

# PRINTER'S PLAN

## JOB WINDOW & QUICK ACCESS TOOLS



Cheat Sheet

### Jobs Window (Your Workspace)

- The Jobs window is more than a list — it's your primary workspace.
- Most daily tasks (open, compare, review, adjust) start here.
- The more familiar you are with the layout and shortcuts, the faster everything becomes.

**Pro tip:** The Jobs window rewards repetition. The more you use it, the less you “hunt and click.”

### Quick Access Tools

- Available across multiple modules, including the Jobs window.
- Provide fast navigation to common actions without digging through menus.
- Designed to reduce clicks and screen hopping.

**Best use:** Pick one quick access tool and use it intentionally for a full day to build muscle memory.

### Compare Tool

- Allows side-by-side comparison of job quotes or work orders.
- Highlights differences such as pricing, production methods (digital vs offset), and line items.
- Does not allow edits and does not change any job data.

**Key takeaway:** Compare is visual only — safe to use without risk of altering jobs.

### Templates & Pricing

- Templates and quick jobs always pull current pricing.
- Updates to paper, labor, or costs automatically flow into new quotes created from templates.
- Templates do not “lock in” outdated pricing unless manually overridden.

**What this means:** You don't need to edit templates every time pricing changes.

### Column Layouts

- Column layouts in the Jobs window are user specific.
- Each user can add, remove, or rearrange columns without affecting others.
- Changes apply only to the currently logged-in user.

**Example:** Your layout ≠ your coworker's layout — and that's by design.

### Quantity Column

- Quantity is not currently available as a standard column in the Jobs list.
- This has been submitted as a feature request based on user feedback.
- Future availability depends on product development priorities.

**Status:** Not configurable today, but on the radar.

### Cloud Environment & Data

#### Sources

- Performance in the cloud often depends on where files are stored.
- Data source folders (attachments, labels, etc.) can be changed within Printer's Plan.
- Locally hosted folders typically provide better performance when attaching files.

**First troubleshooting step:** Verify your data source location.

#### Label Printing (Remote or Cloud Users)

- Labels can be printed while working in the cloud.
- Best practice is to store label data and shipping templates in a locally hosted folder.
- This allows labels to print directly from your computer without delays or errors.

**Bottom line:** Cloud workspace + local label data = best results.

#### Keyboard Shortcut: Escape (Esc)

- The Esc key quickly backs you out of multiple open windows.
- Especially helpful when several layers deep in jobs or setup screens.
- Saves time and reduces clicks.

**Shortcut to remember:** When in doubt, hit Esc.