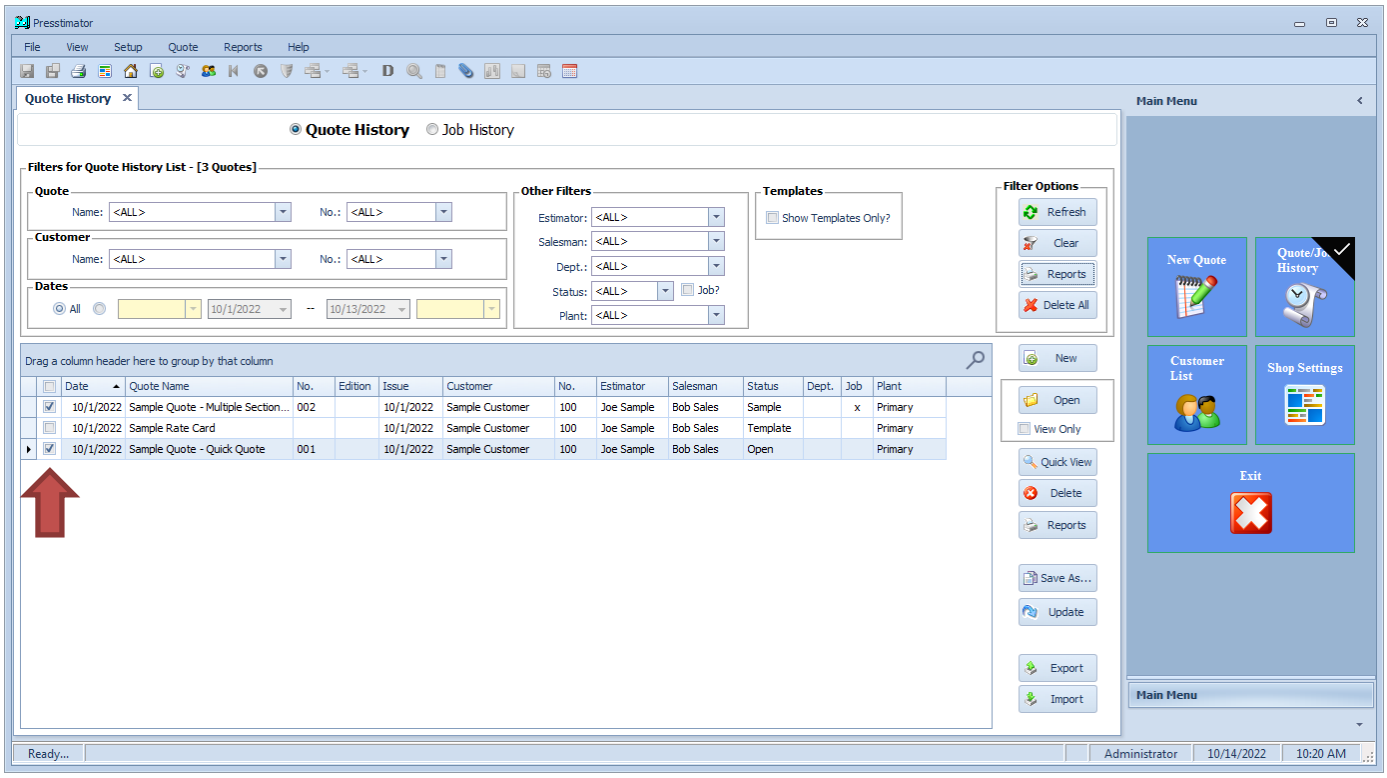
What's New in Presstimator Version 8.5

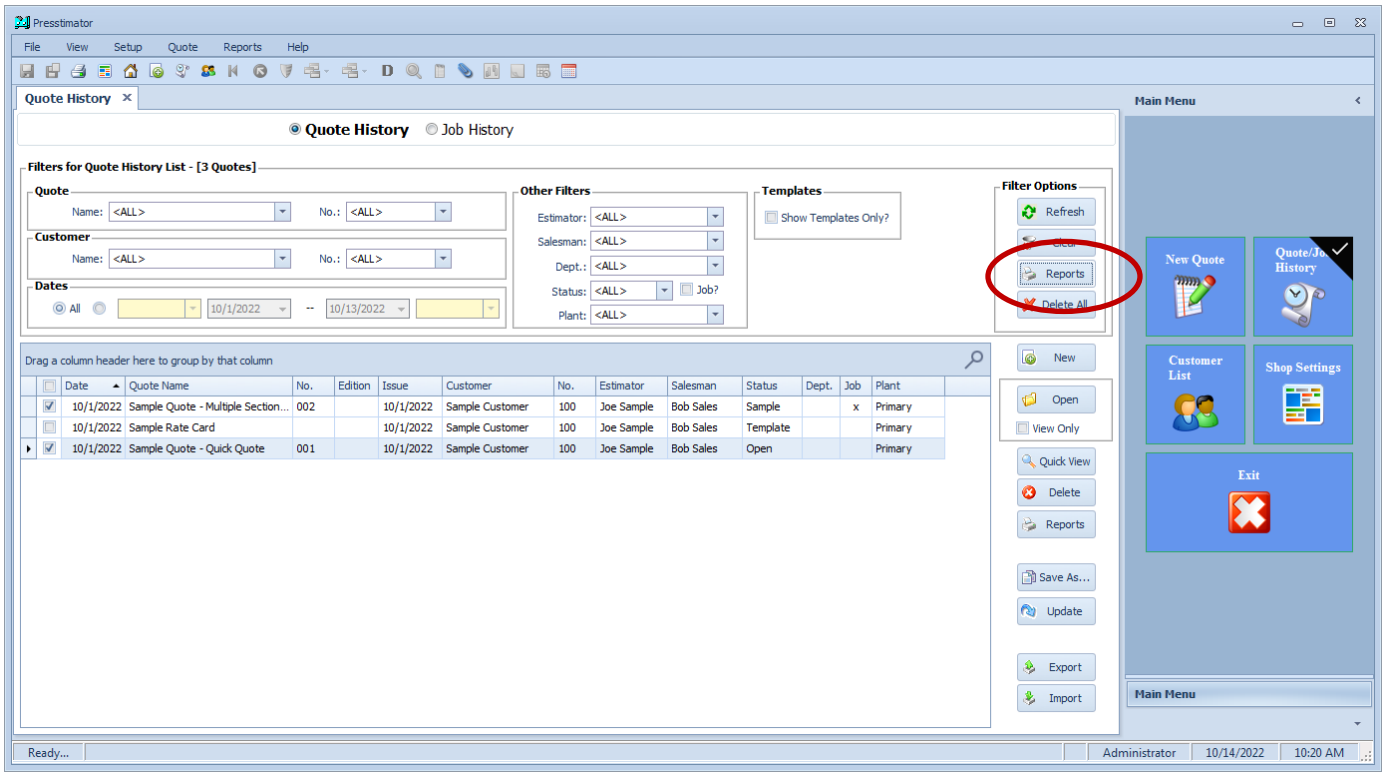
Contents

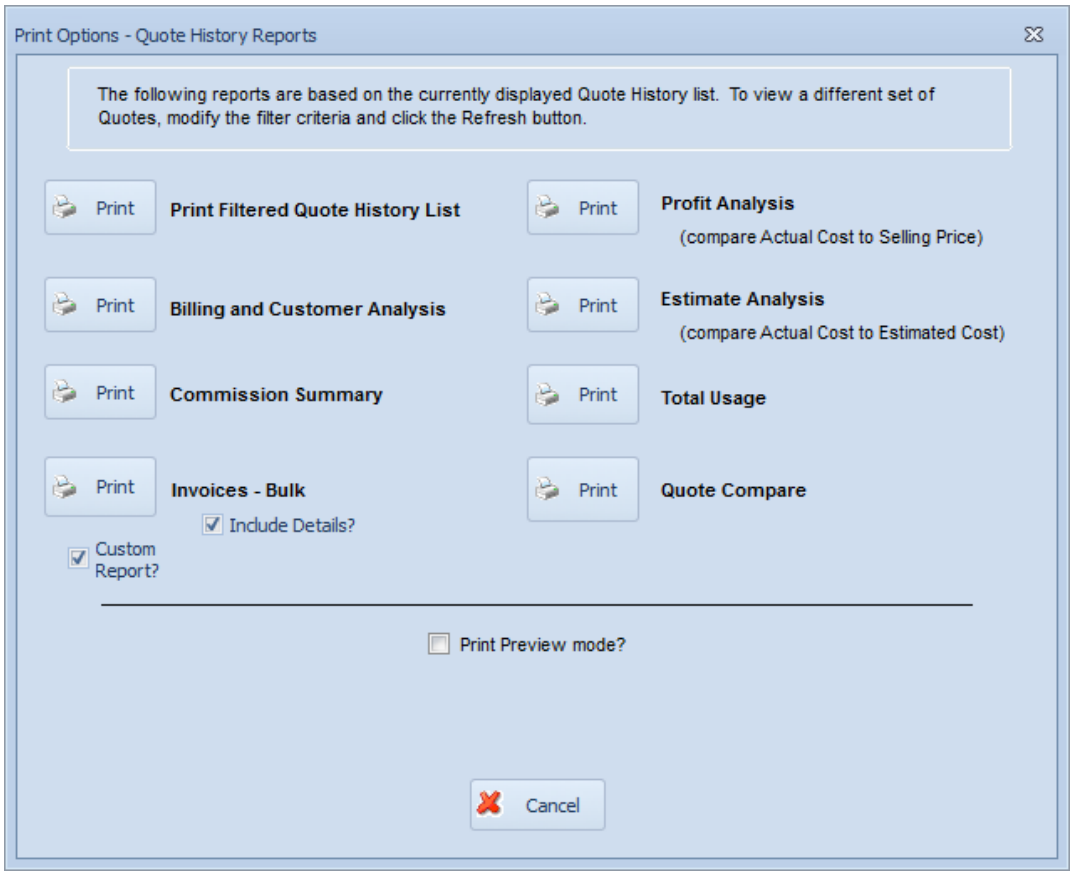
What's New in Presstimator Version 8.5 1
Checkmarks for Quote/Job History Selection: 2
Quote Compare Report: 4
Multiple Tax Rates for Customers and Drop Zones: 6
Taxable Amount on Invoice: 12
Invoice and Bulk Invoice Reports: 14
Send Items to Scheduler Directly from History Screen: 18
View Job Status from Scheduler: 20
Late Copy Received: 22
Update Existing Quotes: 25
More Paper Waste Factors for Finishing Processes: 27
Scheduler Dashboard Application: 30
Presstimator Dashboard Application: 31

Checkmarks for Quote/Job History Selection: The Presstimator is now capable of selecting specific items on the Quote and Job History screens to be included in Reports. Users can still filter the History screens based on specific criteria, but can now also choose individual items to be included in the Reports. The first column on the Quote and Job History screens is where the user can mark items in the list.

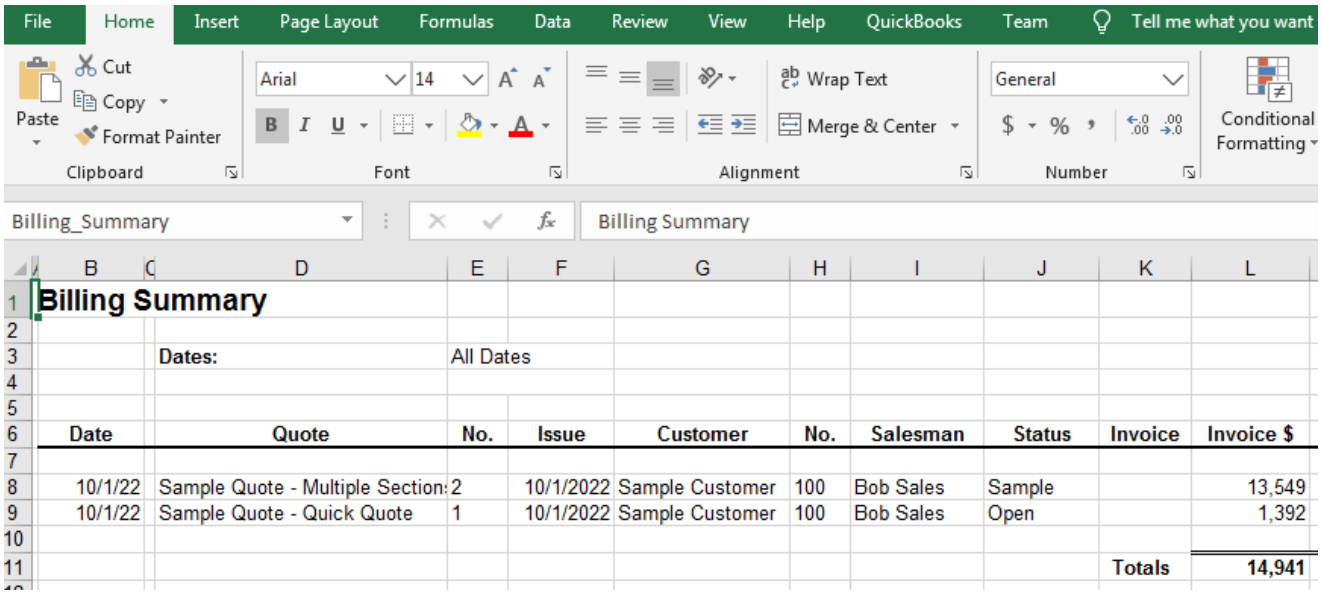


Notice the first and third items in the list are marked. Click the Reports button.





Click on any of the reports for the selected quotes. Notice in the generated report (in the example below, the Billing and Customer Analysis report) that just the two selected quotes are included in the report.

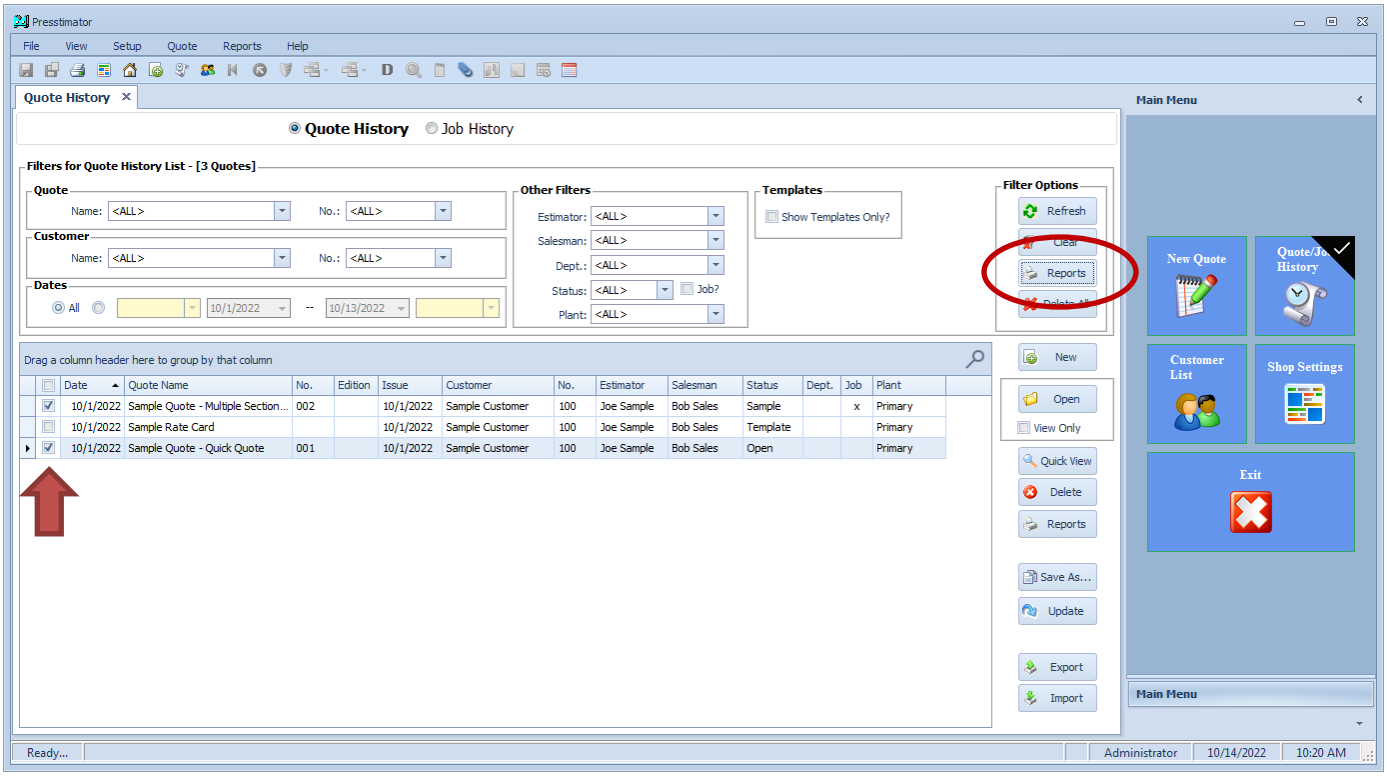


Billing Summary

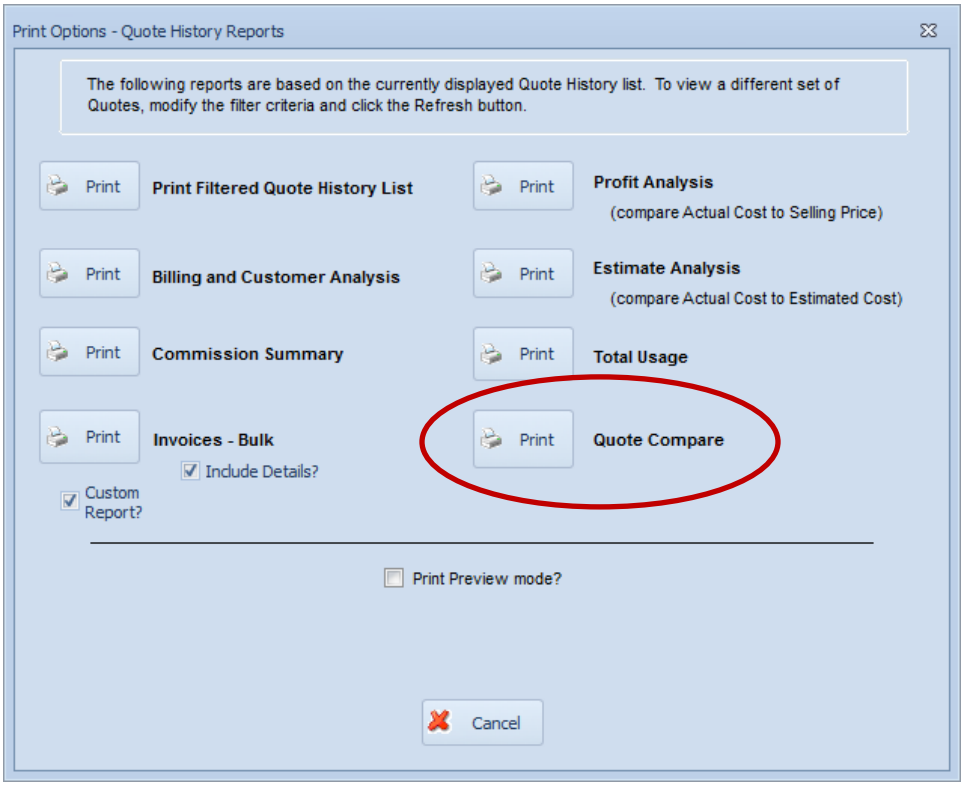
Dates: All Dates

Date	Quote	No.	Issue	Customer	No.	Salesman	Status	Invoice	Invoice $
10/1/22	Sample Quote - Multiple Section	2	10/1/2022	Sample Customer	100	Bob Sales	Sample		13,549
10/1/22	Sample Quote - Quick Quote	1	10/1/2022	Sample Customer	100	Bob Sales	Open		1,392
								Totals	14,941

Quote Compare Report: Users can apply filters and select multiple jobs/estimates from the Quote and Job History screens to generate a report in Excel to compare all aspects (cost, selling price and production actuals) of the selected quotes.

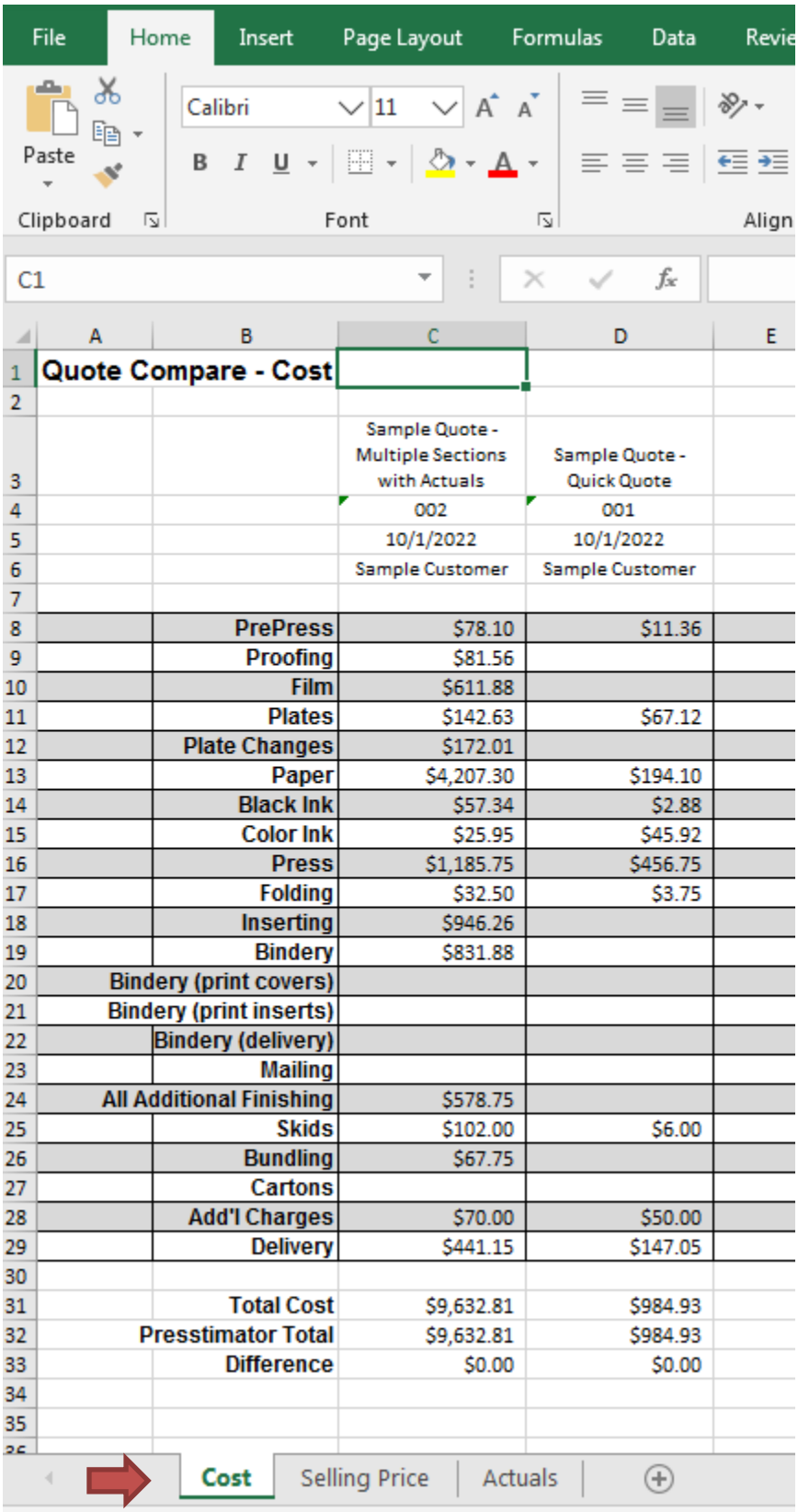


Notice the first and third items in the list are marked. Click the Reports button.



Click the Print button for the Quote Compare report.

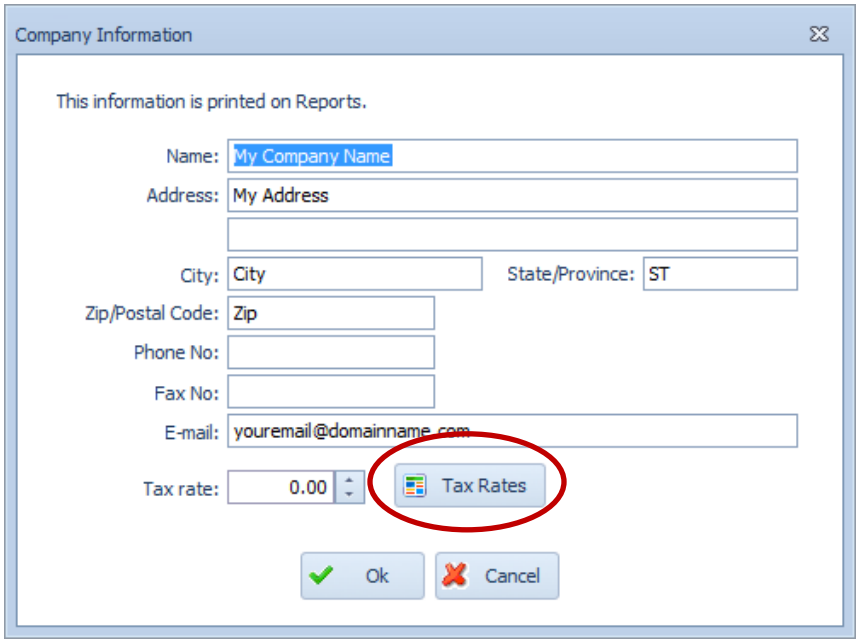
The following report is generated in Excel comparing the two selected Quotes. Users are able to compare more than two Quotes at a time by selecting multiple items on the Quote and Job History screens.



	A	B	C	D	E
1	Quote Compare - Cost				
2					
3			Sample Quote - Multiple Sections with Actuals	Sample Quote - Quick Quote	
4			002	001	
5			10/1/2022	10/1/2022	
6			Sample Customer	Sample Customer	
7					
8		PrePress	$78.10	$11.36	
9		Proofing	$81.56		
10		Film	$611.88		
11		Plates	$142.63	$67.12	
12		Plate Changes	$172.01		
13		Paper	$4,207.30	$194.10	
14		Black Ink	$57.34	$2.88	
15		Color Ink	$25.95	$45.92	
16		Press	$1,185.75	$456.75	
17		Folding	$32.50	$3.75	
18		Inserting	$946.26		
19		Bindery	$831.88		
20		Bindery (print covers)			
21		Bindery (print inserts)			
22		Bindery (delivery)			
23		Mailing			
24		All Additional Finishing	$578.75		
25		Skids	$102.00	$6.00	
26		Bundling	$67.75		
27		Cartons			
28		Add'l Charges	$70.00	$50.00	
29		Delivery	$441.15	$147.05	
30					
31		Total Cost	$9,632.81	$984.93	
32		Presstimator Total	$9,632.81	$984.93	
33		Difference	$0.00	$0.00	
34					
35					

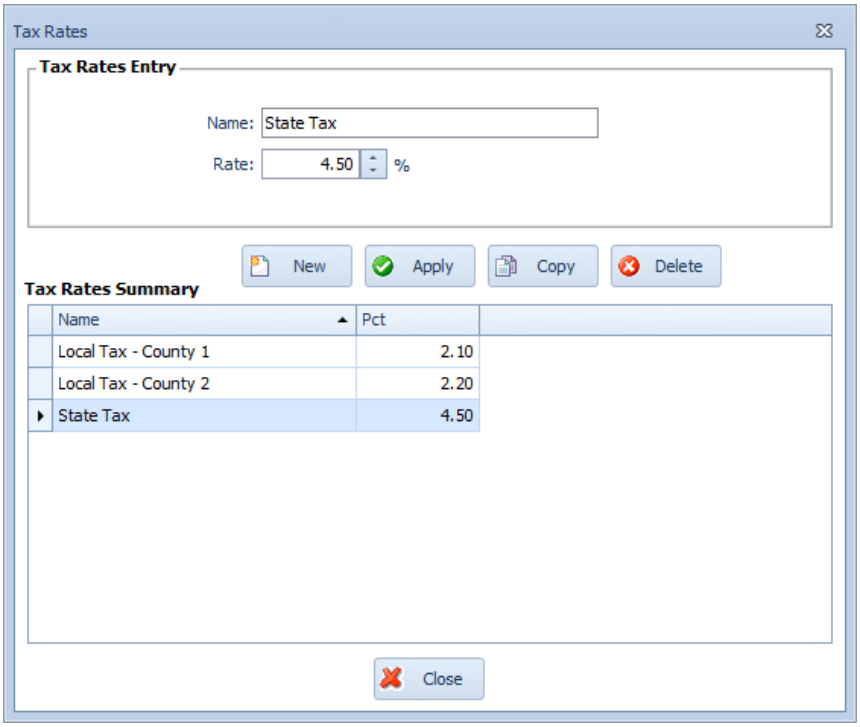
Notice the options to display the comparisons between Cost, Selling Price and Production Actuals.
Gain a global perspective on a given customer over time, or compare jobs to see which is more profitable.

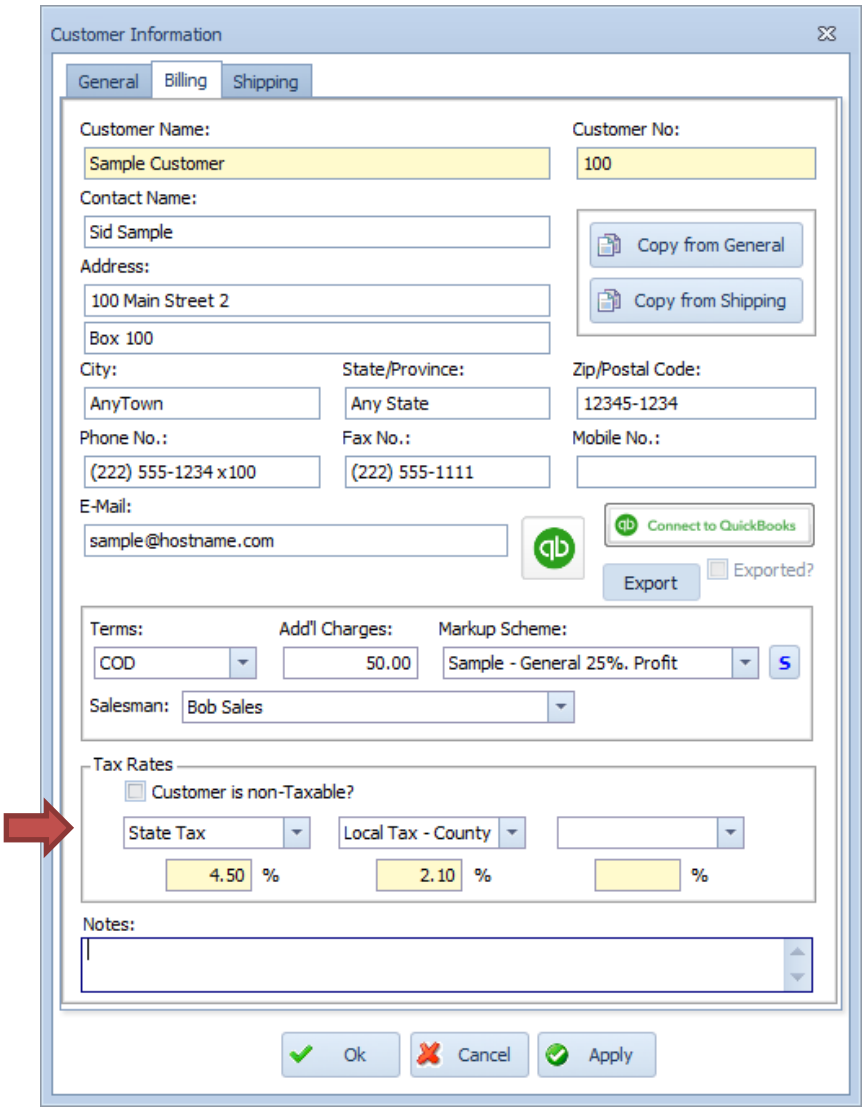
Multiple Tax Rates for Customers and Drop Zones: You may now enter multiple tax rates that apply to jobs produced and sold in your area to have an accurate tax totaled on the invoice. Click the 'Tax Rates' button on the Company Information screen from the Setup menu.



Enter all tax rates to apply to jobs produced in your shop. In this example, there is a State Tax of 4.5% and Local Taxes for two Counties in which products are sold. The tax rate for County #1 is 2.1% and the tax rate for County #2 is 2.2%. Set up as many entries necessary for the tax rates in your area. You can enter different tax rates for your destination-based delivery locations.

"Destination sales tax means that the transaction will be taxed with the sales tax rates of the state where the buyer takes ownership of the product. **Origin sales tax** means that the transaction will be taxed with the sales tax rates of the state where the seller is based."

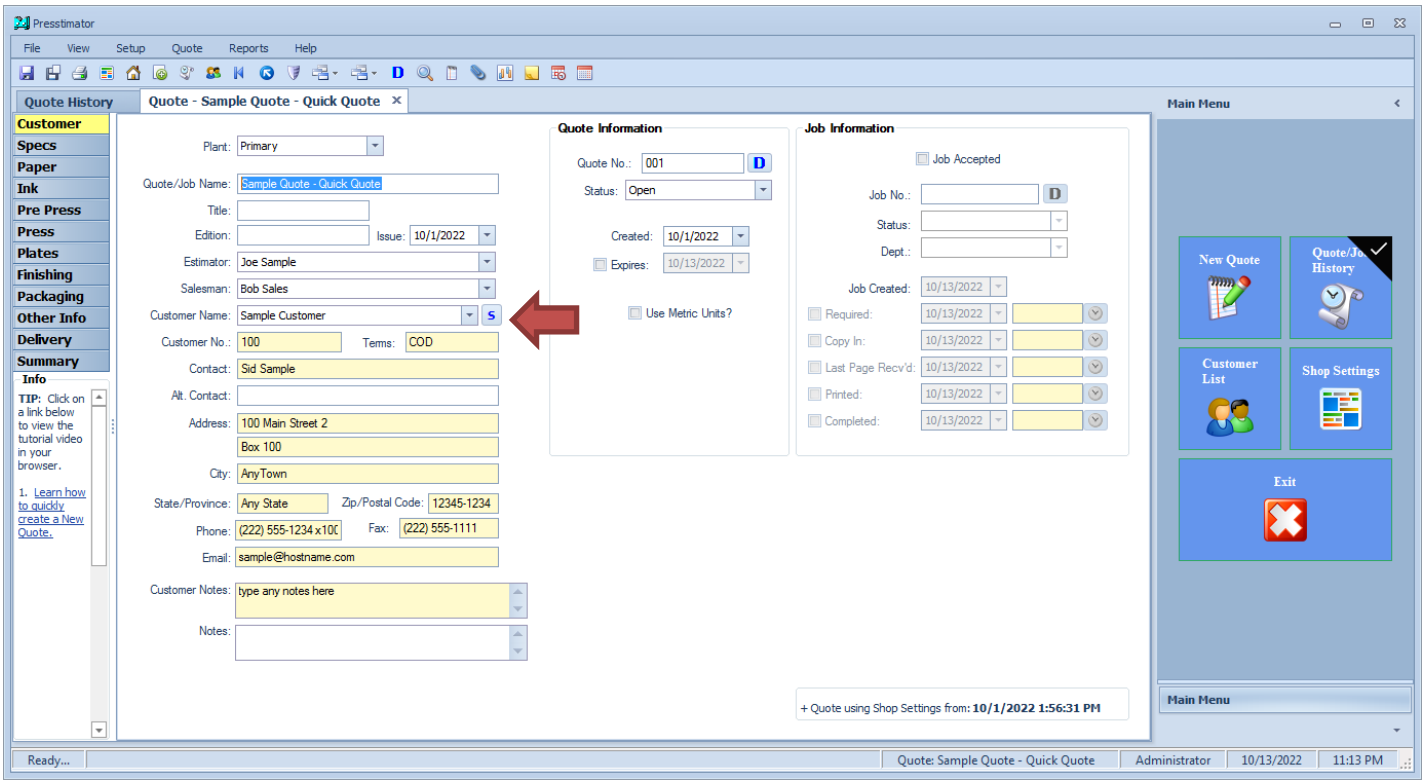




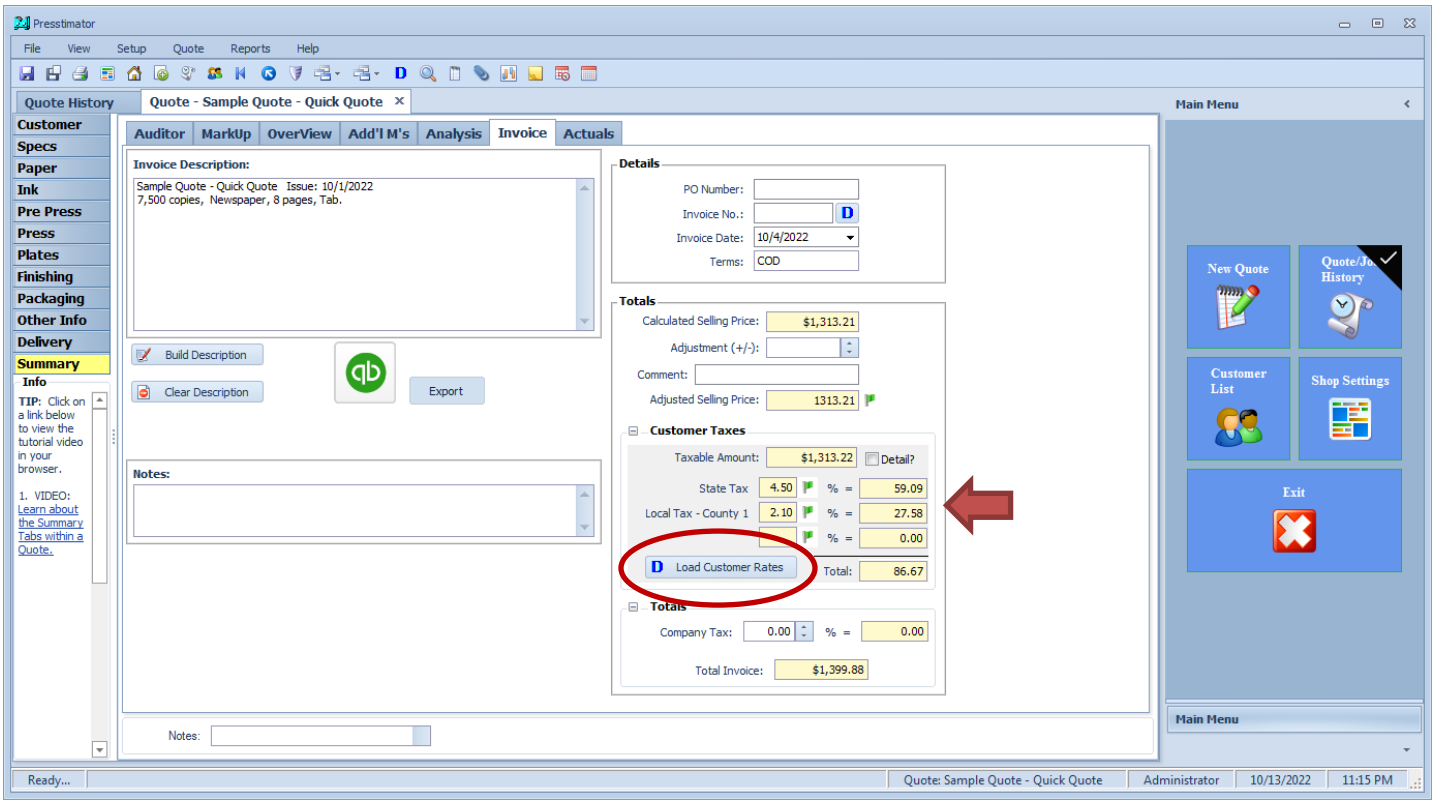
To apply the required tax rates to a given customer or delivery destination (drop zone), open the Customer Information screen for a customer and navigate to the Billing screen. In the 'Tax Rates' portion of the screen, select up to three tax rates for the selected customer or drop zone. In this example, 'State Tax' is selected in the first dropdown and 4.5% is imported into the first rate field. 'Local Tax - County 1' is selected in the second dropdown, and 2.1% is imported into the second rate field.

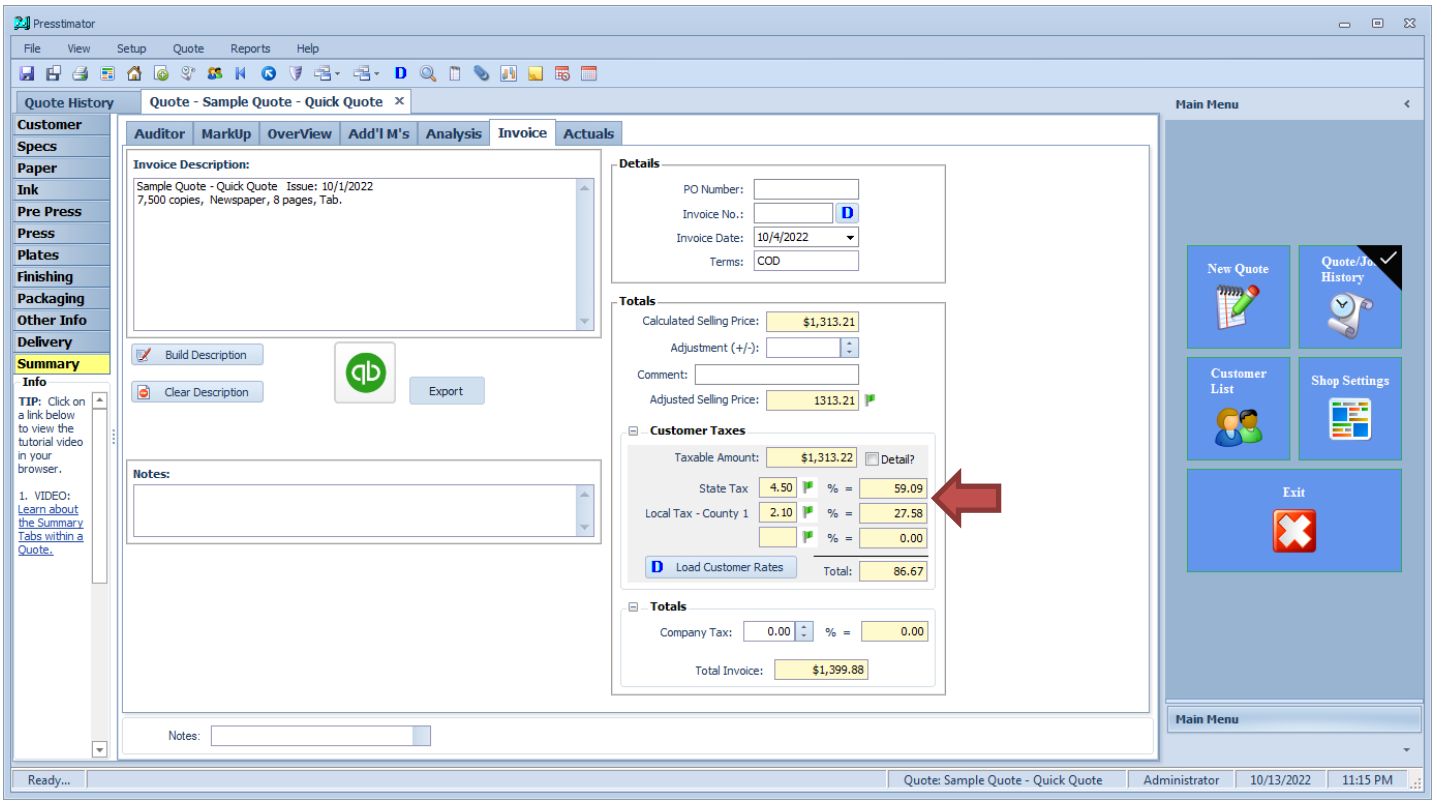
Note: You can also specify if the customer is non-Taxable. If this checkbox is marked, no taxes will be calculated on the invoice screen for this customer.

Select the customer name from the dropdown on the Customer screen within a Quote.



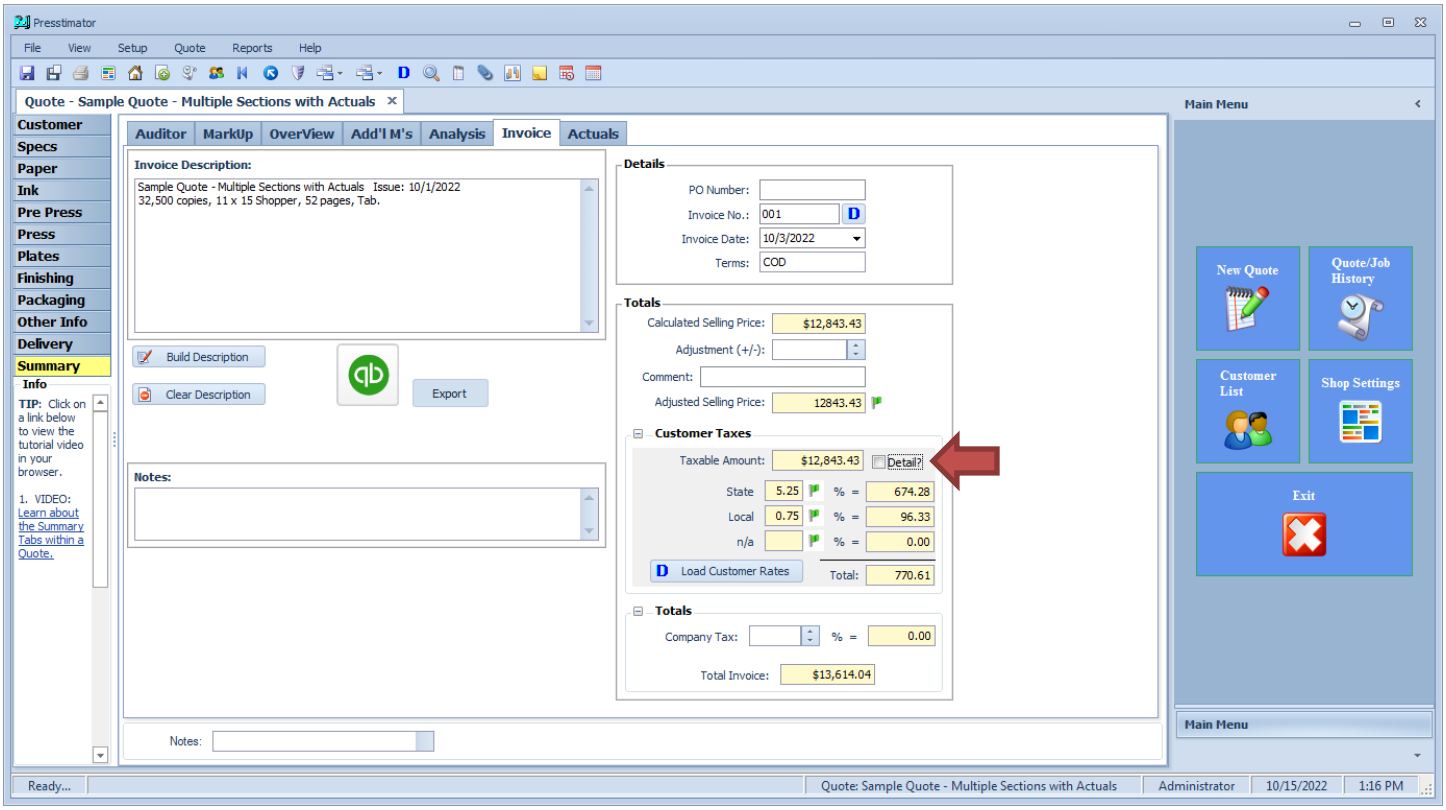
On the Invoice screen within a Quote, the 'Customer Taxes' portion of the screen will import the three tax rates entered on the Customer Information screen for the selected customer. If the tax rates are not automatically displayed, or needs to be updated, click on the 'Load Customer Rates' screen to import the values.

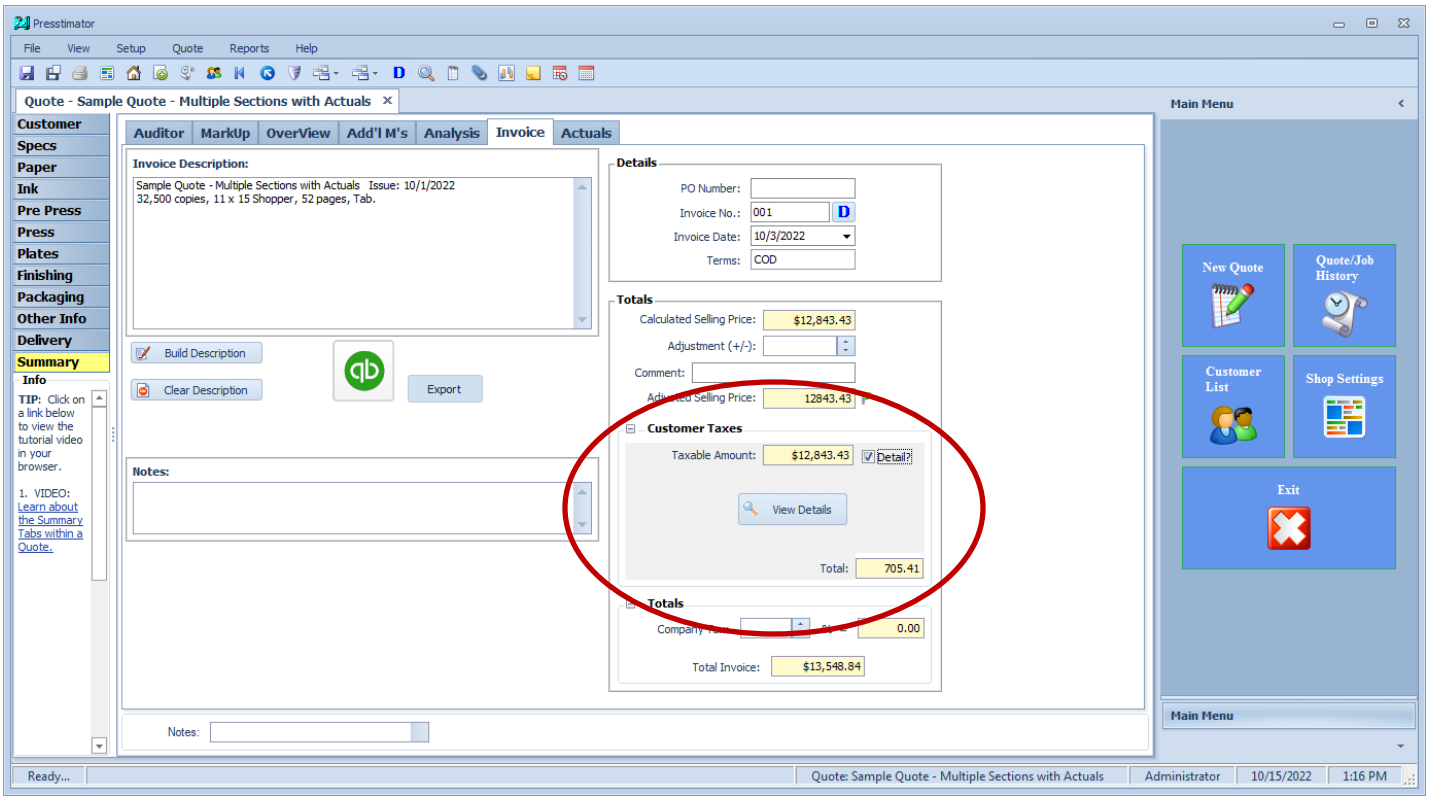




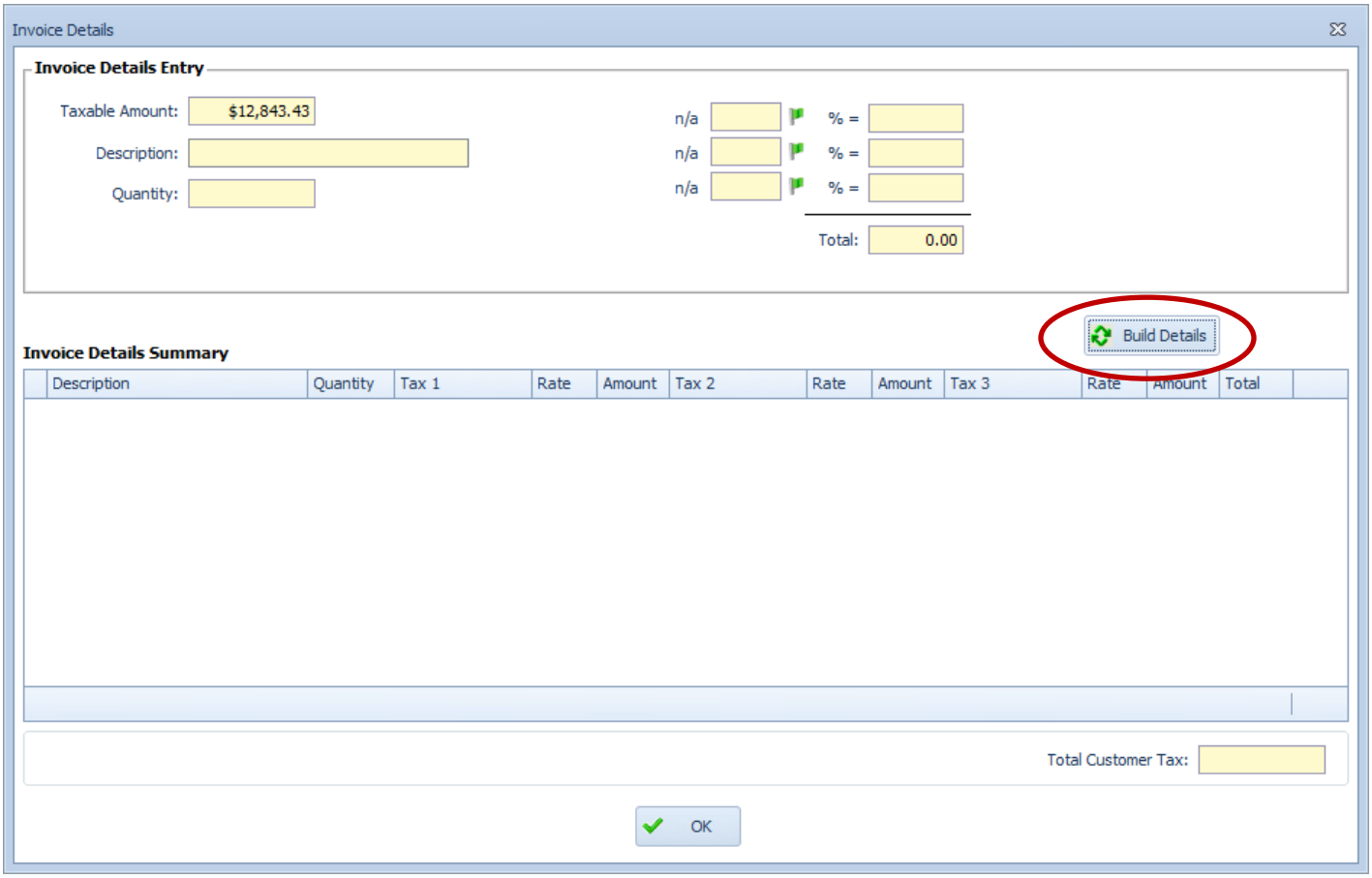
In this example for **origin-based tax rates**, the 'State Tax' of 4.5% and 'Local Tax – County 1' of 2.1% is imported into the appropriate fields and the total tax for the Quote based on the 'Taxable Amount' is calculated.

For **destination-based tax rates**, click on the Details checkbox to indicate that details need to be entered for the destinations provided in Drop Zones within Delivery.

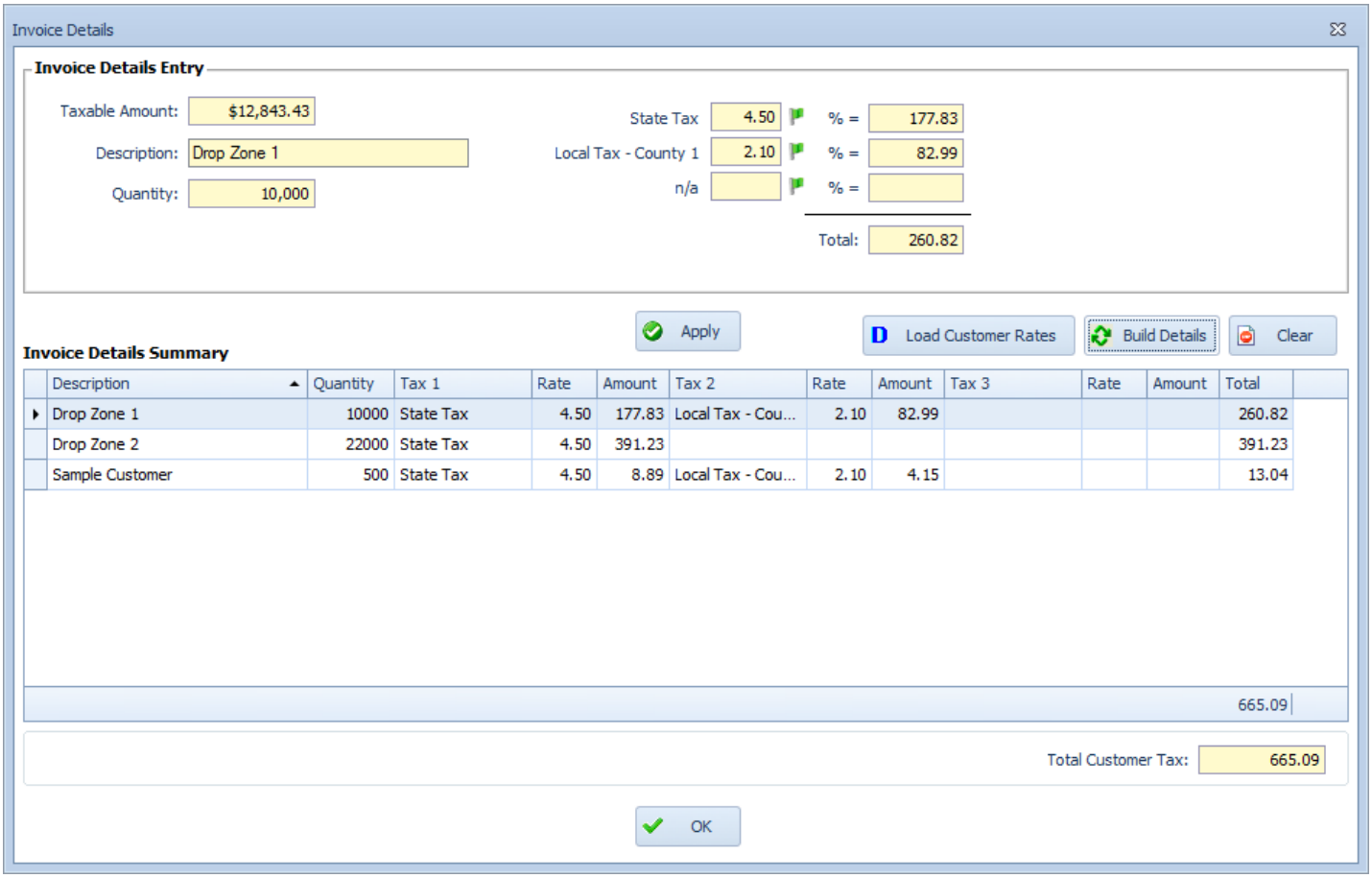




When selecting Details, the display will change to remove any subtotals and a button to View Details will appear. Click the View Details butto. Click the Build Details button to import all of the destination information from Delivery Drop Zones into the list.

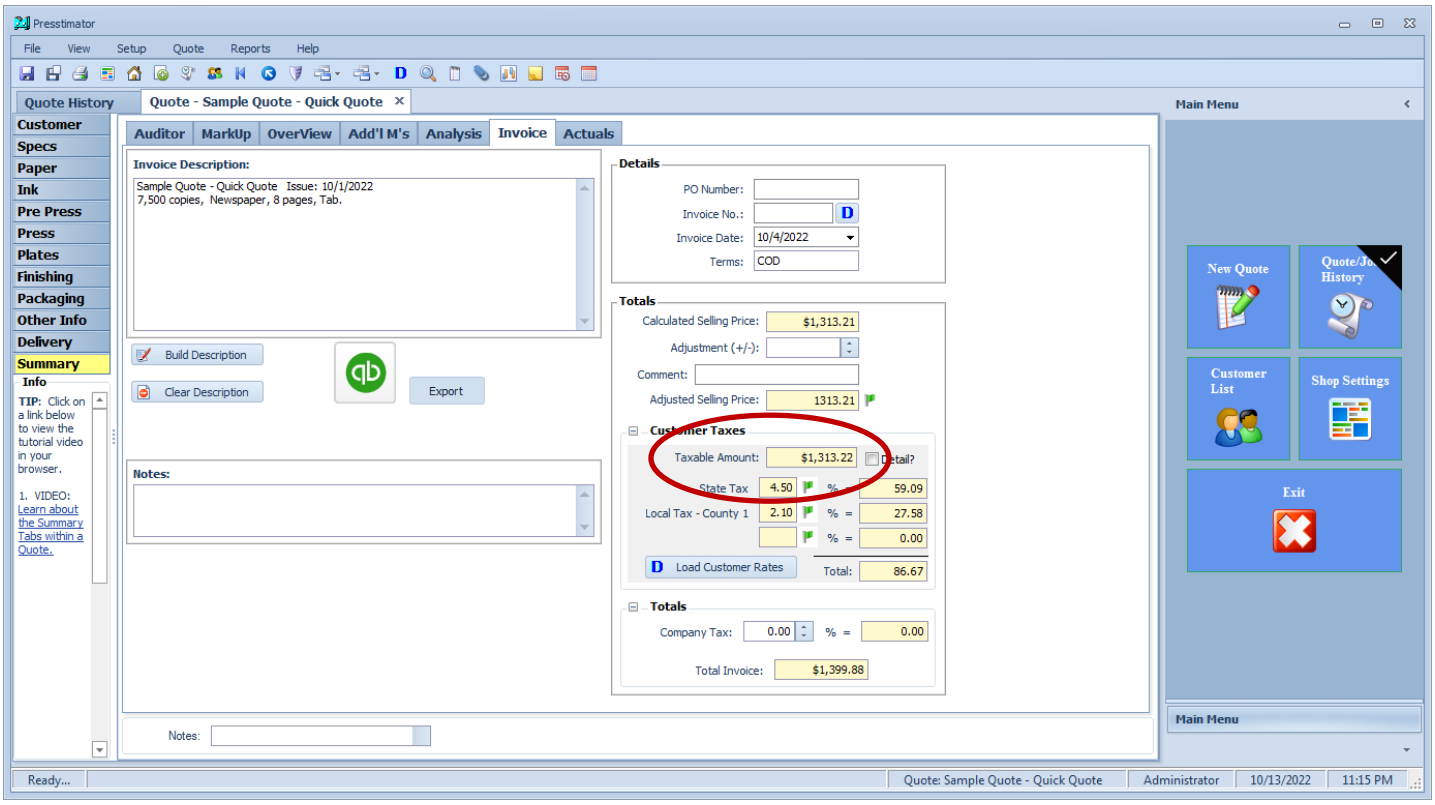


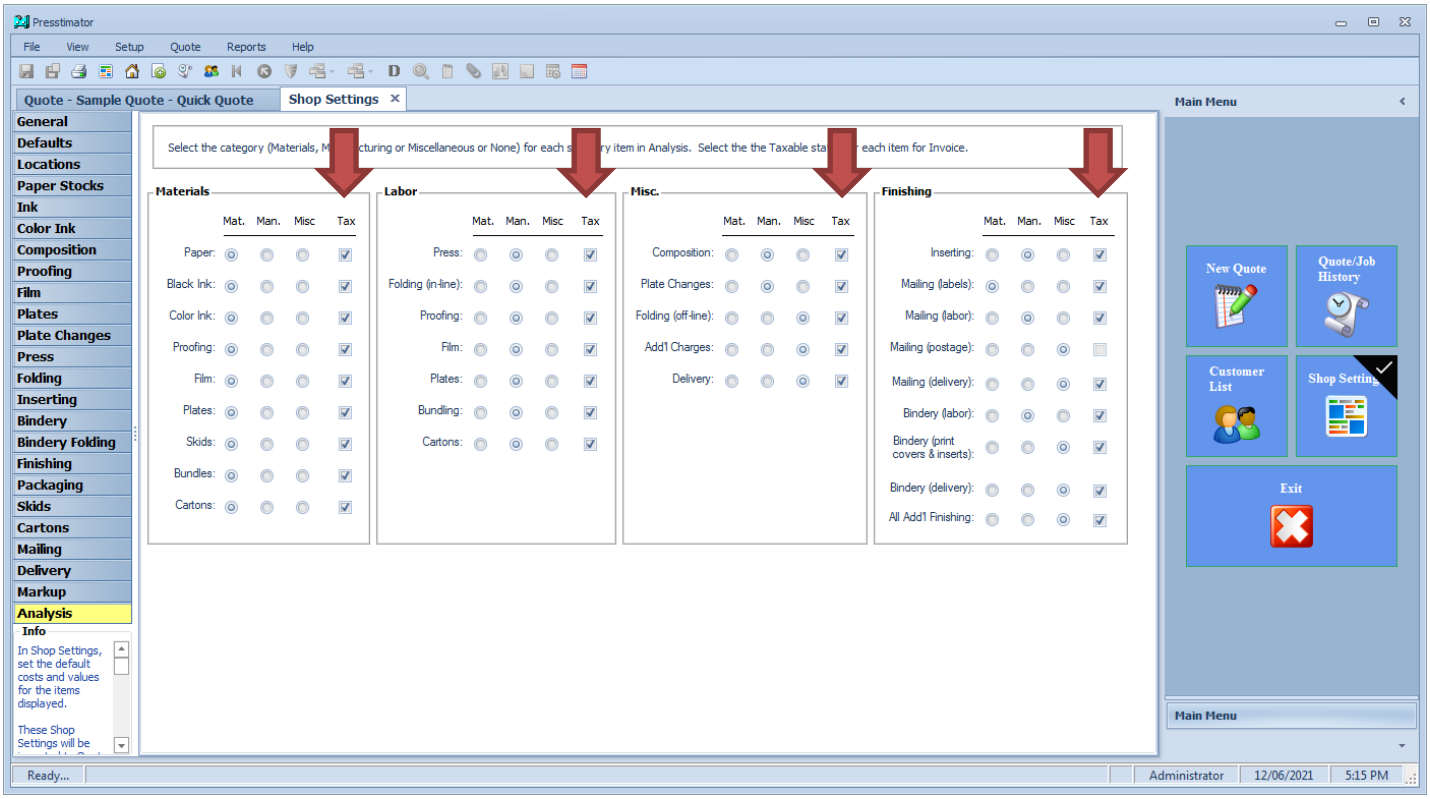
The Invoice Details screen imported each of the delivery locations from the Drop Zones screen in Delivery and imported the tax rates for each one of the Drop Zones from the Customer List. Notice the different tax rates for each of the delivery locations, which is based on the tax rates of each **destination**.



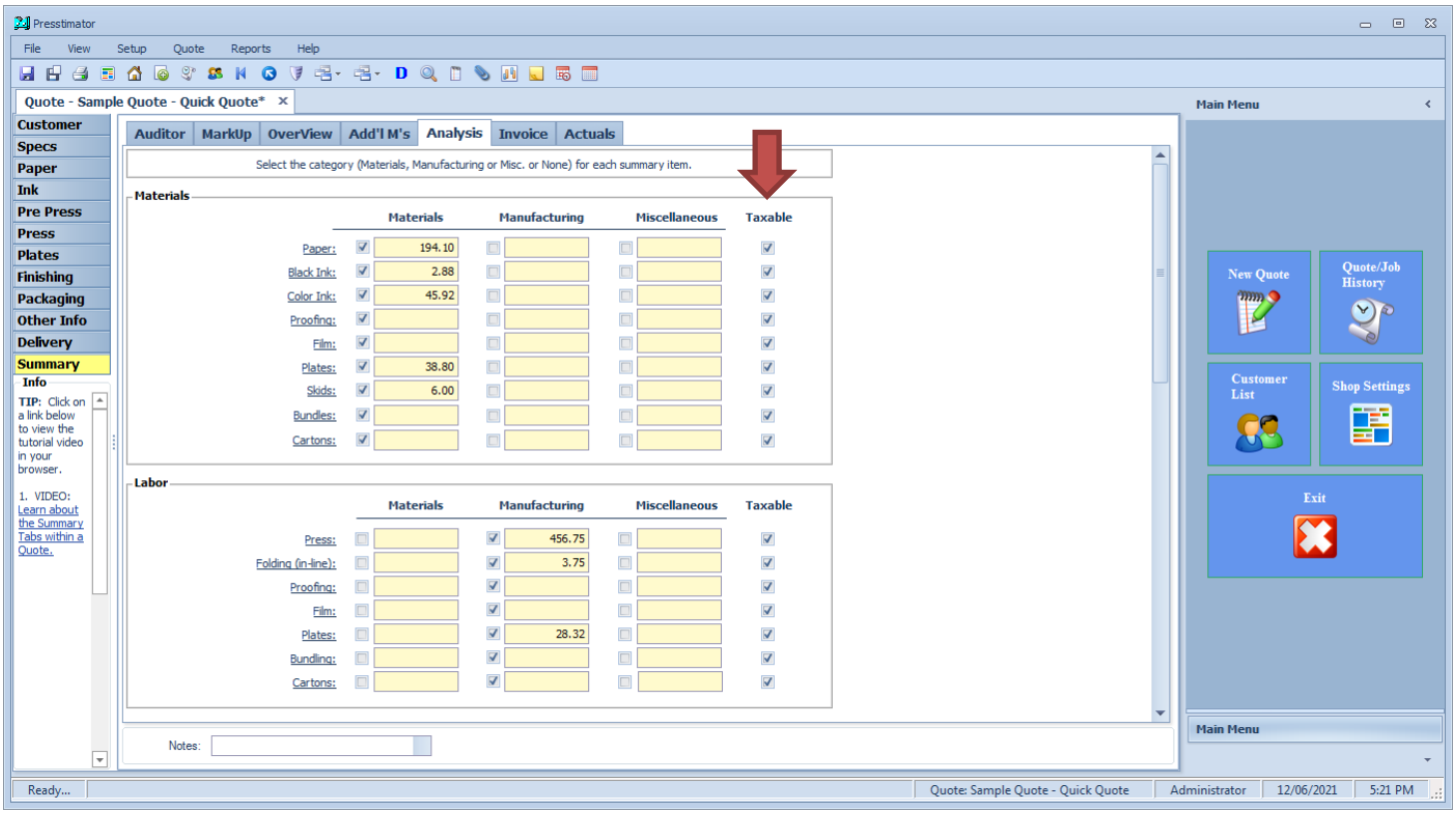
If you open an existing Quote and the tax rates have changed, simply click the Load Customer Rates button to re-import the current tax rates for each of the locations. If the Drop Zones have changed from the original Quote, click the Build Details button to re-import all of the delivery locations and tax rates to bring the invoice up-to-date with current tax charges.

Taxable Amount on Invoice: The 'Taxable Amount' calculated on the Invoice screen is based on the tax attribute of each line-item throughout a Quote.



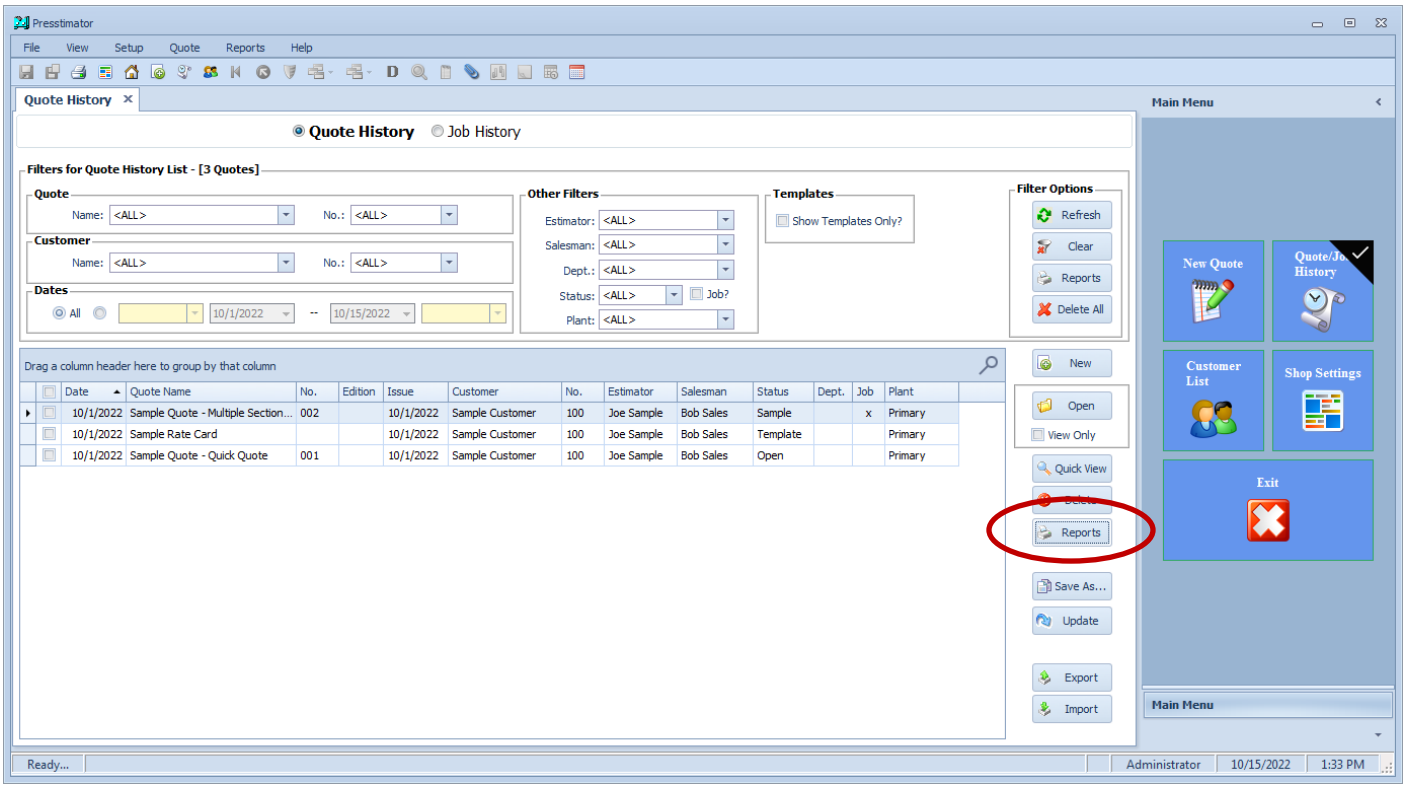


On the Analysis screen in Shop Settings, mark the checkboxes for each component of a job that is a taxable item. The selling price of these items will be included in the Taxable Amount on the Invoice screen.

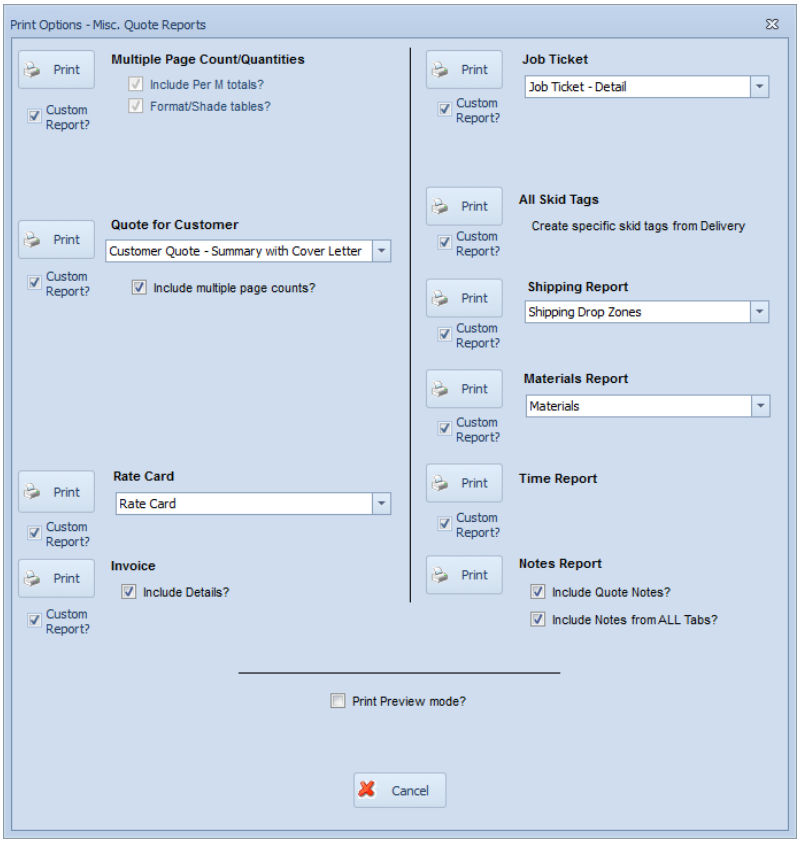


If you want to change the taxable status of specific line-items for just a single Quote (instead of adjusting in Shop Settings), mark the 'Taxable' checkboxes on the Analysis screen in Summary. These checkboxes are automatically defaulted to the status set in Shop Settings when creating a New Quote. Changing the checkbox status for any item adjusts the Taxable Amount calculated on the Invoice screen, for this Quote only.

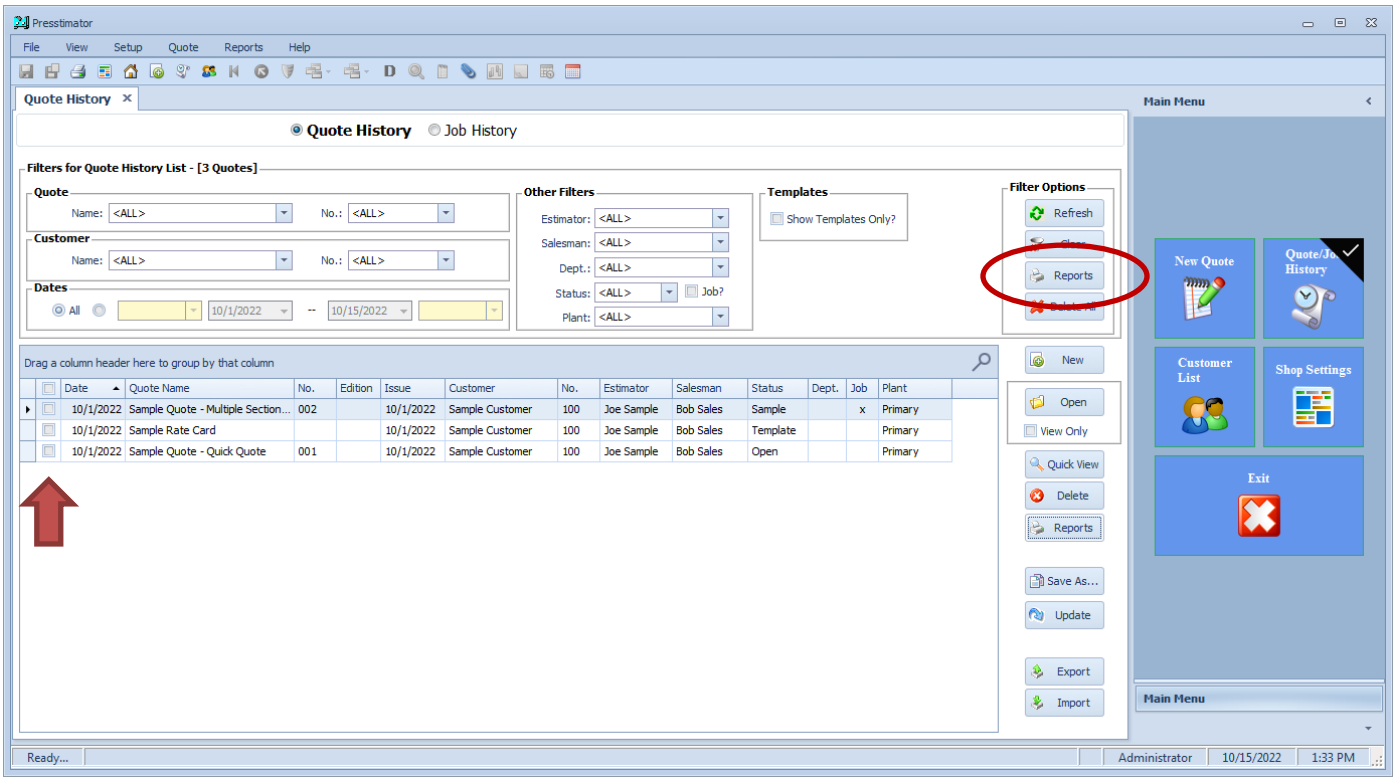
Invoice and Bulk Invoice Reports: Invoices can be printed individually from within a Quote or from the Job History screen. Click on the lower Reports button to select a report to generate for the highlighted item in the list.



The print options displayed are for just the highlighted item. These reports are identical to the reports available from within a Quote.

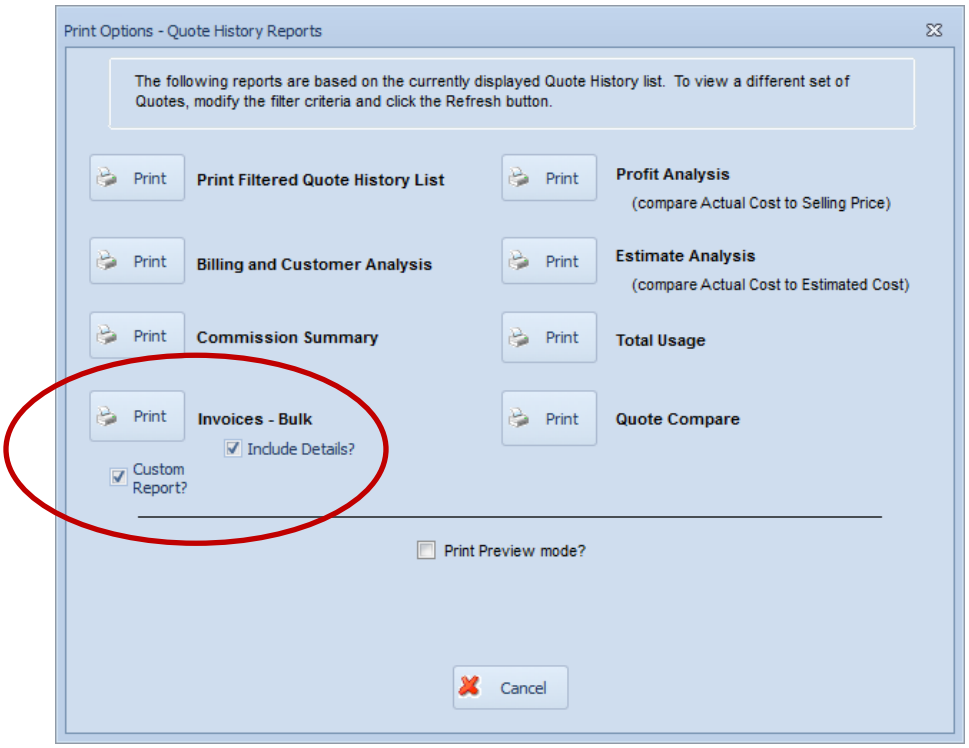


Or, users can mark invoices from the Job History screen and print them in bulk. Click on the upper Reports button to select a report to generate for all of the marked items in the list.

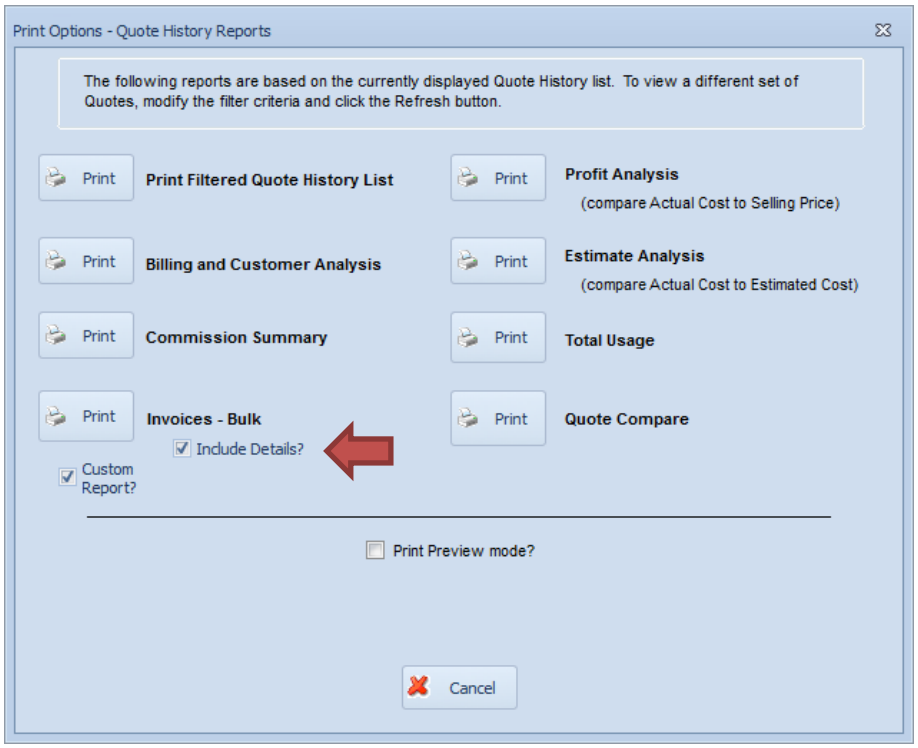


Note: If no items are selected with a checkmark in the list, all filtered items displayed are sent to the report. In other words, selecting none is the same as marking all of the items in the list.

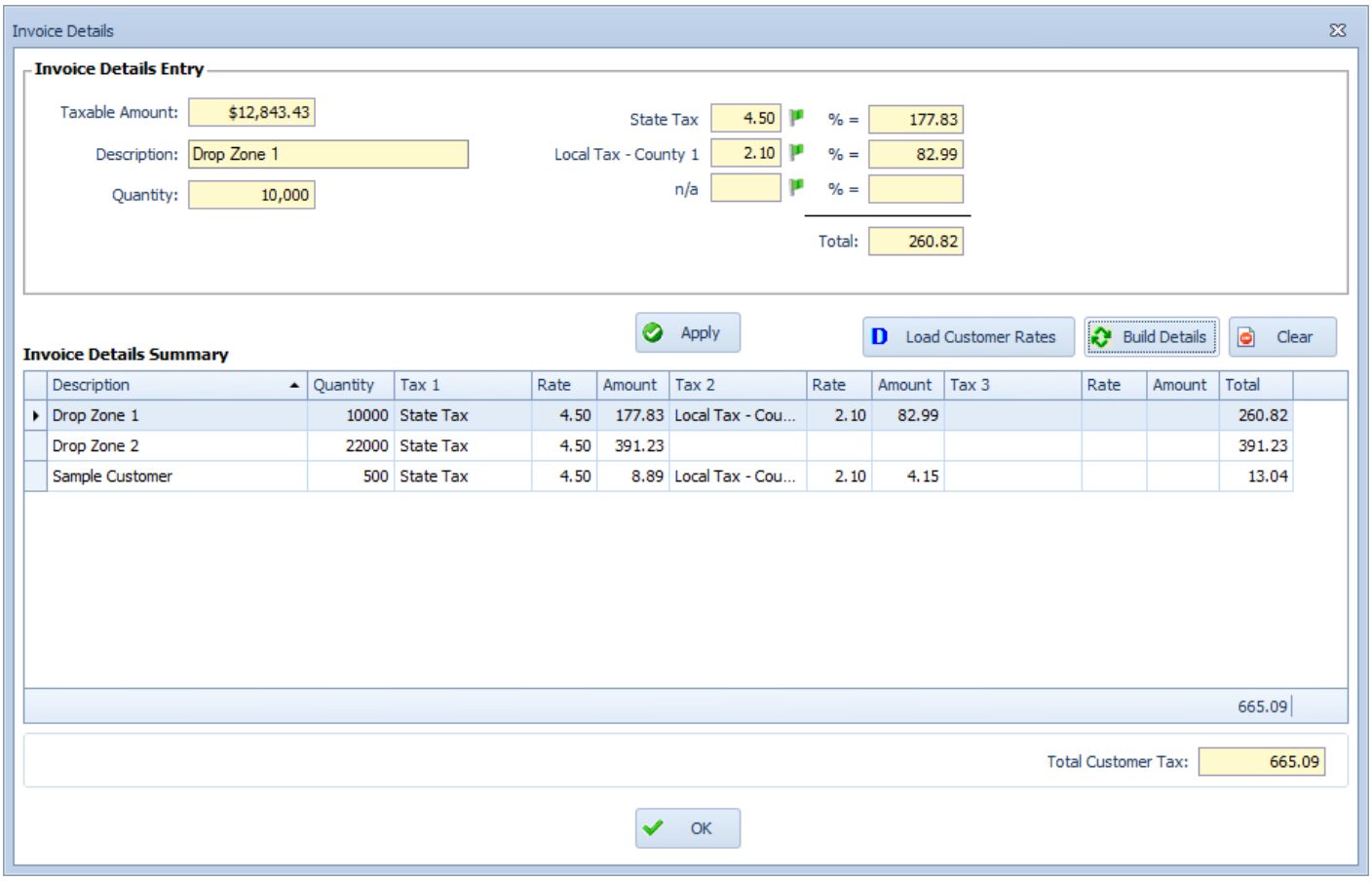
The print options displayed are for all of the marked items in the list. The new Invoices – Bulk report is available to print all marked ivoices in a batch. Each page in the report will be an invoice for each of the marked items in the list.

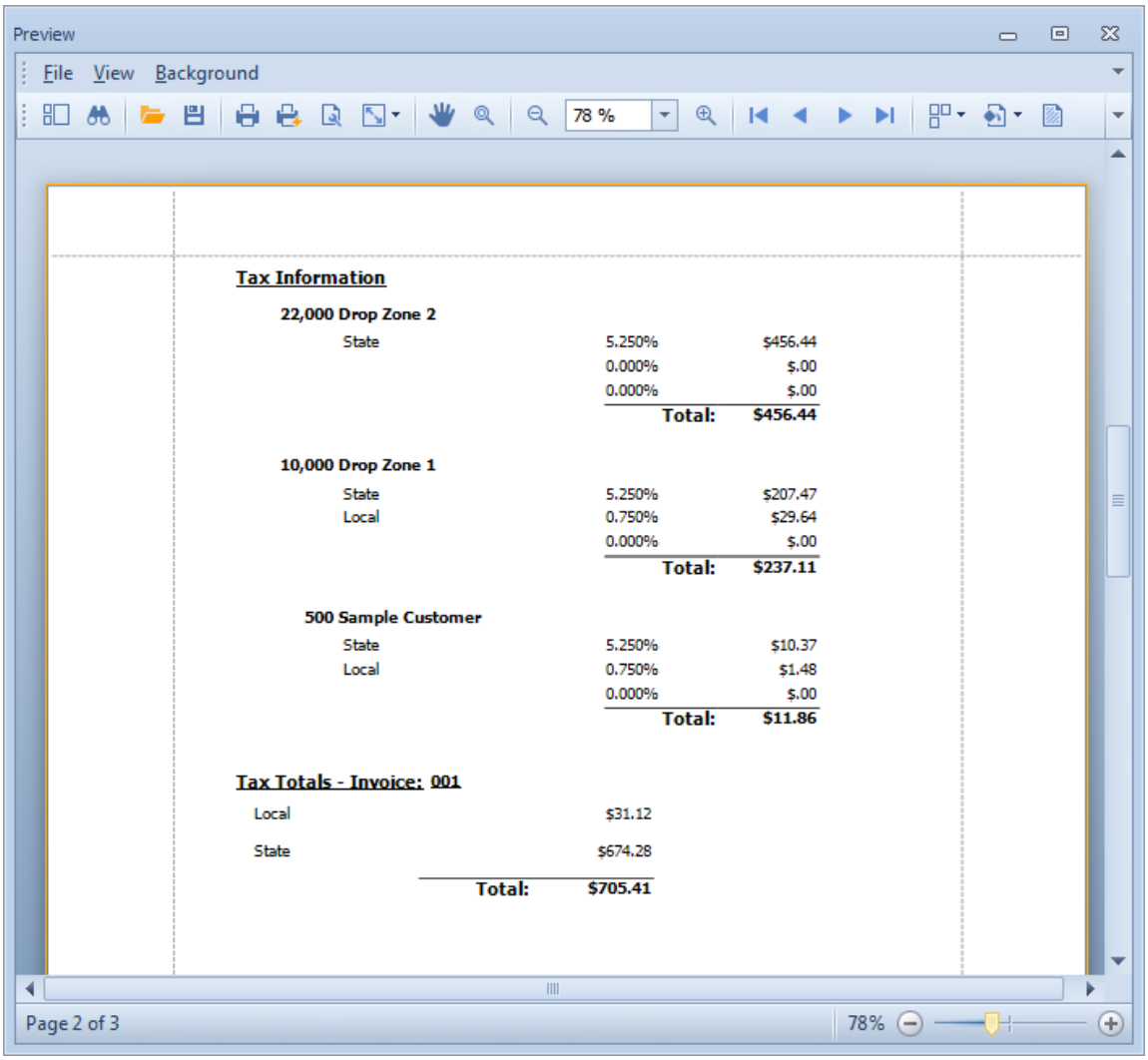


If the user marks the Include Details option, each invoice generated in the report will also include a complete breakdown of all of the charges associated with the Details previously described on the Invoice screen within a Quote.



From our prior example, the accompanying page for each invoice printed will include the totals displayed here.





Tax Information

22,000 Drop Zone 2

State	5.250%	$456.44
	0.000%	$.00
	0.000%	$.00
	Total:	$456.44

10,000 Drop Zone 1

State	5.250%	$207.47
Local	0.750%	$29.64
	0.000%	$.00
	Total:	$237.11

500 Sample Customer

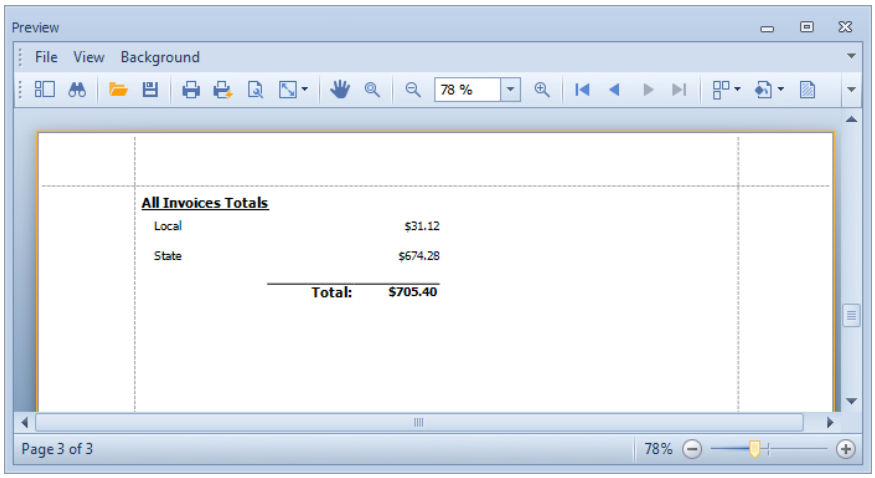
State	5.250%	$10.37
Local	0.750%	$1.48
	0.000%	$.00
	Total:	$11.86

Tax Totals - Invoice: 001

Local	$31.12
State	$674.28
Total:	$705.41

As you can see, a comprehensive breakdown is provided with each printed invoice for each of the delivery destinations.

Also, when printing the invoices in bulk with details included, the last page of the report will include a complete summary of all of the common tax rates for each item.

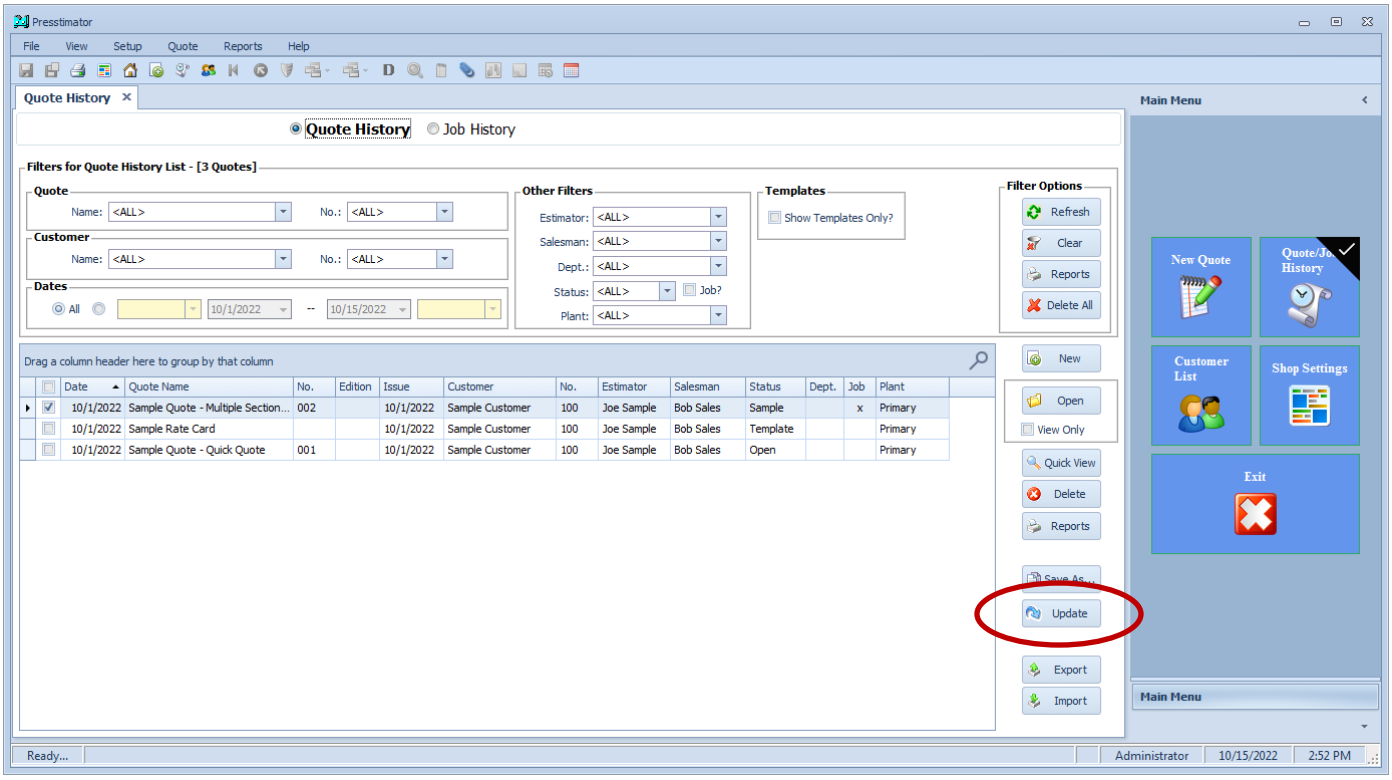


All Invoices Totals

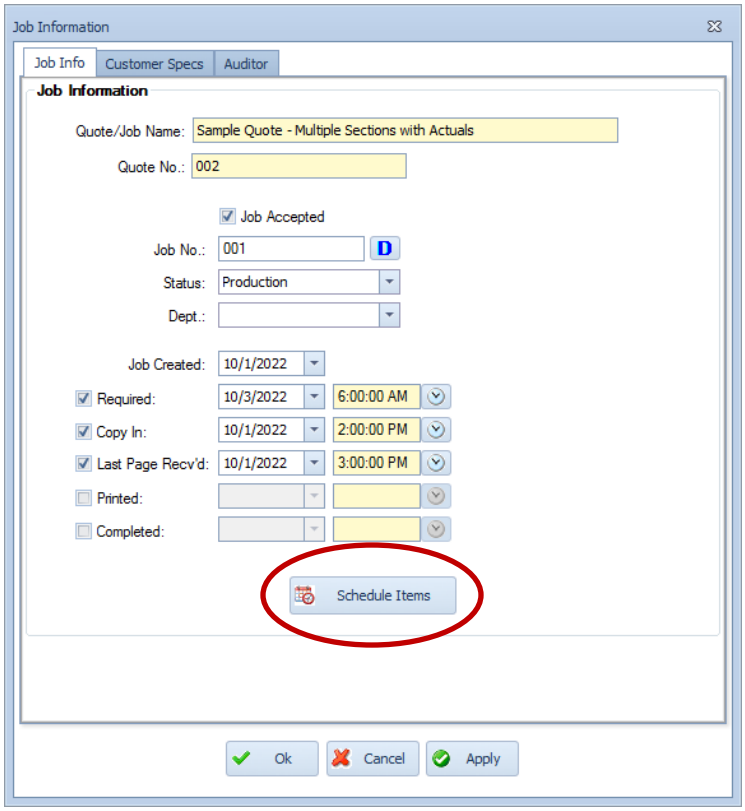
Local	$31.12
State	$674.28
Total:	$705.40

In our example, “Local” and “State” summaries are totaled for all of the selected invoices. This feature is very useful for gathering information for quarterly tax reports. Just filter the Job History by the corresponding date range and print the Invoices – Bulk report with Details to get a complete summary of all taxes paid on the last page of the report.

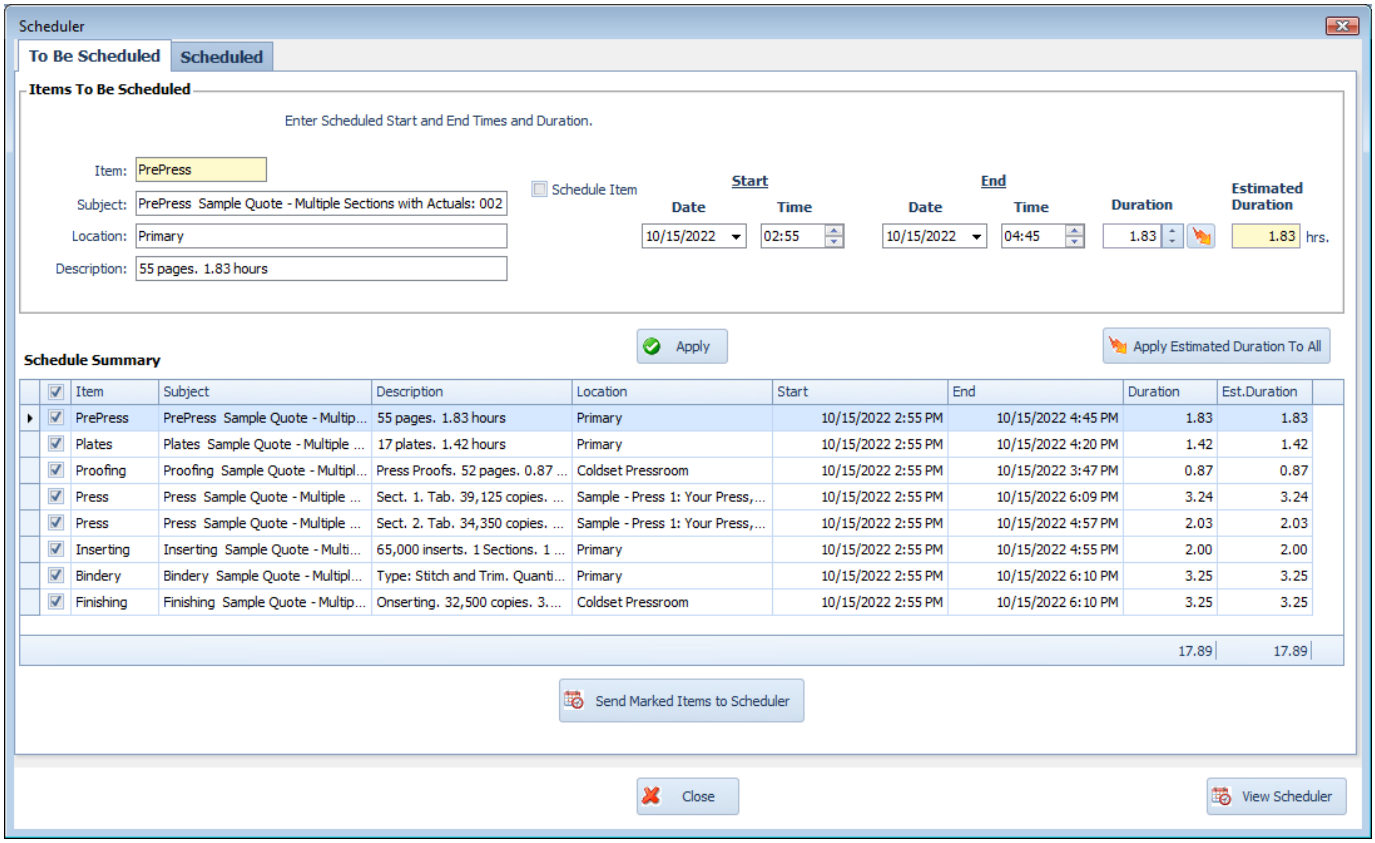
Send Items to Scheduler Directly from History Screen: Quickly and easily send a job directly to the Scheduler from the Quote and Job History screens without having to open a Quote. To schedule a job, simply click on the Update button on the Quote or Job History screens.



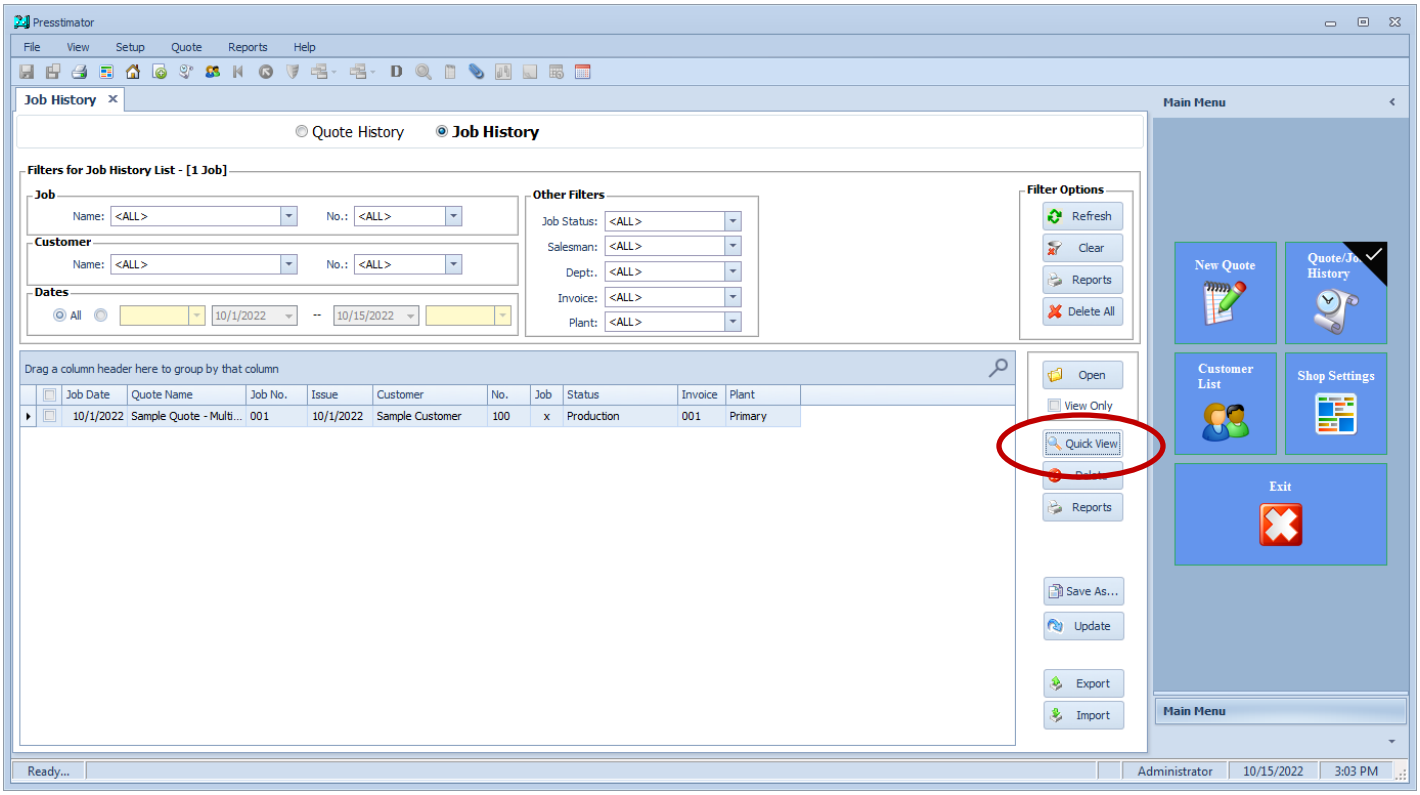
On the Job Information screen, click the Schedule Items button.



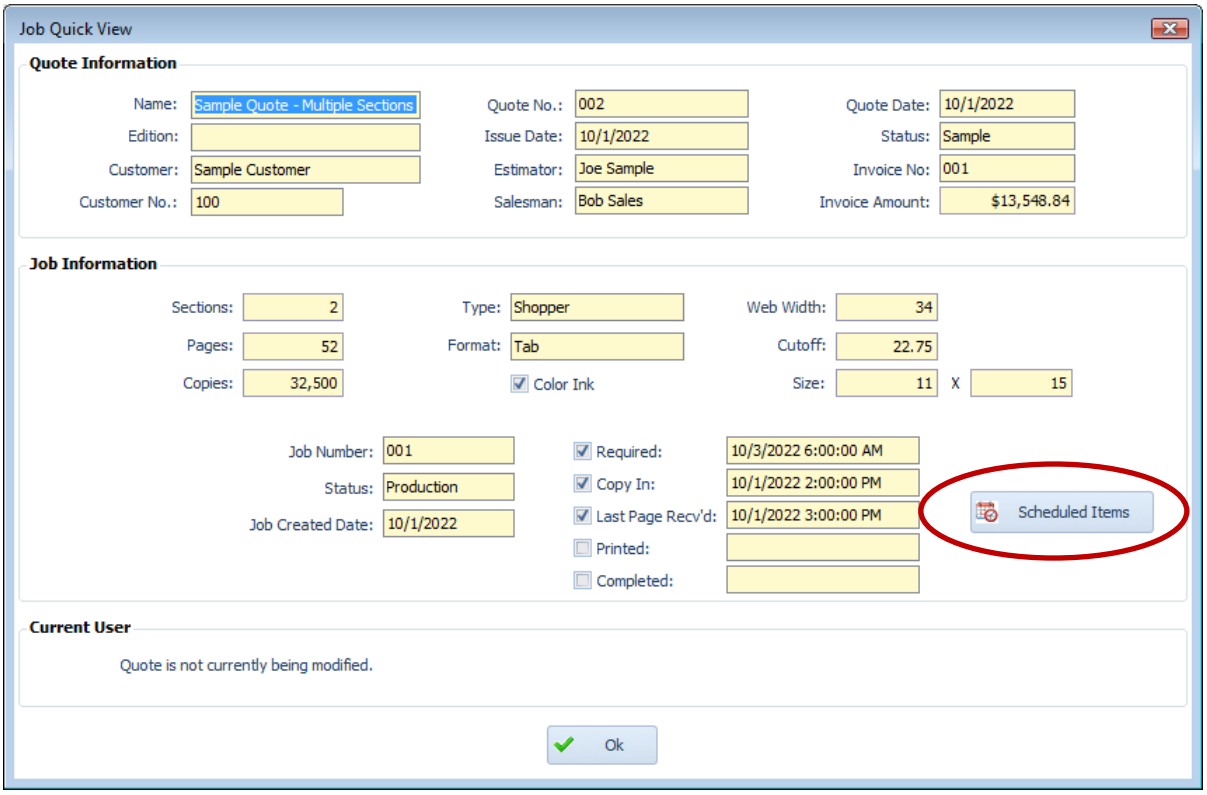
Select the processes you want to send to the Scheduler and click the Send Marked Items to Scheduler button. That's all! The items have been sent to the scheduler exactly the same way as from within a Quote without having to open and navigate through a Quote. Easily delegate the task of sending a job to the Scheduler without any knowledge of the Presstimator.



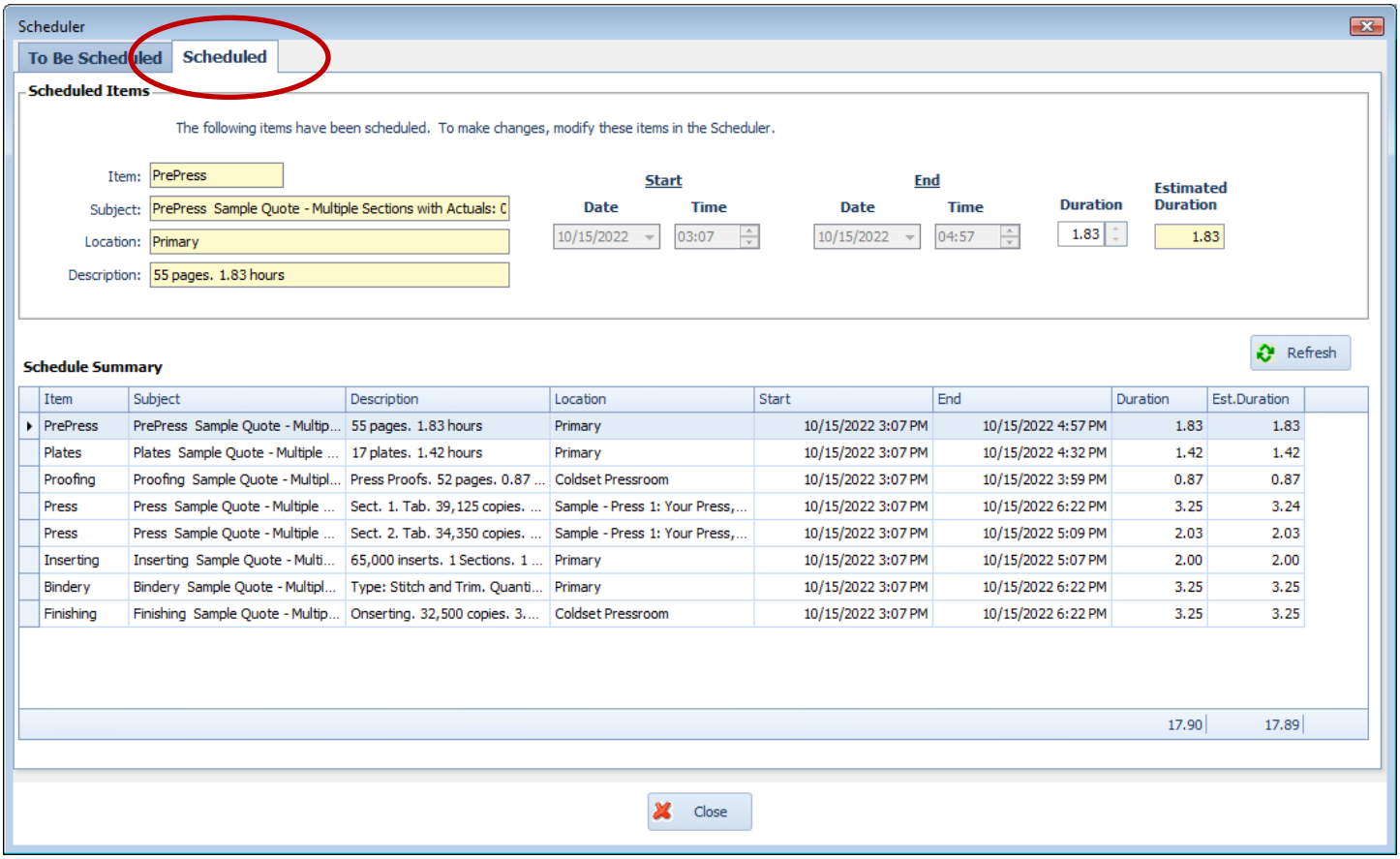
View Job Status from Scheduler: Once a job has been sent to the Scheduler, users can quickly view the status of a job directly from the Job History screen. If a call comes in asking for the status of a job, users can quickly view the status directly from the Job History screen by clicking on the Quick View button.



The Job Quick View screen displays current information about the job. Click the Scheduled Items button to view the current status of the job from the Scheduler.

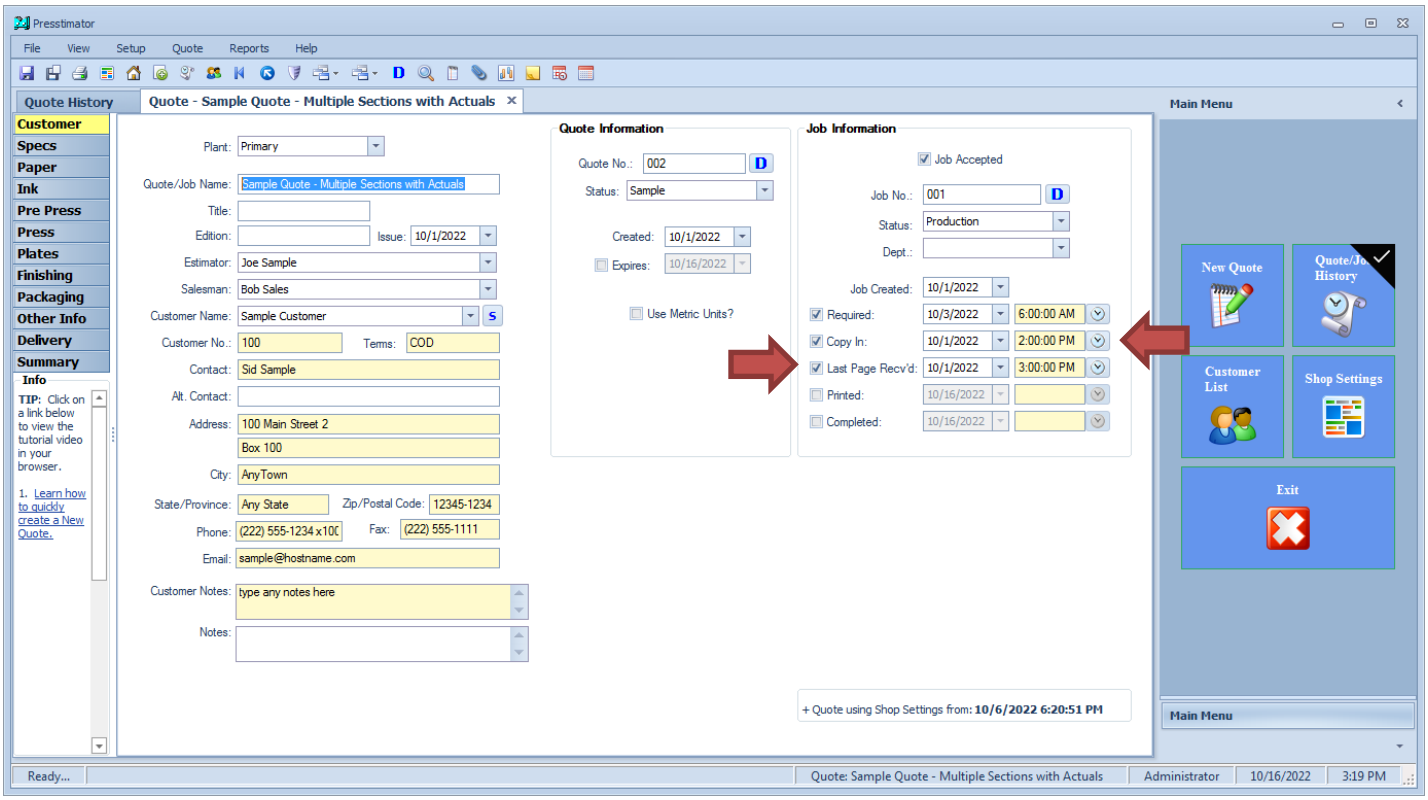


The Scheduled screen displays the current status of each process as reported in the Scheduler application to give you a live view of the status of the job. This allows the user to give instant feedback to requests for job status based on current data.

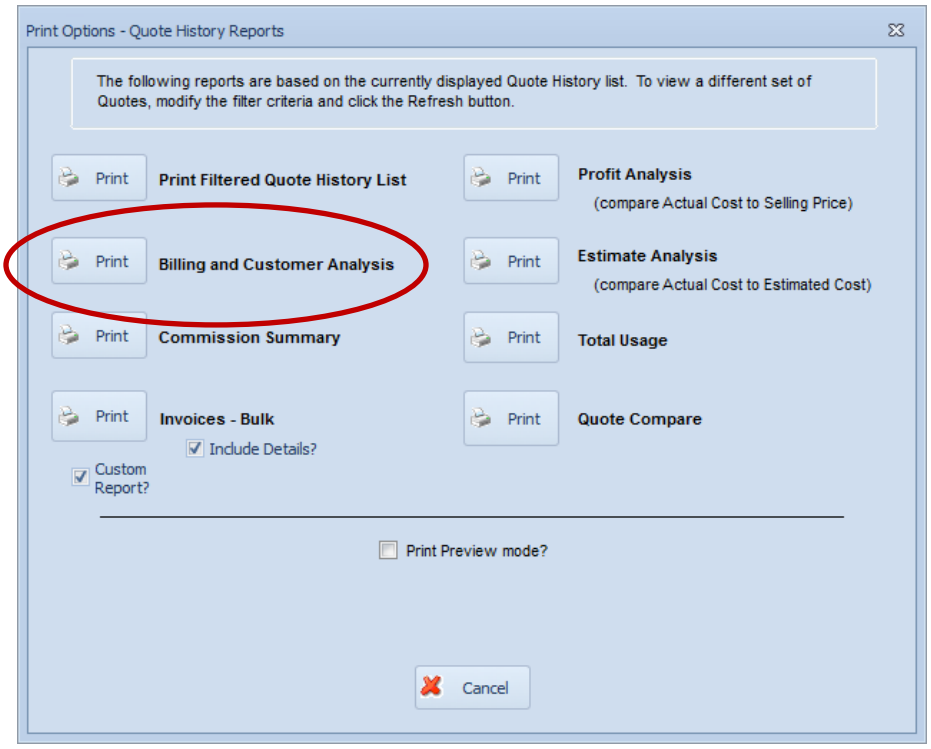


Click the Refresh button to see any real-time updates while the screen is open.

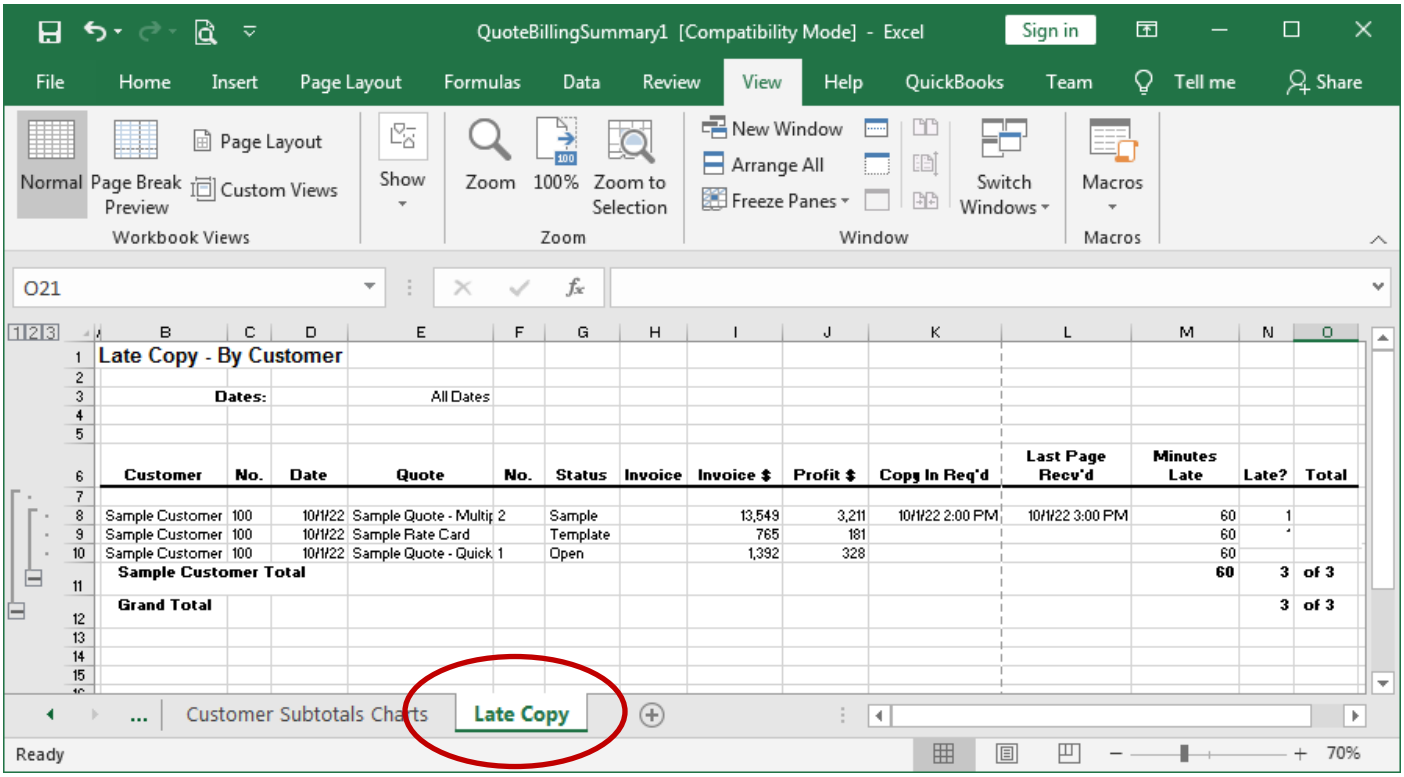
Late Copy Received: Track when the last page is received from the customer in the Job Information area on the Customer screen within a Quote. Click the checkbox to enter in a date and time to indicate when the last page of copy was received from the customer. The Copy In field can be used for setting the due date/time for the copy to be received from the customer. Comparing the Last Page Received to the Copy In field determines if the copy is received late.



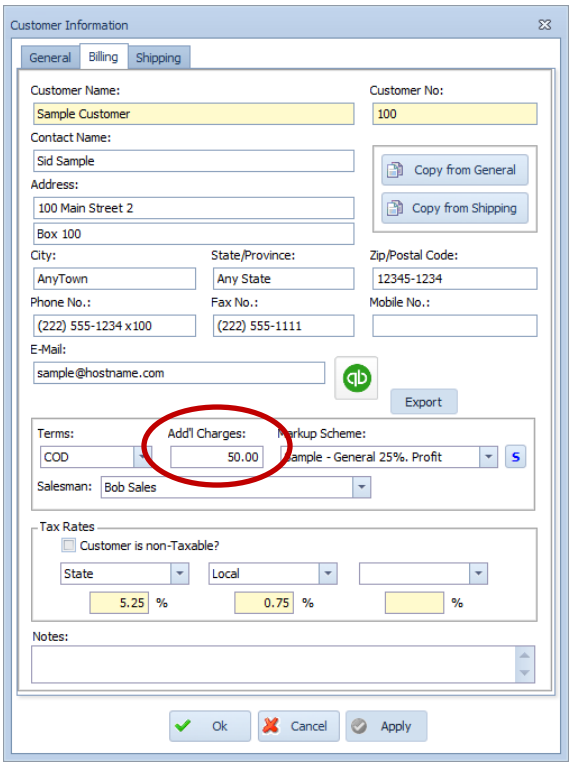
From the Quote or Job History screen, print the Billing and Customer Analysis report to see a review of all of the jobs' last copy received status for the filtered/marked items in the History list.



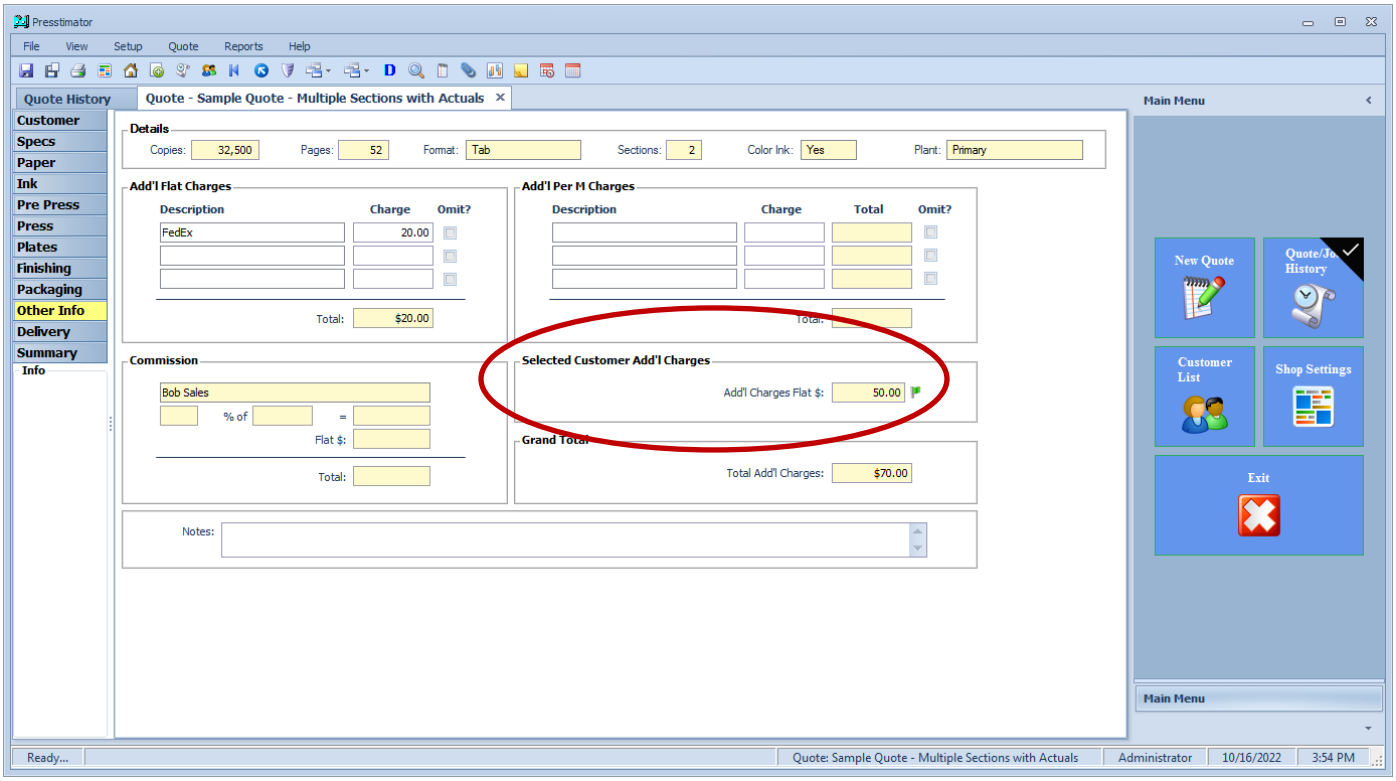
The last Sheet on the customizable Excel report is the Late Copy analysis report. The comprehensive report shows the status for every selected job. A job is determined to be late when compared to the Copy In field on the Customer sreen. Get an average time a customer submits the copy to be printed. Get a summary for all jobs as well to see how often copy is being received from customers after the due date.



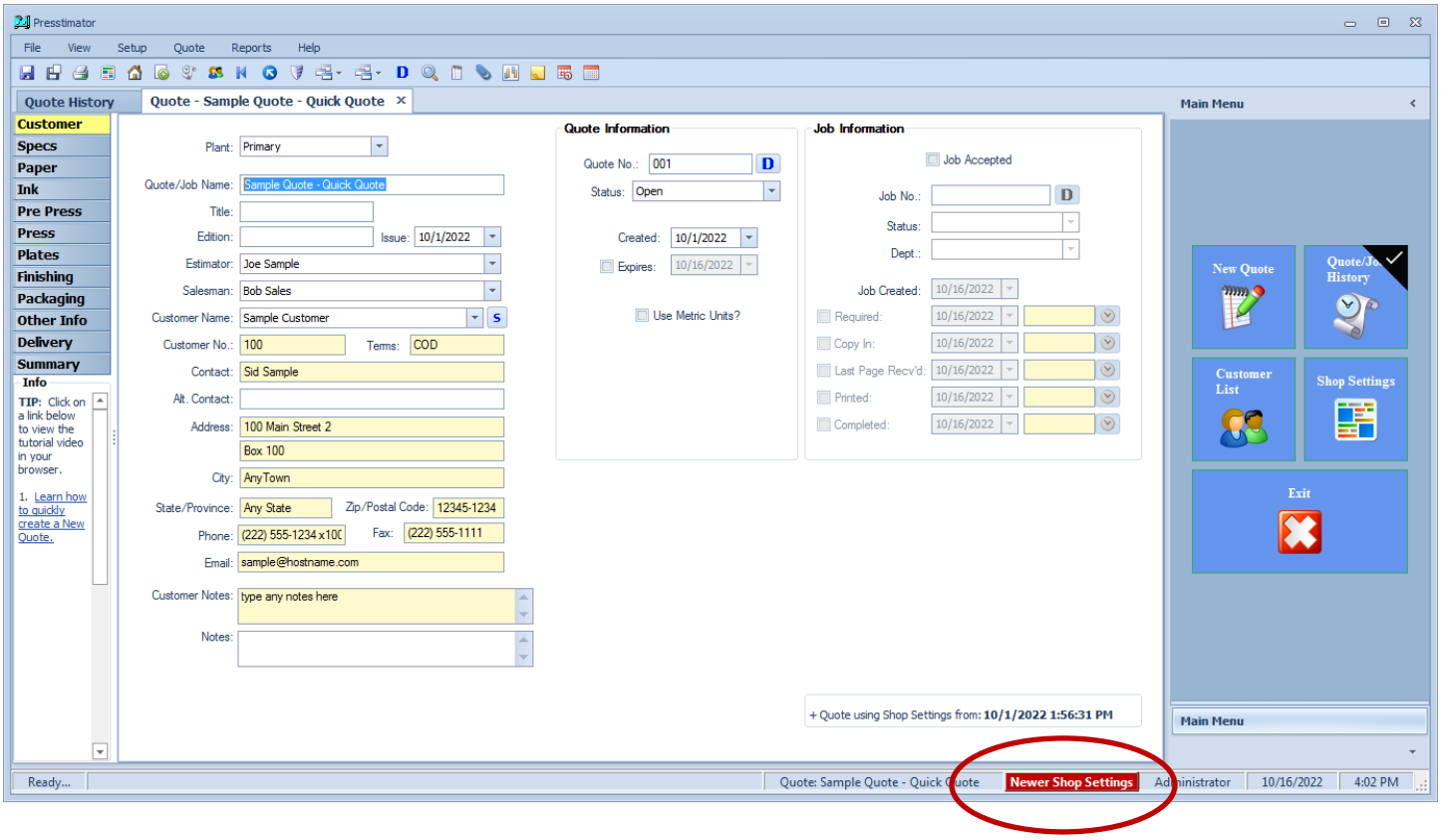
You can use this information to determine if you want to add an additional charge for this customer if they're constantly late with submitting copy. Additional Charges can be added on the Billing screen for a customer on the Customer List.



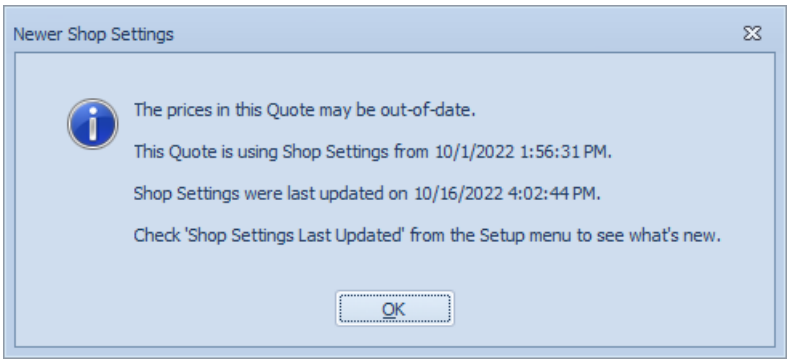
When Additional Charges are entered, selecting a customer on the Customer screen in a Quote automatically imports this value into the costs displayed on the Other Info screen in a Quote. You can click on the green flag to override the imported value if you want to modify or remove the additional charge in this Quote.



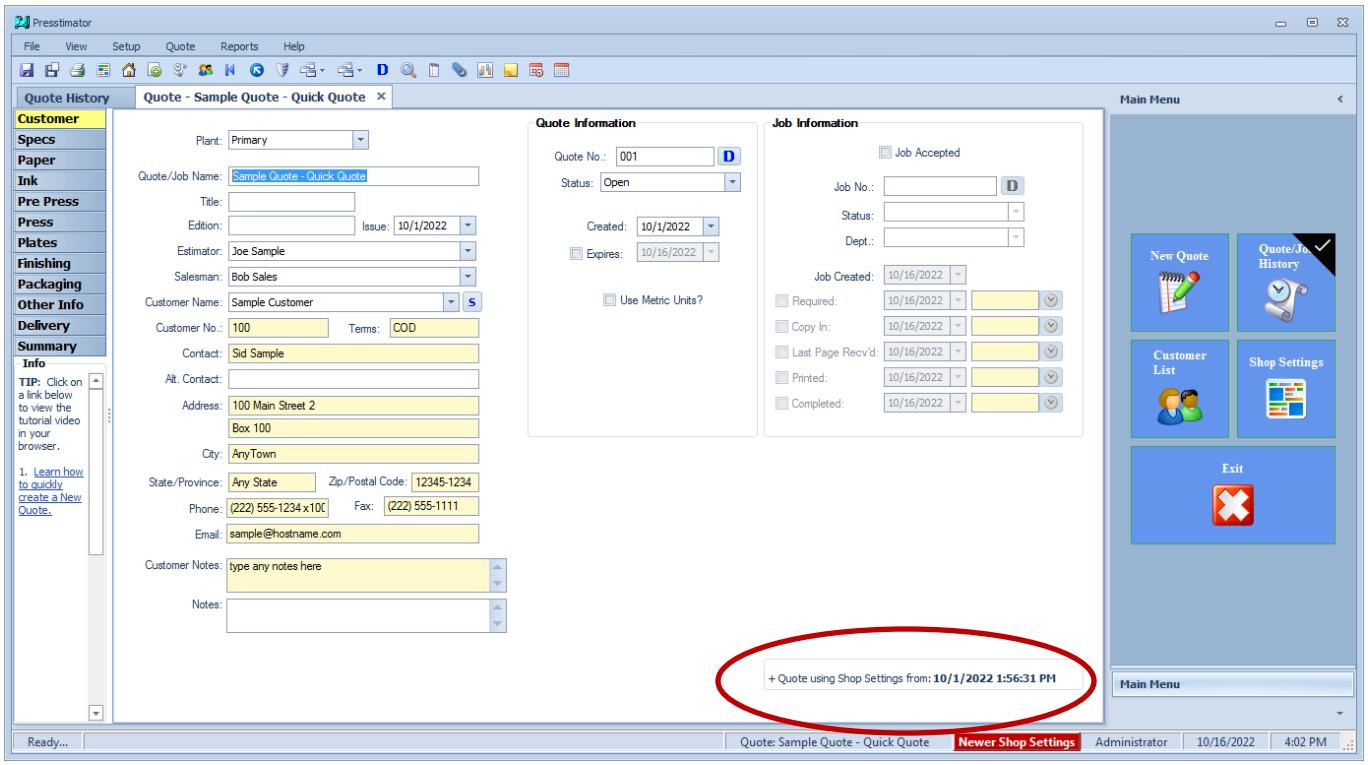
Update Existing Quotes: When opening an existing Quote, users can quickly see if there are any Shop Settings have been updated since the last time this Quote was created. The red message at the bottom of the screen indicates that there are newer Shop Settings.



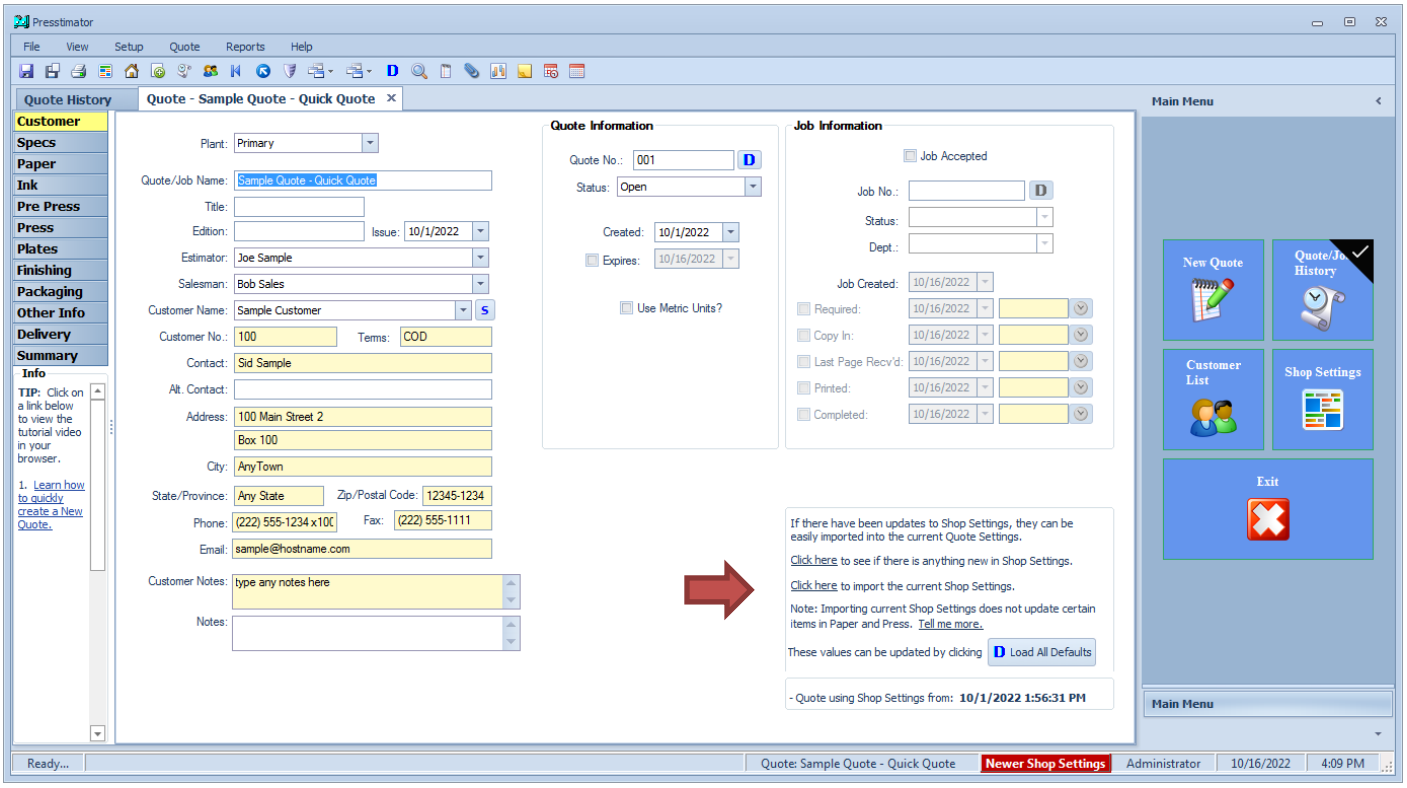
Clicking on the red indicator will display more information about when Shop Settings were last updated and when Shop Settings were last imported into this Quote.



In addition to the red message indicator, the Customer screen now always displays information about when Shop Settings were last imported into this Quote.

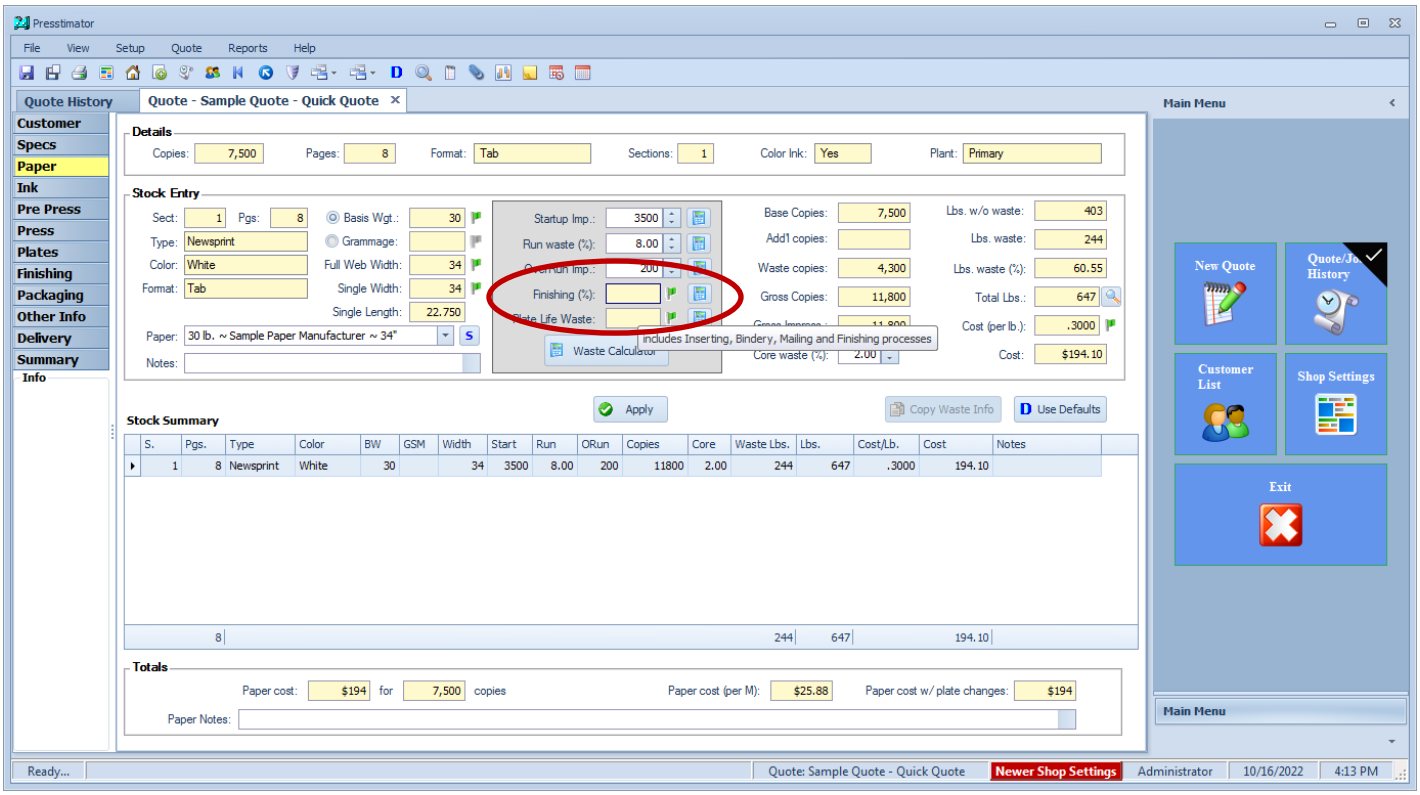


Double-click the '+' icon to expand the information.



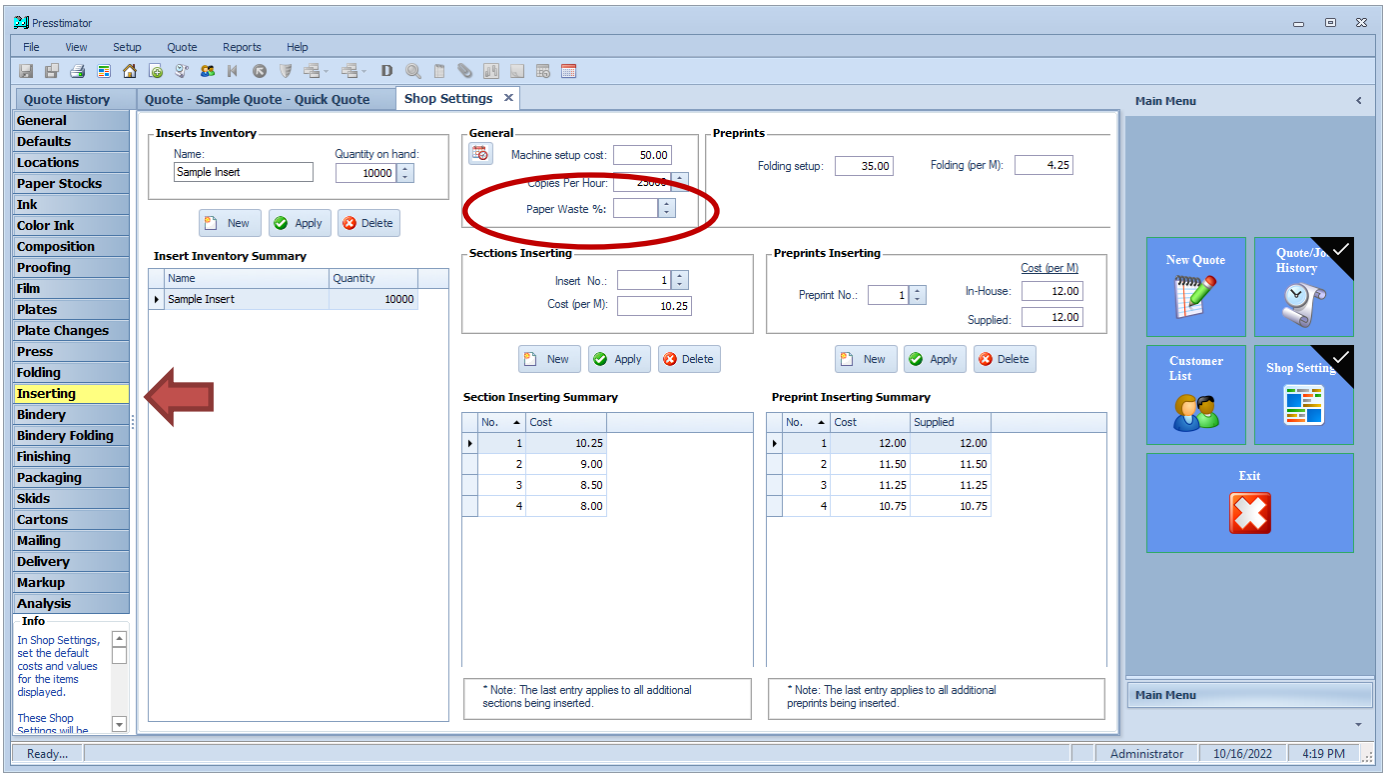
Quickly bring a Quote up-to-date by clicking the Load All Defaults button to import the current Shop Settings. Click the 'Click here' links to see more information about what's new in Shop Settings and how to update the Quote.

More Paper Waste Factors for Finishing Processes: The paper waste value for Finishing imported on the Paper screen within a Quote now includes waste for Inserting, Bindery, Mailing and Finishing.

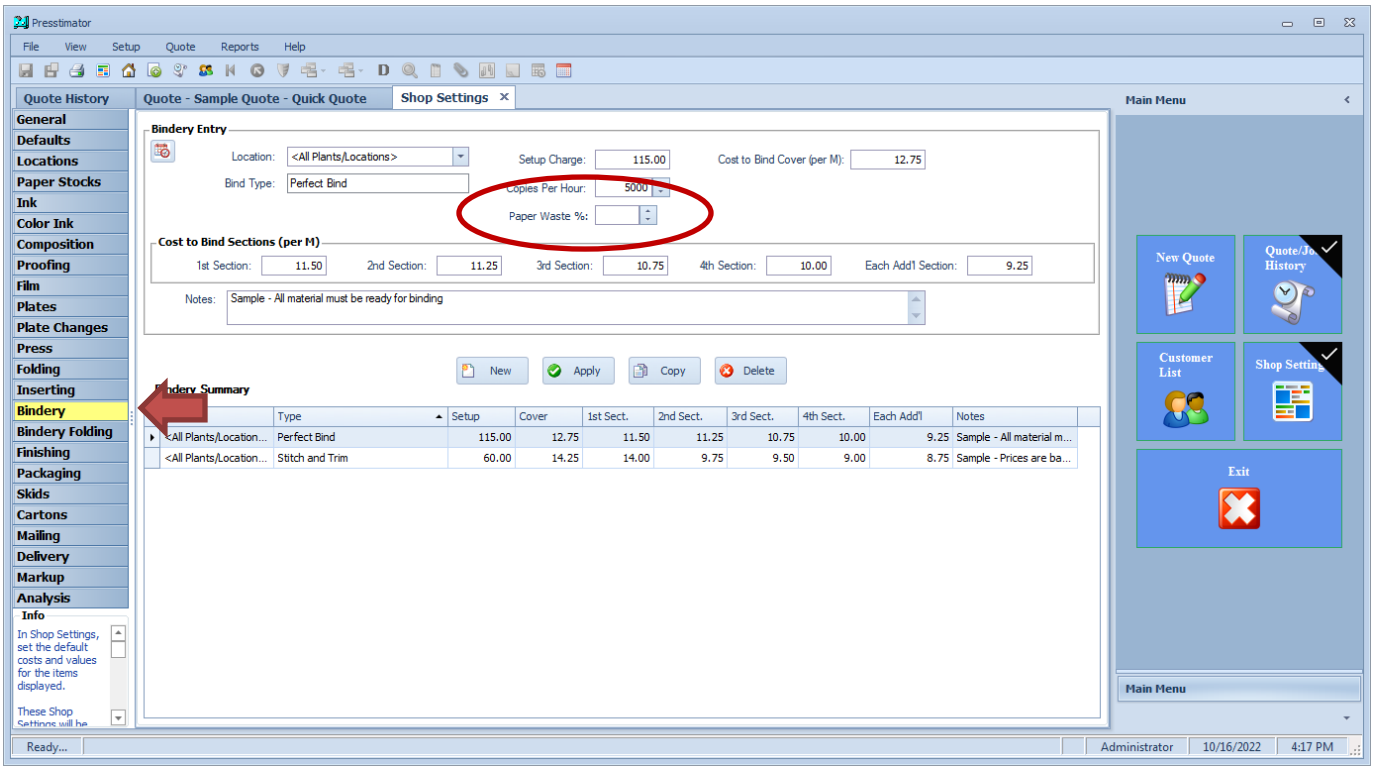


Set defaults in Shop Settings for Inserting, Bindery, Mailing and Finishing to be imported into a Quote when these processes are selected.

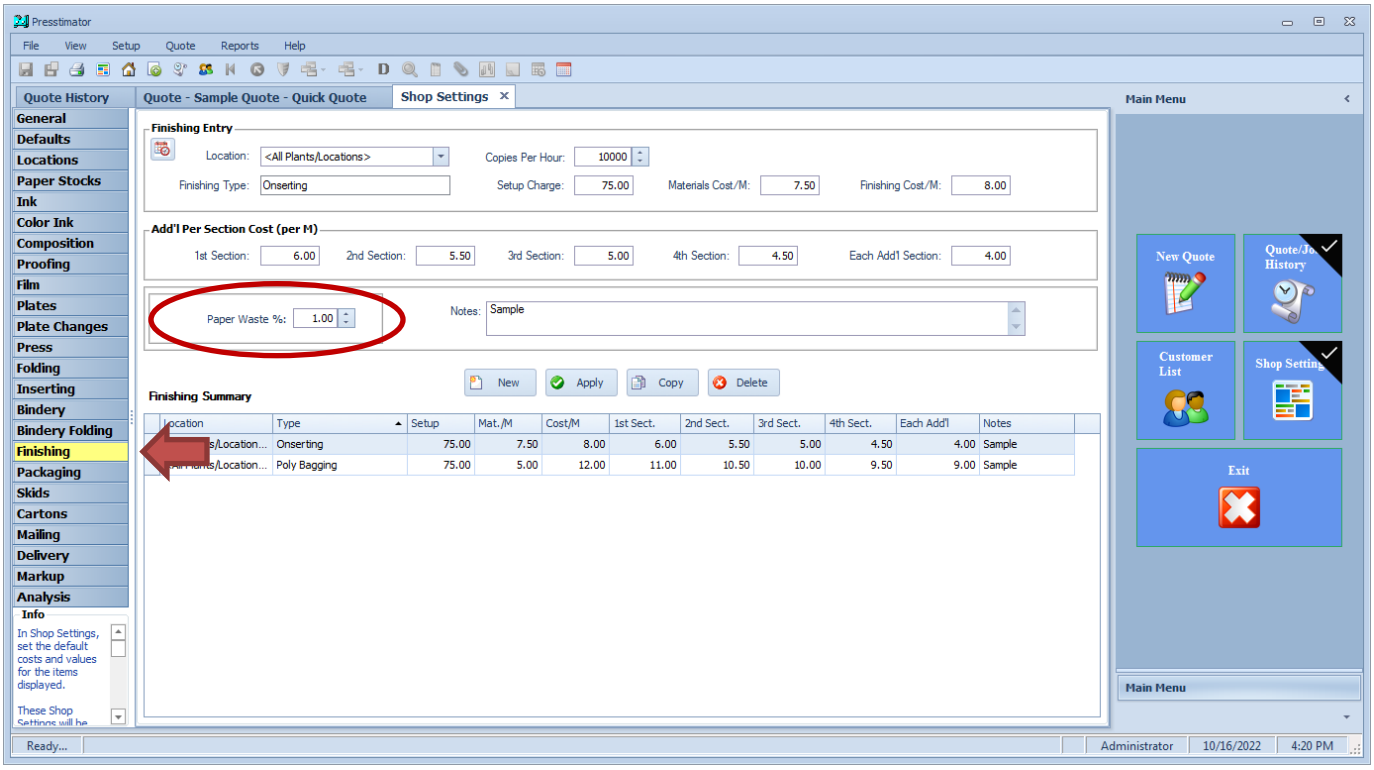
Inserting:



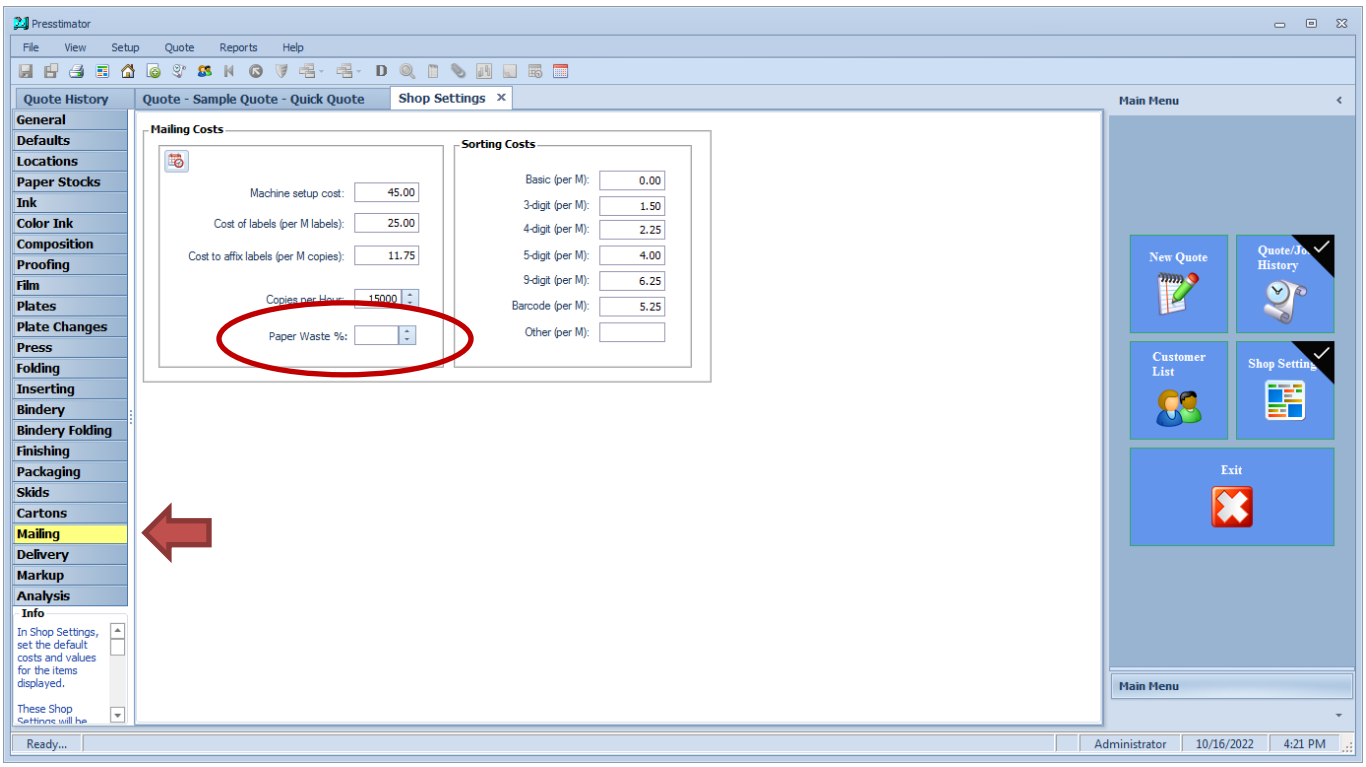
Bindery:



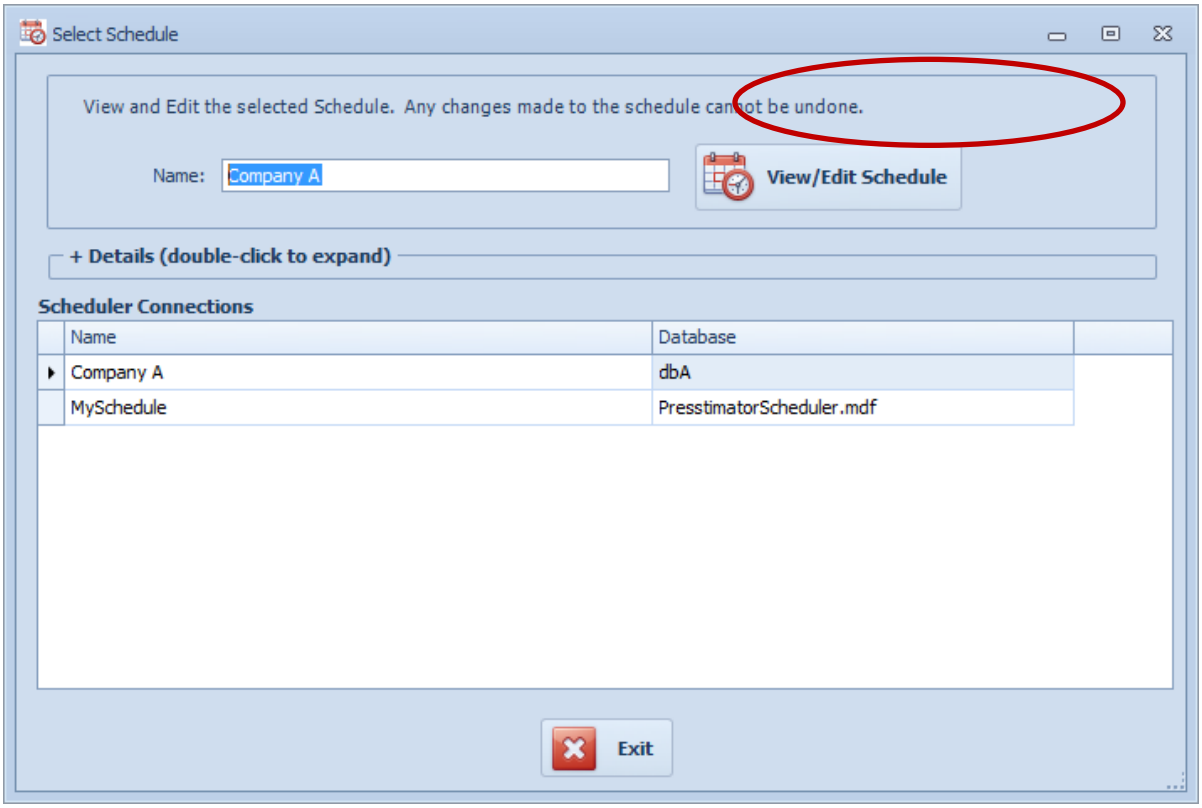
Finishing:



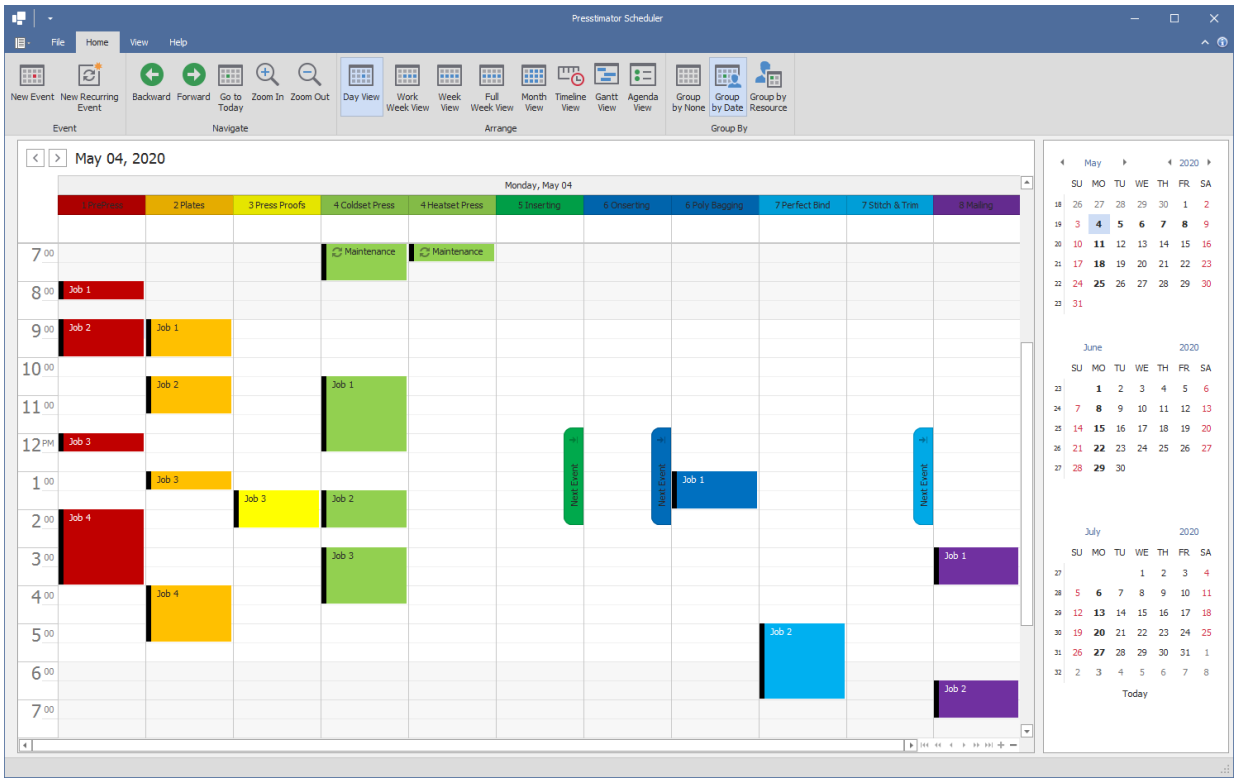
Mailing:


Presstimator
File
View
Setup
Quote
Reports
Help
Quote History
Quote - Sample Quote - Quick Quote
Shop Settings
General
Defaults
Locations
Paper Stocks
Ink
Color Ink
Composition
Proofing
Film
Plates
Plate Changes
Press
Folding
Inserting
Bindery
Bindery Folding
Finishing
Packaging
Skids
Cartons
Mailing
Delivery
Markup
Analysis
Info
In Shop Settings, set the default costs and values for the items displayed.
Mailing Costs
Machine setup cost: 45.00
Cost of labels (per M labels): 25.00
Cost to affix labels (per M copies): 11.75
Copies per Hour: 15000
Paper Waste %:
Sorting Costs
Basic (per M): 0.00
3-digit (per M): 1.50
4-digit (per M): 2.25
5-digit (per M): 4.00
9-digit (per M): 6.25
Barcode (per M): 5.25
Other (per M):
Main Menu
New Quote
Customer List
Exit
Ready...
Administrator
10/16/2022
4:21 PM

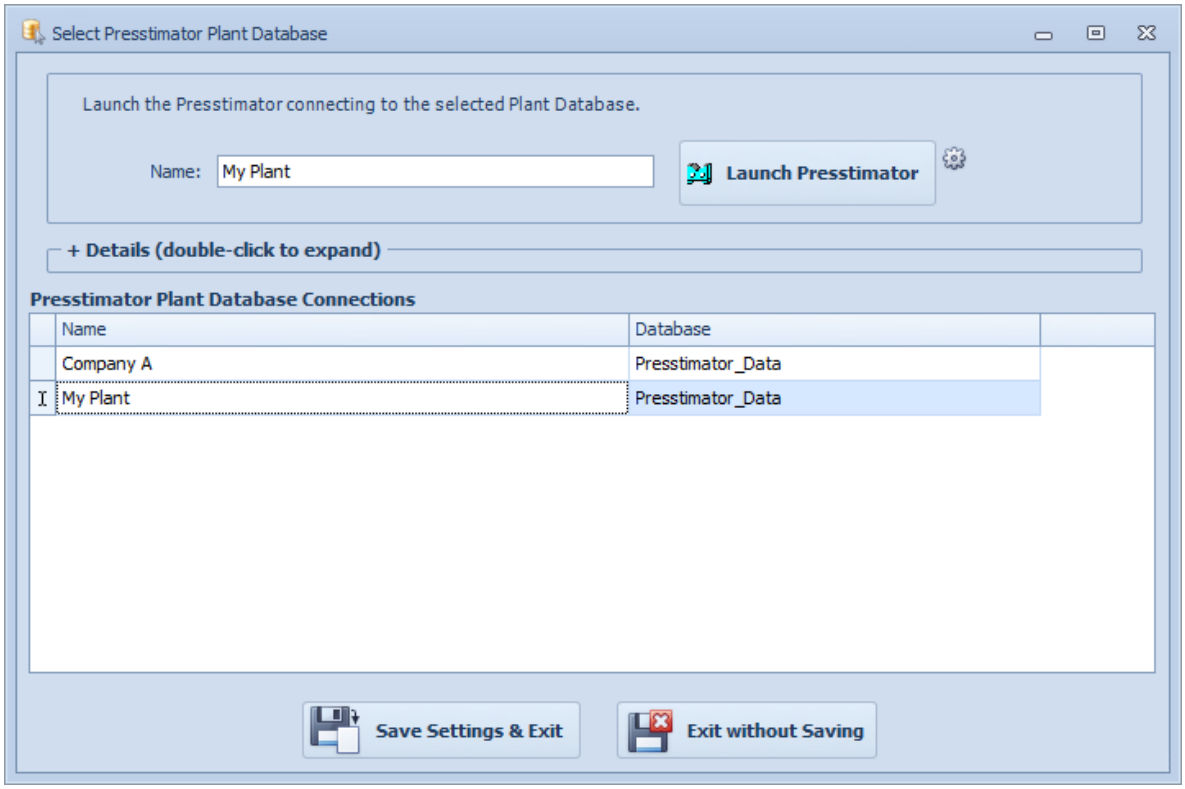
Scheduler Dashboard Application: If you have multiple plants and want to view the schedule for each plant, use the new Scheduler Dashboard Application.



After setting up the database connection information for each plant, click the View/Edit Schedule button to view each selected plant's schedule.



Presstimator Dashboard Application: For customers with multiple plants, the new Dashboard apps allow oversight of every shop from one location. Using the Presstimator Dashboard, you can view a plant's Shop Settings and Quotes, and you can even generate reports and perform an analysis remotely for each plant.



After setting up the database connection information for each plant, click the Launch Presstimator button to connect and view the Presstimator for each plant as though you're sitting in the building.