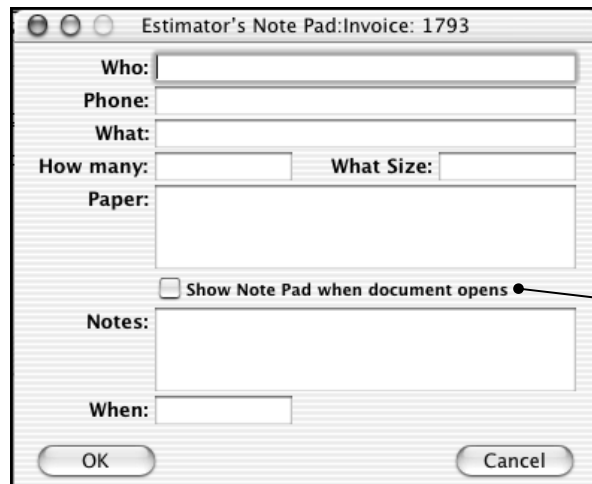
1. Click the **Notes** [icon] icon in the document window.

    Or

    Select **Note Pad** from the Invoice menu.

    The Estimator's Note Pad window is displayed.

    Notes: If the Note Pad was opened from a document, the window title will include the document type (Estimate or Invoice) and the document number, if filed.


Check the Show Note Pad option if you want to have the note pad displayed each time the document is opened.

2. Enter or modify the applicable notes fields including Who, Phone, What, How Many, What Size, Paper, Notes, and When.

3. Check the **Show Note Pad When Document Opens** option, if desired.

4. Click the **OK** button once all necessary information has been entered.
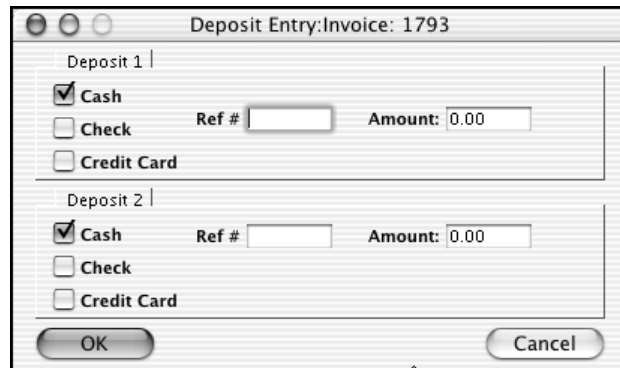
Opening the Deposit Entry Window from the Invoice Window

The Deposit Entry window can be opened from the Invoice window.

1. Open the Invoice.
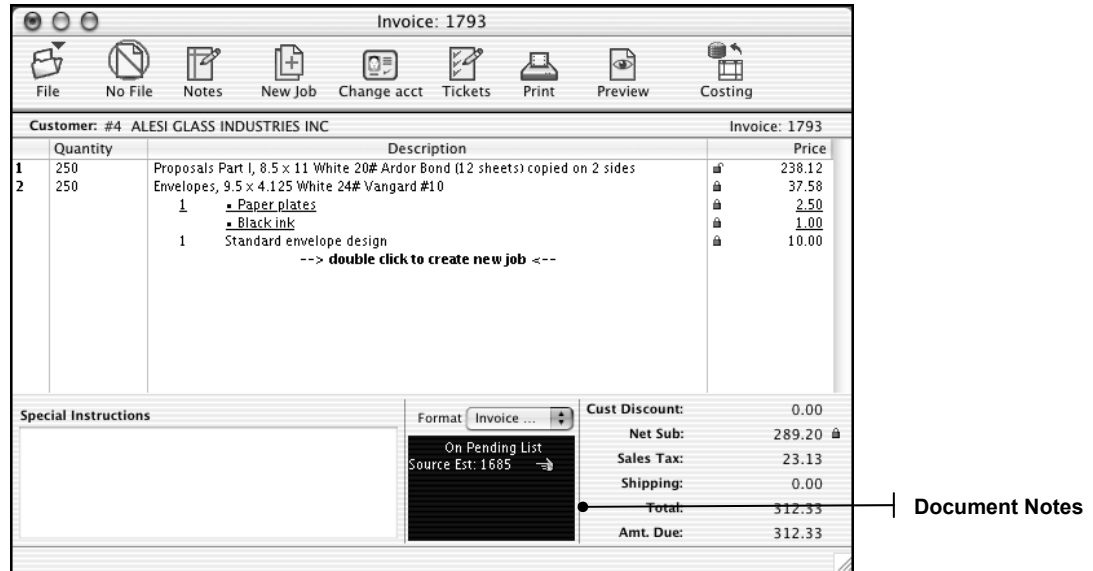
Document Notes

2. Double click on the Document Notes area below the Format drop down. The Deposit Entry window is displayed.


3. Enter the necessary information.
4. Close the Deposit Entry window.

Auto Showing Charges Window from The Job Window

The Charges window can be displayed automatically when tabbing through a job. TO enable this feature:

1.   Select **Admin > Preferences** from the menu. The Preferences window is displayed.

2.   Select **Estimator > Estimator Behavior** from the Prefs list. The Estimator Behavior panel is displayed.
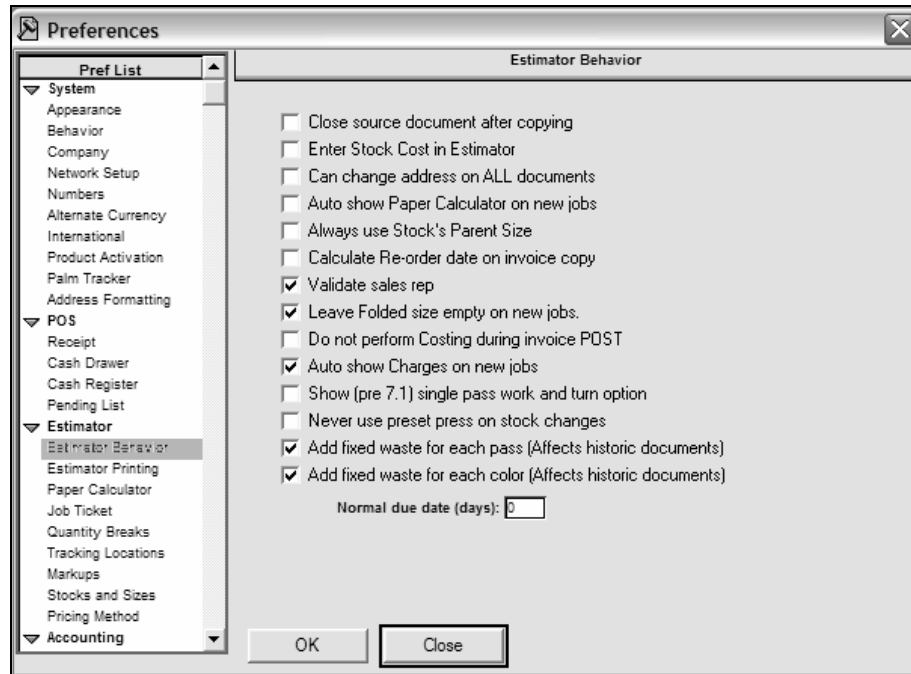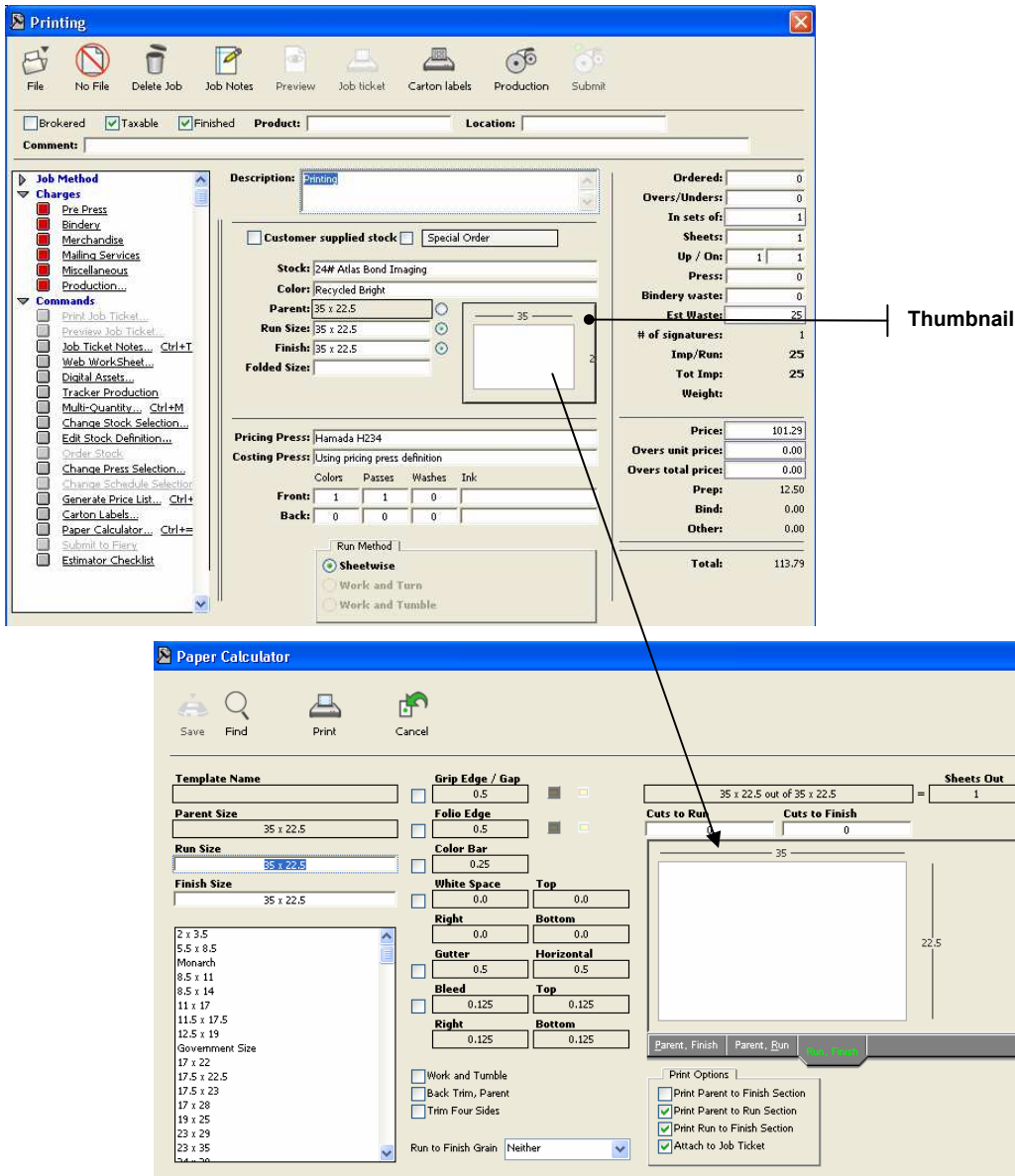

3.   Select the **Auto Show Charges On New Jobs** option.

4.   Click the **OK** button to save.

Once this option is enabled, The Charges window is brought to the foreground after you cycle all the way around each of the job window fields.

### Opening Paper Calculator Through Job Window

You can now access the Paper Calculator by clicking on the thumbnail in the middle of the Job window.

Notes: This thumbnail image will also indicate when the specs of the job have been changed in the job window so they no longer match the paper calculator settings.

Adding Contact Shipping Addresses Using Shipping Charges

Adding a new shipping address in a job can be accomplished by selecting New Address from the pull down menu in the Ship To field. The address you type in will be permanently added to the ship to addresses of the contact in the document.
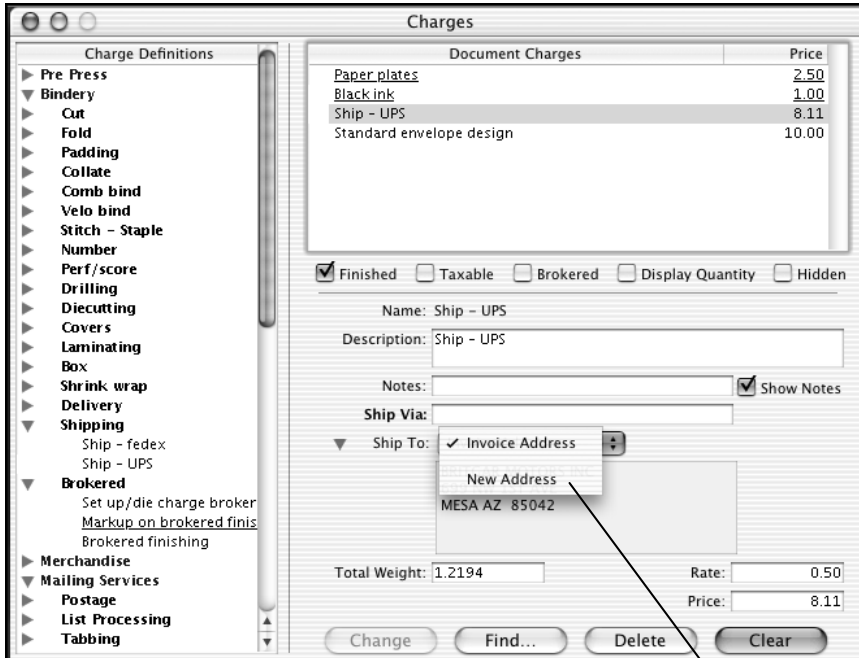
In order for this option to work, the charge must be set to the Shipping Charge method in charge definitions.

Notes: Shipping Charges can be based on Shipping Quantity or Total Weight.
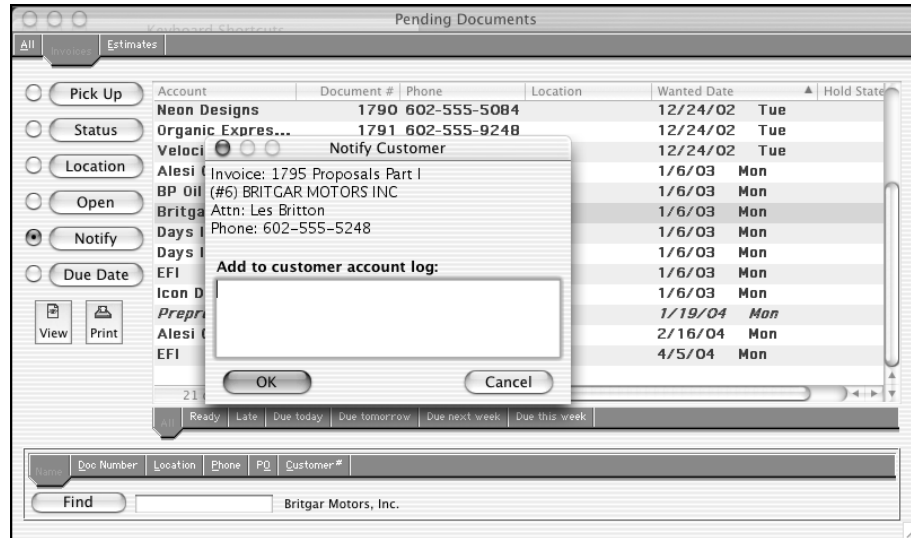
Adding Customer Log Entries From Pending List

Notes can be added to a customer account from the Pending List window.

1. Select **POS > Pending Documents** from the menu. The Pending Documents window is displayed.

2. Select the applicable customer name.

3. Click the **Notify** button. The Notify Customer window is displayed.

4. Enter the information.

5. Click the **OK** button. These notes will be added to the log field in the customer account even if the user does not have access to that customer. The note will indicate who the person entering the note was by showing their user log in name.

Changing Locked Documents

In account history, the description can be changed by double clicking on the existing description while holding down the shift key. Keep in mind that the description is not affected in the document itself, just the way it appears in the history window.

Things that can be changed in a locked document are invoice costing and estimator notes.

Searching For Invoices In Post Payments Window

Invoices can be located in the post payment window by just typing the invoice number when the customer's post payment window is open. You can highlight multiple invoices by continuing to type additional numbers after the previous one has been highlighted.

Creating New Speed And Waste Tables Using File > Save As

Speed tables and waste charts can be copied by doing a file save as while the original speed or waste table is open. This will create a new table with the same settings as the original table which can now be modified without affecting the original.

Renaming List Price Schedules

List price schedules can be renamed by holding down the shift + option+ command key when clicking ok to the list price schedule window. For windows it would be shift + control + alt.

Copying Press And Copier Definitions

The copier and press definitions can be quickly duplicated by holding down the <option> key dragging the existing definition to a new location in the list.

Changing Preset Info From Charges Window

The description of the charge can be changed to reflect a customer's specific term, in place of a printing industry specific term. For example: Here the Fold type is changed from French Fold to *Fold In Quarters*. The Job ticket can reflect either or both terms.

Before **After**
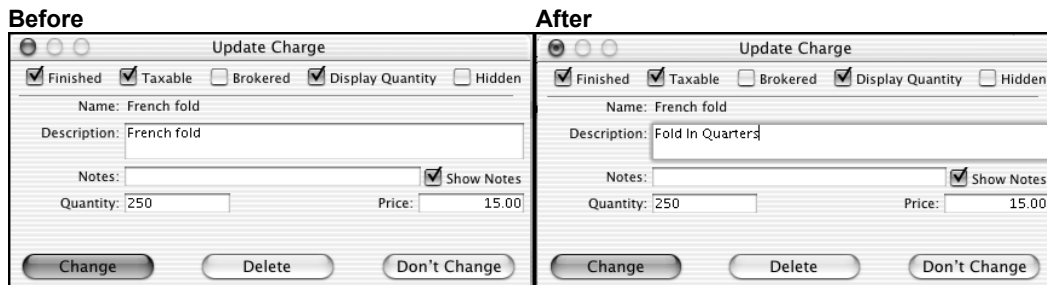
Viewing Composite Reports From Daily Sales

Hold down shift key and select a week's worth of daily closeouts to show a composite report.

Showing/Hiding Help Bar

The help bar incorporates navigation icons, on line help and links to PrintSmith supported web sites. When opened it remains open at all times and is usually positioned near the bottom of the screen. You can move the window but not resize it.

The window has navigation buttons on it that allow the user to open the Customer Account and POS windows as well as PrintSmith update page and PrintSmith On Line Store if connected to the internet.

Probably the most important feature of the Help Bar is that it shows a description of any button or edit field simply by pointing to it. If you are tabbing through edit fields in a window, as soon as you tab to a new field, help text for the selected data field is displayed.

Holding down the <option> key can clicking on the Globe/Hammer icon will launch your default browser and attempt to connect to the PrintSmith.com update page where you can sign on and download upgrades to PrintSmith. The help icon on the far right opens the PrintSmith on-line documentation if available.

Batch Printing Documents

This command allows you to print a group of invoices without having to open them one by one. If you plan to implement batch printing as a daily function, it is best to do it before you run your Daily Closeout. If you try to print today's pickups after doing a Daily Close-out, the list will always be empty as it uses the Register Tape to find new documents.
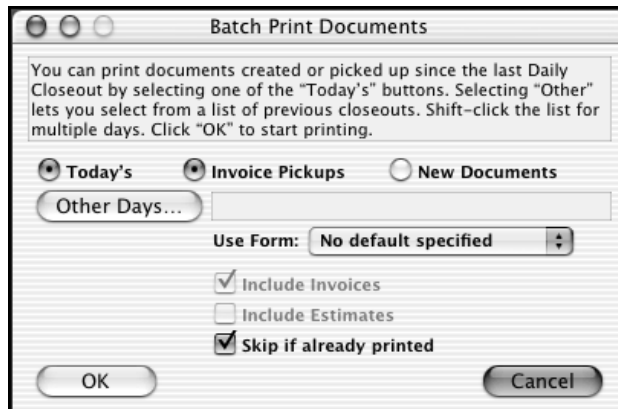
Todays - Whenever you use the pickup function in POS, PrintSmith makes a record of the pickup in the Register Tape. If this button is selected, PrintSmith looks through the register tape for these invoices and when it finds one, prints it.

Invoice Pickups - Invoices picked up since the last daily closeout.

New Documents - Prints documents created since the last Daily Closeout.

Other Days - This button opens a window showing all Daily Closeouts. You select the day for which you want to print documents by clicking on the desired date. You select a range of days by selecting the first day, then hold down the <shift> key while clicking the last day.

Use Form - By defining suitable Quote Letters you can create marketing pieces for mailing to existing customers. For example, you could create a "Thank You" letter for all new invoices created today, select that document preference, and batch print all the letters thanking them for the opportunity to print their "Annual Report" or whatever the document title was.

Skip If Already Printed - PrintSmith keeps track of when each document was printed. If you turn this button on, it will automatically skip any document that was already printed. If the button is off, PrintSmith will still ask you before it reprints an invoice.

Include Invoices - If you select Skip If Already Printed and Include Invoices you would only get invoices that haven't been printed.

Include Estimates - If you select Skip If Already Printed and Include Estimates you would only get estimates that haven't been printed.
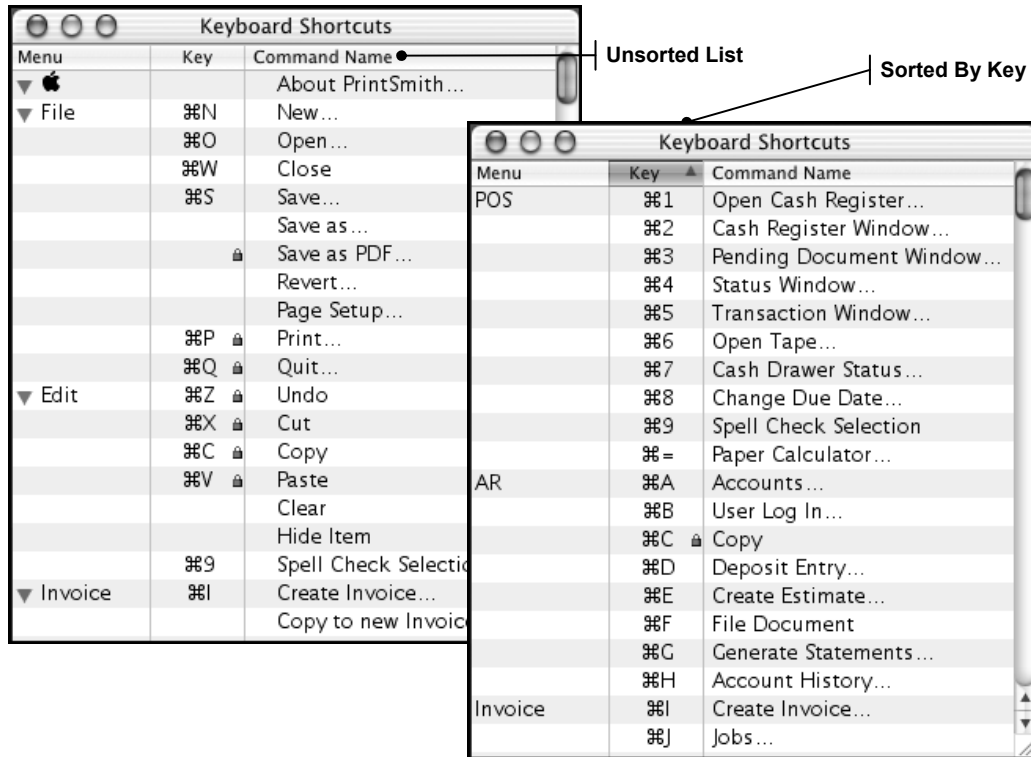
OK - Starts printing the documents based on the buttons selected above.

Cancel - Cancels the request and closes the window.

Defining Keyboard Shortcuts

The Keyboard Shortcuts command allows users to customize keyboard shortcuts.

Functionally, this is very similar to Security Setup. You can sort the list by clicking one of the header columns. You assign a keyboard short cut by clicking in the key column next to the command you want to modify and type the single character shortcut you wish to use. There are some shortcut keys that are system defined and cannot be changed. These are indicated with a small lock icon.

Items that have been changed but not yet saved are shown in italics. When you select the Save command, these changes are immediately applied.

Since most characters are already used, it is often useful to sort the list by the key values as shown below. For your reference and convenience, print out the window by selecting Print from the File menu.

Notes: Keyboard shortcuts can only be defined at the Master on a multi-user system. They are read from the Master when the workstation initially launches.
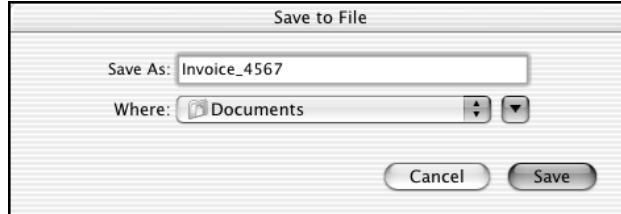
Saving As PDF

In OSX, documents can be printed or saved as a PDF. To print to PDF:

1. Click the **Print** ⊟ icon in the document window.

    Or

    Select **Print** from the File menu.

    A printer specification window will be displayed.
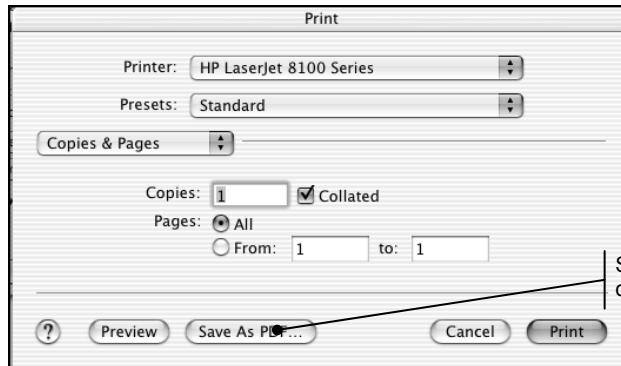
Save As PDF button
displayed in OSX

2. Click the **Save As PDF** button. The Save to File window is displayed.

3. Modify the file name, if necessary.
4. Select the location of where the file is to be saved.
5. Click the **Save** button. The file will be saved as a PDF and the document, printer, and save to file windows will be closed.

Notes: Documents can also be saved as a PDF by selecting Save As PDF from the File menu. If you save the document as a PDF using this method, the printer selection screen will not be displayed – only the Save to File window.

Changing Overall Page Default Setup

PrintSmith, prior to version 7.0, had a single Page Setup record which was used to print all reports and document preferences. In 7.0 this restriction was removed and each window and document preference can now have its own. To affect the original system wide Page Setup, close all windows and then select File > Page Setup from the menu. The built in job ticket still uses this default page information.
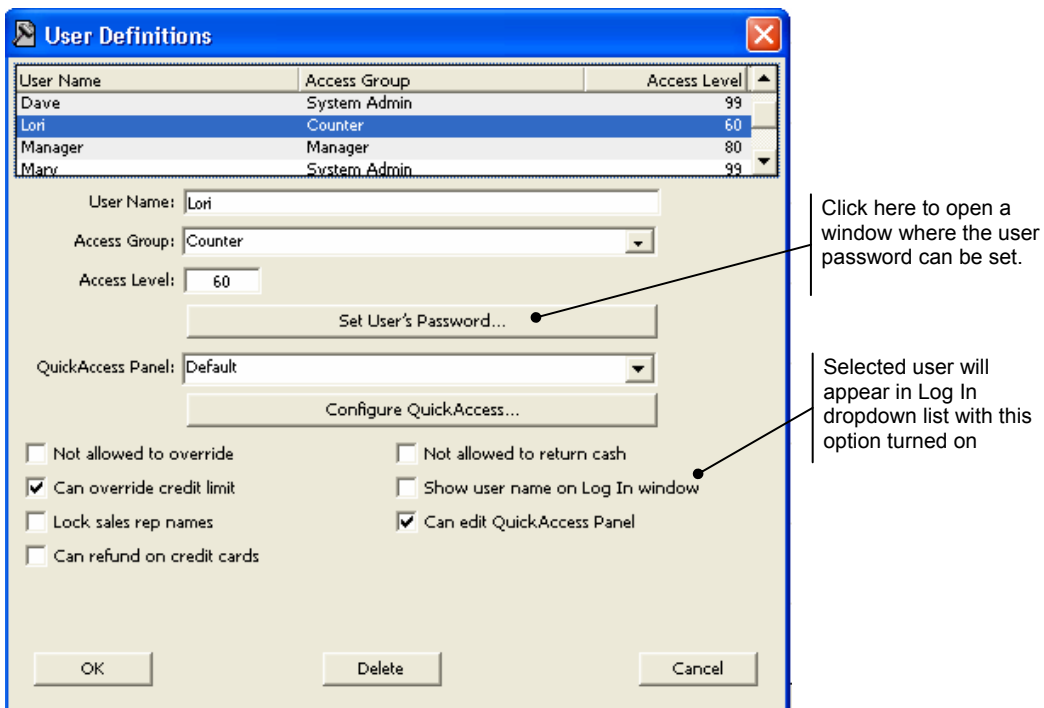
Log In window

The Log In window now supports a dropdown list of usernames. Selecting a user from this list will populate the User Name field and place the focus on the Password field. The dropdown list button will always be shown, but if no users have the option turned on in their User Definition the list will be disabled. The User Name dropdown list is available on Master, Workstations, and Portable. If the user's name appears in the list, starting to type the name will auto-fill the User Name field.


User Names can be selected by clicking here
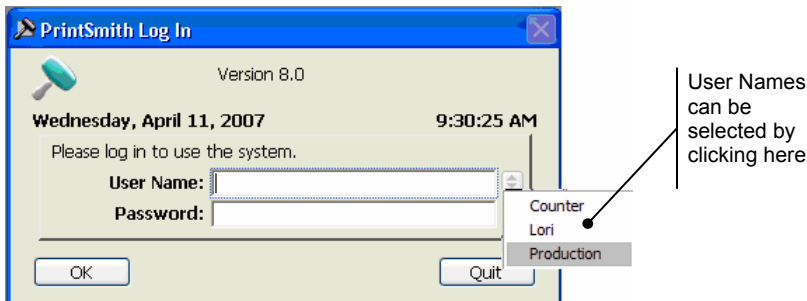
To enable the User Name dropdown list and add users to the list:

1.   Select **Admin> User Definitions** from the main menu. The User Definitions window opens.

2.   Select a user in the list, then select the **Show user name on Log In window** option.

3.   Save changes. The selected User Name will appear in the dropdown list of the Log In window. Repeat for all users whose User Name should appear in the dropdown list.

Click here to open a window where the user password can be set.

Selected user will appear in Log In dropdown list with this option turned on

System Security- User Definitions

The security system is shipped disabled. This means that anyone using the system can make changes to any part of PrintSmith. While this is very desirable as you start using the system some level of security is recommended once you go live with PrintSmith. From the Admin menu, select User Definitions.
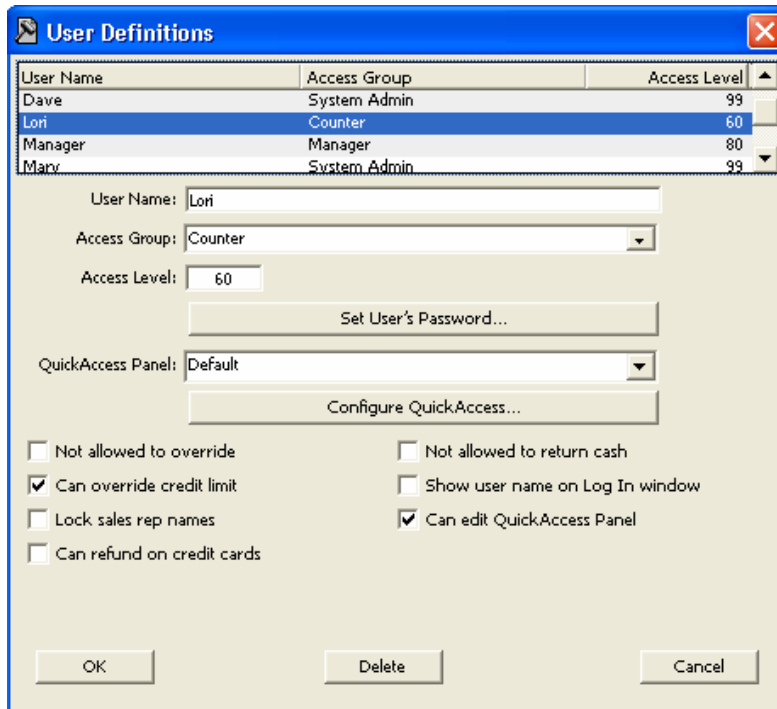
The user currently logged in is shown with a bullet to the left of the name. The User Definition of the System Administrator (there can be only one) is shown in red with a diamond next to the name. The list is in alphabetical order. Although any user can be given access to the User Definition command, only the System Administrator has full use of the command. Specifically, only the System Administrator can change User Definitions that belong to the System Admin access group and only the System Administrator can assign User Definitions to the System Admin access group. Except for the System Administrator, you cannot change anything in your own User ID. The System Administrator password can only be changed using the Change Password command. This feature ensures that you know the old system password before you change it to a new one.

Access Group

Access Groups are defined in the Security Setup command. An access group is a list of all the commands available to members of that group. There are two pre-defined groups: System Admin, which always has all commands, and Minimum, which only has those commands needed to get in and out of PrintSmith (Quit and Log In). These groups cannot be changed in any way.

Access Level

This field used to be the principal security feature of PrintSmith. It is retained in this version solely to support access levels on customer accounts. This was the only way we could retain the full functionality of the access level or we would have discontinued the field entirely.

Lock Sales Rep

This setting is particularly useful in situations where you must ensure that the sales representative name assigned to account and/or document is under management control. When enabled, a user can assign a Sales Rep to accounts and documents only if the field is empty and can not change the assignment thereafter.

Not Allowed To Return Cash

This setting prevents the user from cashing checks in the Cash Register. A transaction is rejected if the amount of change exceeds the total amount of cash.

Security Setup

The Security Setup command is an editor for access groups. Access Groups are lists of commands that members of the group are allowed to perform. Although most of these commands directly correspond to menu commands, there are many commands with no direct menu equivalents such as preference windows.
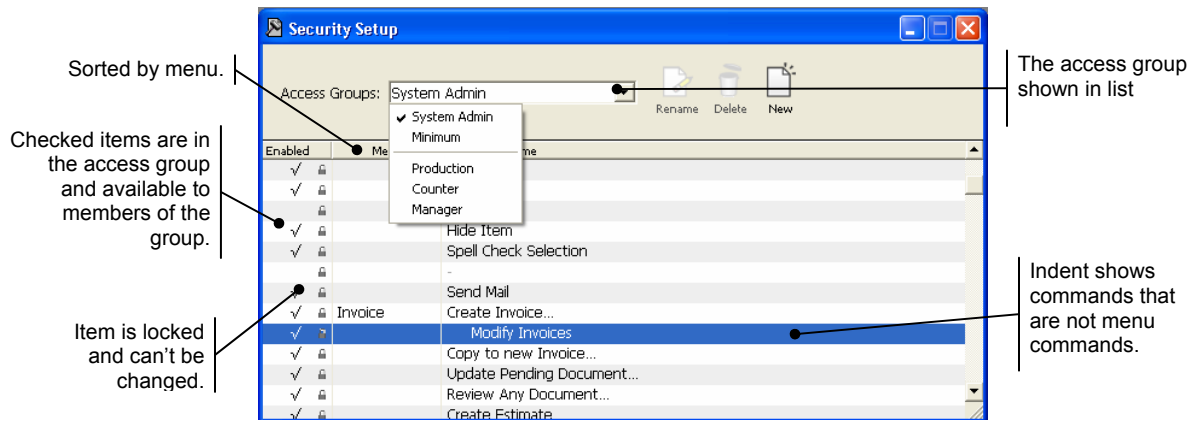
From the pop up menu select the access group you wish to edit. Add or remove check marks from individual commands. Those commands without check marks are not available to members of the group. As you make changes, items will display in italics. When you save those changes using the Save command in the File menu, italics are removed.

Items which cannot be changed show a Locked icon. All items in the System Admin and Minimum group are locked. These two groups are pre-defined in PrintSmith and cannot be changed.

Adjust column widths by dragging the separators in the list header. Sort the list in different ways by clicking on the column by which you want it sorted. It is easier to edit the list when it's sorted by menu.

Any access group can be copied using the Save As command. Since this list includes the System Admin group, we strongly recommend restricting this command to members of that group.

Rename. Select this feature to rename an access group. The groups created during the conversion process may have cryptic names that you will want to change to something that makes more sense.

Delete. You may find that there are more groups than you really need. This button deletes a selected access group. Any User Definitions that are members of a deleted access group are automatically assigned to the Minimum group, which effectively renders that User Definition unusable.

New. Add a new access group.

Change Password

In the Change Password window, password verification now occurs in the main window, rather than in a separate, second window.

```
Enter the current password and the new one twice to
verify your changed password

      User ID:  <NO NAME>

 Old Password:  |

 New Password:

Verify New Password:

  (  OK  )                              ( Cancel )
```

Verify New Password in the
Change Password window

Backing Up PrintSmith

You will be entering and using information in PrintSmith which operates your business. It is imperative that you ALWAYS have backups of your software in case of fire, theft, flood, or other disasters. Rarely, if ever, will you need to restore from a backup. However, the information you collect in PrintSmith is invaluable and should be insured like any other valuable.

Perform a backup daily! ALL of the items in the PrintSmith folder should be backed up daily.

Recommended Backup Procedure

On a daily basis, backup the entire PrintSmith folder to backup media. It is helpful to have a backup set labeled Monday, Tuesday, Wednesday, and Thursday and a set labeled Week 1, Week 2, Week 3, and Week 4 that are run on Fridays. Ideally you use a new tape for every backup.

If you back up your PrintSmith folder on a daily basis using the above plan you can rest assured you are covered. If you call PrintSmith during a crisis, the first question you will be asked is, "Do you have a current back up?"

Back these highlight files and folders up daily. Treat each folder as a single file.

Minimum Backup Procedure

At the very least you should backup:
* Data… folder

* Prices… folder

* ECommerce folder

* PS Setup file

Also, if you use Templates and Reports, you should back them up as well.

Backup Hardware and Storage

One recommendation is a tape drive for backups, so you can automate the process as well as backup other valuable software (information) in your business. ZIP and JAZ drives work very well also. Furthermore we recommend that you always keep a current backup OFFSITE.

Backup media should be stored in a fire safe, secure environment.