

# PRODUCT SPECIFICATIONS



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# INTRODUCTION



Quote & Print Cloud is the result of over thirty three years experience providing management software for the printing industry. It is robust software designed to meet the needs of printers both large and small covering all facets of the industry Worldwide.

## Quote & Print Cloud Modules

Quote & Print is designed on a modular basis enabling companies to purchase the complete package or the relevant modules for their business and budget. For new users and users migrating from a legacy system this may be the majority of modules while a smaller print business may budget to buy and implement one or two modules each year. Quote & Print aims to meet the growing and changing needs of the Printing & Packaging industry for companies with 1 staff to 500. The new product is a rental product (software as a service model), not sold outright but rental by software package by user by year.

## Q&P Start-Up

About 4 years ago the CEO of the Printing Industry of Australia suggested we release an entry level Print MIS solution to first time users. The PIAA believes that about 70% of the printers in Australia today, who do not have a good MIS Solution, do not know their true costs. They may think they are making money, when actually they are not.

Quote & Print introduced a Start-Up Solution and today over 75 printers in Australia use the solution. The software covers all the important functions of a printer today. One can add additional software modules and users, as and when it is required and afforded.

The software has the following functions:-

- Estimating
- Quoting
- Job Bags
- Pre & Post Costing
- Employee Times
- Export
- Printing Invoices
- Debtors
- Packing & Shipping Documents
- It is for Sheet Fed, Digital, Large Format (Plotters), labels Etc

## Benefits

Using a Cloud based software solution gives you the ability of getting information anytime and anywhere. It also saves you an IT infra-structure cost of about 30% in not having to invest and maintain an expensive Local Area Network. Installation and training will be done by using a specially produced E-Learning/E-Classroom, onsite training or a combination of both.

- Future Directions
- Label software
- Continuous forms
- Payroll
- Manufacturing applications
- Android Mobile applications
- Advanced APIs for better connectivity
- JDF connectivity

Quote & Print Estimating covers all sections of the industry be it offset, digital, labels, continuous, price list items, envelope printers, web and even newspapers. This ability means that printers who do a cross section of work can generate estimates for all types in a single module. Integration with 3rd party Web to Print Solutions ensures Quote requests and Online Job orders are processed directly to Quote & Print reducing internal processing time.

- Quoting templates and fast One Screen Quote assist speedy quote calculations for:
  - > Flat Sheet
  - > Digital
  - > Books
  - > Plotters
  - > Labels
  - > Price Lists
  - > NCR
  - > Continuous Forms
  - > Newspapers
  - > Plastic Binders
  - > Web
  - > Screen Printing/Pad Printing
  - > Envelopes
- Single Screen Flat Sheet quoting can be used for the majority of work and is especially useful for less experienced estimators and the Sales Team to produce accurate quotes with rules and options preset by experienced staff.
- Consistent, correct and quickly prepared quotes will ensure a higher success rate with a known expected profit margin.
- Individually designed quote letters may be generated and emailed directly from the system.
- Worksheets show full details of costings and expected markups and indicate when calculated prices have been altered.
- Linked to Prospects and Debtors allowing a full history of quotes.
- Quotes able to be done for targeted contact at a company with his/her specific details on the quote letter.
- Logical and easy to follow One Screen Quote, use of Library quotes and on screen tutorials for less experienced estimators, sales and office staff.
- Default markups may be set for each client and prospect with the ability to override the default on a quote by quote basis if required.
- Ability to quote for up to 5 quantities and to easily duplicate quotes for calculations of variations of stock, number of colours, etc.
- Easy analysis of quote activity, hit rates and identification of potential target niches or areas of concern.
- Calculation and display of Carbon Footprint of each Quote, % waste, % use of recycled paper and % used of chain of custody plantation forests.
- Ability to lock and track any amendments to quote workings once a quote is bid. Snapshot of details is provided.
- Link related documents to the quote.
- Buy in of Materials or Processes.

Integration with the Quote, Ordering, WorkFlow, Scheduling, Shop Floor Management, Employee Times, Deliveries and Invoicing ensures information is processed in the shortest time possible and is able to be updated or viewed by all required users.

- Acceptance of a quote by a customer populates all the relevant details into the job fields, meaning no more re-entering of the same data.
- Orders may be generated on a specific job for Stock or Outside Work with tracking back to the job for costing.
- Ability to set up work tickets or job bags based on company production needs ensures consistent work instructions and reduces error.
- WorkFlow function allows production planners and managers to view, update and report on current jobs in progress with the movement through the factory being updated manually or automatically via the optional Shop Floor Management module.
- Ability to differentiate between, and report on Chargeable, Rework and House jobs.
- In-depth reporting including job profit reports, job analysis and cost centre analysis, as well as estimated and actual comparisons by either hours or dollars.
- True date sensitive Work in Progress report on unfinished jobs based on actual costs.
- User definable report generator enables extensive company specific reporting.
- Split deliveries are easily handled against jobs and may be traced to various delivery addresses if used in conjunction with the Delivery Docket module.
- Fast generation of JDF files when used with the optional JDF module.
- Increased invoice flexibility, with the ability to retain the Job client yet quickly invoicing a different End customer or Multiple End customers for a single Job.
- The ability to have multiple jobs on a single invoice.
- Link related documents to the job.
- Custom definable any number of Text, Date, Decimal and Flag Fields (can be setup in the admin module).
- Option to use the Custom defined fields in the Job Ticket.
- Ability to view/update workflow stages inside the job.
- Custom definable Date field for Proof.
- Multiple proof selection option (Unlimited custom definable entries for each option).
- Ability to record production notes for different Production Groups (Printing, Cutting, etc) and also can be included in the Job Work Ticket.

# WORKFLOW



Workflow is an integral part of the Job module which may be updated by online time entry via Shop Floor Management and linked to Scheduling. This is the key to reducing “back office” times for processing, and therefore significantly reducing Job costs and streamlining the flow of jobs through production.

- User defined unlimited number of Workflow locations with company specific flags for each location which, when selected or updated by Shop Floor Management, enable the Job to automatically progress to next stage of production.
- Location of Jobs to review is fast with reduced possibility of Jobs being “lost” in the production process.
- Production lists are readily available.
- Optional Auto Refresh capability.
- Workflow changes (which can be colour coded) update Schedule display.
- Option to update Workflow manually if Shop Floor Management not purchased.
- Workflow view/update option inside the job.
- Option to mark irrelevant locations (stages) for a particular job so that it will skip to the next location once completed the previous step automatically.

# SCHEDULING

The Scheduling program is an electronic production board showing the loading of all Presses and Finishing machines. In an environment where an increased percentage of jobs are short run with fast turnaround, integration with Workflow ensures all Press and Finishing requirements can be flagged as available on floor, prior to jobs being scheduled to start.

- Job priorities can be changed at any time.
- The Job display is color coded, allowing easy visual recognition of jobs ready to run, ready to run and on time, overdue and complete.
- Ability to view on a daily, weekly or monthly format for fast visual display.
- Locate specific jobs and view details quickly.
- Production Board view shows jobs queued for each machine and the total time involved.
- Easy rescheduling of jobs, using drag and drop OR moving jobs up and down in a list using a list arrow.
- Edit of the schedule by machine, allows easy transfer of jobs from machine to machine, to meet deadlines or reduce production bottlenecks.
- Fast generation of Production lists for those operators who do not have onscreen viewing.
- Ability to view loading on machines each day and the available hours.
- Linked with the Planning Board so updates to the Scheduler is reflected in Planning Board and vice versa.

# PLANNING BOARD



Printers are adopting a new approach like including more lines of products and services into their current processes, everything is done to retain their customers. On top of that, the increasing emphasis on standards and quality has placed more processes and work for Printers. This is where Advance Planning comes in to manage, plan, track and schedule your manufacturing operations.

- Using a single control panel to monitor, plan and adjust your jobs.
- Integrated with the Schedule, Shop Floor to give comprehensive status of each job and operations.
- Intuitive interface to allow quick changes and quick learning.
- A customizable Default Dependency setting in Admin Area to create the Job Plan at the time of a Quote is converted to a Job.
- Graphical user interface to manipulate Job Plan with drag and drop features (If the job is for a Book, you can plan the order of production, i.e. First Cover then Content (Pages) and Divider simultaneously).
- Display the status and % completed of each job operation (Pre-Press, Press, Cut, Fold, etc) with different colors (User can setup their own).
- Managing of outsource work itself by the Planning Board.
- Once plan is done the job can be moved to the scheduler as a whole or part by part (Section by section).
- Changes/Update done to Scheduler is reflected on the Planning Board and vice versa real time.



# SHOP FLOOR MANAGEMENT



Direct entry mode records time directly from the factory floor. This module is of increased significance now in times of faster job turnaround, with counter and administration staff needing to be able to respond to clients' queries on the progress of jobs.

Linked to WorkFlow and Scheduler so that as times are captured against a Job or a specific operation of the Job, the Job is "signed off" through site defined WorkFlow areas as it progresses through production. This progression enables fast feedback to customer re the current status of the Job. Also linked into a MIMIC display (a graphic which represents the factory showing which Presses are running, the job number that the machine is working on and the employee working on that machine). By clicking on a Machine all details of the job currently running are displayed.

- Online employee times entry using a touch screen or a mouse.
- Easy to use as an employee selects the job, the machine and his/her name from which times are then recorded till a change in job or function or break/end of shift is selected.
- Alternative Bar Code time entry of employee times, to record times and machine status or to record only the status of the machine if recording of time is not required.
- To capture unproductive time, there will be a list of custom definable unproductive tasks, so that these can be used to capture unproductive time, eg Down time, Maintenance or waiting on plates.
- Ability to generate a time sheet, at the end of a shift, of hours worked.
- Link with the Scheduler updates the statuses and graphically displayed the progress in Planning Board.
- Graphical interface to plan the physical machine arrangement in the production floor.





# ORDERING



The Ordering module streamlines the entire order process and allows both staff and management to view if goods have been ordered or received. This module is also the source of costs for actuals for back costing obtained when supplier invoices are entered to Creditors. These are also reflected in job profit reports. Ordering can be done for either goods required for a specific job or for goods to go into stock.

- Used in combination with Stock Control module enables updating of stock levels as orders are received.
- Full or partial orders can be received and labels printed for stock including the bar code for logistics companies.
- The order reports allow monitoring for companies needing to track outside work to ensure delivery by due date.
- Order follow up is streamlined with outstanding orders and overdue orders reports.
- Flagging of stock as it is received with a pallet slip identifying the Job number enables quick identification.
- Provides Certified Stock “Chain of Custody” details for audit purposes, including supplier’s PEFC/FSC certificate, invoice and packing slip numbers.
- Order reports to check overdue orders, orders expected to be received today, incomplete orders and discrepancies where ordered quantity varies from received quantity.
- Format of the Purchase Order (print/emailed) can be customized using the Document Designer.

# DELIVERY DOCKETS

Designed to meet the growing requirement for multiple deliveries from a Job. Quote & Print maintains a database of all customer delivery addresses including delivery contact name, phone number, dock opening, closing times and preferred courier.

- Generates a delivery docket to go with goods, giving full details with the ability to print multiple copies and with the option of sign off for receipt of goods.
- Ability to nominate different delivery docket headings, a useful feature if doing trade printing.
- Linked to jobs and allows multiple delivery dockets per job if required.
- Handles multiple deliveries of varying quantities to different delivery addresses for production runs, with a report of Delivery Instructions if required.
- A full history of all deliveries is kept with reporting of goods delivered, delivery address, date and time.
- Multi Job Delivery Docket enables delivering multiple jobs in a single delivery docket for a particular customer. A Delivery folder is maintained to keep the jobs that are ready to deliver which can be attached to a single Docket at end of week/month.

# EMPLOYEE TIMES



Capturing of Employee Times is possibly the most vital aspect in providing comparisons of estimate to actual costs and in calculating job profit reports, where unexpected production costs need to be identified and if possible charged back to the client. This is critical in repeat work where margins may be quickly eroded.

- Entry of Employee Times can be automated by purchase of the Shop Floor Management module which uses bar code technology or touch screens to automatically capture “Real Time” Employee Times and Job Status.
- Alternatively, entry of Employee Times can be either from a time card where both the start and stop times can be entered (Bundy Mode), or the elapsed times (either in hours or minutes). These can also be entered from times written on the Job Bag. There is also the ability to record the number of runs and a short (20 character) comment, which will be printed on the worksheet.
- All times worked show on the job worksheet so a comparison can be made with the estimated times and are utilised on job profit reports.



# STOCK CONTROL



This module is a database of all raw materials, finished goods and a price list item used within a company and is accessible from Estimating, Production and Logistics.

- Items are categorized as raw material, finished goods, etc to enable fast location and selection from other modules.
- Multi warehouse capability where stock can be kept in. Unlimited number of warehouses can be defined by the user.
- Single screen review of stock levels across multiple warehouses as well as outstanding orders.
- Ability to nominate Reserved Stocks and report on levels of reserved stock, with details of jobs that stock is reserved for.
- Stock issued on a job, or invoiced out from Logistics is automatically deducted from stock.
- Stock Status allows viewing of all the recent movements of the stock.
- Stock Notes screen allows for specific details to be kept on stock if required, i.e. detailed specifications, which may print on the invoice, or any specific instructions re running stock.
- Stock Audit Trail shows all stock movements for issued, orders, received and transferred stock.
- Stock Reorder report lists all stock due for reorder based on minimum stock levels.
- Ability to apply % increases or decreases to quickly update stock prices when notified by the supplier.
- List of Custom definable features can be attached to a Stock that is used for Estimation.



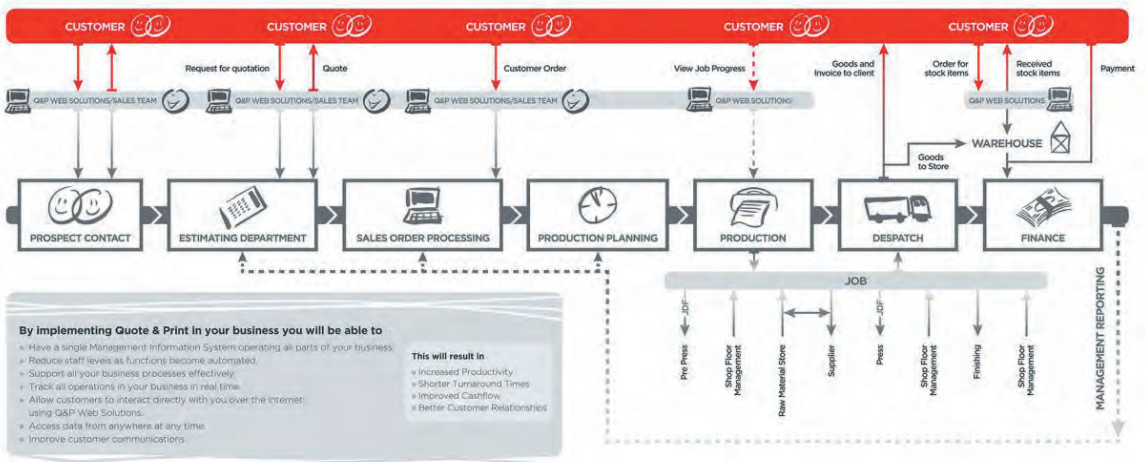
# MACHINE MANAGEMENT



- This module is a database of all machines that are accessed from Estimating.
- This is the list of Logical Machines which are used for Estimation.
- Separate list is maintained (Physical Machine) for Production purposes that are used in Planning Board and Scheduler. (Linked using the Process Type).
- Machines are categorized as Offset, Digital, Plotter, Pre Press, Guillotine, Finishing, CST, etc.
- Each type captures relevant details for estimation.
- Price is maintained as Hourly Rate or a table that is based on Quantity.
- Maintains a list of Plates that is compatible with the Press Machine and also the make ready time is maintained as a table based on number of Plates.
- Ability to maintain the speed based on quantity.
- Table to maintain Make Ready based on number of Colors for different sides as a Percentage or based on Quantity.
- Unlimited number.



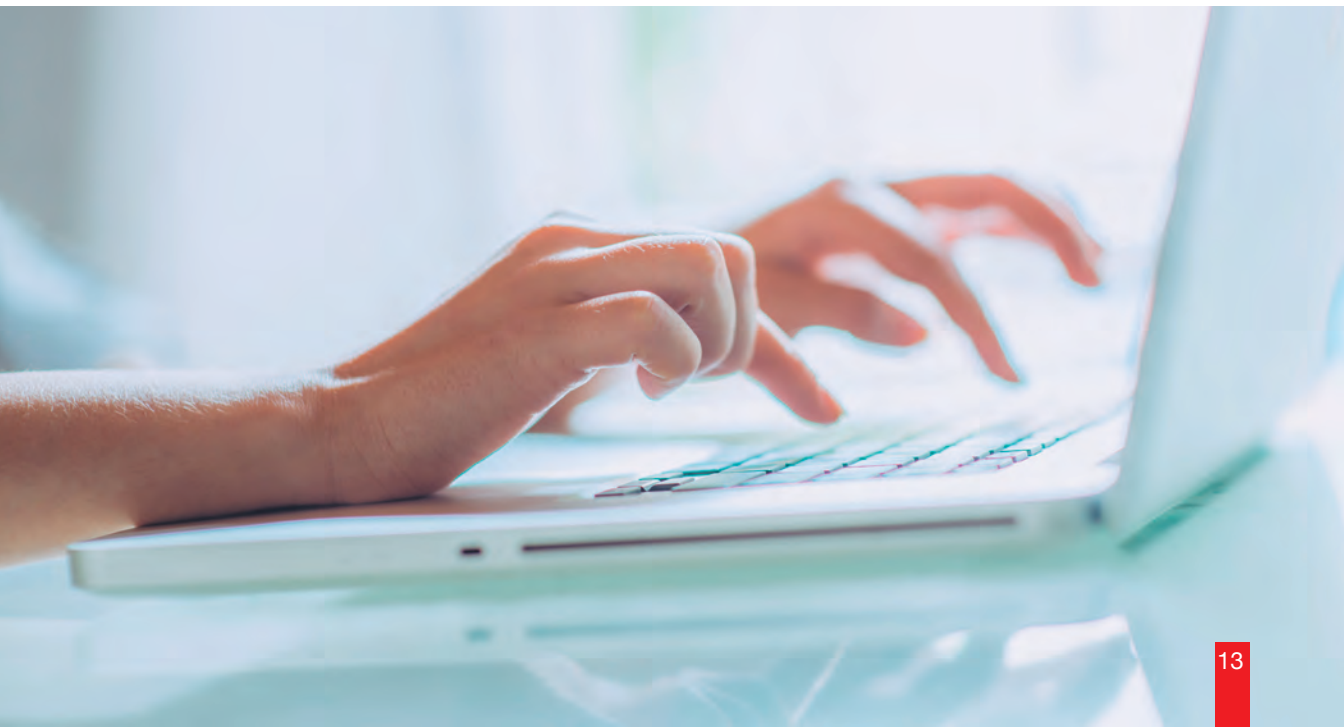
## Australia's Leading ERP Solution for the Printing Industry



The Dashboard is a set of Management Reports which allows management to keep a finger on the pulse of the business and to have an overall view on how the business is running over time. Reports are presented as diagrams or graphs and it is very easy to see trends over time.

Some of the reports available are:

- Job Late Report - This shows the number of jobs late each month. Jobs are shown as 1, 2, 3, 4 and so on.
- Rework Report - This report shows the number of chargeable jobs, rework jobs and house jobs. Either the number of jobs or the dollar value of jobs is displayed. These are shown on a month by month basis.
- Machine Activity Report - This report displays the following machine information on an individual machine or range of machines - Estimated Runs, Actual Runs, Estimated Hours, Actual Hours, Estimated Dollars, Actual Dollars, for a nominated date or job range using a filter.
- Employee Activity Report - This report shows the number of hours each employee worked for the nominated period. This can be split into Chargeable, House and Rework Hours.
- Employee Efficiency Report - This report shows efficiency by individual employee.
- Customer Activity Report - This report shows the ratios of customers' orders between the first and second half of a nominated period.
- Job Distribution Report - This report shows the distribution of a range of jobs by dollar value or quantity.
- Stock Activity Report - This report shows the quantity and value of stock used over a given period.
- Sales Budget Report - This report shows orders received for the current date, week to date, month to date for either single or all customers and compares them with the monthly budget.



# SECURITY



The Security module allows for control of user access, and the level of access for each user and each module within Quote & Print.

- The Password File is encrypted.
- Access to security is controlled by a master password which is allocated by the site.
- Each module has multiple levels of access.
- User Groups are maintained and users are assigned in to Groups. User can be in many groups.
- The Rights are assigned to User Groups and any time Administrator can active/inactive groups to manage access.
- Different function menus can be set up for different types of users.
- Sales Reps can be restricted to viewing their customers only.
- Lowest levels of access restrict users to read only access.
- Higher levels let users have read/write access.
- Only those users which have the authority for the most sensitive processes for that module would have the highest security level.
- Reports show all users and their access levels.

# OFFICE COMPANION

Office Companion, as an extension on management reporting, enables any report to be exported to Excel and also enables browse screen information to be exported in various formats.

- Ideal for reformatting reports using the Microsoft Office range of products.
- Quote & Print data can be exported into third party products for further analysis.
- Data can be reformatted as HTML for display on Web Pages.
- “Send To” option on Browse screens to Printer, File, Email FTP or Clipboard.
- Nomination to file types: PDF, HTML, Word, Excel, CSV and HTML.

This module is designed to enable you to have fast personalised communication with your customers and prospects via targeted emails for direct marketing.

- Four formats are available:
  - > Text Only. Good for a short message, eg “Our new 10 Colour Press is now Up and Running.”
  - > Text plus attached File, eg a PDF file containing a design portfolio.
  - > HTML format. This allows the designer greater flexibility in message layout.
  - > Newsletter Format.
  - > Template.
- All images can be embedded in the email or referenced from your web site.
- A log facility is available to record emails not sent.
- Email sending can be easily restarted in case of a system crash.
- Optional facility to bulk email remittance advices.
- Optional facility to bulk emails some or all users of the Quote & Print Internet Interface advising of new lines available.
- Uses same email protocols as the rest of Quote & Print.
- Email can be sent to debtors.





A Customer Relationship Management (CRM) database of clients, prospective clients and their individual contacts ensures vital sales information is not lost if account managers/sales reps leave the company and enables allocation to other sales staff if desired. The linked database of Sales Executives or Reps within the company enables allocation of Budgets.

- Important detail and relationship history is not lost if account managers/sales representatives leave the company.
- Enables fast reallocation of prospective clients to Sales Team.
- The linked database of Sales Team members within the company enables allocation of Budgets.
- Ability to generate campaigns.
- Enables direct marketing of sales promotional letters and flyers with individual contact and representative details and when used in conjunction with Bulk Emailer enables specifically targeted email promotions.
- Advanced Calendar, Setting up Reminders and Repeating Activities for each Rep, is automatically updated. Graphical interaction for modifying the Calendar. Many extra features, eg Monthly, Weekly, Daily and Agenda View of the Calendar.
- Automatic notification for Reminders, Activities of Quote and Job completion for internal staff and direct to the customer.
- Integrated with Google Maps for Delivery Addresses.
- Tracking of sales contacts, with inclusion of call reports, enables the Sales Team to ensure all prospects are followed up.
- Full history of all contact for each customer.
- Allows for multiple sales contacts per company, with a Notes screen for each contact, allowing for capture of personal and hobby details as well as a history of contact.
- Linked with quoting enabling quotes to be done for a specific contact for a prospective client with merged quote letter specific to the contact.
- Ability to track the Sales Team performance both in prospect/client activity as well as a comparison of actual sales to budget and all sales (invoices less credits) by company or by sales rep. Reporting on Quote to Job Hit Rate allows for early detection of reduced activity and trend monitoring.
- Ensures sales staff proactively follow up existing clients by inclusion of job re order dates on call reports.



# INTEGRATED ACCOUNTS



The accounts modules of Debtors, Creditors, General Ledger and Cash Book are developed in-house and therefore seamlessly integrated to all areas of Quote & Print. This has distinct advantages in accounts control and real time reporting with direct updating of transactions as they are processed. Full integration also allows for better back cost reporting on jobs profitability and enhanced tracking of cost recovery.

- Has full Tax (user can define multiple tax codes of their own) recording abilities for accrual or cash basis, also a Tax Statement and Business Activity Reconciliation report.
- All transactions are date sensitive therefore multiple months may be open at the same time in Debtors and Creditors.
- Integration with Sales module enables a Sales Prospect to be converted to a Debtor on initial order with retention of all details, including callback dates and linked quotes.
- Payment of accounts using EFT, and uploading of file to bank software with emailed EFT payment notification giving full details of payment and invoices applied to.
- Integration to Ordering allowing orders to be generated with all correct Creditor information and verification of order prices against Creditor invoices.
- Bills can be entered for the Purchases orders as Stock Items or general purpose items (Miscellaneous).
- Ability to define any number of Cash Books and attach with a Ledger account which will be used when making and receiving payments.
- Undeposited funds (Payments from customers) can be maintained separately until that is deposited using bank deposit functionality.
- The General Ledger has a user definable chart of accounts.
- Complete standard functionality and accounts reporting within each of the modules.
- End of period facility to close reconciled periods.
- Multi Job Invoicing.

- Outputs a file to be imported into external accounting products such as MYOB, QuickBooks, Attache and Sage.
- Exports service invoices or item invoices to MYOB.
- Special reporting and customisation available.



# QUOTE & PRINT CLOUD CHECKLIST



Number of users: \_\_\_\_\_

Number of employees: \_\_\_\_\_

## Modules:

- Quotes & Jobs
  - Flat Sheet
  - Digital/Price Lists
  - Plotter
- Workflow
- Scheduling
- Planning Board
- Shop Floor Management
- Employee Times
- Ordering
- Delivery Dockets
- Cost Recover Planner
- Stock Control
- Machine Management
- Logistics
- Big Picture
- Security (included with Quotes & Jobs)
- Office Companion
- Emailer
- Asset Register
- Dashboard
- Sales & Customer Relationship Management
- Debtors
- Creditors
- General Ledger
- Cash Book
- Export



# NOTES



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# Quote & Print CLOUD

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