# What's New In PrintPoint 5

PrintPoint™

Printshop Estimating & Management Software

Version 5 Revision v09



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| Module | Feature | New/ Fixed | User Action Required Before, During Or After the Upgrade Process | How To Start Using... |
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| Estimating | **New WorkSheet**<br><br>We have created a new Offset Estimating WorkSheet to improve the workflow. You may continue to use the "old" WorkSheet, however many of the new options will not available. | New | File > User Settings > Estimates tab > Use New Worksheet check box | To begin using the New WorkSheet you can either use the <Command> + N (Mac), <Control> + N (PC) or from the Estimate List View Click on the New button and choose WorkSheet from the drop-down list. |
| | **Pre-Press Estimating**<br><br>There is now a Pre-Press Only Estimating Screen | New | None | New Menu > Pre-Press Estimating Only or Navigator > Daily tab > Estimate > New Button> Pre-Press Only |
| | **Estimate Numbering**<br><br>The estimate number can be used as the job number. | New | File > Preferences > Sequence Numbering > Use Estimate Number for Job check box | When converting an estimate to a job, PrintPoint will automatically assign the estimate number as the job number. You may also choose to use the job number as the invoice number. This is covered in the invoice numbering section below. |
| | **Estimate Linking**<br><br>We have extended Estimate Linking to automatically (if desired) generate linked Quotes, linked Jobs and Invoices to ensure that all components of a job are Estimated/Quoted/Manufactured and Invoiced. Linked parts are identified by either an alpha or numeric extension to identify the part. | New | | Once estimates are linked together and then one of the estimates is converted to a quote and/or a job, you have the option of converting all of the linked estimates as well. |
| | **Plate Change Charge**<br><br>Plate change charges can be included in offset estimates if you have this option in the press record. | New | Navigator > Maintenance Tab > Press > Select a press from the List View > Plate Change Group Box Options | Available on the New Offset WorkSheet. |
| | **Part Number**<br><br>There is now a new field available for the "part" or "component" of a job/estimate. | New | None | You can just add the parts as you go along. You may want to review your templates and add the part name. Maintenance of the part list is performed in the List Editor. |
| | **Linked Estimate Totals Popup**<br><br>The "$" button on estimating forms will become a popup menu if the estimate is part of a linked group. The popup will displayed the total for all part of the linked group. | New | None | After linking an estimate, you can click on the popup to opent the Profit/Qty Review dialog or look at the grouped totals. **NOTE: You must use the Link Switching popup in the Estimate Button Bar to make sure that the totals are accurately updated. Just clicking between open estimates will not update this poup.** |
| | **Clone Button**<br><br>The clone function has been given it's own button. | New | None | From an open estimate form, click on the clone button to select a linked clone or linked cover if appropriate. |

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| Estimating | **Press Related Ink Functions**<br><br>**Automatic PMS Charges for Ink**<br><br>You can now automate the PMS Charge form selected PMS Inks.<br><br>**No Plate Required**<br><br>You can now exclude the plate charge for a specific ink such as Aqueous Coating or Varnish.<br><br>**No Charge for Ink**<br><br>You can now exclude a charge for a specific ink.<br><br>**No Makeready Required**<br><br>You can now exclude a makeready from being charged for a specific ink.<br><br>**No Wash Required**<br><br>You can now exclude a wash from being charged for a specific ink. | New | None | [1] Navigator > Maintenance Tab > Ink Button to display Ink List View<br>[2] Select the ink(s) to modify and click the Assign Button. Place a check in the appropriate check box.<br><br>or<br><br>Follow step [1] above<br><br>[2] Double-click a desired ink and place a check in the appropriate check box.<br><br>NOTE: Auto PMS settings with inks will define the number of PMS mixing charges that appear on the Estimate. If you do not have this option set for one of the inks, then the customized value on an Estimate has no very “real” meaning. “Customized field colors” are only set to remain consistent with the color that “would” occur if you had this option set. |
| | **More Inks on Side B than A**<br><br>During the estimating process you can now have more inks selected for the back side of a job than the front. | New | None | In previous versions of PrintPoint, the larger number of inks would always be designated for side A. With PrintPoint version 5.0 that is no longer necessary. |
| | **Inks on Side A and Side B**<br><br>The new Worksheet displays the Inks on Side A and Side B in visible, selectable fields. | New | None | Inks on Side A & B are now displayed directly on the new WorkSheet. |
| | **Press Speed Popup**<br><br>The new Worksheet displays the selected Press Speed | New | None | The press speed is now displayed in a popup on the new WorkSheet. You may select this speed when choosing the press or directly on the WorkSheet. |
| | **Drawings Displayed on New WorkSheet**<br><br>A new poup menu/icon in the Estimate Button Bar displays the drawings for the current setup. | New | None | This popup menu/icon has three functions:<br>[1] Display the current drawings<br>[2] Show the last draw area used (checked)<br>[3] Open any drawing area. |
| | **Layout/Cutout Description Enhanced** | Enhanced | Non | The explanation of the number out of press sheet and parent sheet has been enhanced to show more information. A “button” behind the area displays the full information. |

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| Purchase Orders | **Purchase Orders**<br><br>This is a new module for PrintPoint. It gives you the ability to automatically or manually create, print, customize, and track purchase order for outside services and paper. | New | None | Refer to the manual. This is a large new area that requires some preference set-tings, SuperReport settings for custom reports and additional settings for vendors. |
| | **Purchase Order SuperReports**<br><br>2 new SuperReport Purchase Orders options have been created. If PrintPoint's new built-in Purchase Order is not used then:<br><br>[1] Paper PO<br><br>[2] General Purchase Order | New | None | You will need to load these SuperReports into your data file to use. Please see the manual for instruction on loading SuperReports from disk.<br><br>Suggestion:<br><br>Load the Paper PO and General PO into your Purchase Order table from the Purchase Order List View > Print > Report Manager > New SuperReport |
| Linking | **Estimate Linking**<br><br>We have extended Estimate Linking to display totals of linked estimates and to show the parts in the link popup on the estimate forms. You can now automatically (if desired) generate linked Quotes, Jobs and Invoices to ensure that all parts of a job are Estimated/Quoted/ Manufactured and Invoiced. Linked parts are identified by either an alpha or numeric extension to identify the part. | New | None | See the manual for further instructions. |
| | **Job Linking**<br><br>We have extended Estimate Linking to automatically (if desired) generate linked Quotes, linked Jobs and Invoices to ensure that all components of a customers job are Estimated/Quoted/Manufactured and Inviced. Linked parts are identified by either an alph or numeric extension to identify the part. | New | File > Preferences > Sequence Numbering > Automatic Job Numbering > Use Alpha Sequence letters for Linked jobs | Once estimates are linked together and then one of the estimates is converted to a quote and/or a job, you have the option of converting all of the linked estimates as well. |

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| Ink | **Automatic PMS Charges for Ink**<br><br>You can now automate the PMS Charge form selected PMS Inks.<br><br>**No plate required**<br><br>You can now exclude the plate charge for a specific ink such as Aqueous Coating or Varnish.<br><br>**No charge for ink**<br><br>You can now exclude a charge for a specific ink.<br><br>**No makeready required**<br><br>You can now exclude a makeready from being charged for a specific ink.<br><br>**No wash required**<br><br>You can now exclude a wash from being charged for a specific ink. | New | None | [1] Navigator > Maintenance Tab > Ink Button to display Ink List View<br>[2] Select the ink(s) to modify and click the Assign Button. Place a check in the appropriate check box.<br><br>or<br><br>Follow step [1] above<br><br>[2] Double-click a desired ink and place a check in the appropriate check box. |
| | **Metalic Inks & Coatings**<br><br>We have incorporatied better handling of Metaliic inks and Coatings | New | List View > Ink Table<br>List View > Inks > Select an ink > Select a new ink type | Once into the Ink Table you will see a rows for metallic ink and coating. Contact you ink vendor and determine the amount coverage and the unit price. |
| Descriptions | **Job/Quote/Invoice/Shipping Descriptions**<br><br>Descriptions for jobs, quotes, invoices and shipping can all be individually set as defaults in preferences. This new feature allows greater automation of the formatting for each of these descriptive areas to make sure that all users use the same descriptive formats to begin with. We have had many requests to make the Invoice and Shipping descriptions shorter. | New | None | Preferences > Job Description > Setup all your defaults. NOTE: Your old job description delimiters were NOT retained...you must reset them manually. |

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| Customers/Contacts | **Customer Code**<br><br>Customer Code is now 40 characters, increased from 15. This is a system wide change. | New | None | If you change the customer code, You will have to re-associate the estimated, quotes, jobs and invoice’s for that customer if you want to retain the ability to search your list view. This is a simple process, but you should contact Technical Support for assistance before you begin. |
| | **Customer Relationship Manager**<br><br>We have added a CRM module giving you the ability to view customer history for Estimates, Quotes, Jobs and Invoices in a simple and familiar way directly from either the contact or customer screens. | New | None | You will probably not notice any changes when you open a customer record but you see additional buttons on the navigator to assist you in contact management. |
| | **Contact Manager**<br><br>PrintPoint can now be used as a contact manager. You can track Job History, Estimate History, Quote History and Sales Calles. You will be able to set followups to sales calles and view it all in a “To Do” calendar. | New | None | Click on the Contacts button from the Navigator to display the Contact List View. From here you can sort your contact list to make the management easier as well as do mail merge |
| | **Mail Merge**<br><br>We have added a mail merge facility that allows you to create marketing material aimed at your contact base or parts of it. We have also provided facilities to include references to a particular contacts history of Jobs and Quotes. | New | None | By selecting the desired contacts from the Contact List View and clicking on the Merge button, you can generate and save documents for later use. The PrintPoint Mail Merge works like any other popular merge programs but also give you built in access to the information stored in PrintPoint. |
| | **Calendar/To Do List**<br><br>This is a powerful new module that gives you a standard based style Calendar program and To Do List with the ability to set followups to your proofs due dates, Job due dates,,ect. These dates can be shown on a To Do list, linked to contacts and CSRs and have the calendar/list printed out on a daily basis. | New | None | The To Do List is really a program with-in a program. You have a separate preferences in the do list that helps you organize your calls, jobs, estimate follow-ups ...etc. Depending on you permission level, you can assign and view these task in the way you choose. Each item can be color coordinated and the program can be set-up to look almost anyway you like. |

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| Sales Categories | **Sales Category Calculations**<br><br>There was a bug in the calculation of sales category totals due to an incorrect selection of jobs in a specified date range. | Fixed | None | N/A |
| Quotes | **CombiLetter Quote**<br><br>Now you can create a CombiLetter which combines several estimates into a single Letter style quote. | New | None | Linked estimates travel together to the quote. When you click on the quote button from with-in the estimate you have the option to combine all of the linked estimates into one quote line item or keep them as separate items. |
| | **Adding Estimates to CombiQuotes**<br><br>You can now double click items in the Estimate list inside the CombiQuote Window and have them automatically add to the CombiQuote, either as separate line items or as combined line items. | New | None | This feature works like the above item but also give you the ability to add additional items once the quote has already been started. |
| Paper | **Paper Purchase Order**<br><br>Purchase Orders can be generated if there is insufficient stock. | New | File > Preferences > Paper | This will cause PrintPoint to prompt you to order stock when it gets below the desired number of sheets or cartons in stock |
| | **Paper Reorder**<br><br>We now check the re-order level for paper to generate a PO if stock is below Reorder Level. If the Reorder Level is set to zero, then the Sheets In Stock will still be used. | New | File > Preferences > Paper > make sure “Ignore Negative Stock Levels” is not checked | This will cause PrintPoint to prompt you to order stock when it gets below the desired number of sheets or cartons in stock |
| | **Paper History**<br><br>Quantity and Start Date-Accumulates the total amount of paper used. This allows you to reset your sheets in stock without losing the history of how much paper you have used. | New | None | Paper List View -> Double-click a paper -> Select the Supplier/Inventory tab > History Group box. We have copied the Sheets in Stock (which was negative value if you had been using this to total the sheets used) and turned it into a positive value. |
| Shipping | **Shipping List View**<br><br>The Shipping Module is now setup with a list view the same as the other modules in PrintPoint. This gives you the ability to recall shipping tickets and reprint them. | New | None | By double clicking on a shipping record in the Shipping List View, you will be able to reprint and/or view the shipping record as desired. Searching, sorting, totatally and reporting are now available. |

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| **QuickReport Editor** | **QuickReport Editor**<br><br>The QuickReport Editor has been completely re-written. Autotmatic styles and other options are now available. See the docs. Note: we do not support the cross-table option even though it is made available for advanced users who understand this “Excel” feature . | New | None | See the manual. |
| **SuperReport Editor** | SuperReport Editor | Updated | There have been some changes to method (procedure) names and fields which will affect your SuperReports.<br><br>pGetLogo has changed to pLogo_Get<br>[Job]Purchase_Order has changed to [Job]Customer_Purchase_Order<br>[QuItem]Line_Number has been changed to [QuItem]Line. This is used in the Start script of many Quote.srp reports. | You should update your SuperReports (if using). |
| **Letters** | **Letters Scripts** | Updated | There have been some changes to method (procedure) names and fields which will affect your Letters.<br><br>pGetLogo has changed to pLogo_Get<br>[Job]Purchase_Order has changed to [Job]Customer_Purchase_Order | You should update your Letters files (if using). |
| **Invoice** | Job Numbers Can Be Invoice Numbers | New | File > Preferences > Sequence Numbering > Use Job Number for Invoices check box | Set Preferences |
| | **Linked Jobs Can be Invoiced Together**<br><br>Now you can create an Invoice which combines several jobs into a single Invoice Liine Item. | New | None | If jobs are linked |

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| List Views | **Share Views**<br><br>We have facilitated the design and sharing of customised List Views | New<br><br>Multi-User Only | Open any List View > Click on the List View Editor button > Select Define List View > Click the Share List View with... button | Once a list view is shared, all users with the appropriate permissions will have that list view as an option when they click on the List View Editor button. |
| | **Select Highlighted**<br><br>Due to changes in the new Macintosh OS X platform we have replaced the Command - H (Select Highlighted) in the Select Pop-up Menu with **Command - T**. This now applies to ALL platforms (Windows and Macintosh) | Changed | None | List View > Select Pop-up Menu > Now Command-T or Control-T |
| | **All Record Search Option**<br><br>The command to force searches to look at all records and not just the displayed records has been changed from Mac command Key/ win Control key is now **Option** and **ALT**. | Updated | None | When searching in a list view - if you choose to search for records that are not currently displayed...hold down the Option of Mac or ALT on Windows when you select the search function. |
| | **Save Size and Column Width List Views**<br><br>Each user can now save the size of a list view window as well as the width of columns. This applies individually to each list view for have for each file/table such as paper, press, etc. | New | None | Display any list view > Set the window size and column widths > Select "Save Size and Column Widths for (..layout) from the |
| | **Print Current List View**<br><br>You can now print the currently displayed list view without having to create a parallel QuickReport. | New | None | Display any list view > Create a selection of records > Select Screen List from the Print popup menu. |
| | **List View Totals**<br><br>You can now print the currently displayed list view without having to create a parallel QuickReport. | New | None | Preferences > List Views > Select the check box to turn on totally and set the maximum number of records to total. Totally records can be slow...do not set this figure too high (less than 500 is recom-mended) |
| | **Alternate Row Coloring** | New | None | Preferences > List Views > Select the check box to turn on Alternate Row Color-ing. |
| | **Use Colors In List View** | New | None | Preferences > List Views > Select the check box to turn on either User List View Colors for Jobs or To Do Items. These colors will match the due dates in Jobs or the categories in To Do Items. |

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| List Views Continued | **Sort Order Indicators In Column Headers**<br><br>The sort order arrow indicators are embedded directly in the column headers. Additionally, if the text is too large for the column width, elipses are added. | New | None | Open any list view and click on the column headers. Additionally, drag a column header size to remove the elipses and use the new Save Column Size option from the Design List View button. |
| Press | **Impression Basis: Number of Inks or Passes**<br><br>You can now select to use the number of inks **or** the number of passes to calculate the number of impressions. Example: 3/2 on a two color press would be 5 impressions instead of 2 on a 4 color press. | New | None | Press List View > Select a press > Impressions/Press Speeds tab > Impression Rates Group Box > Select the appropriate radio button. |
| | **Plates Changes**<br><br>Plate Changes can now be automatic based on the number of impressions and additional Makeready charges can apply. | New | None | |
| | **Press Times**<br><br>Times can be entered for Makeready, Wash, PMS Mix and Stripping (you may have customized these last two) | New | None | When you create a new press you can not enter the BHR for the press and enter times for these actions. The time will calculate the charge. |
| | **Press Speed for Quantity Levels**<br><br>You can now enter various press speed for each level of Number of Impressions. Example: from 1-1000 impression you can enter one press speed and then for 1001-2500 another. | New | None | |
| | **Press Speed Factors**<br>You can now enter various Press Speed Factors for each press (up to 15) to deal with issues of paper thickness, ink drying time, etc. | New | None | Press List View > Select a Press > Click on the Press Speed Factor Tab > Add or Delete various Speed Factors along with Speed/Hr and Variation %. |
| Data Collection | **Don't Update Station**<br><br>Check box to prevent a station from being updated during data collection. There are times when a job may move "back" in the production process, but you do not want to log that activity in. NOTE: If you don't check the box, the stations will automatically contain "Station Not Set" since you have left them blank. | New | None | Job Costing > Express Setup > Highlight an operation > Station Group Box > check the **Don't Update Station** check box. |
| | **Operations & Chargeable Defaults**<br><br>If an operation has been set to chargeable, then all other linked activities (collect paper, material) are chargeable. | Updated | Care is needed when collecting data that may have been previously "not-chargeable" by default, will now be chargeable. | |

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| Jobs | **Job Linking**<br><br>We have extended Job Linking to displayed “components of a a job” using either a numeric or apha suffix. (Example: Job# 244.1, 244.2, 244.3 or Job# 244.A, 244. B, 244.C. | New | The default suffix is numeric. If you choose to use Alpha suffixing:<br><br>File > Preferences > Sequence Numbering > Automatic Job Numbering > Use Alpha Sequence letters for Linked jobs | |
| | **Estimate -> Job Linking Dialog**<br><br>Converting Linked Estimates to Jobs is now handled by a new dialog box titled: “Linked Estimates Ready for Conversion To Jobs”. From here you can assign various pieces of information to individual jobs or all jobs in the linked set. (Example: assign quantites, sales rep, csr, due date, due time) | New | File > Preferences > Jobs > Job Linking > Automatically Link Jobs on Linked Estimates | During estimate creating use the Clone button to create “Linked” clones..<br><br>or<br><br>Estimate List View > Select several estimates > Link Button > Link Selected Estimates |
| | **Job Screen Redesigned**<br><br>The Job Entry screen has been redesigned. Note that a new tab for paper (media) has been added. | New | None | |
| | **Job Type**<br><br>Options for New Job, Reprint w/Changes, Reprint No Changes and Rework have been added/combined to the Job Type Group Box. | New | None | |
| | **Scheduling**<br><br>Press Scheduling now includes the Makeready and Wash times along with Printing time. | Updated | None | |
| | **Due Date List Coloring**<br><br>Job List View brings back the Coloring of Jobs based on Due Date Status | New | None | File > Preferences > Jobs > Job List Group > Place a check in the Use Colors in Job List View check box. The set the foregroud colors by clicking on the color blocks. Example text is shown with each due date. |
| | **Digital Job Folder**<br><br>Upon creation of a new job, PrintPoint can automatically create a Job Folder for all the job files. | New | None | File > Preferences > Jobs > Miscellaneous > Create Digital Job Folder.<br><br>Enter the path of the location for job folder to be created. |