



PrintSmith Session Handouts

Stock Definitions, Inventory, Customers, Contacts, and Campaigns

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Stock Definitions

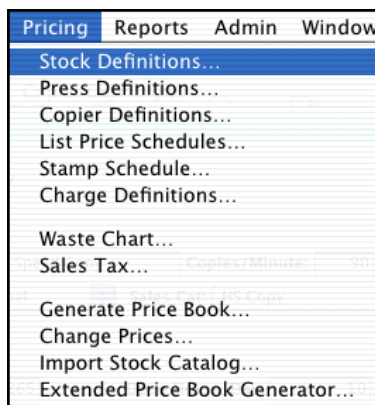
A stock definition controls the information regarding the papers used in your operation; how much they cost, what size you purchase, what size you normally run, and what equipment you normally run it on.

In this section we will achieve the following objectives:

- Searching the Stock Index
- Changing Stock Prices
- Testing Pricing
- Printing Price Lists

There are three areas you need to review in each stock definition; Stock Description, Specification & Pricing and Options.

Select Stock Definitions from the Pricing menu.



When selected, a stock picker window will open giving you the option to search for and select a stock.

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Searching the Stock Index

The stock index can be expanded to search the fields in the top description area of the window. When data is entered, the list will narrow to just those selections that match. The group designation is table and can be customized.

Clicking on a column title will sort the data by that column's information, in this case, stock name.

Name	Weight	Size	Generic Color	Finish	Thick	Stock Number	Ordered
Ardor Bond	20	8.5 x 11	White	Wove			
Ardor Bond	20	8.5 x 14	White	Wove			
Ardor Bond	20	11 x 17	White	Wove			
AstroBright Cover	65	23 x 35	White	Vellum			
Atlas Bond Imaging	24	35 x 22.5	Bright White	Smooth		0126-2238A	0
Bond	20	8.5 x 14	White	Wove			
Centura	80	23 x 35	White	Gloss			
Centura Cover	80	17.5 x 22.5	White	Gloss			
Classic	65	8.5 x 11	White	Linen			

Stock information is displayed in eight columns. Column information can be sorted and displayed by clicking on any column title. Scrolling up and down is much faster due to live updates. Pop up menus are also available for most fields in the description area. These menus are controlled and customized in the Table Editor.

Stock Definitions are available on WorkStations. Stock records are locked and unavailable to others when selected in the Stock Definition window. When you update the pricing folder in order for PrintSmith Portable to work properly, the file is copied into the portable system.

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To print a listing, select a particular stock. Select the Print command from the File menu. The stock list printed will be based upon the Group that stock belongs to. Paper is the default group. Select a stock from each group and print a listing.

Preview of "Stock Picker- Stock Definitions".pdf

12/2/03 **Stock Definitions - Paper** Page 1

Class	Stock Description	Parent Size	Run Size	Cost	Vendor Units	Markup	Q Limit	Vendor Stock No. List/M	Sets
Bond	20# Ardor Bond White	8.5 x 11	8.5 x 11	3.4578	500	1.5			
	Press: SF-Bonds				Blank Sheets: 1	0.0339			
	Copier: Letter High Speed Copy				100	1.695			
	Copier: Letter Full Color Copies				500	6.78			
	Schedule: Paper Prices2				0	0.00			
					0	0.00			
					0	0.00			
Bond	20# Ardor Bond White	8.5 x 14	8.5 x 14	4.4268	500	1.5			
	Press: SF-Bonds				Blank Sheets: 1	0.0434			
	Copier: Letter High Speed Copy				100	2.17			
	Copier: Letter Full Color Copies				500	8.68			
	Schedule: Paper Prices2				0	0.00			
					0	0.00			
					0	0.00			
Bond	20# Ardor Bond White	11 x 17	11 x 17	6.9258	500	1.5			
	Press: LF-Bonds				Blank Sheets: 1	0.0339			
	Copier: Tabloid High Speed Copy				100	1.695			
	Copier: Tabloid Full Color Copies				500	6.78			
	Schedule:				0	0.00			
					0	0.00			
					0	0.00			
Cove	65# Astrobright White	23 x 35	11 x 8.5	214.5774	1000	1.5		0.62	
	Press: SF-Offset, Text				Blank Sheets: 1	1.0518		Copier 1: 0.045	
	Copier: Letter High Speed Copy				100	52.5925			
	Copier: Legal Full Color Copies				500	210.37			
	Schedule: Paper Prices2				0	0.00			
					0	0.00			

Review all stock definitions and either customize them with your information or delete them.

Deleting All Stocks

If you would like to delete all of the stocks entered and start over, quit PrintSmith and remove the Stocks file from the Prices... folder. Restart PrintSmith. When you select Stock Definitions from the Pricing menu, you will receive an error message about the missing file: "The Stock Index file is damaged...OK to repair the Stock Index file?" Click the Yes button to continue and you can now create a new stock list.

Notes: This should never be done on a system that is being used - only during initial set up.

Viewing Stock Definitions

To view a stock definition, select the stock from the list and click the Select Stock button. The Stock Definitions window is displayed.

Top section, Stock Definitions window

Stock Definitions

Last Next Price List File Get New Export Delete Cancel Close

Group: Envelopes Class: 8 Metric ☐ Envelope ☐

Name: Classic Crest #8 Finish: Weight: 24 ☐ Sheet Stock ☐

Color: White Grade: Coated: ☐ Roll Stock ☐

Generic Color: White Last Updated: 8/20/01 ☒ Large Format

Last Price Change: 8/20/01

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Stock Descriptions

The top section of the window contains the following fields, which are visible from either panel:

Group

This is a convenient way to group stocks by their overall attributes. Prior to this release, there were four pre-defined stock groups: Paper, Envelopes, Carbonless, and Other. Stock Group is controlled by the Stock Group Table in the Table Editor, making it possible to change the name of groups and add many more stock groups. We recommend that you refrain from changing the name and use of the first four groups as importing stocks from vendors relies on them to some degree. If you do change them, importing stocks from vendor catalogs will still work, but the group in which newly imported stocks are placed may not be what you expect.

Class

The new Stock Picker does not use this field. It has been retained solely for use with the original Stock Lister.

Metric

The system used for measuring metric stocks is much simpler and straightforward than the system used in the US. The principal difference is a common basic size (A0). The effect of this difference is that there is no need to calculate M Weight and the Basic Size is always the same. Enabling the Metric option removes those fields from the stock definition and changes the thickness measurement to "Microns" (one millionth of a meter).

Envelope

Selecting this option makes the M Weight field editable. Since envelopes are manufactured products, they will not have an M Weight from the manufacturer.

Sheet Stock

Select to define sheet stock. Different options appear on the tabs below.

Roll Stock

Select to define roll stock. Different options appear on the tabs below.

Large Format

Select to define large format stock. Different options appear on the tabs below.

Name

As PrintSmith sorts the list alphabetically, it is important to pay attention to extra spaces and misspellings. Limit the name to a description. We have separated the fields for weight, color, finish, and size. The Stocks and Sizes Preference panel allows you to decide how to combine the name, weight and finish in those cases where the stock description is presented as a singled data element (stock order, invoice window, job ticket, etc.)

You may wish to modify the names of your existing stock definitions to remove text from the description that is now tracked in other data fields. At a minimum, the weight and finish should be removed.

Finish

This field contains a finish description such as wove, linen or laid. The text of each available finish is stored in the Stock Finish table in the table editor. You select the finish from a pop up list that appears when this field is selected.

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Weight

This contains the basic weight of a stock. This field is used to calculate the M Weight, and Carton Weight of the stock. If you store the weight as part of the stock name, we strongly recommend removing it and storing the weight only in this field.

Color

If you plan to import stock catalogs from vendors or order stock electronically, you should add a color to each stock definition. Enter the full "mill" color for each stock. In other words, if the mill color is "Avon Brilliant White" use that color rather than simply "White".

Each color in the stock database is stored in a special Stock Color table in the table editor, which you control. In this table, each mill color (25,000 are supported) is associated with a Generic Color. In the above example, "Avon Brilliant White" would have a generic color of "White". This allows you to find the stock using either the mill color or the generic color.

Generic Color

Each stock definition should have a generic color. This considerably enhances the power of the Stock Picker. When a stock is selected which does not have a generic color assigned, PrintSmith checks the Stock Color table to see if there is a generic color for that stock color.

If it finds one, it automatically assigns it to the stock definition. If the stock color in the table does not have a generic color, it will ask you to select one and will update both the Stock Color table and the Stock Definition with your selection.

Grade

This field is used to indicate the stock grade description; #1 Coated, #1, #2, #3, etc. You select the grade from a pop up list that appears when this field is selected. This table is the Stock Grade in the Table Editor.

Coated

This field tracks whether or not a stock is coated and on how many sides. Enter a 1 for stock coated on one side or a 2 for stock coated on two sides.

Last Updated

This field displays the date of the last change to any part of the stock definition you are viewing.

Last Price Change

This field displays the date of the last change to the stock definition which changed the costs or prices of this stock. This could be the result of using the Change Prices function or changing blank pricing in the "Stocks and Sizes" preference panel, not just changing the price directly in this window.

Stock type radio buttons

Select the appropriate radio button to view and complete the specifications for that stock type. The options on the tabs below change depending on your choice.

Specification and Pricing Panel

The fields on this panel change relative to the stock type that you choose.

Stock Definitions window, Specification & Pricing tab

Specification and Pricing | Pricing Options | Inventory

Vendor: Unisource Stock #:

Stock Type: Business Papers Basic Size: 17 x 22

Parent Size: 8.5 x 11 Thickness: Caliper

M Weight: 12

Sheets/ Carton: Carton Weight:

Min. Order: 1 ☐ Charge Customer for Entire Order

Qty. Adjustments:

Costing Units: 1,000 # Sheets/Set: 1 ☐ Cost is in Sets

Qty. Breaks:	Cost:	CWT:	Markup:	List/M:
	22.46	187.17	1.5	1.45
			1.4	1.35
			1.3	1.25

Price Expires: <never>

Comment:

Keep in mind that although you do not enter units for weight or length values in PrintSmith, the values must be consistent with each other. For example, you cannot use pounds in one field and ounces in another, or mix feet and inches.

Vendor

The stock vendor is used to identify the vendor of the stock. The Vendor Table in the Table Editor controls it. If you purchase the same stock from multiple vendors, you should create additional stock definitions for each vendor.

Stock #

Enter the stock number used to order this stock from the indicated vendor. You can enter letters and numbers, up to 31 characters.

Notes: It is possible to search the stock file for a stock with a particular stock number. To do this type "/" or "?" followed by the stock number while in a blank stock record.

Stock Type (Envelope and Sheet Stock only)

This identifies the type of paper: Business, Book, Cover, Index, and Tag. In non-metric stocks, this is a critical piece of information because it determines the basic size of the stock. The basic size determines the M Weight, the Carton Weight, and the CWT (hundred weight) Price. The Basic Sizes Table controls the contents of this menu. Generally, you should not modify this table unless you are certain of the changes. This table is already set up with all the common stock types and their associated sizes.

Basic Size (Envelope and Sheet Stock only)

Basic Size corresponds to the Stock Type selection. This field cannot be edited and simply shows the size associated with the selected Stock Type in the Basic Sizes table. This size is used to calculate both the M Weight and the CWT price.

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Parent Size (Envelope and Sheet Stock only)

The size of the stock you purchase from the vendor. For envelopes, use the Sizes Table in the Table Editor to set up common text descriptions such as #10. This also applies to international sizes: A2, A4, A6, etc.

A quick way to enter a size from the numeric keypad is "17/28". PrintSmith automatically expands this to "17 x 28".

Normal Cutoff (Roll Stock and Large Format only)

For Roll Stock, this is the maximum length of the stock that that you can run through your roll-fed device per impression. For Large Format, this is the Normal length of the stock that that you run through your large format press.

M Weight (Envelope and Sheet Stock only)

This is the scale weight in pounds of 1,000 sheets of paper of a given size. The given size in PrintSmith is the Parent size in each stock definition. That parent sheet is compared to the basic paper size to determine the comparative weight or estimated M weight. The calculation for stock with a basis weight of 20 pounds in a 17 x 22 parent sheet that has a basic size of 17 x 22 can be calculated as follows:

$$\left(\frac{\text{Area of Parent Sheet}}{\text{Area of Basic Paper Size}} \right) \times \text{Basis Weight} \times 2$$

$$\left(\frac{17 \times 22 \text{ or } 374}{17 \times 22 \text{ or } 374} \right) \times (20 \times 2) = 40 \text{ MWeight}$$

Thickness

This field defines the thickness of the paper in one of 4 measurements: caliper, points, plies, or microns. Microns are used exclusively for metric stocks while the other three types of measurements are interchangeable and are used for certain types of stocks as follows:

Thickness	
Measurement	Definition
Caliper	Caliper is the thickness of a paper measured in thousandths of an inch, traditionally applied to most printing papers which are between 0.001 and 0.008 inch thick.
Points	One point is the equivalent of 0.001 inch, traditionally used to indicate heavy card stock such as coated covers. 12 point cover is 0.012 inch thick (12 points x 0.001in.)
Ply	Ply is traditionally used to indicate thickness of card or chipboard. A sheet of 6-ply board is 0.024 inch thick (multiply the ply value by 3 and add 6 to that result).
Micron	Micron the standard unit of thickness measurement for metric stocks. A micron is one millionth of a meter.

Sheets/Carton (Envelope and Sheet Stock only)

The Sheets per Carton field is the number of sheets of the Parent Size in a single carton. Can also be used to specify the number of parent sheets in a skid.

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Carton Weight (Envelope and Sheet Stock only)

If the Stock Type is properly selected or the stock is a metric size, and the Basis Weight is known, PrintSmith is able to calculate the M Weight. The M Weight is used to determine the weight of a carton (or skid). The formula for calculating the carton weight is:

$$\left(\frac{MWeight}{1000} \right) \times SheetsPerCarton = CartonWeight$$

These two fields define the order information for a particular stock. The carton weight for 1,000 sheets equals the M weight. If the carton holds only 500 sheets, the carton weight is half that amount.

Rolls/Order (Roll Stock only)

Minimum number of rolls that you will sell at one time. As you cannot purchase a partial roll, this field should be either 0 (zero) or the number of rolls that must be purchased.

Roll Weight (Roll Stock only)

The weight of an entire roll.

Minimum Order (Envelope and Sheet Stock only)

For stocks that can be ordered in any quantity, enter a 1 in this field. If the stock has a minimum order such as ream wrapped stock that can only be ordered in sets of 500, enter a 500 in this field. This ensures that the stock order and job ticket properly reflect the amount of stock to be ordered. In addition, it allows you to pass on the cost for ordering more stock than absolutely needed to your customer.

Example: In the Production Data window in the Estimator, if a job requires 200 sheets and the minimum order in the stock definition is 250, 250 will display in the Sheets Purchased field. Note that although the number of sheets purchased may be greater than needed for the job, production charges are based on the number of sheets used in the job, not the full quantity purchased.

Min. Order (weight) (Roll Stock only)

The minimum weight of this stock that you will sell at one time.

Min. Order (length) (Large Format only)

Minimum length of this stock that you will sell.

Charge Customer for Entire Order

Enabling this button for a particular stock, tells the Estimator to add the cost of the entire stock order to the stock charge of the job. This cost is marked up in the usual manner, but the additional sheets are not included in the charge for printing or copying. Using the previous example, the job's stock cost will reflect the 250 sheet minimum purchase.

Costing Units

This is the quantity in which the stock is priced. Usually this is 1,000 since most stocks are priced in lots of 1,000. Envelopes often come 500 to a box and priced in that way. You can also break roll stock into sheets to price rolls. For example, if a roll costs \$300.00 and 25,000 sheets can be cut out of the roll, you would enter 25,000 here and \$300.00 as the cost of the stock.

sheets/set (Envelope and Sheet Stock only)

Used to define carbonless stock in pre-collated sets. If you have a 3 part carbonless stock, for example, you would enter 3 in this field. The Estimator can then automatically make the correct calculations based on the number of sheets in a set.

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Cost Is In Sets (Envelope and Sheet Stock only)

This feature is intended primarily to enhance carbonless pricing. Prior to this release, the number of sheets per set determined the cost of the stock. A price for 3-part carbonless was the price for the entire set. Most paper vendors' price carbonless by the sheet rather than the set so you had to either change the Costing Units or calculate the price before entering it. This button allows you to choose how you enter the cost for carbonless. When enabled, it indicates that the cost entered is for sets, not individual sheets. Changing the setting of this button automatically changes the cost of the stock. For example, a 2 part carbonless set is priced at \$200.00 per 1000 sets with this button turned on. Turning it off will change the price to \$100.00, because the price is now based on half as many sheets. The Estimator will handle pricing for this stock correctly regardless of which setting you choose. We recommend setting it to match how each of your vendors specify the stock.

Stock Price Table

The stock price table has been expanded from 3 to 6 quantity break columns. This expanded table also works in conjunction with enhancements to the stock importing process, which can also handle importing multiple quantity breaks.

Qty Breaks (Envelope and Sheet Stock only)

This is the maximum quantity of parent sheets for each column in the price table. For example, entering 1000, 2000, and 3000 in the first three columns tells PrintSmith to use the first column for the stock cost and markup for quantities up to and including 1000. The second column is used for quantities between 1001 and 2000. The third column is used for quantities greater than 2000. Make sure there is a quantity in this field for any column you want to use or PrintSmith will assume that it is not used.

Weight Breaks (Roll Stock only)

Use to define the price at varying weights.

Area Breaks (Large Format Only)

Use to define the price at varying areas.

Cost (Envelope, Sheet Stock, and Large Format only)

Cost of the stock and the number of pieces you can buy at that price. Normally this is the cost per 1000. Envelopes usually come in boxes of 500. In that case, use 500 for the units.

CWT (Envelope, Sheet Stock, and Roll Stock only)

CWT stands for Hundred Weight Price. This field contains the cost for 100 pounds of paper regardless of size. Hundred weight pricing is a convenient way to compare paper prices for different stocks in different sizes. Although there is some variation within a given stock family for different size stocks, the CWT price is generally similar. You have a choice of entering either the CWT price or the Cost. Entering one calculates the other providing there is sufficient information available in the stock definition to make the calculation.

To calculate the CWT price, the Basic Size and Weight must be known and be correct.

Markup

The stock markup is used by the Estimator to mark up the cost of the stock. If the markup in the first column does not appear to be overridden (overrides are shown in the outline face on Macintosh and underlined italic on Windows), you are actually looking at the standard stock markup defined in the Stocks and Sizes Preference panel.

Normally you will leave it alone. Change it if you want a particular stock to be marked up differently from the standard stock markup you specified in Pricing Preferences. Enter a markup rate in columns 2 through 6 when the markup you want to use is different from the first column. Leave the markup field empty across the row unless the rates in columns 2 through 6 are different from the first.

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Notes: If you change the system default stock markup in Pricing Preferences, you change the markup for all stock definitions except those, which have been overridden.

List/M (Envelope and Sheet Stock only)

Used to specify an additional price per thousand sheets for use with the "List" pricing method because list pricing does not factor in the stock cost when generating a price. The amount (plus or minus) entered in this field is divided by 1000 and multiplied by the quantity ordered and added to the price of the job.

Example: A price schedule is used for a stock, which costs \$10.00 per thousand. You want to use it for a stock that costs \$11.00 per thousand. You could enter \$1.00 in "List/M" and PrintSmith would add 1.00 to each thousand ordered.

Price Expires

This information is only provided as part of importing stock prices from a third party stock vendor. It tells you whether the price shown in the stock definition is valid. If the price has expired, you will receive a warning message that the price has expired, however, you can still use the stock.

Although we have defined this field as part of the Generic Vendor stock import data format, we know of no paper vendors that have implemented it. Our intention with this field, is to support the idea that the paper price quoted by the vendor will be honored until the expiration date of the price in stock definition. If your paper vendor supports importing into PrintSmith, you may want to ask them when they'll support this feature.

Comments

Use this to keep track of notes related to the stock and ordering process.

Pricing Options Panel

The Pricing Options panel is used set up specifications used by the Estimator to price jobs using this stock definition. The fields on this panel change relative to the stock type that you choose.

The screenshot shows the 'Pricing Options' tab within a software interface. At the top, there are three tabs: 'Specification and Pricing', 'Pricing Options' (which is selected), and 'Inventory'. Below the tabs, there are several input fields and sections:

- Normal Run Size:** 8.5 x 11
- Cut/100:** 0.00
- Min. Cut Chg.:** 0.00
- Import One Stock:** A button.
- Select Press for Printing:** A dropdown menu showing 'Text 8.5 x 11/14 1C Normal Coverage'.
- Schedule for List Pricing:** A section with a 'Select Schedule' button and the text 'Paper Prices2'.
- Pricing for Blank Sheets:** A section with 'Quantity' and 'Price' input fields, and a checkbox labeled 'Auto Calculate Blank Stock'.
- Adjust Copier Matrix and Select Default Copier:** A section with three rows: 'B&W' with a value of 0.04 and a dropdown showing '8.5 x 11 B&W Copy'; 'Color' with a dropdown showing '8.5 x 11 Color Copies'; and 'Large Format' with a dropdown showing '<use default copier>'.
- Preset up to 10 Charges:** A section with an 'Add Charges...' button and the text '<nothing selected>'.

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Normal Run Size (Sheet Stock only)

This specifies the most common run size when you create a job using this stock definition. It is also used as both the run and finish size when generating a price list with the Price List button or the Generate Price Book command in the Pricing Menu. PrintSmith automatically calculates the number of sheets that can be cut out of the selected parent sheet. If you do not specify a run size, PrintSmith will assume that it is the same size as the parent size.

Cut/100 (Sheet Stock only)

Cut charge for each 100 parent sheets. This charge is added to the stock cost and is useful when the vendor charges for cutting parent sheets to the size you've entered in Parent Size. The cut charge is calculated including estimated waste and is added to the cost of the stock after the stock has been marked up. The cut charge itself is not marked up.

Notes: For best results, we recommend adding a Pre Press cutting charge instead of using Cut/100 since a charge is much more "intelligent" about how many cuts and lifts are needed.

Min. Cut Chg (Sheet Stock only)

Used in conjunction with "Cut/100" to specify a minimum charge for cutting. If theirs is no Cut charge specified, the minimum is added to the stock for all quantities.

Select Press for Printing

The Select Press For Printing allows you to preset a press definition for use with a particular stock. When you select a stock definition that has a preset press, PrintSmith assigns the press to that job and adds any charges that are preset in the press definition. Selecting a stock definition without a preset press will assign the "default" press, the first press in the definition list.

PrintSmith is designed so that you can use the press definition as a way of defining a production environment. If you know a stock will always be used in a particular production environment, you can create a press definition and preset the press for each stock definition to which it applies. Some good examples are carbonless forms and envelopes.

Use the press pop up menu to select a press. The first item in the press menu is "<use default>". Select this if you do not want a preset press. The default press is the first press in the menu after "<use default>".

Select Schedule for List Pricing (Envelope, Sheet Stock, and Roll Stock only)

To use list pricing with more than one price schedule, you must tell PrintSmith which price schedule to use with each stock. To select a price schedule, click this button and select the schedule from the list of the currently defined price schedules, which is displayed. If you select a stock in the Estimator, which does not have a preset schedule, PrintSmith will warn you and will use the default price schedule, which is the default List price schedule.

When a price schedule has been assigned to a stock, its name is displayed to the right of the button. To remove a preset schedule, click "Select Schedule" and then "Cancel" when the schedule list is displayed.

Pricing for Blank Sheets (Envelope and Sheet Stock only)

Blank pricing has six prices for six different quantity breaks, each of which can be based on the cost of the stock at a different markup. As shipped, these quantity breaks are 1, 10, and 100, but you can change the quantity breaks and markups to anything you like in each definition.

You may also change the system default values using the "Stocks and Sizes" preference panel.

PrintSmith calculates the price for blank stock at the defined quantities using the standard markups. If you change the quantities in the stock definition, PrintSmith will calculate the price using the quantities you entered with the markups from the Stocks Preference panel.

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Auto Calculate Blank Stock (Envelope and Sheet Stock only)

The blank stock pricing style relies on pre-calculated prices that are based on the cost of the stock. This button turns automatic calculation on and off for the stock shown in the window. Turning this button off and then on causes auto-calculation to be performed for the current stock definition.

The Auto-Calculate button allows you to specify, for each stock, whether or not you want PrintSmith to maintain these rates for you automatically. We recommend that you leave this button turned on unless you have very specific pricing targets for blank stock that do not depend on the stock cost.

Any change to the stock price triggers automatic calculation. The price is calculated for the run size based on the parent size.

Notes: Changing blank stock preferences do not recalculate blank sheet pricing. You can use the Change Prices command to update prices for all stocks.

Adjust Copier Matrix and Select Default Copier (Envelope, Sheet Stock, and Large Format only)

PrintSmith supports several pricing models for copying. One of the important options in these pricing models is the ability to specify how stock is priced. In some models the price is taken directly from the cost of the stock. In others it may be necessary for each stock to have a stock price for copying that differs from its actual marked up cost.

The Copier 1, Copier 2, and Copier 3 rates are provided to allow you to have different stock costs for copying on each stock definition. The rate that is used for pricing depends on the copier definition used for the job. Because each copier definition can use either of these fields you should decide how each is to be used. For example, a common method of using these fields is to use Copier 1 for black and white copies, Copier 2 for color copies, and Copier 3 for large format

Note: "Copier 1", "Copier 2", and "Copier 3" are actually based on the name of the copying pricing methods. These pricing method names can, and often are changed. This section may look somewhat different on your system.

Each stock can have a preset copier for each of the two copier pricing methods. To preset a default copier, select the copier from the pop-up menu. When a stock with a preset copier definition is selected in a copier job, PrintSmith assigns the copier to that job and adds any charges that are attached to the copier definition. Select "<use default>" to remove a preset copier.

Add Charges

Each stock definition can have up to 10 preset charges. This button allows you to edit the preset charge list. When charges are already assigned to the stock definition, the number of charges is displayed as "(1) Charges..." the number in parentheses indicates the number of preset charges.

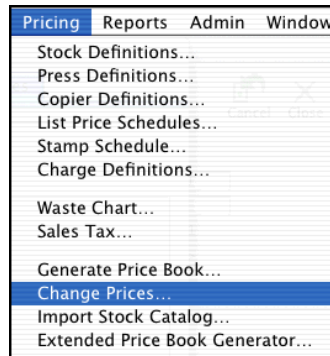
Import One

Use this button to import a single file containing a single stock definition, which will display in the window for immediate editing. The data file must contain a single stock record that was exported from the XPEDX Printer's Product Guide or other paper vendor. The location of the file and file format must be set up in the Import Stock Catalog command.

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Changing Prices

If you want to increase or decrease prices across the board, or on all or some stocks, use the **Change Prices** feature in the Pricing menu.



Stock Definitions

Change Prices

Stock Definitions Other Prices

Stocks to update

☐ All Groups
 ☒ Selected Group: Group: Paper ▾

☒ Match Vendor Name: Mac Paper

Prices older than: 4/14/2007

Action:

☐ Enter each stock price ☒ Confirm each change
☒ Auto update by percent(%): 10.0% ☒ Re-calculate blank stock prices
☐ Auto update by amount (\$): 0.00 ☒ Auto adjust copier prices

Add Charges to Selected Stocks...

Name: #

Vendor:

Size	Current Cost	New Cost	% Preset Charges	New Charges
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
	0.00	0.00		
Copier 1:	0.00	0.00		
Copier 2:	0.00	0.00		

OK Cancel

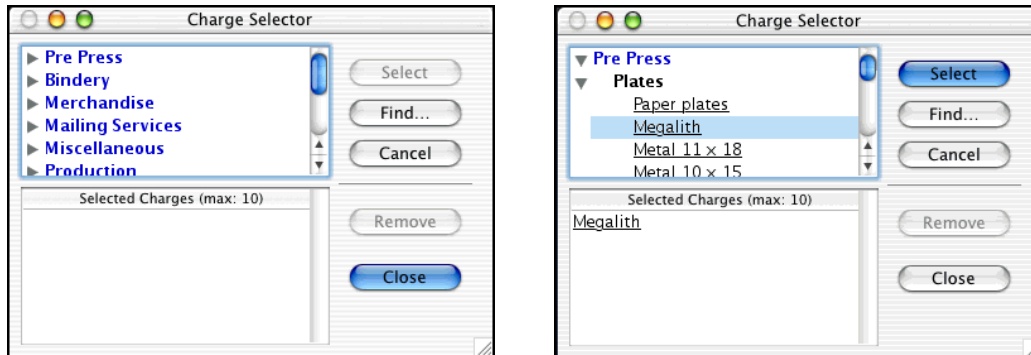
Enter the criteria to change prices. Example you could update all stock records from the Paper Group and enter Dixon in the Vendor field and auto update by 10%.

PrintSmith Session Handouts

Adding Charges to Stock Definitions

Charge definitions add a tremendous amount of flexibility to the PrintSmith estimator. The six charge definition commands are: Pre Press, Bindery, Production, Merchandise, Mailing Services, and Miscellaneous. Select any six of those charges and "attach" them to a stock definition. When you select a stock, the preset charges are automatically loaded. If you change to a different stock, the charges that are attached to the old stock are discarded and a new set of charges is loaded.

To add charges to the preset charge list, click the Add Charges button. The Charge Selector window is displayed.



The window is divided into two areas, the top section is used for making new selections, and the bottom displays the current selections and is used to remove preset charges from the list. You can preset up to six charges, which will display in the bottom of the window. Remove a preset charge by selecting it and clicking the Clear button. When a charge is attached to a stock, PrintSmith remembers how to find the charge, not what was in the definition. If you change a charge definition, PrintSmith uses the latest definition when the charge is added to a job.

Click the Close button when you have made your selections.

Notes: The Change Prices command also supports adding charges to groups of stock definitions automatically.

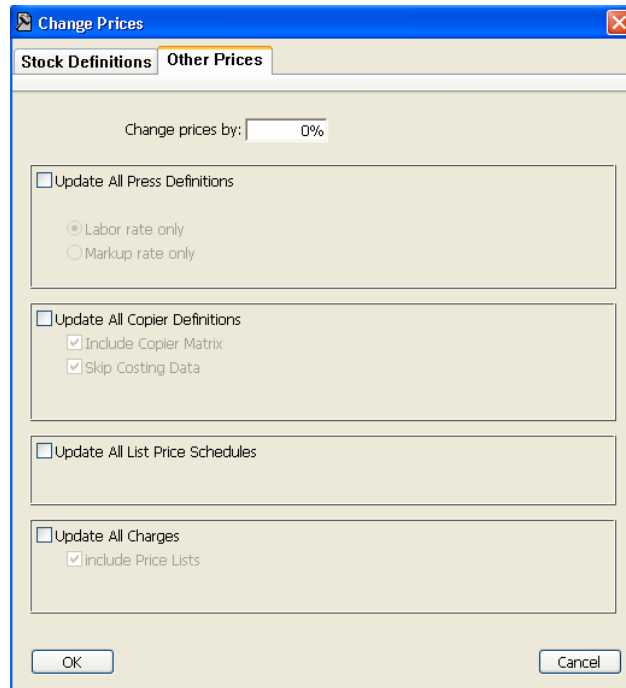
Strategies for Using Preset Charges

The biggest advantage to using preset charges is it gives you the ability to quickly generate complex quotes in a more consistent manner. In the case of stocks, you could add a pre press or bindery cutting charge to always charge for cutting (as long as there was no minimum or setup charge in either definition.) Another example is to attach carbonless padding to all carbonless stock definitions, as it is rare for carbonless stock to leave the shop unpadded. It makes sense to attach this charge because this is a function, which occurs most of the time. These types of preset charges can also be set up as hidden charges and will not print on customer documents.

PrintSmith Session Handouts

Other Prices

Use this command to raise or lower prices on Presses, Copiers, charges, and list price schedules.

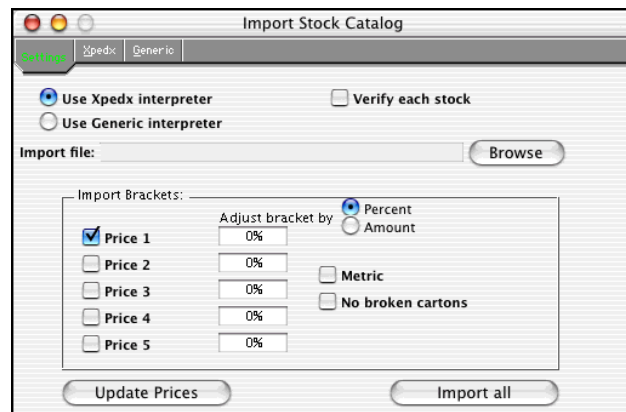


Importing Stock Catalog

The ability to import stock definitions and update prices from a vendor's electronic price catalog is a powerful tool for managing stock. The Import Stock Catalog window has three panels. The first panel controls the overall process. The remaining panels are used to confirm the import process is in the correct format based on the selected interpreter.

Settings

The Settings panel is used to control the import process.



PrintSmith Session Handouts

Use xpedx Interpreter

Select this option when importing data from the xpedx pricing catalog. See the xpedx panel for the expected file format. Generally, this file must be created using the xpedx Export Utility that creates a file named "data.txt". Normally, the file will be in the catalog folder although this can be changed in their program. The program and documentation for the export utility should be available through an xpedx representative on both the Macintosh and Windows platform.

Use Generic Interpreter

Select this option when importing data from any other pricing catalog. See the Generic panel for the expected file format.

Verify Each Stock

Before adding or importing a stock definition a window is opened which asks if you wish to save changes either to a new definition or an existing one.

Import File

This is the location of the file containing the stock data to import. Once set, this file name is remembered and shouldn't need to be reselected.

Notes: This must be performed before doing anything in the interpreter panel.

Browse

Use this button to find the file to be used for importing.

Adjust Bracket by Percent or Amount

The bracket price being imported can be changed during the import process by either a percentage or a fixed dollar amount. Increase the price by entering a positive amount or decrease the price by entering a negative amount. Whether the adjustment is a fixed amount or percentage is determined by the button selection.

Expanded Price Brackets

You used to only be able to import one price bracket, which you had to select. The stock import now supports up to five price brackets and different adjustments can be made to each. If you select just one bracket, bracket four for example, it will place the stock cost in the first price column in the stock definition. If you were to import bracket two and bracket four, for example, these brackets would import into the stock definition's first and second price columns, respectively.

No Broken Cartons

When this button is selected, the "Min. Order" field in the stock definition is set to the value of Lot Count when importing using either the Generic or Xpedex interpreter.

Metric

This setting allows imported metric information and automatically turns the metric button on in the stock definition.

Update Prices

Click here to use the imported data to update existing stock definitions. Locate stock definitions by vendor name and stock number ("Stock #" in stock definition window). Stocks in the import file, which are NOT in the stock definition, are not added.

Import All

Click here to use the imported data to create new stock definitions. This is identical to updating prices except that it will add stocks if unable to locate an existing one.

PrintSmith Session Handouts

Stock Inventory

Stock items can be inventoried using the Inventory tab in the Stock Definitions window.

In the Stock Picker window, accessed from the main PrintSmith menu by selecting Pricing > Stock Definitions, inventoried items appear in bold, and there are options to **Only Show Inventoried Stock**, or **Only Show Shells**. Additionally, four columns have been added to the right side: Qty on Hand, Committed, Ordered, and Shell.

Filter by inventory options

Inventoried items in bold

Name	Weight	Size	Generic Color	Finish	Thick	Stock Number	Ordered	Qty on Hand
Ardor Bond	20	8.5 x 11	White	Wove				
Ardor Bond	20	8.5 x 14	White	Wove				
Ardor Bond	20	11 x 17	White	Wove				
Astrobright Cover	65	23 x 35	White	Vellum				
Atlas Bond Imaging	24	35 x 22.5	Bright White	Smooth		0126-2238A		0
Bond	20	8.5 x 14	White	Wove				
Centura	80	23 x 35	White	Gloss				
Centura Cover	80	17.5 x 22.5	White	Gloss				
Classic	65	8.5 x 11	White	Linen				

Note: In the Qty on Hand column, quantities displayed in green indicate there is enough stock on hand to fill current orders. Quantities displayed in red indicate there is not enough stock on hand to fill current orders.

Inventoried Stock Items

To add inventory information to a stock definition:

1. Select **Pricing>Stock Definitions** from the menu bar. The Stock Picker window opens.
2. Select a stock from the list. The Stock Definitions window for the selected stock opens.

PrintSmith Session Handouts

The screenshot shows the 'Inventory' tab of a software application. It contains several input fields for inventory management: 'Stock On Hand', 'Committed', 'Available', 'On Order', 'Target Level', 'Reorder Point', 'Min. Order Qty.', 'Stock Expires', and 'Bin Location'. A section titled '10 Most Recent Inventory Changes' displays a table with columns for User, Date, How Changed, Quantity, and Reference. A 'Show Entire History' button is located at the bottom of this table. Callouts from the right side of the image point to the 'Inventory' tab, the 'Stock inventory information' fields, and the 'Show Entire History' button.

3. Click the **Inventory** tab.
 - a. Select the **Stock is standard inventory item** option to make inventory fields editable.
 - b. Enter the current **Stock on Hand**.
 - c. Enter **Committed** stock. The **Available** stock will automatically be calculated.
- Note:** Committed stock can be manually entered or automatically calculated. As stock is selected and assigned to a job, the committed number will increment. Stock committed prior to the stock being defined as a standard inventory item will not affect the inventory count.
- d. Enter a **Stock Expires** date, if applicable.
 - e. Enter a **Bin Location**.
 - f. Enter the **On Order** amount, the **Target Level** amount, the **ReOrder point**, and the **Min. Order Qty**.
4. Select the **Shell Item** option, if applicable, and then click the **Assign Customer Account** button to assign an account.
 5. Click **File** to save all changes to the stock inventory. The **10 Most Recent Inventory Changes** are displayed at the bottom of the Inventory tab.

Inventory tab field descriptions

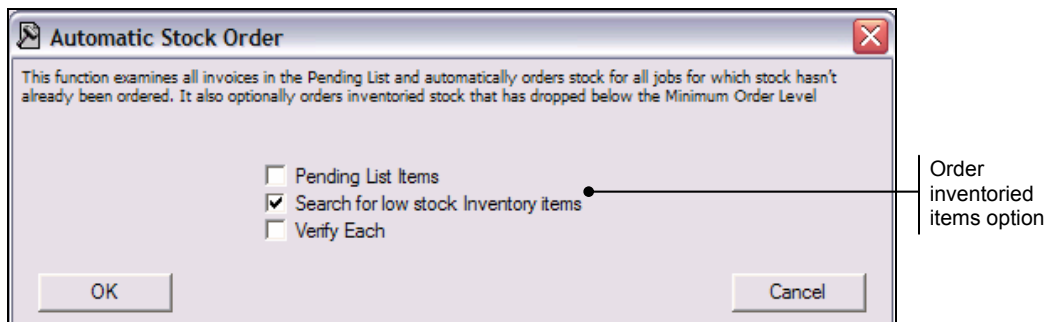
Field	Description
Stock on Hand	The amount of stock currently in inventory.
Committed	The amount of stock committed to current jobs that have not yet been run.
Available	The amount of stock available. This field is not editable, and is the difference between Stock On Hand and Committed.
On Order	The amount of stock currently ordered.
Target Level:	The desired amount of stock to keep in inventory.
Reorder point	The "trigger-point" at which new stock should be ordered.

PrintSmith Session Handouts

Field	Description
Min. Order Qty.	The minimum amount that can be ordered at one time.
Stock Expires	If the stock expires you can enter a date here. PrintSmith checks the expiration date prior to creating or running a job. It is still possible to run the job, even if the stock is expired.
Bin Location	A string describing the physical location in the store where the stock is located.
Shell Item	If this item is a shell item created by the shop for use in another job, check this box and optionally assign it to a customer account.
10 Most Recent Inventory Changes	A static list of the 10 most recent inventory changes. Clicking the Show Entire History button opens the complete Inventory History window.

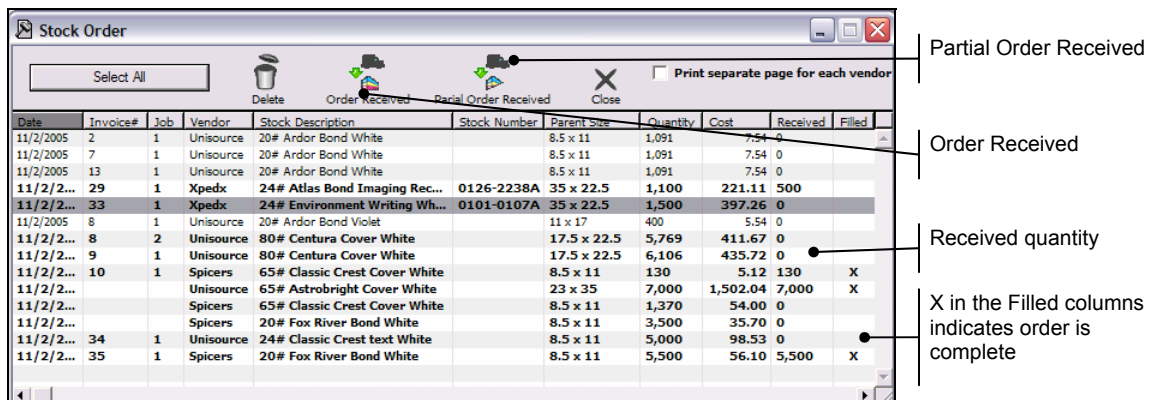
Automatic Stock Order

The **Pending List Items** and **Search for low stock Inventory items** options have been added to the Automatic Stock Order window. If the Available amount is less than the ReOrder point, selecting the **Search for low stock Inventory items** option will prompt ordering.



Stock Order Report

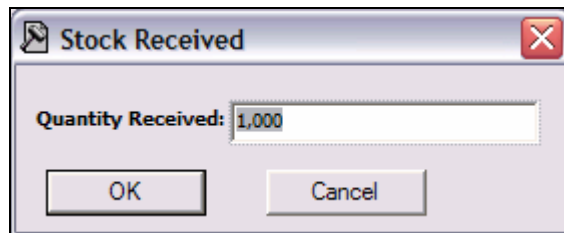
Buttons and columns in the Stock Order window support the stock inventory functionality.



PrintSmith Session Handouts

To update received stock orders:

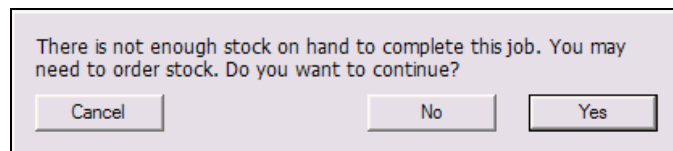
1. Select **Reports> Stock Order** from the main menu. The Stock Order window opens.
2. Select a stock within the listing.
3. If the entire stock order has been received, click the **Order Received** button. The Received quantity will equal the Ordered quantity, and an **X** will appear in the Filled column. Within the Stock Definitions window, the On Order quantity will be reduced and the Stock On Hand quantity will be increased by the amount of the order.
4. If part of the stock order has been received, click the **Partial Order Received** button. The Stock Received dialog opens.



5. Enter the **Quantity Received** and click **OK**. The quantity received is displayed in the Received column and the Stock on Hand Quantity will be increased by the amount of the order.

Job Definition changes

When inventoried stock is assigned to a job, PrintSmith checks if enough stock is available to complete the job (On Hand and Committed), upon saving. If there is not enough stock on hand to complete the job, a warning appears.



When the job and its invoice are filed, the stock's *Committed* number will reflect the quantity assigned to the job.

Stop Tracker Step

When a stop step occurs within the Tracker Console, the stock's On Hand quantity is reduced by the number of sheets actually used (including spoilage). The Committed quantity is reduced by the original amount committed.

Note: The actual quantity used may differ from the committed quantity if the actual spoilage differs from the projected waste initially associated with the job.

PrintSmith Session Handouts

Customer Information

Another task in setting up PrintSmith is adding customer information. PrintSmith manages a great deal of customer information. It identifies who they are, where they are, sales this year, last year, this month, money owed, cash, check, charge, etc.... Before it can manage the information, you need to enter your customer information.

Notes: You only need to enter customers that have an outstanding account balance to get started; others can be added as needed.

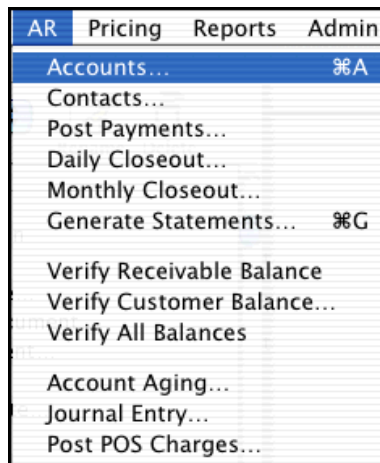
If you already have your customer list in an electronic format (i.e. on Disk), PrintSmith can import that information directly for a small fee.

Prospect information can be imported into PrintSmith. See "Import Prospect Template" for information on how to import Prospects. Once in PrintSmith, prospects are easily converted to customers.

Notes: If you have your customer list in ASCII format, PrintSmith can import that data. Contact PrintSmith for information on conversions.

Accounts

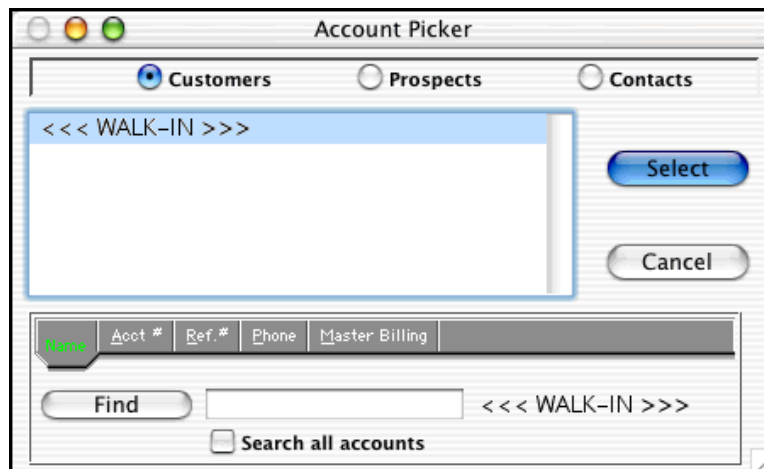
Select Accounts from the AR menu.



Notes: You can also use the shortcut commands <command> + <a> on Macintosh or <control> + <a> on Windows.

PrintSmith Session Handouts

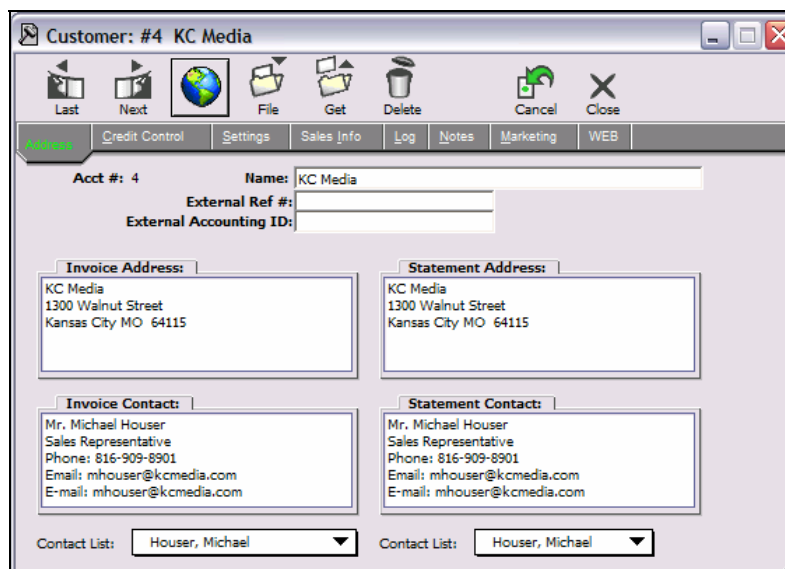
The Account Picker window is displayed. Your new installation of PrintSmith will not have any customers other than <<<WALK-IN>>>. Click on the Cancel button to get to a blank customer account window.



Notes: PrintSmith can handle over 60,000 customers and prospects. Enter in all potential customers and contacts. You can search for customers by name, account number, reference number, phone, or part of a phone number and master billing account.

The Customer window is displayed. Since no customer was selected from the Customer Picker window, PrintSmith will assume you are entering a new Customer. The window title will read Customer: New Customer.

Click on the Address drop tab to reveal the contents of that panel.



PrintSmith Session Handouts

Address

The Address panel contains the account name or title, external reference number, external accounting ID (to allow third party accounting integration), invoice and statement addresses, and their associated contact information.

There are four "editor" fields, an address and contact editor field for the invoice address and for the statement address. When you create a new customer account, the information in the contact field is used to automatically create contacts for that account. This is the only time you can create contacts from the Customer Account window. Changing the contact data in this window also edits the information in the Contact Manager window.

Contact List

Once you have entered contact information, a "Contact List" pop up menu is found under each of the contact editor fields. This is used to select the default contact for each of the two types of contacts supported (Invoice and Statement).

The last item in the contact menu in this window is always the "Edit" command. Selecting this command opens the Contact Manager window and displays the default contact for editing. Unless you need to modify marketing information for a contact, it's generally much easier to edit default contacts from the Customer Account window.

Default Contacts

It is possible to create a customer account without an assigned contact. In fact, the "Walk-In" account cannot have any contacts. We strongly recommend always creating a contact at the same time as you create the account so mailing lists, labels, reports and other marketing activities will have contact information. Once a contact has been assigned to an account, the assignment is fairly permanent in the sense that there must be an assigned contact. You can change the default contact and you can select the same contact for both the invoice and statement contacts. You cannot change an account so that it no longer has a contact assigned.

The Contact Manager will not allow you to delete a default contact.

Statement Address

The Statement Address is the billing address where statements will be mailed. This address information could optionally be shown on the invoice or estimate.

Notes: If the statement address is the same as the invoice address, no further action is necessary. When the account is filed, the invoice address information is copied over to the statement address.

PrintSmith Session Handouts

Credit Control

The Credit Control panel contains the data used to set credit limits, finance charges, account type and account status.

Customer: #19 EFI

Address **Credit Control** Settings Sales Info Log Notes Marketing WEB

Credit Limit: 75,000.00
 Due days from posting: 0 Avg. Days to Pay: 130
 Monthly Finance Charge Pct: 0% (Using standard rate of 1.5%)
 Finance Charges YTD: 0.00 ☐ Never calculate finance charges
 Current Balance: 336.15

Automatic Discount
☒ Percent: 0% ☐ Dollars: 0.00 ☐ One-time discount

Account Status
☐ New ☐ Current ☐ Inactive
☒ Past Due ☐ Delinquent ☐ Frozen

Type
☐ Full Deposit
☐ Cash Only
☐ Cash/Check/Credit Card
☐ Charge Account
☒ Credit Card on File

Credit Limit

Enter a dollar amount representing the maximum a customer is allowed to charge to their account. If it is 0.00, the system credit limit is used (you set the system limit using the "Credit" Preference panel). The system credit limit will display immediately to the right of this field. If there is no default limit and the field is empty, "Unlimited Credit" will display to the right of the field because there is no system credit limit. This field will use the default limit unless another number is entered. If the preference default is zero then they have no credit limit.

Due Days From Posting

Although calculated and tracked, this feature is not fully implemented. Except for the history detail, no other direct use is made of the due date. This field is available for use with DownLoader and Report Writer. When an invoice is picked up, this field is used to calculate the number of days before the payment is due. If a date isn't specified here, the "Aging Periods" Preference panel is used to calculate the account status based on the number of days indicated there. "Avg. Days to Pay" show's the customer's average payment period. The history detail shows the due date on items posted.

Monthly Finance Charge Percentage

The Monthly Finance Charge Percentage field is the percentage PrintSmith uses to calculate finance charges during statement generation. If zero%, the system default finance charge rate is used (defined in the "Credit" Preference panel). When the default rate is used, it is displayed to the right of this number as shown in the previous screen shot. This field will use the default rate unless another has been entered or "Never calculate finance charges" is checked.

Notes: This is the actual rate used each time you calculate finance charges when generating statements. It is not an annual rate.

Finance Charges YTD

Records the total amount of finance charges posted to the account in the current year.

PrintSmith Session Handouts

Never Calculate Finance Charges

Used if you never want to generate a finance charge for this account. This button is only needed when there is a system finance charge and you never want to generate a finance charge for this particular account.

Automatic Discount Percent

Enter a percentage only if you want this customer to always be given a discount or a markup. To set up a markup, enter a negative percentage. Discount percentage will provide customers with a percentage (%) off each invoice. Additionally, a negative percentage (-%) can add money to each invoice created for that customer.

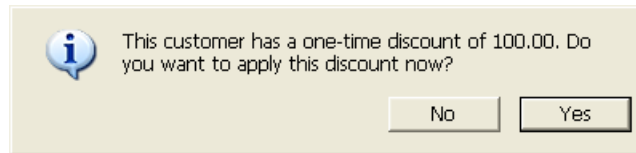
Automatic Discount Dollars

Enter a cash amount. The Automatic Discount is calculated each time you create an invoice for the customer.

One-time discount Dollars

A One-time discount is expressed as a cash amount only. Use a one-time discount if, for example, you are offering a special for first-time customers, or featuring a new service as part of your business. To set up a one-time discount:

1. Create the customer account, if it does not already exist.
2. On the **Credit Control** tab for the account, select **Dollars** in the Automatic Discount area and enter the cash amount of the discount.
3. Select **One-time discount**.
4. When you create an invoice for this customer, you receive a message about the discount asking if you want to apply it.



5. Click **Yes** to apply, or **No** to deny the discount. If you click No, the discount remains in the customer account. If you click Yes, the discount amount is cleared from the Credit Control tab. If you click Yes and the discount amount is greater than the invoice amount, you are asked if you want to save the remainder of the discount to be applied to the next invoice.

Note: The discount can be changed in the Document Totals window.

Current Balance

The total amount owed to you by this customer including Merchandise Charges.

Account Status

Provides a description of the current status of the account as of the last aging (although you can change it here on a case by case basis). Frequent reference is made to accounts being 30, 60, or 90 days past due. There are three aging classifications whose standard values are 30, 60, and 90; they can be changed as needed in the "Aging Periods" Preference panel.

Account Status	
Status	Meaning
New	When an account is first created and has never been aged, it is considered a new account.

PrintSmith Session Handouts

Status	Meaning
Current	The account is current if all amounts owed are within the allowable limits.
Past Due	The account has open items picked up more that 30 days ago. (Settings for aging are variable; your aging may be different.) See Accounting, System Defaults chapter for details.
Delinquent	The account has open items picked up more than 60 days ago.
Inactive	As of the last aging, the customer had not ordered anything within the inactive period specified in the "Credit" Preferences panel. The system checks to see if the customer has had any activity. Estimates, invoices, or payments made will cause the customer to be active.
Frozen	The account aging process can automatically freeze accounts with open items picked up more than 90 days ago. Once an account has been frozen, no more invoices can be created and no charges can be accepted. An account is normally unfrozen manually or automatically during the aging process.

You can choose the account status or let PrintSmith update and maintain the account status. All customers will be new when first entered. PrintSmith will update this information when an account aging is performed. You will have choices to make in the account aging process. It is recommended that the status buttons are left alone as you set up the system.

Account Type

The account type determines what types of transactions are accepted for this account.

Type	Account Type Meaning
Full Deposit	When an invoice is opened or filed with a balance due, a reminder notice is displayed to remind the user that this customer must pay in advance. This notice can seem obnoxious but serves as a warning to proceed with caution. In addition, cash register transactions (POS) must be paid in cash. Deposits can be paid with checks or credit cards.
Cash Only	Customer must pay with cash. Checks and credit cards are not accepted. Charges are not permitted to accounts receivable.
Cash/Check/Credit Card	Customer must pay with cash, check, or credit card. They may not make any charges to accounts receivable.
Charge Account	Customer may make charges to their account. There are no restrictions on payment type.

When entering a new account, the payment method automatically defaults to Checks. Once your customer has undergone your credit process and you have established a credit limit, the account can be changed to Charge status with the appropriate credit limit entered.

PrintSmith Session Handouts

Settings

The Settings panel contains a variety of settings that control or modify how the account is used throughout the system.

Customer: #7 Days Inn

Address Credit Control **Settings** Sales Info Log Notes Marketing WEB

Last Next File Get New Delete Cancel Close

Select Master Account... 18 Major Holding Company

Sales Rep: DAVE
Business Type: 6801
Ship Via:
PO Number:

☐ PO required on Invoice
☐ Do NOT generate statements
☐ Account is commissioned
☒ Always file originals

Default Invoice: No default specified
Default Estimate: No default specified

Preset up to 10 Charges:
Add Charges... Add to Invoices and Estimates
Add Charges... Add to Jobs

Tax Setup
Tax Table: Default
Tax Codes:
Resale: 00000086-5
Cert. Expires:
☒ Tax Exempt

Security level of this account: 0

Import

Name of master account shown here.

This button creates the ImportProspectFormat.txt file.

The Import icon is used to import the customer information.

Preset up to 10 charges for Invoices and Estimates and 10 charges for Jobs

Select Master Account

The Master Account section is used to assign the account to a master account. Any account can be selected as a master account. There are two ways; click the Select Master Account button and select the customer account; or, if you know the account number, type the account number into the edit field.

Master accounts are very useful for companies where there are multiple contacts. For example you might have three departments at Xerox. All three do business with you but payment comes from Xerox AP. Set up 4 accounts in this scenario, the 3 departments all will have Xerox AP as the master billing account.

Sales Rep

Choose Sales Rep from the popup list. This list comes from the Sales Rep table in the Table Editor. This information is copied into the "Sales Rep." field in the Account Info window in the Estimator when the account is assigned to a document.

Business Type

Business type is a 4 character field for use in sorting your customer list. The Customer List report and Mailing Labels both provide options for sorting by business type. SIC codes work and ABC method of ranking are possible ways to sort.

PrintSmith Session Handouts

Shipping Method (Ship Via)

This popup list allows you to define the default shipping method for a customer using the same table in the Account Info window. Setting a default shipping method automatically defaults that method in a document when that customer account is assigned. The prompt on the shipping method field is the same as the title of the Table. Changing the table title "Ship Via" will change the prompt. This holds true on invoices as well, so you can use this for something entirely different if appropriate for your business.

PO Number

Enter a PO Number here and it will appear on all new invoices created.

PO Required On Invoices

If customers require a Purchase Order, you will need to check this box. PrintSmith will warn you to enter PO, and will not allow you to pick up an invoice for this customer without one. When enabled, a reminder notice displays if no PO number has been entered on the invoice. It doesn't prevent the invoice from being created although it cannot be picked up. The notice also displays when an estimate is converted to an invoice and each time the document is opened until a PO number is entered.

Do NOT Generate Statements

When enabled, the statement generator will ignore the account when generating statements. You can still generate a statement for any account by specifically indicating that account. If a statement would offend a customer, check the Do NOT Generate Statements option for this customer. This option is useful for sub accounts of a master billing account that never responds to a statement.

Account Is Commissioned

The Account Is Commissioned option is used with the Report Writer to generate commission reports. Other than this function, PrintSmith does not use it.

Selecting The Standard Document Preferences

Some customers may have unique quoting and billing requirements. For these customers, you can specify the document preferences to use when creating invoices and estimates. For example, if you enter in a negative discount percentage (a markup) you might consider selecting a document preference that hides customer discount.

Default Invoice and Default Estimate

Select the document preference to use when creating invoices and estimates for this account.

Tax Table ID

A two character ID identifies the tax table when you require a different tax rate for a particular account. PrintSmith won't let you enter an ID unless there is already a tax table defined for that ID. Generally, you'll find it much easier to select the desired tax table using the Tax Table menu.

Tax Table Menu

This menu provides a quick and easy way to select a defined tax table. Selecting a tax table from the menu automatically inserts the correct tax table ID in the field.

Tax Code

Use tax codes to categorize sales for tax reporting purposes. If a particular customer must be coded in a particular way, enter the tax code here and PrintSmith copies it to the document when this account is assigned to the document.

Notes: There are no rules or requirements in using tax codes. The only function of a tax code is to create a separate line in the tax detail report within the same tax table.

PrintSmith Session Handouts

Resale

Used to record the customer's tax exemption ID or license number. Entering text in this field only serves to record the tax or license number in the account and on documents created for this account.

Notes: The only way to make an account tax exempt is to use the "Tax Exempt" button.

Certificate Expires

Enter the date the customer's tax exempt certificate expires, if any.

Tax Exempt

When the Tax Exempt option is enabled, documents created for this account will not have sales tax.

Security Level on This Account

Account level security codes prevent access to employees who otherwise have access to the Account History, Customer Accounts, and Post Payments commands. Accounts are only accessible in those commands by users whose access level is equal to or greater than the access level in the account.

Notes: Accounts can be assigned to documents even if the user's access code prevents them from viewing account history and the customer account.

Import Prospects

This function allows you to build a database of customers based on criteria of your choice. It is useful for building lists of inactive customers, mass mailings, and special announcements about your shop.

Import Prospect Template

Creates a file showing the order of the data expected by the Import Prospects function. The format expected is:

```
"Full Name", "Street 1", "Street 2", "City", "State", "Zip",  
"Contact Name", "Phone Number", "Fax Number", "External  
Reference Number", "Sales Rep. or Empty", "Resale Number or  
Empty" <return>
```

The file can use the comma delimited form shown above or a tab delimited form shown in the export example.

Preset up to 10 Charges

This function allows you to preset 10 charges to be added to Invoices and Estimates, and 10 charges to be added to Jobs. Clicking the Charges button opens the Charge Selector window, and the number of Charges set will display in the button.

PrintSmith Session Handouts

Sales Info

The Sales Info panel contains mostly sales statistics. You can use this panel to change the sales representative (this can also be done in the "Settings" panel) and to perform an instant aging of the account.

Customer: #4 Alesi Glass Industries Inc.

Address | Credit Control | Settings | **Sales Info** | Log | Notes | Marketing | WEB

Balance		Account Status: Current	
Current:	4,914.00	POS Charges:	0.00
30 days:	0.00	Current Balance:	2,618.92
60 days:	0.00		
90+ days:	0.00		

Age now

Sales Ranking: 2 of 25 customer accounts as of Tue, Dec 31,
Sales Rep: Dave

	This Month	This Year	Last Year
Sales	0.00	0.00	0.00
# orders	0	0	
Average Order			
Quotes:Orders		21:0	

Created: 12/31/94
Total orders: 28
Last Billed: 1/15/96
Last Payment: 12/31/02
Last Aged: 5/25/00
Last Invoice: 12/31/02
Last Estimate: 12/19/02
First Invoice: 1/2/02
First Estimate: 1/2/02
Estimates Won/Lost: 22:2

Shows the relation between aging categories as of the last aging.

Account Aging

Shows the account balances as of the last aging. These balances can be updated at any time by clicking the "Age Now" button.

Account Status

Show the current status of the account. Normally PrintSmith as part of the aging or statement generation process sets this automatically. It can also be changed manually in the Credit Control panel.

POS Charges

The outstanding balance of Cash Register department transactions charged to this account. You use the Post POS Charges command from the POS menu to convert this balance into an open item.

Current Balance

The total amount owed to you by this customer. It also includes Merchandise Charges.

Age Now

Clicking this button will perform an instant aging of the account using the current date as the aging base date. See Account Aging in the System Defaults chapter for a more complete description of the aging process.

Sales Ranking

The standing of this account's sales volume in relation to other accounts the last time you ran the Sales Ranking by Year report and saved the ranking. View the Reports>Customer List Report.

Notes: We recommend you print out and save the sales ranking at the end of each year.

PrintSmith Session Handouts

Sales Rep.

This information is repeated in the "Settings" panel. This information is copied into the "Sales Rep." field in the Account Info window in the Estimator when the account is assigned to a document.

Sales Statistics

Sales statistics include invoices picked up for this customer that do not include tax.

Sales Statistic	
Statistic	Meaning
Sales	Total sales volume for this account in the current month, current year, and prior year.
# Orders	The number of invoices for this account in the current month, current year, and prior year.
Average Order	The average amount of all invoices in this account in the current month, current year, and prior year.
Quotes: Orders	The ratio of estimates to orders. This helps to identify accounts for which you are continually entering estimates but rarely getting jobs. The number of estimates may not be exact. PrintSmith counts an estimate only when you are filing a new estimate. If the account is in use in another window or WorkStation, it won't be counted. Changing the account on an existing estimate isn't included either.

Created

The date the account was entered into PrintSmith.

Total Orders

Total number of orders placed for this account.

Last Billed

The date a statement was last generated for the account.

Last Payment

The date the account's last payment was received and entered via the Post Payments command.

Last Aged

The date the account was last aged.

Last Invoice

The date the last invoice was created.

Last Estimate

The date the last estimate was created.

First Invoice

The date the first invoice was created.

First Estimate

The date the first estimate was created.

Estimates Won/Lost

PrintSmith tracks this ratio automatically. Estimate History explains how estimates are won / lost. This information is recorded in the Sales Info panel of the Account or Prospect. It is stored in this area so you can restrict access to those who can view that information.

PrintSmith Session Handouts

This ratio is never reset by PrintSmith; however, you can change it yourself whenever appropriate on a case by case basis if you are a member of the System Admin security group. To change the ratio, enter the number of wins, a colon (:), and the number of losses. You can use the won/lost ratio with Report Writer to generate an automatic daily/ weekly/monthly success report.

Log

The Log panel provides access to the customer contact log. There is an enlarged edit field that shows the maximum length of the text.

Date	Comment
------	---------

Comment

Print Log Add Delete

Records the date, time, user name, and comments in a log for the customer account. It can be used for anything you wish. Add a new entry by typing the text and clicking the "Add" button. Delete an existing entry by clicking on the entry and then clicking the "Delete" button. Log entries are automatically made when text is entered in the Notify Customer window, which resides within the Pending Document Window. These entries also contain the text "(Notified)". Click the "Print Log" button to print a hardcopy of the log.

Notes: Only the last 500 entries per customer account are shown in the log.

PrintSmith Session Handouts

Notes

Used for notes that will appear based on different functions.

Account Selection Notice

Notes, for specific customers, can be retained to display when the customer account is selected while creating an estimate or invoice. Additionally, these notes are placed on the invoice or estimate automatically.

This text block serves two purposes:

- Notify the user of something special about the account whenever the account is assigned to a document.
- Place these notes in the special instruction field of a document

When you copy a document for an account or assign an account to a document, a window opens displaying this notice and asks if you wish the text copied in to the "Special Instructions" field.

Notes: There is a limit of 2,000 characters in this text block.

Notes To Insert In Each Job

Any text in this text block is automatically copied to job ticket notes whenever a new job is created in a document to which the account is assigned. It isn't copied to job ticket notes for existing jobs so assigning the account to a document that already has jobs won't insert this text in the job ticket notes of those jobs.

Notes to insert in each job will be printed on all job tickets for this customer only. You can use these notes for accounts whose jobs are always handled in a certain way. For example, you might have a customer for whom you won't start production unless a proof has been signed, or to whom you always return the artwork. You can make note of this here and

PrintSmith will automatically put this in job ticket notes, which are printed on the job ticket.

PrintSmith Session Handouts

Notice To Place On Statements

The text in this block is placed on statements generated for this account (unless this feature is disabled in the Statement Generator). You can use this to customize collection notices for an account or to remind them of upcoming repeat orders.

Notes to place on statements are one of three custom notes that can appear on statements. This note would be specific to the customer account and would appear ONLY on this account's statement.

Notes: These notes are all designed for small blocks of text for the specific purpose described. They should not be used for lengthy messages or as a record keeping repository – use the contact log for that. The maximum practical amount of any text block is 2,000 characters.

Marketing

This window records all kinds of useful marketing information.

The screenshot shows a software window titled "Customer: New Account" with a "Marketing" tab selected. The window contains several input fields and checkboxes. At the top, there are buttons for "Last", "Next", "File", "Get", "Delete", "Cancel", and "Close". Below these are tabs for "Address", "Credit Control", "Settings", "Sales Info", "Log", "Notes", "Marketing", and "WEB". The "Marketing" tab is active, showing fields for "Customer" (selected with a radio button), "Personal Account" (checkbox), "Prospect" (radio button), and "Do not mail" (checkbox). There are also fields for "Number of Employees" (0), "Annual Revenue" (0.00), and "Business Type". On the right, there are "Marketing Dates" fields: "Follow up", "Birthdate", "User 3", "User 4", and "User 5". At the bottom, there are "Marketing Tags" fields: "Lead Source", "Common Interest", "User 3", "User 4", "Type of Work", "Lead Source", "Sport Interest", "User 8", "User 9", and "Mailer Type".

The Customer and Prospect buttons are used to control whether the account is a prospect or customer account. If a customer can't be changed to a prospect, the buttons are disabled. The rules governing this are as follows:

- Account has a balance or an open item in history.
- Account has Pending Invoices.
- Account is a Master Account or a Sub-account. (Note: this relationship only works with customers).

Personal Account

The Personal Account option should be used to mark accounts that are a person rather than a company.

For example, if you have an account for "Tom Jones" and Mr. Jones prints Christmas cards and personal stationery, the account should be a personal account. An account for a Dr. Jones would usually not be marked as a personal account as the relationship is probably a business to business relationship. This setting is used by the mailing label command to segregate personal accounts for targeted mailings. It is also available in the Report Writer.

PrintSmith Session Handouts

Do Not Mail

This button is used by the Mailing Labels command. Enabling this feature removes the account from labels or mail merge files generated with the Mailing Labels command. This button may also be used with the Report Writer to control output.

The rest of the information is data that you can use to design a marketing campaign in any way you see fit. This window, together with the Report Writer can generate some powerful reports.

Number Of Employees

Enter the number of employees in the company. This is useful for targeting companies based on their size.

Annual Revenue

Enter the annual amount of revenue of the account or your annual budget target expected from them. This can help target companies based on their revenue stream.

Business Type

This information comes from the business type table. The information stored comes from the ID of the table element, not the text. This means that you can change the text in the table and immediately see this change reflected in all accounts.

Marketing Dates

This is a group of five dates that can be used for any customer related purpose. The first date is shown as "Follow-up". This is just a suggested use to give you some ideas as to how it can be used. To make best use of the dates, they should be labeled properly. The label for each date is stored in the "Marketing Date Labels" table.

Marketing Tags

These ten fields that, like Business Type, store the ID of the associated table. The two Lead Source fields both use the same table - Lead Source. The remaining 8 fields each have their own dedicated table whose name matches the prompt on the field.

PrintSmith Session Handouts

Contacts

Although default contact information can be effectively managed via the Customer Account command, you may wish to specify marketing information for default contacts or create additional contacts, perhaps with different addresses. Select Contacts from the AR menu. This is a command used for managing contacts.

Address

The Address panel is the main data entry area for all contact information.

The screenshot shows the 'Contacts' window with the 'Address' tab selected. The window has a standard Mac OS X title bar and a menu bar with icons for Last, Next, File, Get, Delete, Cancel, and Close. Below the menu bar, there are tabs for Address, Marketing, Credit Info, and Web. The main area contains several fields: 'ID #' and 'Name' at the top, 'Acct # 0' and 'Account: ---- not assigned ----' below them. A large text area for 'Contact:' is on the left. To the right of this are 'Sales Rep:' and 'Created: 11/17/03' fields, with a 'Change Account...' button below them. At the bottom left is a checkbox labeled 'Use Contact Address'. At the bottom right is a 'Shipping Address' section with a large text area and 'New', 'Delete', and 'Edit' buttons.

ID#

The ID Number is a unique identifier for the contact record. PrintSmith automatically assigns this number when the contact is created.

Name

The contact name is used to place the contact in alphabetical order in the contact list and to show the contact in the Contact List pop up menus. It is always derived from the last name and first name of the contact. You can change this name if you wish, but this is not generally recommended because if you change any of the contact data in the Contact Editor, the text in the "Name" field will be replaced by the last and first name of the contact.

Acct#

The Account Number field is the customer account to which a contact is assigned.

Account

The Account field shows the name of the account to which the contact is assigned. Below the account name the status of the contact is displayed. If nothing is displayed, the contact is assigned to a customer but is neither the shipping nor the billing contact. It may also show <shipping contact>, <billing contact>, or <default contact>. "Default Contact" means that the contact serves as both the shipping and billing contact. If the contact is not yet assigned to a customer or prospect, it will show "---- not assigned----". It is also possible that you may see "--MISSING CUSTOMER ACCOUNT ----" if the account to which the contact is assigned to was deleted. Contacts not assigned to accounts can't be used in the Estimator.

PrintSmith Session Handouts

Sales Rep

The Sales Rep field is the sales representative assigned to the contact. It is useful for report generation.

Created

This is the date that the contact record was initially created.

Last Used

This is the date the contact was last used in the Estimator.

Change Account

This button is disabled when a default account is selected. PrintSmith always tries to ensure that each account has at least one contact, so that marketing activities that are centered on contacts don't inadvertently leave out accounts because there's no contact.

There is only one way to change a default contact assignment and that is by using the Customer Account command and selecting a different contact using the contact menu. Normally, when an account is created, the default contact is created at the same time.

Use Contact Address

When enabled, an address editor field becomes available where you can enter an address that is specific to this contact. If you select a contact with a separately defined address in the Estimator, the contact address is used instead of the account address.

Default contacts always use the account address, even if you've set them up with a separate address.

Shipping Address

You can create up to 100 shipping addresses for each contact. When an invoice is created and a Contact is selected, all of that Contact's shipping addresses are available in a pop up menu in shipping charges.

To organize the Shipping Address list, drag and drop the items into the order you want. The buttons located below the Shipping Address list are used for controlling the content of the address list.

Marketing

The Contacts Marketing panel operates in the same way as described above for an Account.

PrintSmith Session Handouts

Summary

Click the OK button and file the customer account or contact. Repeat this process for each customer account and then proceed with your set up. You can enter customers at any point in time. It is a great exercise to spread out over several sessions.

Campaigns

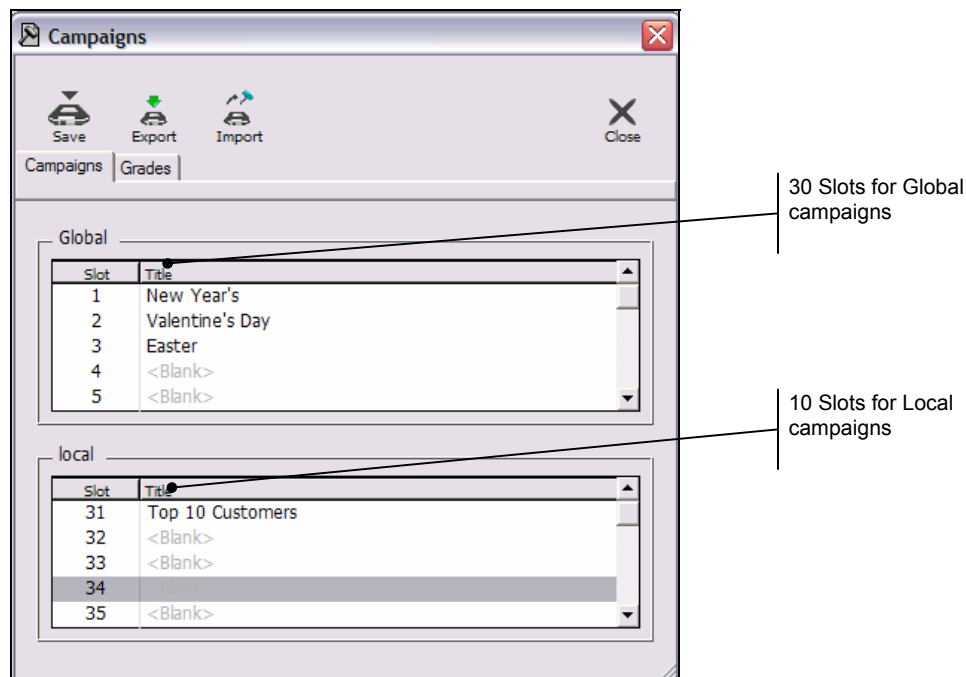
Mailer Campaigns, for Report Writer owners, allows the creation of mailings that can be grouped together and assigned to contacts.

Adding Campaigns

Thirty Global Campaigns and ten Local Campaigns can be added. Example campaigns might be Holidays or Top 10 Clients.

To add campaigns:

1. Select **Reports > Mailer Campaigns** from the main menu. The Campaigns window opens.
2. Select the **Campaigns** tab.
3. Click in the **Title** field to the right of a global or local slot.
4. Enter a **Title** for the campaign.
5. Click **Save**.



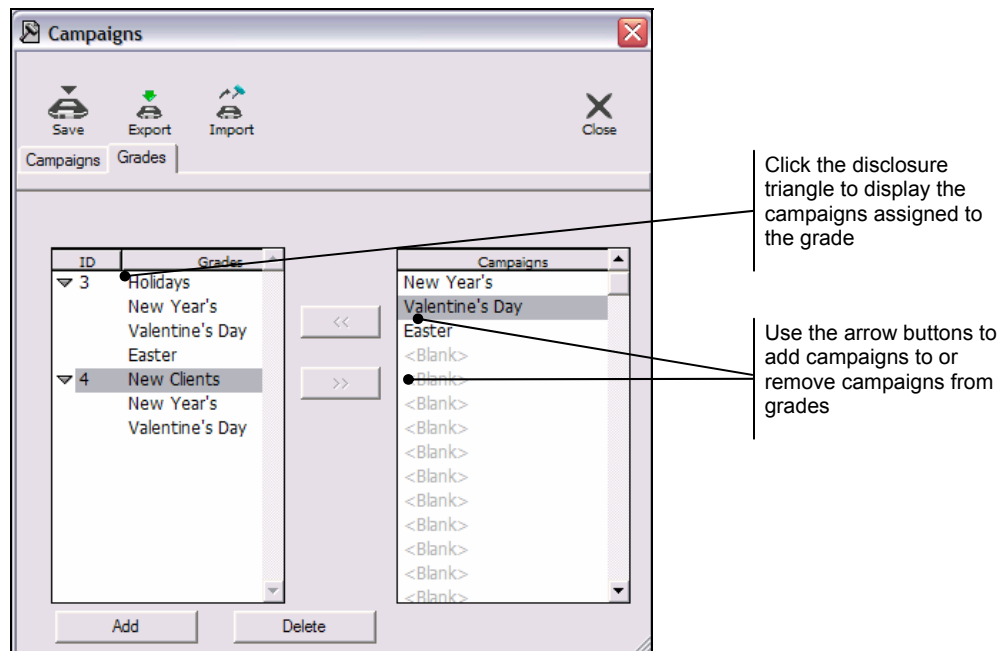
PrintSmith Session Handouts

Adding Grades and Assigning Campaigns

Grades are a group of campaigns that can be used as a template to assign one or more campaigns to multiple contacts. All campaigns created within the Campaign tab will appear in the right column of the Grades tab. A total of forty campaigns can be created, but an unlimited number of grades can be created. Campaigns can be assigned to multiple grades.

To add grades:

1. Select **Reports > Mailer Campaigns** from the main menu. The Campaigns window opens.
2. Select the **Grades** tab.
3. Click the **Add** button. An Untitled Grade field is added.
4. Double-click the Untitled Grade field to edit the name.
5. Click **Save**.



To assign campaigns to a grade:

1. Select the **Grade** in the Grades column.
2. Select the **Campaign** from the Campaigns column and click the left arrow button, or double-click the campaign. The campaign is added to the grade.

Assigning Campaigns to Contacts

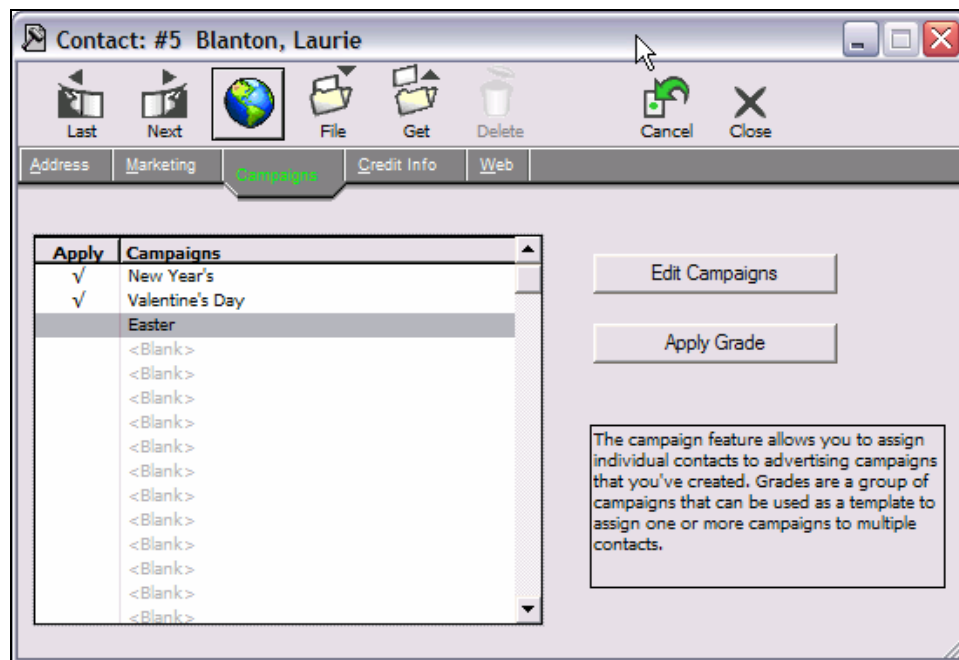
Multiple campaigns or grades can be assigned to individual contacts through the new Campaigns tab in the Contacts window.

To assign a campaign to a contact:

1. Select **AR > Contacts** from the main menu. The Contact Picker window opens.

PrintSmith Session Handouts

2. Highlight a contact and click the **Select** button. The Contact window opens.
3. Click the **Campaigns** tab. All available campaigns are displayed.
4. Select individual campaigns to assign, by clicking in the **Apply** column to the left of the campaign.
5. To assign a grade (group of campaigns), click the **Apply Grade** button. The Grade picker window opens.
6. Highlight a grade and click the **Select** button. The Apply option is turned on for all campaigns that are a part of the grade.



Note: If a grade of campaigns is applied, individual campaigns within the grade can be removed by unselecting the Apply option. This will not modify the grade, just the campaign selections for the contact.

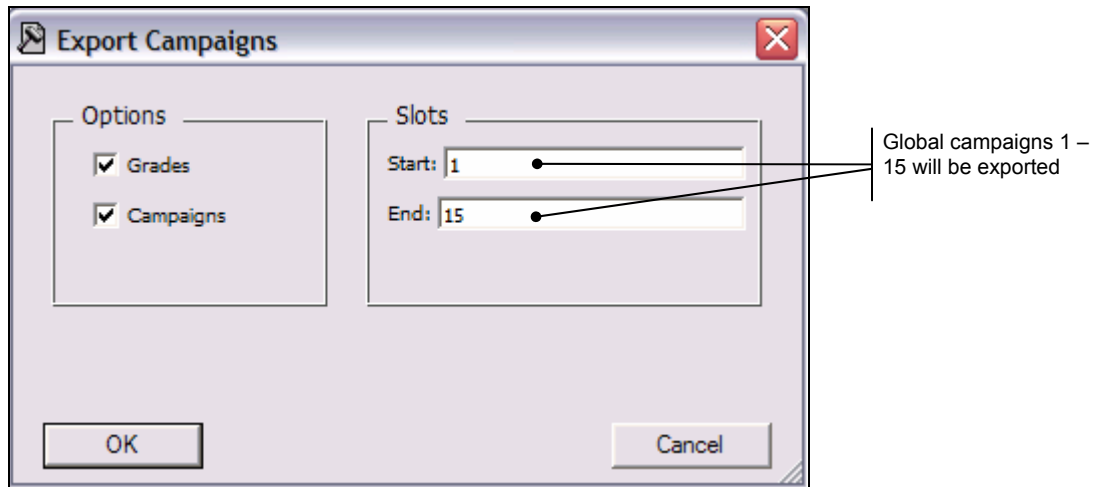
Exporting and Importing Campaigns

Use the Export and Import buttons to share campaigns. Campaigns are exported into an xml file.

To export a campaign:

1. In the Campaigns window, click the **Export** button. The Export Campaigns window opens.
2. Select to export **Grades** and/or **Campaigns**.
3. If Campaigns are selected, select which campaign slots to export. Slots 1 – 30 are the Global campaigns, and slots 31 – 40 are the local campaigns. Enter a **Start** slot and an **End** slot.
4. Click **OK**. A Save dialog opens. Browse to the folder where the Campaign.xml file should be saved.
5. Click **Save**. Campaign.xml is saved in the designated location.

PrintSmith Session Handouts

**To import a campaign that was exported from another shop:**

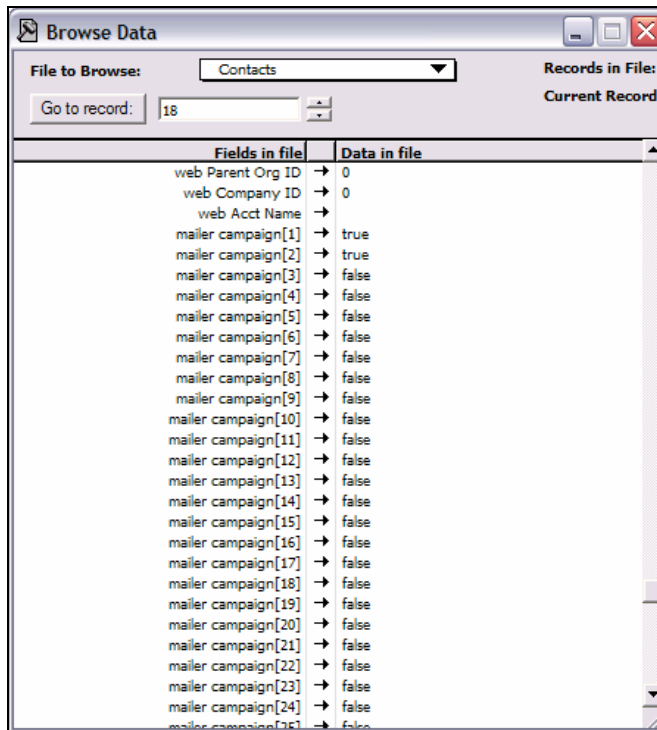
1. In the Campaigns window, click the **Import** button. The file browser window opens.
2. Browse to the Campaign.xml file and click **Open**.
3. The Grades and Campaigns are imported and displayed in the Campaign window.

Note: Imported Grades are added to the current list of Grades. There is no maximum to the number of grades that can be added. However, since only 40 campaigns can be stored, campaigns in the import file will replace campaigns in the current list if the total number of campaigns exceeds 40.

PrintSmith Session Handouts

Report Writer Data

Forty mailer campaign slots, listed by slot number, have been added to the Contacts Data file. To view, select **Reports> Downloader> Browse**.



Adding Contacts to Accounts

Here are 3 ways to add contacts to any accounts.

- While creating a document (invoice or estimate) - select the Account, while in the Account Info window - select New from the File menu or use the shortcut of Command N (Mac) Control N (windows) - when you execute this command you'll notice that most of the information in the Edit Contact window has been cleared - the phone numbers stay and are easy to modify. Add the contact information and close the window. The contact list now shows ****NEW CONTACT****. Clicking the OK button will create a contact and add it to the account. Use this method too for adding new Accounts on the fly. Create a document, enter the information, and then select Create Acct/Prospect under the Invoice menu to create a new account and new contact.
- Select Accounts from the AR menu. Click on Cancel in the account picker. Enter in the Account and Default Contact information. File the account. If you want to add additional contacts to this account, click on Get, locate the Account, and then select the Edit command in the Contact list. Then click on File and you are ready to enter new contact information that will be associated to the selected Account.
- Select Contacts under the AR menu. Click on Cancel in the contact picker. Enter in the Contact information and click on Change account to assign the contact to the appropriate account. File the contact.

PrintSmith Session Handouts

Searching For A Customer

The customer index is searchable. To perform a search, select the data for which you want to search from the drop tab at the bottom of the window, type the data you want to search for, and click the Find button.

To find the next occurrence, click the Find button again. To find the previous occurrence hold down the <shift> key and click the Find Next button.

Found items are selected and the Select button is highlighted. Selected items can be opened by: pressing the <return> key, clicking the Select button, or simply double-click on the item.

Prospects

To access your Customers and Prospects, select Create Invoice from the Invoice menu.

In PrintSmith, Customers are defined as persons with whom you have created invoices. Prospects are persons who haven't done business with you, but you are seeking to turn into Customers. When an invoice is created for a Prospect, that Prospect is moved from your Prospects list to your Customers list. The differentiation between Customers and Prospects helps to keep your Customer database populated with only true Customers. As customers become inactive, they can automatically be turned in to prospects based on account aging.

Your Customers list and Prospects list are both accessible from the Account Picker window seen below.

Finishing Touches

Once you have set the system defaults, entered your customers, and established your pricing, you are a few small steps away from going live. You will need to inform PrintSmith of your customer's outstanding balances and any orders in progress.

Resetting the System

If you have been experimenting with invoices, daily closeouts and other functions and would like to start with only the Customers and Contacts you have entered, follow this procedure to reset your system.

1. Back up the entire PrintSmith folder before going any further.
2. Open the Data... Folder and select the following files: Customers, Customer Index, Customer Notes, Customer Log (if available), Contacts, and Contact Index.
3. Drag these files to the Desktop.
4. Delete the Data... folder.
5. Rerun the PrintSmith Installer from the CD.
6. Place the files from Step 2, which are on the Desktop, into the new Data... Folder of the PrintSmith Folder. Replace the files in the Data folder.
7. Launch PrintSmith and first rebuild the Account History. Hold down the <option>+<shift> keys (Mac) or <alt>+<shift> keys (Windows) and select Account History from the Reports Menu. Click "OK" to the message asking you to rebuild the history.
8. Verify your customers and pricing are installed in this new version. From the AR menu, select "Verify all Balances" and "Verify Receivable Balance" to make sure they are set to zero.

When the items listed above have been verified, you have a clean version of PrintSmith with you customers, pricing, and settings ready to go live.