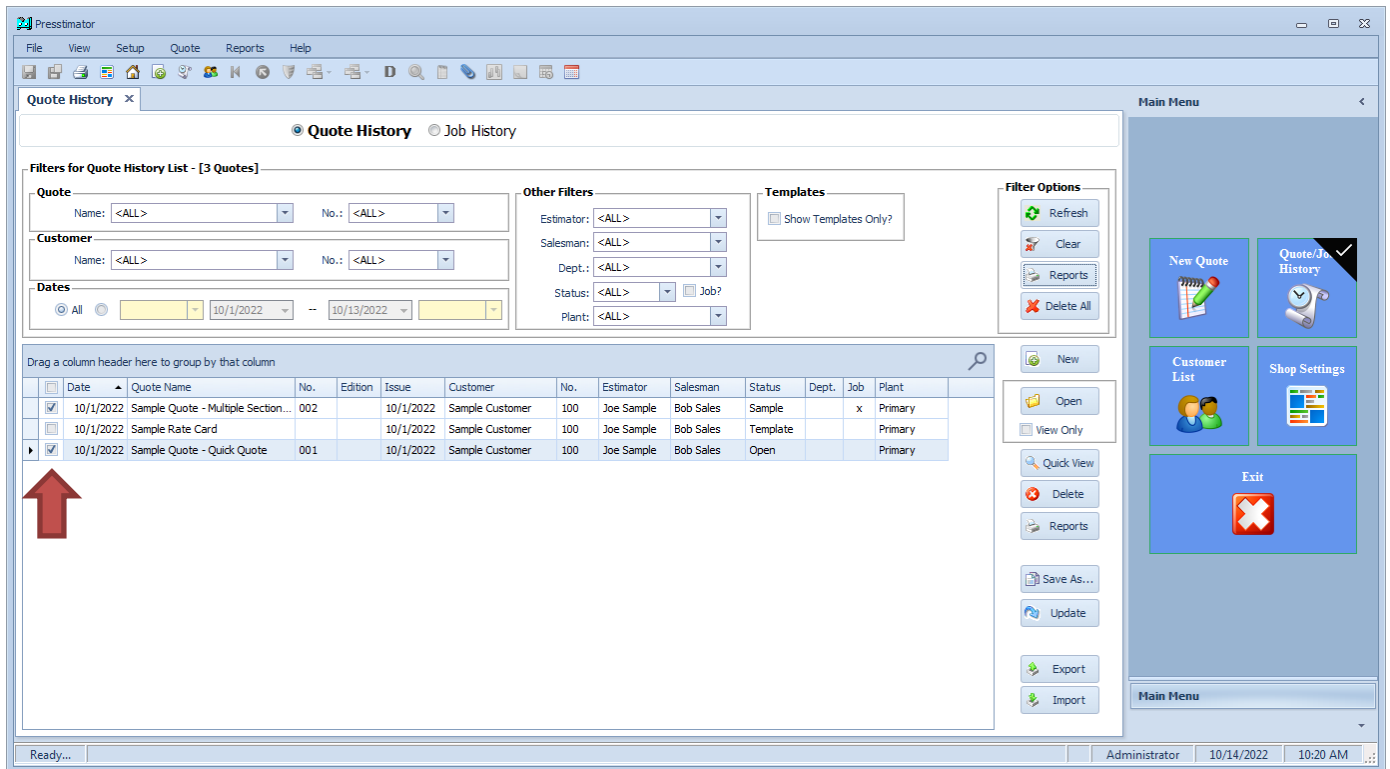


## What's New in Presstimator Version 8.5

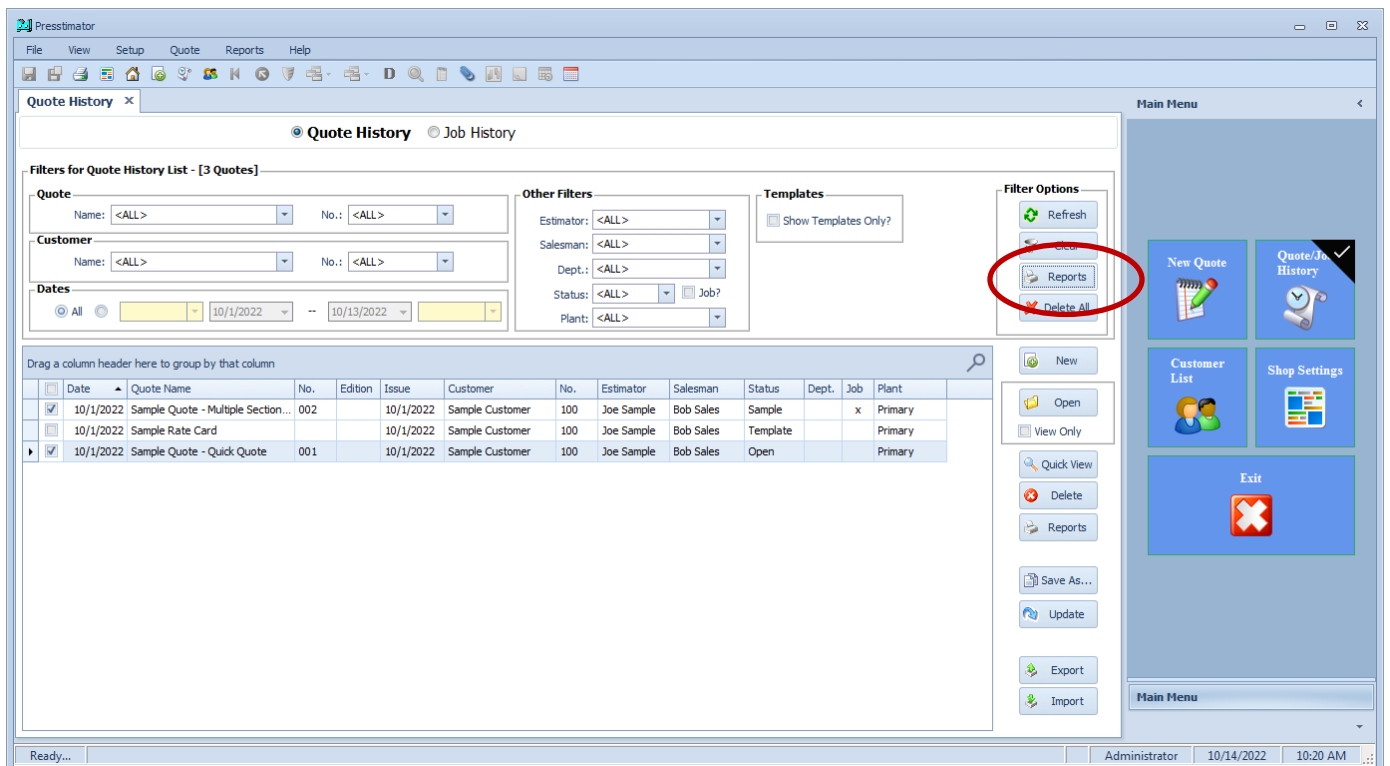
### Contents

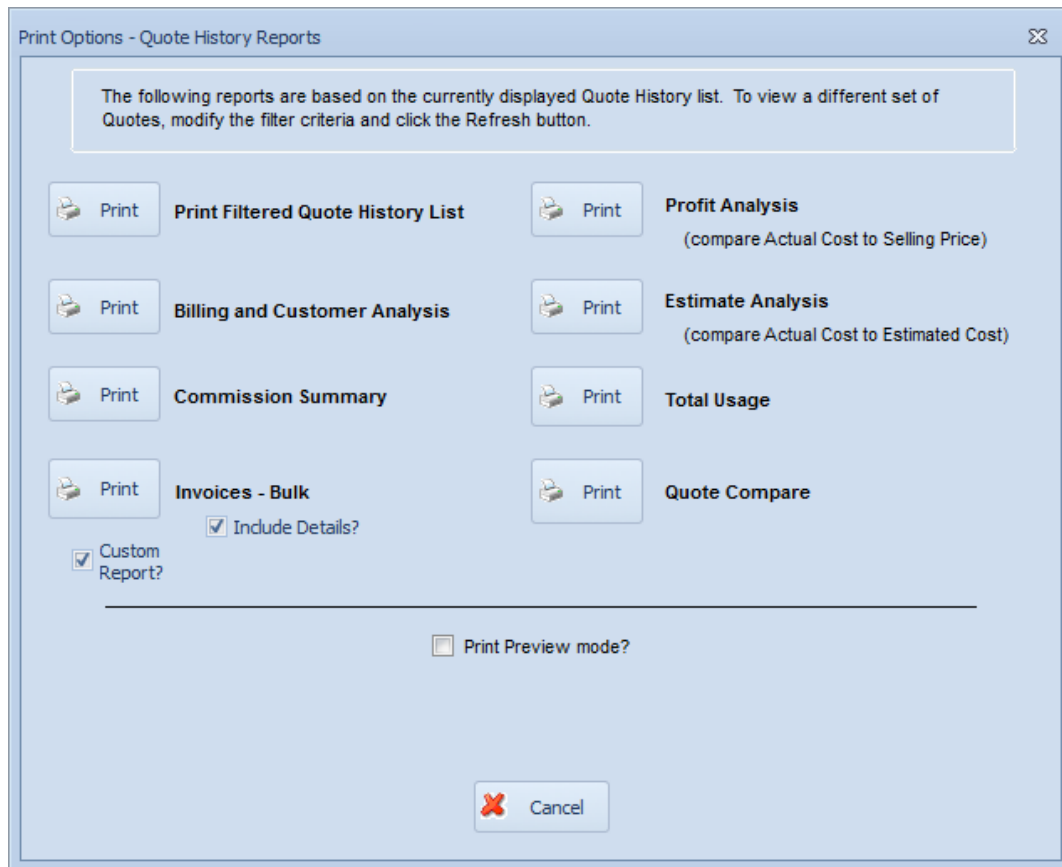
What's New in Presstimator Version 8.5 .....	1
Checkmarks for Quote/Job History Selection: .....	2
Quote Compare Report:.....	4
Multiple Tax Rates for Customers and Drop Zones: .....	6
Taxable Amount on Invoice: .....	12
Invoice and Bulk Invoice Reports: .....	14
Send Items to Scheduler Directly from 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.


FileHomeInsertPage LayoutFormulasDataReviewViewHelpQuickBooksTeamTell me what you want




Paste



Cut



Copy



Format Painter

Clipboard

Arial

14


A


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I


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









Font



















Alignment



Wrap Text




Merge & Center


General


\$


%

,












Number




Conditional Formatting

Billing\_Summary



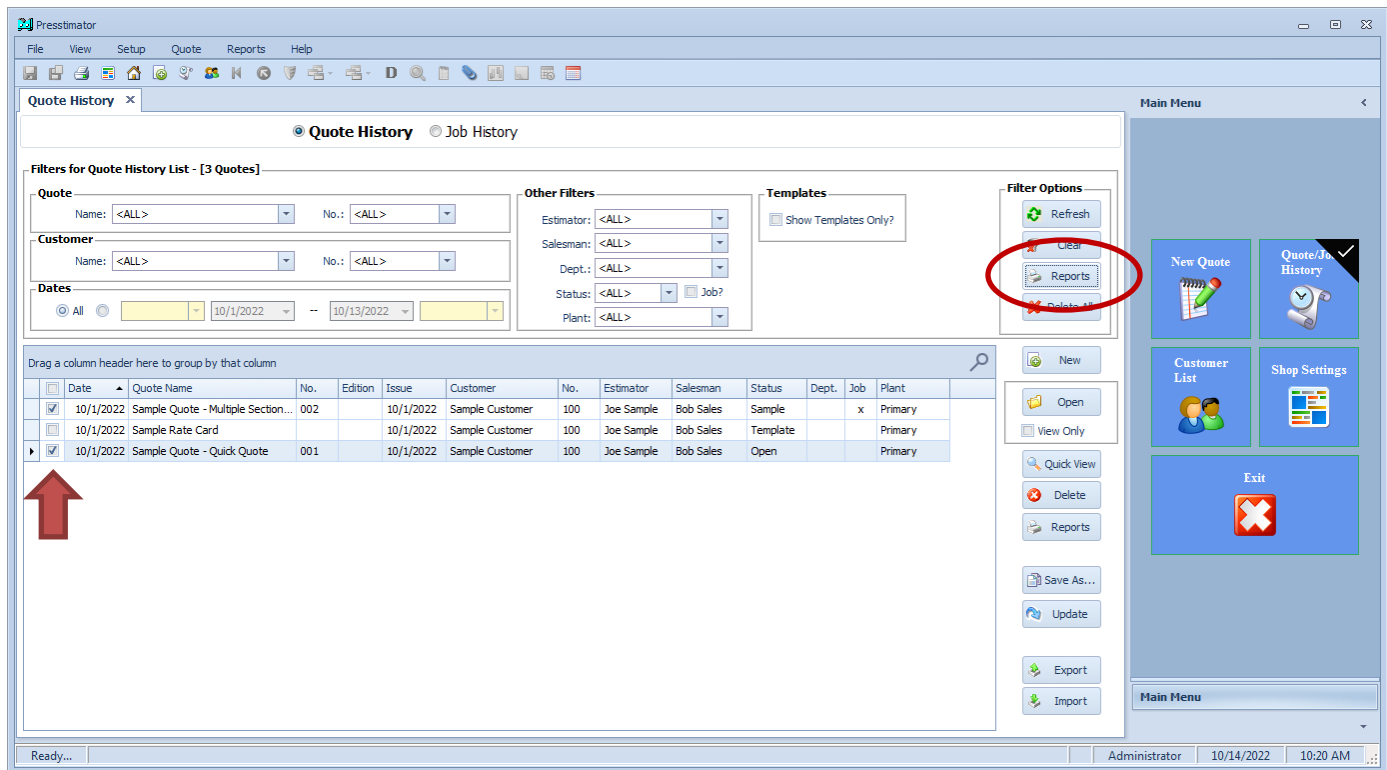




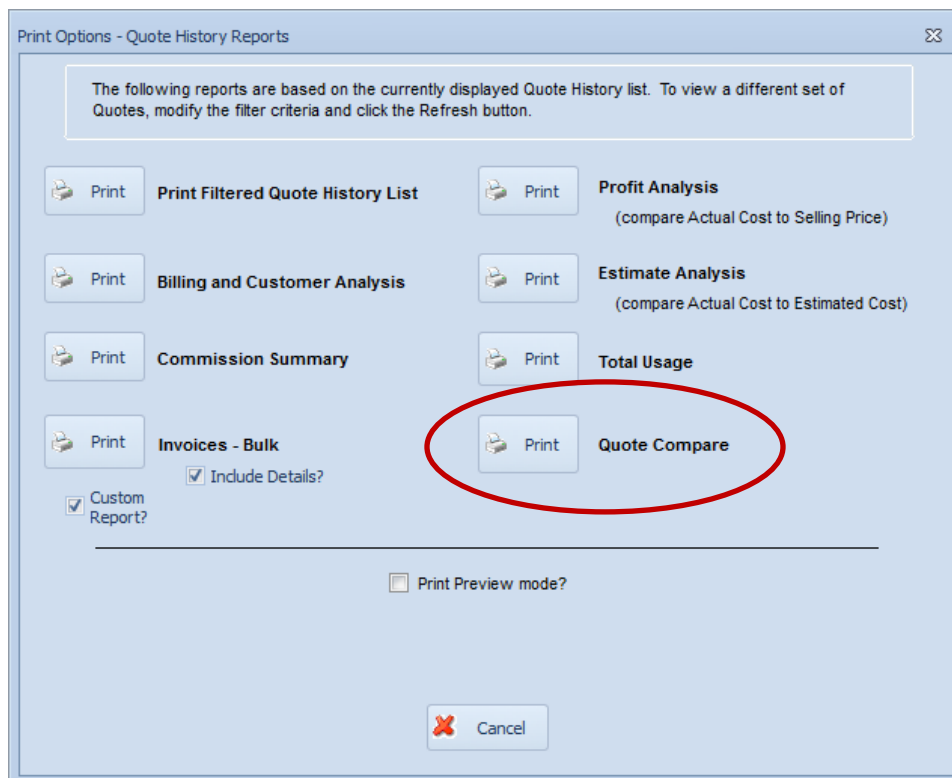
Billing Summary

	B	C	D	E	F	G	H	I	J	K	L
1	Billing Summary										
2											
3		Dates:		All Dates							
4											
5											
6	Date	Quote		No.	Issue	Customer	No.	Salesman	Status	Invoice	Invoice \$
7											
8	10/1/22	Sample Quote - Multiple Section		2	10/1/2022	Sample Customer	100	Bob Sales	Sample		13,549
9	10/1/22	Sample Quote - Quick Quote		1	10/1/2022	Sample Customer	100	Bob Sales	Open		1,392
10											
11										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.



**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.

The 'Company Information' dialog box contains the following fields: Name (My Company Name), Address (My Address), City (City), State/Province (ST), Zip/Postal Code (Zip), Phone No., Fax No., and E-mail (youremail@domainname.com). The Tax rate is set to 0.00. A 'Tax Rates' button with a flag icon is circled in red. At the bottom are 'Ok' and 'Cancel' buttons.

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.”

The 'Tax Rates' dialog box has two main sections. The 'Tax Rates Entry' section has fields for Name (State Tax) and Rate (4.50 %). Below this are buttons for New, Apply, Copy, and Delete. The 'Tax Rates Summary' section contains a table with the following data:

Name	Pct
Local Tax - County 1	2.10
Local Tax - County 2	2.20
State Tax	4.50

A 'Close' button is at the bottom.

Customer Information

General Billing Shipping

Customer Name: Sample Customer Customer No: 100

Contact Name: Sid Sample

Address: 100 Main Street 2 Box 100

City: AnyTown State/Province: Any State Zip/Postal Code: 12345-1234

Phone No.: (222) 555-1234 x100 Fax No.: (222) 555-1111 Mobile No.:

E-Mail: sample@hostname.com

qb Connect to QuickBooks

Export Exported?

Terms: COD Add'l Charges: 50.00 Markup Scheme: Sample - General 25% Profit S

Salesman: Bob Sales

Tax Rates

☐ Customer is non-Taxable?

State Tax 4.50 % Local Tax - County 2.10 %

Notes:

Ok Cancel Apply

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.

The screenshot shows the 'Quote - Sample Quote - Quick Quote' window in the Presstimator application. The 'Customer' tab is selected on the left sidebar. The main form contains various fields for customer and quote information. A red arrow points to the 'Customer Name' dropdown menu, which currently displays 'Sample Customer'.

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.

The screenshot shows the 'Invoice' tab selected in the 'Quote - Sample Quote - Quick Quote' window. The 'Customer Taxes' section is highlighted with a red circle, and the 'Load Customer Rates' button is also highlighted with a red circle and a red arrow. The 'Totals' section shows the calculated selling price, adjusted selling price, and total invoice amount.

Totals			
Calculated Selling Price:	\$1,313.21		
Adjustment (+/-):			
Adjusted Selling Price:	1313.21		
Customer Taxes			
Taxable Amount:	\$1,313.22		
State Tax	4.50	% =	59.09
Local Tax - County 1	2.10	% =	27.58
		% =	0.00
<b>Total:</b>	<b>86.67</b>		
Totals			
Company Tax:	0.00	% =	0.00
<b>Total Invoice:</b>	<b>\$1,399.88</b>		



Presstimator

File View Setup Quote Reports Help

Quote - Sample Quote - Quick Quote

Quote History

Customer Specs Paper Ink Pre Press Press Plates Finishing Packaging Other Info Delivery Summary

Info

TIP: Click on a link below to view the tutorial video in your browser.

1. VIDEO: [Learn about the Summary Tabs within a Quote.](#)

Invoice Description:

Sample Quote - Quick Quote Issue: 10/1/2022  
7,500 copies, Newspaper, 8 pages, Tab.

Build Description

Clear Description

qb

Export

Notes:

Details

PO Number:

Invoice No.:  D

Invoice Date: 10/4/2022

Terms: COD

Totals

Calculated Selling Price: \$1,313.21

Adjustment (+/-):

Comment:

Adjusted Selling Price: 1313.21

Customer Taxes

Taxable Amount: \$1,313.22

State Tax 4.50 % = 59.09

Local Tax - County 1 2.10 % = 27.58

n/a % = 0.00

Total: 86.67

Load Customer Rates

Totals

Company Tax: 0.00 % = 0.00

Total Invoice: \$1,399.88

Main Menu

New Quote

Quote/Job History

Customer List

Shop Settings

Exit

Ready...

Quote: Sample Quote - Quick Quote Administrator 10/13/2022 11:15 PM

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.

Presstimator

File View Setup Quote Reports Help

Quote - Sample Quote - Multiple Sections with Actuals

Quote History

Customer Specs Paper Ink Pre Press Press Plates Finishing Packaging Other Info Delivery Summary

Info

TIP: Click on a link below to view the tutorial video in your browser.

1. VIDEO: [Learn about the Summary Tabs within a Quote.](#)

Invoice Description:

Sample Quote - Multiple Sections with Actuals Issue: 10/1/2022  
32,500 copies, 11 x 15 Shopper, 52 pages, Tab.

Build Description

Clear Description

qb

Export

Notes:

Details

PO Number:

Invoice No.: 001 D

Invoice Date: 10/3/2022

Terms: COD

Totals

Calculated Selling Price: \$12,843.43

Adjustment (+/-):

Comment:

Adjusted Selling Price: 12843.43

Customer Taxes

Taxable Amount: \$12,843.43

State 5.25 % = 674.28

Local 0.75 % = 96.33

n/a % = 0.00

Total: 770.61

Load Customer Rates

Totals

Company Tax: % = 0.00

Total Invoice: \$13,614.04

Main Menu

New Quote

Quote/Job History

Customer List

Shop Settings

Exit

Ready...

Quote: Sample Quote - Multiple Sections with Actuals Administrator 10/15/2022 1:16 PM



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**.

Invoice Details
Σ3

**Invoice Details Entry**

Taxable Amount: \$12,843.43

Description: Drop Zone 1

Quantity: 10,000

State Tax 4.50 % = 177.83

Local Tax - County 1 2.10 % = 82.99

n/a % =

Total: 260.82

✓ Apply
D Load Customer Rates
🔄 Build Details
🗑 Clear

**Invoice Details Summary**

Description	Quantity	Tax 1	Rate	Amount	Tax 2	Rate	Amount	Tax 3	Rate	Amount	Total
Drop Zone 1	10000	State Tax	4.50	177.83	Local Tax - Cou...	2.10	82.99				260.82
Drop Zone 2	22000	State Tax	4.50	391.23							391.23
Sample Customer	500	State Tax	4.50	8.89	Local Tax - Cou...	2.10	4.15				13.04

665.09

Total Customer Tax: 665.09

✓ OK

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.

**Invoice Description:**  
Sample Quote - Quick Quote Issue: 10/1/2022  
7,500 copies, Newspaper, 8 pages, Tab.

**Details:**  
PO Number:   
Invoice No.:  D  
Invoice Date: 10/4/2022  
Terms: COD

**Totals:**  
Calculated Selling Price: \$1,313.21  
Adjustment (+/-):   
Comment:   
Adjusted Selling Price: 1313.21

**Customer Taxes:**  
Taxable Amount: \$1,313.22  
State Tax: 4.50 % = 59.09  
Local Tax - County 1: 2.10 % = 27.58  
Total: 86.67

**Totals:**  
Company Tax: 0.00 % = 0.00  
Total Invoice: \$1,399.88

Select the category (Materials, Labor, Misc. or Finishing) for each item in Analysis. Select the Taxable status for each item for Invoice.

Category	Item	Mat.	Man.	Misc.	Tax
Materials	Paper:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Black Ink:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Color Ink:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Proofing:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Film:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Plates:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Skids:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Bundles:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Labor	Press:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Folding (in-line):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Proofing:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Film:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Plates:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Misc.	Composition:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Plate Changes:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Folding (off-line):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Finishing	Inserting:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Mailing (labels):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Mailing (labor):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Mailing (postage):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
	Mailing (delivery):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Bindery (labor):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Bindery (print covers & inserts):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
	Bindery (delivery):	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

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.

Quote - Sample Quote - Quick Quote\*

**Customer**  
**Specs**  
**Paper**  
**Ink**  
**Pre Press**  
**Press**  
**Plates**  
**Finishing**  
**Packaging**  
**Other Info**  
**Delivery**  
**Summary**

**Info**  
TIP: Click on a link below to view the tutorial video in your browser.  
1. VIDEO: [Learn about the Summary Tabs within a Quote.](#)

**Analysis**

Select the category (Materials, Manufacturing or Misc. or None) for each summary item.

	Materials	Manufacturing	Miscellaneous	Taxable
Paper:	<input checked="" type="checkbox"/> 194.10	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Black Ink:	<input checked="" type="checkbox"/> 2.88	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Color Ink:	<input checked="" type="checkbox"/> 45.92	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Proofing:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Film:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Plates:	<input checked="" type="checkbox"/> 38.80	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Slides:	<input checked="" type="checkbox"/> 6.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bundles:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cartons:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Labor**

	Materials	Manufacturing	Miscellaneous	Taxable
Press:	<input type="checkbox"/>	<input checked="" type="checkbox"/> 456.75	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Folding (in-line):	<input type="checkbox"/>	<input checked="" type="checkbox"/> 3.75	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Proofing:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Film:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Plates:	<input type="checkbox"/>	<input checked="" type="checkbox"/> 28.32	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bundling:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cartons:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Notes:

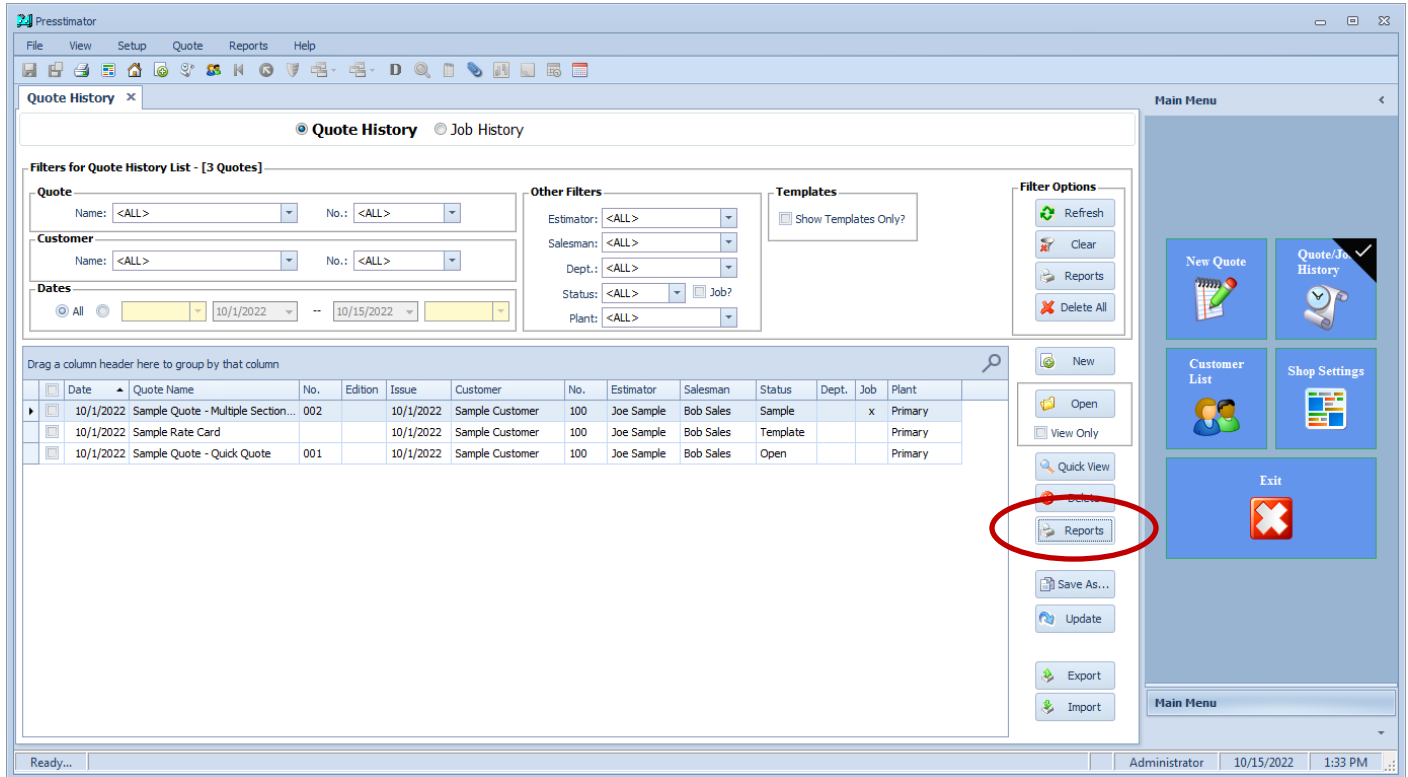
Ready... Quote: Sample Quote - Quick Quote Administrator 12/06/2021 5:21 PM

**Main Menu**

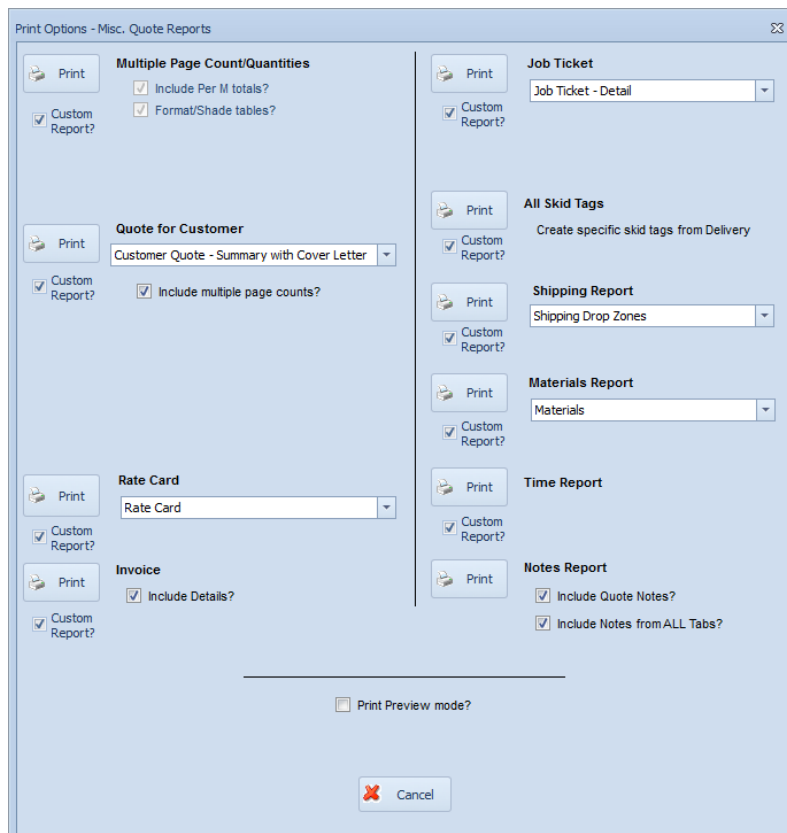
New Quote  
Quote/Job History  
Customer List  
Shop Settings  
Exit

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.

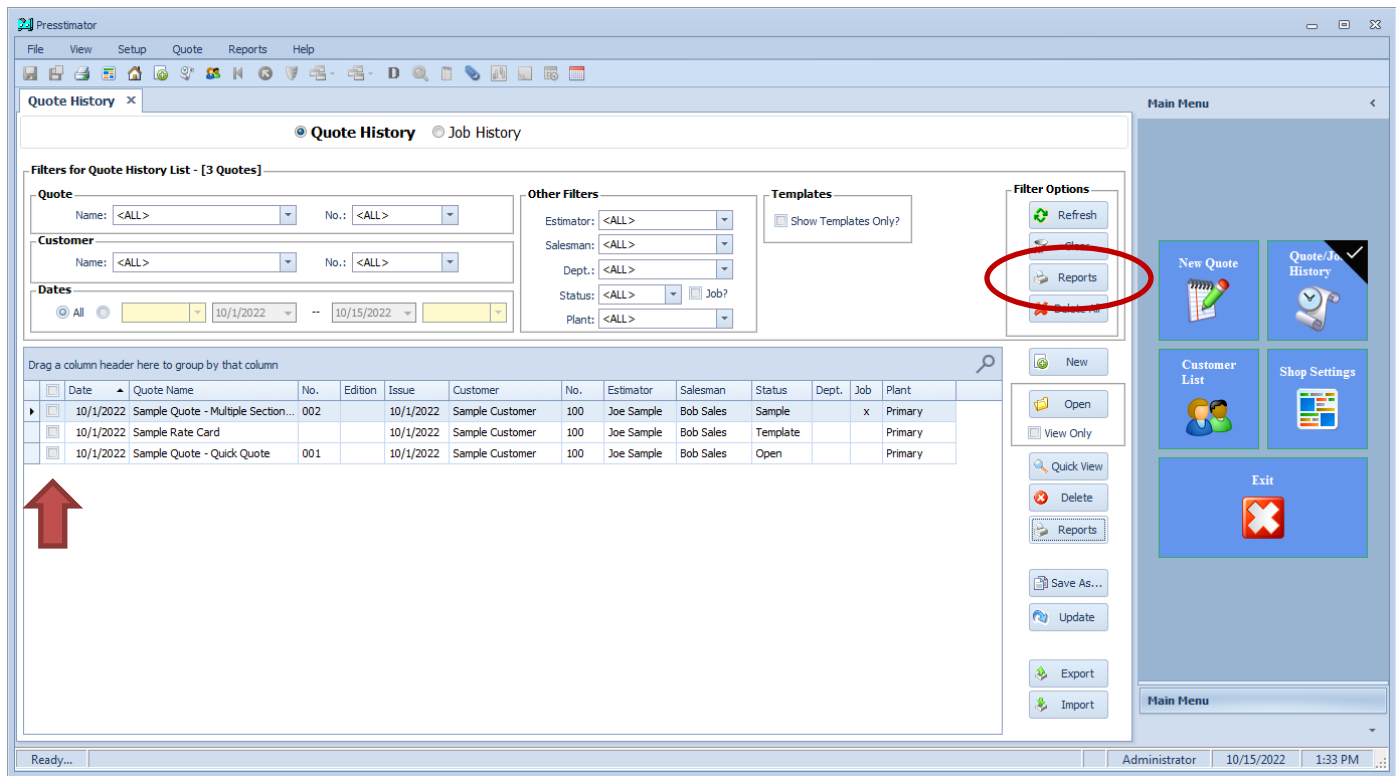
**Invoice and Bulk Invoice Reports:** Invoices can be printed individually from within a Quote or from the Job History screen. Click on the lower Reports button to select a report to generate for the highlighted item in the list.



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

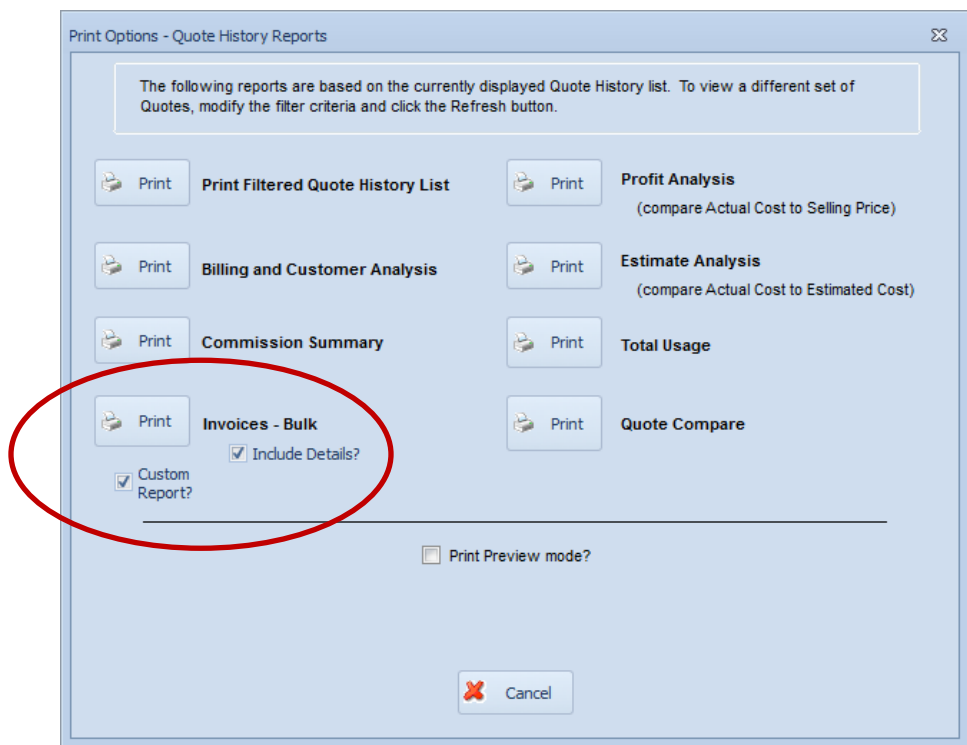


Or, users can mark invoices from the Job History screen and print them in bulk. Click on the upper Reports button to select a report to generate for all of the marked items in the list.



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 invoices 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.

Print Options - Quote History Reports

The following reports are based on the currently displayed Quote History list. To view a different set of Quotes, modify the filter criteria and click the Refresh button.

**Print Filtered Quote History List**

**Profit Analysis**  
(compare Actual Cost to Selling Price)

**Billing and Customer Analysis**

**Estimate Analysis**  
(compare Actual Cost to Estimated Cost)

**Commission Summary**

**Total Usage**

**Invoices - Bulk**  
☒ Include Details?

**Quote Compare**

☒ Custom Report?

☐ Print Preview mode?

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

Invoice Details

**Invoice Details Entry**

Taxable Amount: \$12,843.43

Description: Drop Zone 1

Quantity: 10,000

State Tax 4.50 % = 177.83

Local Tax - County 1 2.10 % = 82.99

n/a % =

Total: 260.82

**Invoice Details Summary**

Description	Quantity	Tax 1	Rate	Amount	Tax 2	Rate	Amount	Tax 3	Rate	Amount	Total
Drop Zone 1	10000	State Tax	4.50	177.83	Local Tax - Cou...	2.10	82.99				260.82
Drop Zone 2	22000	State Tax	4.50	391.23							391.23
Sample Customer	500	State Tax	4.50	8.89	Local Tax - Cou...	2.10	4.15				13.04

665.09

Total Customer Tax: 665.09



Preview

File View Background

78 %

<b><u>Tax Information</u></b>			
<b>22,000 Drop Zone 2</b>			
State	5.250%	\$456.44	
	0.000%	\$0.00	
	0.000%	\$0.00	
	<b>Total:</b>	<b>\$456.44</b>	
<b>10,000 Drop Zone 1</b>			
State	5.250%	\$207.47	
Local	0.750%	\$29.64	
	0.000%	\$0.00	
	<b>Total:</b>	<b>\$237.11</b>	
<b>500 Sample Customer</b>			
State	5.250%	\$10.37	
Local	0.750%	\$1.48	
	0.000%	\$0.00	
	<b>Total:</b>	<b>\$11.86</b>	
<b><u>Tax Totals - Invoice: 001</u></b>			
Local		\$31.12	
State		\$674.28	
	<b>Total:</b>	<b>\$705.41</b>	

Page 2 of 3

78 %

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.

Preview

File View Background

78 %

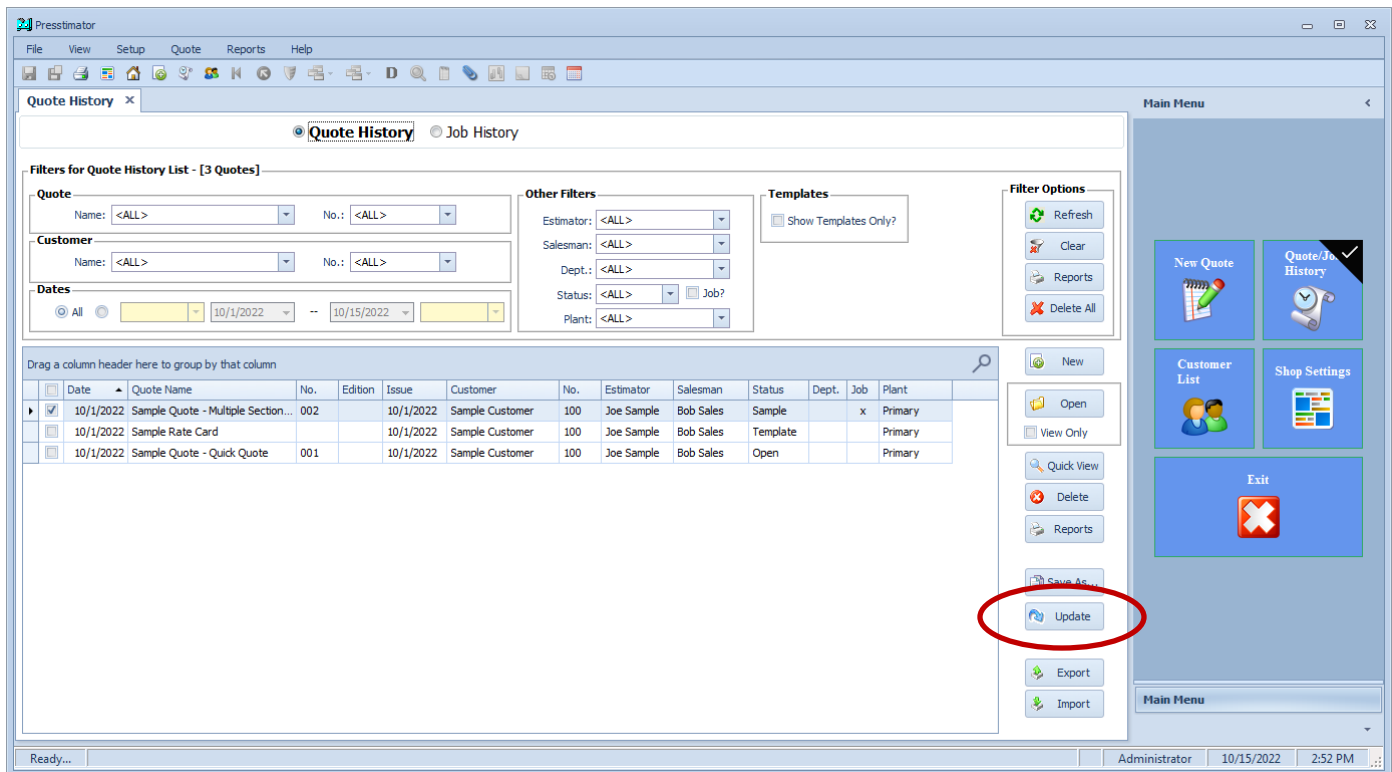
<b><u>All Invoices Totals</u></b>			
Local		\$31.12	
State		\$674.28	
	<b>Total:</b>	<b>\$705.40</b>	

Page 3 of 3

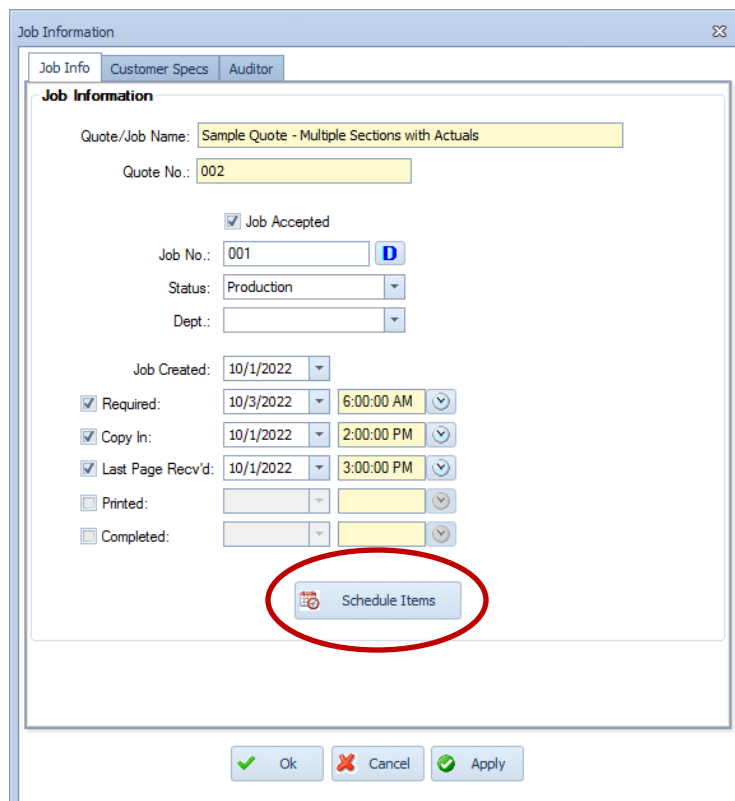
78 %

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.

Scheduler

To Be Scheduled

Scheduled

Items To Be Scheduled

Enter Scheduled Start and End Times and Duration.

Item: PrePress

Subject: PrePress Sample Quote - Multiple Sections with Actuals: 002

Location: Primary

Description: 55 pages, 1.83 hours

☐ Schedule Item

Start

End

Date

Time

Date

Time

Duration

Estimated Duration

10/15/2022

02:55

10/15/2022

04:45

1.83

1.83 hrs.

Apply

Apply Estimated Duration To All

Schedule Summary

<input checked="" type="checkbox"/>	Item	Subject	Description	Location	Start	End	Duration	Est.Duration
<input checked="" type="checkbox"/>	PrePress	PrePress Sample Quote - Multiple...	55 pages, 1.83 hours	Primary	10/15/2022 2:55 PM	10/15/2022 4:45 PM	1.83	1.83
<input checked="" type="checkbox"/>	Plates	Plates Sample Quote - Multiple ...	17 plates, 1.42 hours	Primary	10/15/2022 2:55 PM	10/15/2022 4:20 PM	1.42	1.42
<input checked="" type="checkbox"/>	Proofing	Proofing Sample Quote - Multipl...	Press Proofs, 52 pages, 0.87 ...	Coldset Pressroom	10/15/2022 2:55 PM	10/15/2022 3:47 PM	0.87	0.87
<input checked="" type="checkbox"/>	Press	Press Sample Quote - Multiple ...	Sect. 1. Tab. 39,125 copies, ...	Sample - Press 1: Your Press,...	10/15/2022 2:55 PM	10/15/2022 6:09 PM	3.24	3.24
<input checked="" type="checkbox"/>	Press	Press Sample Quote - Multiple ...	Sect. 2. Tab. 34,350 copies, ...	Sample - Press 1: Your Press,...	10/15/2022 2:55 PM	10/15/2022 4:57 PM	2.03	2.03
<input checked="" type="checkbox"/>	Inserting	Inserting Sample Quote - Multi...	65,000 inserts, 1 Sections, 1 ...	Primary	10/15/2022 2:55 PM	10/15/2022 4:55 PM	2.00	2.00
<input checked="" type="checkbox"/>	Bindery	Bindery Sample Quote - Multipl...	Type: Stitch and Trim. Quanti...	Primary	10/15/2022 2:55 PM	10/15/2022 6:10 PM	3.25	3.25
<input checked="" type="checkbox"/>	Finishing	Finishing Sample Quote - Multip...	Onserting, 32,500 copies, 3,...	Coldset Pressroom	10/15/2022 2:55 PM	10/15/2022 6:10 PM	3.25	3.25
							17.89	17.89

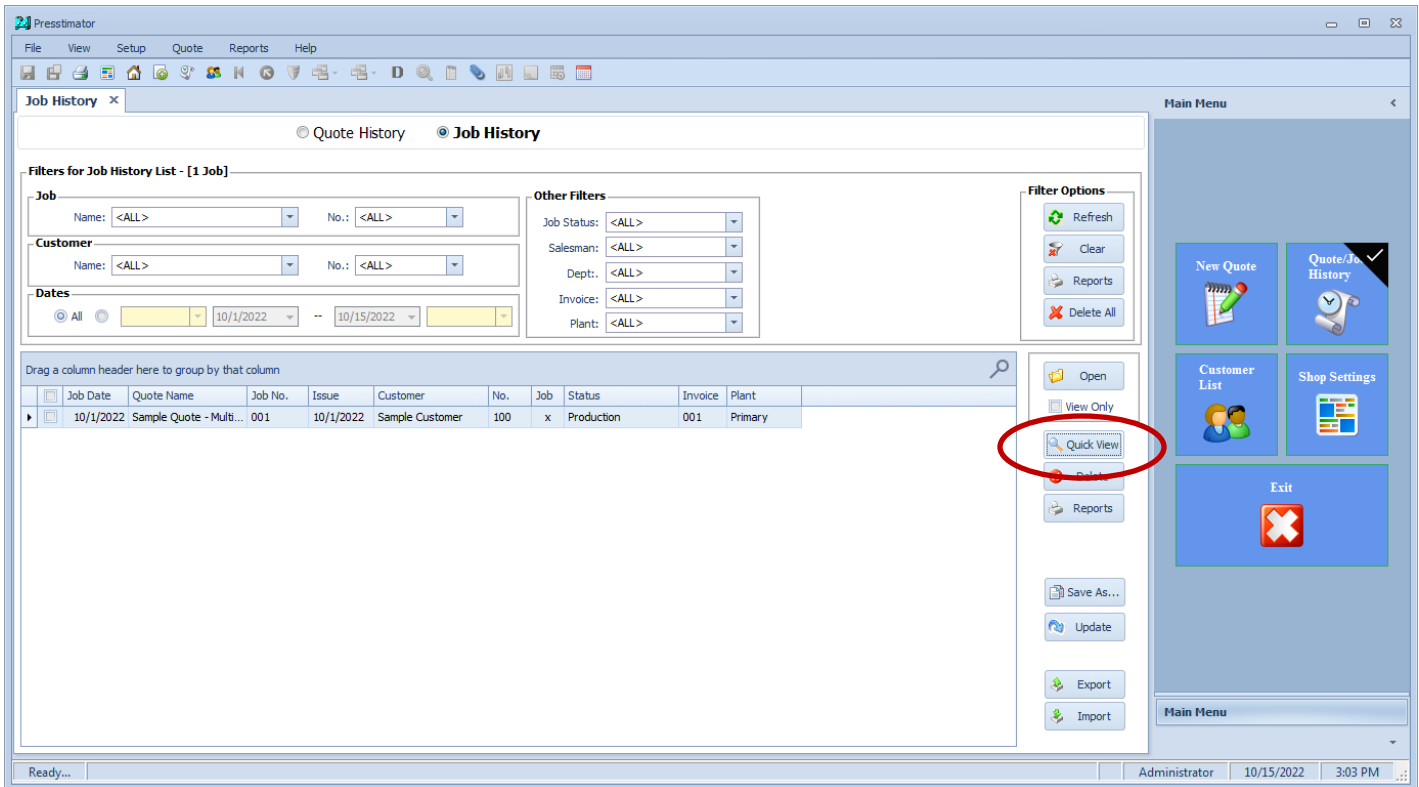
Send Marked Items to Scheduler

Close

View Scheduler

19

**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.

**Job Quick View**

**Quote Information**

Name: Sample Quote - Multiple Sections      Quote No.: 002      Quote Date: 10/1/2022  
Edition:      Issue Date: 10/1/2022      Status: Sample  
Customer: Sample Customer      Estimator: Joe Sample      Invoice No: 001  
Customer No.: 100      Salesman: Bob Sales      Invoice Amount: \$13,548.84

**Job Information**

Sections: 2      Type: Shopper      Web Width: 34  
Pages: 52      Format: Tab      Cutoff: 22.75  
Copies: 32,500      ☒ Color Ink      Size: 11 X 15

Job Number: 001      ☒ Required: 10/3/2022 6:00:00 AM  
Status: Production      ☒ Copy In: 10/1/2022 2:00:00 PM  
Job Created Date: 10/1/2022      ☒ Last Page Rec'd: 10/1/2022 3:00:00 PM  
☐ Printed:      ☐ Completed:

**Current User**

Quote is not currently being modified.

☒ Ok

**Scheduled Items**

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.

Scheduler

To Be Scheduled

Scheduled

Scheduled Items

The following items have been scheduled. To make changes, modify these items in the Scheduler.

Item: PrePress

Subject: PrePress Sample Quote - Multiple Sections with Actuals: C

Location: Primary

Description: 55 pages. 1.83 hours

Start

End

Date

Time

Date

Time

Duration

Estimated Duration

10/15/2022

03:07

10/15/2022

04:57

1.83

1.83

Refresh

Schedule Summary

Item	Subject	Description	Location	Start	End	Duration	Est.Duration
PrePress	PrePress Sample Quote - Multip...	55 pages. 1.83 hours	Primary	10/15/2022 3:07 PM	10/15/2022 4:57 PM	1.83	1.83
Plates	Plates Sample Quote - Multiple ...	17 plates. 1.42 hours	Primary	10/15/2022 3:07 PM	10/15/2022 4:32 PM	1.42	1.42
Proofing	Proofing Sample Quote - Multipl...	Press Proofs. 52 pages. 0.87 ...	Coldset Pressroom	10/15/2022 3:07 PM	10/15/2022 3:59 PM	0.87	0.87
Press	Press Sample Quote - Multiple ...	Sect. 1. Tab. 39,125 copies. ...	Sample - Press 1: Your Press,...	10/15/2022 3:07 PM	10/15/2022 6:22 PM	3.25	3.24
Press	Press Sample Quote - Multiple ...	Sect. 2. Tab. 34,350 copies. ...	Sample - Press 1: Your Press,...	10/15/2022 3:07 PM	10/15/2022 5:09 PM	2.03	2.03
Inserting	Inserting Sample Quote - Multi...	65,000 inserts. 1 Sections. 1 ...	Primary	10/15/2022 3:07 PM	10/15/2022 5:07 PM	2.00	2.00
Bindery	Bindery Sample Quote - Multipl...	Type: Stitch and Trim. Quanti...	Primary	10/15/2022 3:07 PM	10/15/2022 6:22 PM	3.25	3.25
Finishing	Finishing Sample Quote - Multip...	Onserting. 32,500 copies. 3. ...	Coldset Pressroom	10/15/2022 3:07 PM	10/15/2022 6:22 PM	3.25	3.25
						17.90	17.89

Close

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.

The screenshot shows the Presstimator software interface. The 'Customer' screen is active, displaying various fields for a quote. The 'Job Information' section is highlighted with a red arrow pointing to the 'Last Page Recvd' field, which is set to 10/1/2022 3:00:00 PM. The 'Copy In' field is set to 10/1/2022 2:00:00 PM. The 'Main Menu' on the right includes options like 'New Quote', 'Quote/Job History', 'Customer List', 'Shop Settings', and 'Exit'.

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 screenshot shows the 'Print Options - Quote History Reports' dialog box. The 'Billing and Customer Analysis' option is circled in red. Other options include 'Print Filtered Quote History List', 'Profit Analysis', 'Estimate Analysis', 'Commission Summary', 'Total Usage', 'Invoices - Bulk', and 'Quote Compare'. The 'Custom Report?' checkbox is checked, and the 'Print Preview mode?' checkbox is unchecked.

The screenshot displays the Microsoft Excel interface with the 'View' tab selected on the ribbon. The ribbon includes tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Help, QuickBooks, Team, Tell me, and Share. The 'View' tab is active, showing options for New Window, Arrange All, Freeze Panes, Window, Switch Windows, and Macros. Below the ribbon, a portion of an Excel spreadsheet is visible, showing a table with columns for Customer, No., Date, Quote, No., Status, Invoice, Invoice \$, Profit \$, Copy In Req'd, Last Page Recv'd, Minutes Late, Late?, and Total. The 'Late Copy' worksheet is selected, indicated by a red circle around the tab name in the bottom-left corner.

Customer Information

General

Billing

Shipping

Customer Name:

Sample Customer

Customer No:

100

Contact Name:

Sid Sample

Address:

100 Main Street 2

Box 100

City:

Any Town

State/Province:

Any State

Zip/Postal Code:

12345-1234

Phone No.:

(222) 555-1234 x100

Fax No.:

(222) 555-1111

Mobile No.:

E-Mail:

sample@hostname.com

Export

Terms:

COD

Add'l Charges:

50.00

Markup Scheme:

Sample - General 25% Profit

S

Salesman:

Bob Sales

Tax Rates

☐ Customer is non-Taxable?

State

Local

5.25 %

0.75 %

Notes:

Ok

Cancel

Apply

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.

Presstimator

File View Setup Quote Reports Help

Quote History Quote - Sample Quote - Multiple Sections with Actuals x

**Customer**  
Specs  
Paper  
Ink  
Pre Press  
Press  
Plates  
Finishing  
Packaging  
Other Info  
Delivery  
Summary  
Info

**Details**  
Copies: 32,500 Pages: 52 Format: Tab Sections: 2 Color Ink: Yes Plant: Primary

**Add'l Flat Charges**

Description	Charge	Omit?
FedEx	20.00	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Total: \$20.00

**Add'l Per M Charges**

Description	Charge	Total	Omit?
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Total:

**Commission**  
Bob Sales  
% of =  
Flat \$:  
Total:

**Selected Customer Add'l Charges**  
Add'l Charges Flat \$: 50.00 ☒

**Grand Total**  
Total Add'l Charges: \$70.00

Notes:

**Main Menu**  
New Quote  
Quote/Job History  
Customer List  
Shop Settings  
Exit

Ready... Quote: Sample Quote - Multiple Sections with Actuals Administrator 10/16/2022 3:54 PM



**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.

The screenshot shows the Presstimator software interface. The main window is titled "Quote - Sample Quote - Quick Quote". It contains several sections: "Customer Information", "Quote Information", "Job Information", and a "Main Menu" on the right. The "Customer Information" section includes fields for Plant, Quote/Job Name, Title, Edition, Issue, Estimator, Salesman, Customer Name, Customer No., Terms, Contact, Alt. Contact, Address, City, State/Province, Zip/Postal Code, Phone, Fax, Email, and Customer Notes. The "Quote Information" section includes fields for Quote No., Status, Created, Expires, and a checkbox for "Use Metric Units?". The "Job Information" section includes a checkbox for "Job Accepted", Job No., Status, Dept., Job Created, and a list of checkboxes for "Required", "Copy In", "Last Page Recv'd", "Printed", and "Completed". The "Main Menu" on the right includes buttons for "New Quote", "Quote/Job History", "Customer List", "Shop Settings", and "Exit". At the bottom of the window, there is a status bar with the text "Ready...", "Quote: Sample Quote - Quick Quote", and a red indicator labeled "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.

The screenshot shows a dialog box titled "Newer Shop Settings". It contains the following text: "The prices in this Quote may be out-of-date. This Quote is using Shop Settings from 10/1/2022 1:56:31 PM. Shop Settings were last updated on 10/16/2022 4:02:44 PM. Check 'Shop Settings Last Updated' from the Setup menu to see what's new." There is an "OK" button at the bottom.

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

The screenshot shows the Prestimator software interface. The 'Quote - Sample Quote - Quick Quote' window is open. The 'Customer' tab is selected on the left sidebar. The main area displays fields for Quote Information and Job Information. A red circle highlights a message at the bottom right: '+ Quote using Shop Settings from: 10/1/2022 1:56:31 PM'.

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

The screenshot shows the Prestimator software interface with the 'Quote - Sample Quote - Quick Quote' window. The 'Customer' tab is selected on the left sidebar. The main area displays fields for Quote Information and Job Information. A red arrow points from the '+' icon in the previous screenshot to the expanded information box. The expanded information box contains the following text:

If there have been updates to Shop Settings, they can be easily imported into the current Quote Settings.  
[Click here](#) to see if there is anything new in Shop Settings.  
[Click here](#) to import the current Shop Settings.  
 Note: Importing current Shop Settings does not update certain items in Paper and Press. [Tell me more.](#)  
 These values can be updated by clicking [Load All Defaults](#)

At the bottom of the expanded information box, it says: '- Quote using Shop Settings from: 10/1/2022 1:56:31 PM'

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.

Presstimator

File View Setup Quote Reports Help

Quote - Sample Quote - Quick Quote

Customer: Specs: Paper: Ink: Pre Press: Press: Plates: Finishing: Packaging: Other Info: Delivery: Summary: Info:

Details: Copies: 7,500 Pages: 8 Format: Tab Sections: 1 Color Ink: Yes Plant: Primary

Stock Entry: Sect: 1 Pgs: 8 Basis Wgt.: 30 Grammage: Full Web Width: 34 Single Width: 34 Single Length: 22.750 Paper: 30 lb. ~ Sample Paper Manufacturer ~ 34" Notes:

Startup Imp.: 3500 Run waste (%): 8.00 Finishing (%): 0.00 Waste Calculator: Includes Inserting, Bindery, Mailing and Finishing processes

Base Copies: 7,500 Lbs. w/o waste: 403 Add'l copies: Waste copies: 4,300 Lbs. waste (%): 60.55 Gross Copies: 11,800 Total Lbs.: 647 Cost (per lb.): .3000 Cost: \$194.10

Stock Summary: S. Pgs. Type Color BW GSM Width Start Run ORun Copies Core Waste Lbs. Lbs. Cost/Lb. Cost Notes

S.	Pgs.	Type	Color	BW	GSM	Width	Start	Run	ORun	Copies	Core	Waste Lbs.	Lbs.	Cost/Lb.	Cost	Notes
1	8	Newsprint	White	30		34	3500	8.00	200	11800	2.00	244	647	.3000	194.10	

Totals: Paper cost: \$194 for 7,500 copies Paper cost (per M): \$25.88 Paper cost w/ plate changes: \$194

Ready... Quote: Sample Quote - Quick Quote **Newer Shop Settings** Administrator 10/16/2022 4:13 PM

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

### Inserting:

Presstimator

File View Setup Quote Reports Help

Quote - Sample Quote - Quick Quote Shop Settings

General: Inserts Inventory: Name: Sample Insert Quantity on hand: 10000 New Apply Delete

General: Machine setup cost: 50.00 Copies Per Hour: 2500 Paper Waste %: 0.00

Preprints: Folding setup: 35.00 Folding (per M): 4.25

Section Inserting: Insert No.: 1 Cost (per M): 10.25 New Apply Delete

Preprints Inserting: Preprint No.: 1 In-House: 12.00 Supplied: 12.00 New Apply Delete

Section Inserting Summary: No. Cost

No.	Cost
1	10.25
2	9.00
3	8.50
4	8.00

\* Note: The last entry applies to all additional sections being inserted.

Preprint Inserting Summary: No. Cost Supplied

No.	Cost	Supplied
1	12.00	12.00
2	11.50	11.50
3	11.25	11.25
4	10.75	10.75

\* Note: The last entry applies to all additional preprints being inserted.

Ready... Administrator 10/16/2022 4:19 PM

## Bindery:

Pres estimator

File View Setup Quote Reports Help

Quote History Quote - Sample Quote - Quick Quote Shop Settings x

**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.  
 These Shop Settings will be used.

Ready...

**Bindery Entry**

Location: <All Plants/Locations> Setup Charge: 115.00 Cost to Bind Cover (per M): 12.75  
 Bind Type: Perfect Bind Copies Per Hour: 5000 Paper Waste %:  
 Cost to Bind Sections (per M)  
 1st Section: 11.50 2nd Section: 11.25 3rd Section: 10.75 4th Section: 10.00 Each Add'l Section: 9.25  
 Notes: Sample - All material must be ready for binding

New Apply Copy Delete

**Bindery Summary**

Location	Type	Setup	Cover	1st Sect.	2nd Sect.	3rd Sect.	4th Sect.	Each Add'l	Notes
<All Plants/Locations>	Perfect Bind	115.00	12.75	11.50	11.25	10.75	10.00	9.25	Sample - All material m...
<All Plants/Locations>	Stitch and Trim	60.00	14.25	14.00	9.75	9.50	9.00	8.75	Sample - Prices are ba...

Main Menu

New Quote Quote/Job History Customer List Shop Settings Exit

Administrator 10/16/2022 4:17 PM

## Finishing:

Pres estimator

File View Setup Quote Reports Help

Quote History Quote - Sample Quote - Quick Quote Shop Settings x

**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.  
 These Shop Settings will be used.

Ready...

**Finishing Entry**

Location: <All Plants/Locations> Copies Per Hour: 10000  
 Finishing Type: Onsetting Setup Charge: 75.00 Materials Cost/M: 7.50 Finishing Cost/M: 8.00  
 Add'l Per Section Cost (per M)  
 1st Section: 6.00 2nd Section: 5.50 3rd Section: 5.00 4th Section: 4.50 Each Add'l Section: 4.00  
 Paper Waste %: 1.00 Notes: Sample

New Apply Copy Delete

**Finishing Summary**

Location	Type	Setup	Mat./M	Cost/M	1st Sect.	2nd Sect.	3rd Sect.	4th Sect.	Each Add'l	Notes
<All Plants/Locations>	Onsetting	75.00	7.50	8.00	6.00	5.50	5.00	4.50	4.00	Sample
<All Plants/Locations>	Poly Bagging	75.00	5.00	12.00	11.00	10.50	10.00	9.50	9.00	Sample

Main Menu

New Quote Quote/Job History Customer List Shop Settings Exit

Administrator 10/16/2022 4:20 PM

## Mailing:

Presstimator

File View Setup Quote Reports Help

Quote History Quote - Sample Quote - Quick Quote Shop Settings x

Main Menu

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.  
These Shop Settings will be

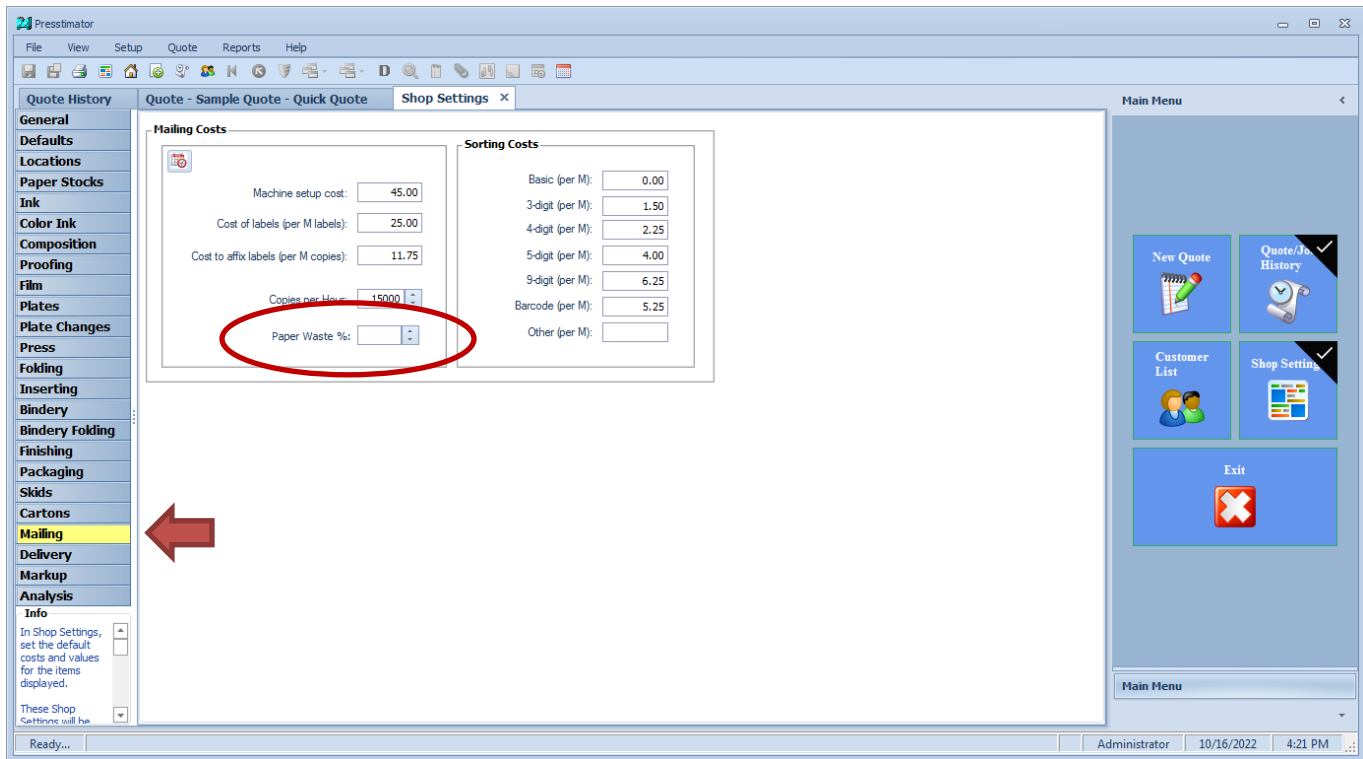
Mailing Costs

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 %:

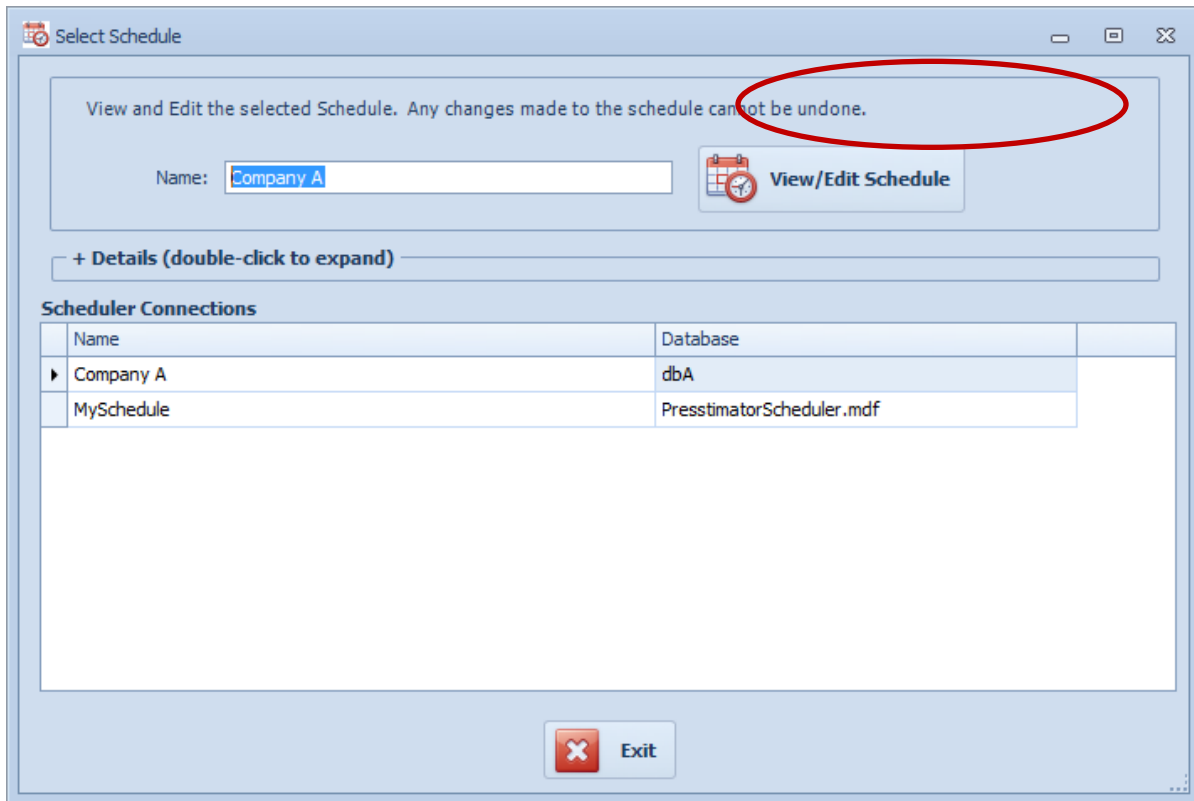
Sorting Costs

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):

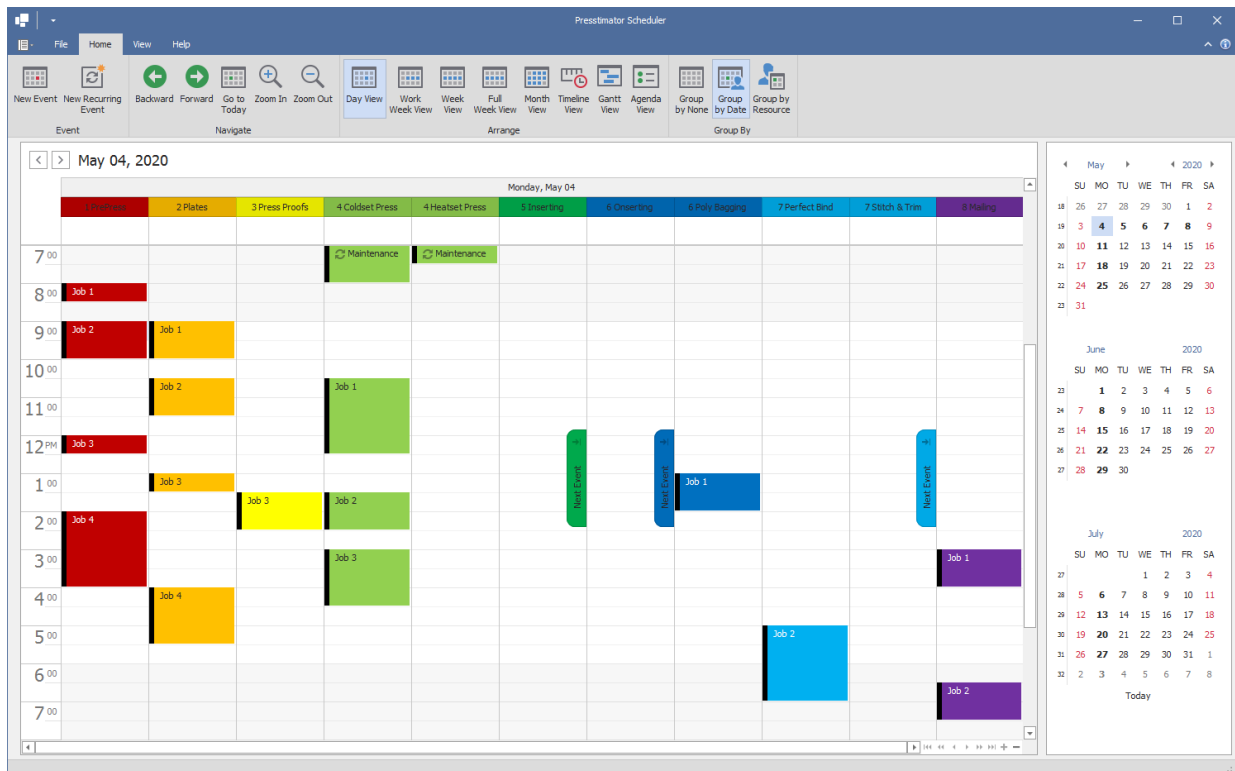
Ready... Administrator 10/16/2022 4:21 PM



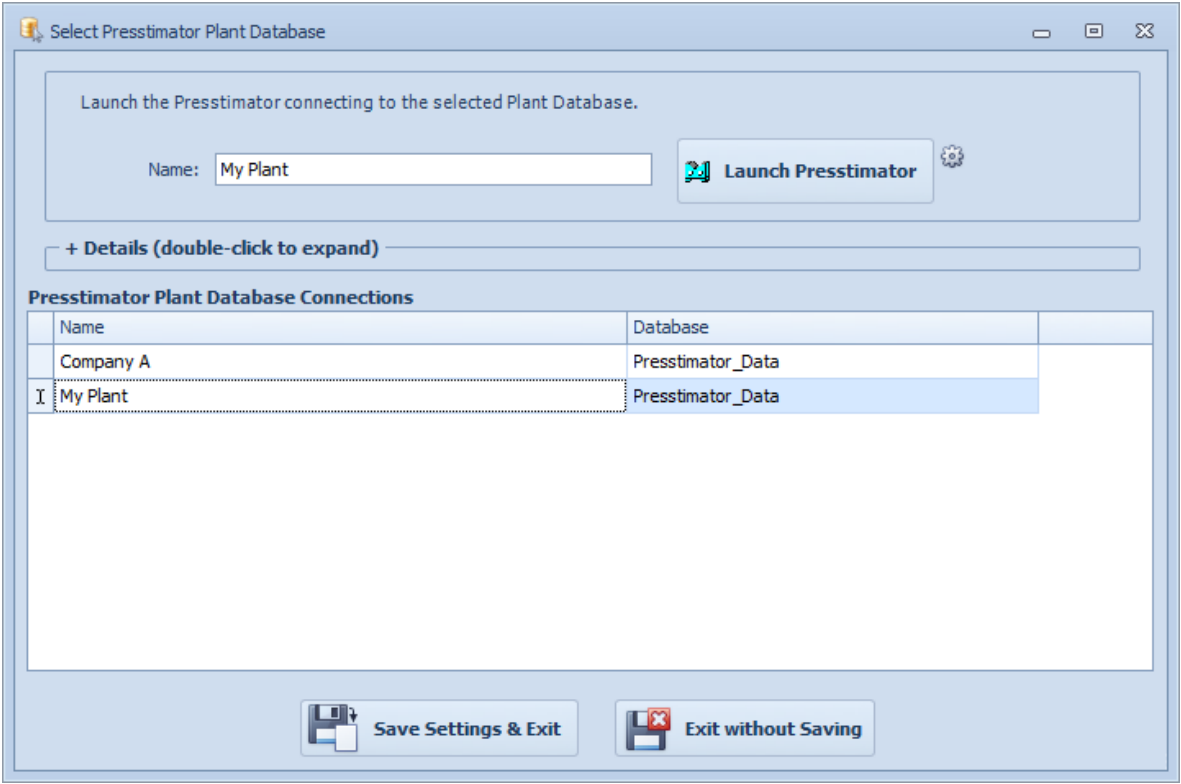
**Scheduler Dashboard Application:** If you have multiple plants and want to view the schedule for each plant, use the new Scheduler Dashboard Application.



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.