April 2016

Print Shop Pro®
2016 User Group Meeting
March 20-22
San Diego, CA

2016 User Group Meeting Recap!

PSP User Group 2016 - Seaport Village

Over 40 Print Shop Pro® users from around the country gathered in San Diego for our 2016 User Group Meeting. We were worried about rain but San Diego delivered sunny skies and great weather. People came from coast to coast including a couple from BYU Hawaii.

Thanks to our Steering Committee Members, Tammy Slone from Cedarville University, Danelle Sedore from Grand Rapids Community College, Doug Darling from Springfield Public Schools and David Liss

from San Diego County Office of Education for helping us establish the format and the topics. And, thanks to Dave for printing our user group notebooks - they looked great.

We covered a great deal in our two days together. We started off with Mike Strand's "Best Features You May Not Know About". It was extremely well received and several users chimed in with some of their own best features. If you did not attend the event and would like a copy of the Best Features just email me at tstrand@edubusinesssolutions and I'll get a copy out to you right away.

Other topics included home page optimization, getting the most from your wide format equipment, integrating the V13 store, adding new revenue streams and enhancing the workflow process, to name a few. The "Show & Tell" and "Bragging Time" sessions gave attendees an opportunity to share with their peers how they are using PSP in their environment.
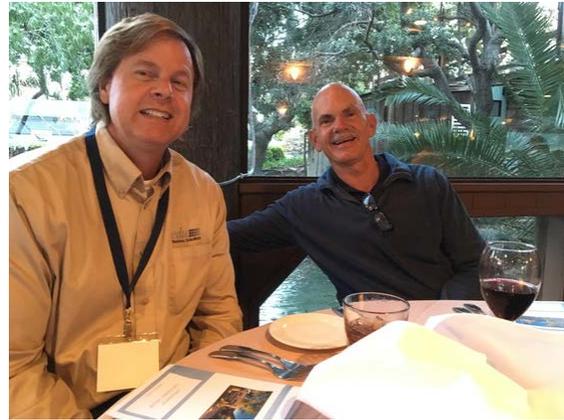
Chuck Bailey & Mike Strand at the Harbor House Restaurant

Tim Ericson of Anaheim Union High School District & Tonnia Strand boarding the bus for Seaport Village

It was unanimous that meeting with other PSP users and learning how they are using PSP was the highlight of the event. It was suggested that we have more attendees share how they are using PSP and that we have a couple more open forums for Questions & Answers at the 2017 meeting.

We wrapped up the final day with a session on Future Enhancements/Wish List ideas. We had great participation on this one. We got some great ideas for V13 and the development team is already busy working on them.

We conducted a follow up survey a week after the meeting and were pleased to learn that everyone felt like the information was valuable, that their objectives for coming to the meeting were met and that they discovered new techniques that will make them more effective at using PSP. Everyone that responded said they plan on returning to next year's event.

In our survey we asked the attendees "What one thing did you learn that you put into practice as soon as you returned to work"? Here are a few of their responses:

- We started using email templates more and adjusted a few settings that will help users make more accurate choices

- Starting working on refreshing our Home Page,

adding new graphics

- We are working on getting our templates set up in Template Builder

- Working on getting a plan together for updating add on and wide format

- Using the blue arrow to move jobs along in the process

Mike O'Hara, Chris & Alisa Anderson, Rob Lingard from Deseret Mutual, Glenn & Amy Dawson from BYU Idaho at the Harbor House Restaurant

What a great time it was. Everyone left the meeting with new techniques for making the most of PSP, new excitement about how to get their staff and users motivated about using PSP and a couple of new friends to boot. Please plan to join us for the 2017 User Group Meeting next March. The date and location will be announced in next month's newsletter.

Danelle & Avery Sedore of Grand Rapids Community College at Rockin' Baja Lobster

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Running a report to include discontinued equipment.

Need to run a report on click charges for the last fiscal year, but some equipment that was active in that time has since been discontinued? Is it possible to run such a report that will include click charges from that now discontinued piece of equipment? It is possible and here's how you can do that in this very simple three stage process.

Stage 1 - Temporarily reinstate the discontinued piece of equipment.

- Go to **Administration** > **Website** > **Equipment** to be taken to the **Equipment** page.
- Check the box marked **Show Discontinued** to bring up the discontinued piece of equipment.
- Click the link for the discontinued piece of equipment in question and you will be taken to the **Equipment Detail** page for that discontinued piece of equipment.

Uncheck the box next to where it says **Discontinued** and click the <u>**Update**</u> link at the bottom of the page to save.

Stage 2 - Run the report.

- **Go to Reports** > **Click Summary Reports** > **Click Summary - By Equipment**.
- On the **Click Charge Summary - by Equipment** page, set your date range up at the top.
- Click the **Export** button to run the report. A pop-up will appear asking: "***Do you want to open or save this file***?"
- Save the file/report.

Stage 3 - Return the piece of equipment you just reactivated to _Discontinued_ status.

- Click the link for the piece of equipment you reactivated and you will be taken to the **Equipment Detail** page for that piece of equipment.
- Check the box next to where it says **Discontinued** and click the <u>**Update**</u> link at the bottom of the page to save.

You have now successfully run your report with the figures from the "**Discontinued**" piece of equipment included.

QUESTION:

We have several Account Numbers that are no longer valid and we'd like to remove them from circulation. How can we do this?

ANSWER:

Account numbers cannot be deleted. However, they can be **Discontinued** and thus made inactive. Here's how you can discontinue an account number.

1. Go to **Website** > **Account Numbers**.
2. Select the **Account Number** you wish to discontinue from the list, or search for it using the search function at the top of the page to write in a specific number or to filter it out to make it easier to find from the list.
3. Once you find the account number in question, click on the account number and you will be taken to the **Account Number Detail**.
4. Checkmark the box next to where it says **Discontinued.**
5. Finally, click the <u>**Update**</u> link to save the changes made. The account number should now be **Discontinued** and thus no longer accessible to users.

PSP VERSION 13.0 COMING SOON!

Here are some exciting new features that are coming in Version 13 that will make work flow even better.

Improved "Save As Quote" Notification

One of the things we learned from the 2015 Print Shop Pro® User Group meeting is that sometimes a customer will complete the online order process and click **Save as Quote**. Even though they are alerted that the order is not yet submitted, they seem to think that it has

been submitted to the print shop. Two new features in the next release will help avoid this misunderstanding in the future. In **Owner Configuration** you may now configure the message that is displayed to customers after they click **Save as Quote**. This will allow you to put greater emphasis on the fact that the order has not yet been submitted. To set this up:

1. Go to **Website** > **Owner Configuration**.
2. Edit the value for "**Default Message to Customer when clicking Save as Quote**."

In addition, you can create an email template that is automatically sent to the user, letting them know that they have saved an order as **Quote Only** and that the order has not yet been submitted for printing.

1. Go to **Website** > **Owner Configuration**.
2. Check the box labeled "**Send Quote Only Confirmation Email to Customer When Order Saved As Quote by Customer**."
3. Then select an email template from the dropdown list labeled "**Quote Only Confirmation Email Template.**"

Finally, we recommend that you create a sample order under your profile in Print Shop Pro® and left click **Save as Quote** so you can see and inspect the email that it sent to you.

Configure the Maximum File Size

You will soon be able to configure the **Maximum File Size** of a file that is uploaded by your customer and also configure the message that is shown to the customer if they exceed the maximum file size. Before Print Shop Pro® begins the upload process, it will ensure that the selected file of the customer is of an allowable size and it will advise the customer of the file size.

Download Multiple Files at Once

Have you ever received a *Print Order* that has many files attached? Version 13 will bring added convenience by allowing you to download all files attached to an order with one click and then open them in a folder for convenient access.

When viewing an **Order Detail** page, just click "**Zip and Download All**" from the *Attachments* grid.

Stitch PDF's

In Version 13, customers will be able to set the **Display Order** of the attachments that they include with a Print Order. Print Shop Pro® will now give you the option when viewing the attached files of an order to combine multiple PDF's into one.

1. Just click "**Stitch PDFs**" and select the files you want to stitch.
2. You can then easily save the newly created PDF to the order for future reprints.

Configure Special Landing Pages for Certain Customers

Now you will be able to have more control over your customer's online ordering experience by creating different landing pages for different customers.

1. Just go to **Website** > **Landing Pages** and create your new landing page.
2. Go to any **Site/Department** profile and select that Landing Page.
3. When that customer logs in to Print Shop Pro®, they will now be immediately redirected to the new Landing Page.

Limit Finish Sizes to Certain Departments

You will now be able to further tailor your customer's online experience to their needs. In **Finish Size Defaults** you can now configure what departments can see each finish size.

Just click on the **Manage Permissions for this Finish Size** link to set permissions for either specific departments or a group of departments.

Upcoming 2016 Events:

IGA - Industrial Graphics Association
May 26-27, 2016
Palm Springs, California

IPMA
June 20-24, 2016
Denver, Colorado

SUPDMC
September 11-15, 2016
Asheville, North Carolina

Graph Expo
September 25-28, 2016
Orlando, Florida