

Print Shop Setup Guide

Use this as the full configuration reference while building the system for a print company.

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Print Shop Setup Guide

This guide is written specifically for printing companies using Excelsus IQ as their estimating, job, scheduling, purchasing, invoicing, and reporting system.

It is intentionally detailed. The goal is to give you one setup order that makes the program work the way a real print shop works.

What This System Should Be The Source Of Truth For

For a print company, this system should become the source of truth for:

- customer defaults
- estimating inputs
- production rates
- machine and finishing costs
- production sequencing
- rush and prepress charging
- order scheduling
- operator actual labor cost
- purchasing and receiving
- invoicing and reporting

If the same information is entered differently in multiple places, the system will feel inconsistent. The cleanest setup is:

1. Build the shop structure in Settings first.
2. Create clean customer records with correct defaults.
3. Quote from the catalog instead of typing ad hoc values whenever possible.
4. Convert approved quotes into orders.
5. Let scheduling and time tracking run from those orders.

Recommended Setup Order

Set the system up in this order:

1. Company settings
2. Team members and roles
3. Accounting basics
4. Catalog categories and vendors
5. Materials
6. Machines
7. Processes
8. Hardware
9. Labor rates and margin groups
10. Prepress charges
11. Rush charges
12. Production departments
13. Shop hours and resource availability
14. Operator skills
15. Job flow rules
16. Process sequences
17. Estimating defaults and volume discounts
18. Customers and contacts
19. Optional inventory
20. Purchase orders, scheduling, time, invoicing, and reports

Do not start by building quotes first. Quotes work best after customers, materials, machines, processes, prepress, rush rules, and departments are already in place.

Before You Start

Gather this information before setup:

- company legal name, display name, slug, timezone
- logo URL and primary brand color
- order, PO, and invoice prefixes
- shop working days and hours
- holiday closures
- list of departments
- list of machines with pricing model and speed
- list of finishing processes
- list of operators and their actual hourly cost
- customer tax defaults, commission rules, discounts, and quote loading rules
- material purchasing data
- margin targets
- tax rates
- overhead values
- default prepress charges
- rush policy

1. Company Settings

Go to [Settings > Company](#) .

Company Info

Use [Company Info](#) to set:

- Company Name
- Company Slug
- Timezone

Recommendations for print shops:

- Use the real operating company name that should appear on documents.
- Use the timezone the production floor actually runs on.
- Do not leave timezone generic if your team, due dates, and schedule are local.

Branding And Logo

Use [Branding & Logo](#) to set:

- Logo URL
- Primary Brand Color

This matters for customer-facing documents and future white-label output. If quotes and invoices should look like your shop, set this early.

Document Numbers And Defaults

Use [Document Numbers](#) to set:

- Order Prefix
- Purchase Order Prefix
- Invoice Prefix
- Show Cost On Internal PDF
- Show Margin On Internal PDF
- Require Proof Approval Before Production
- Auto Generate Schedule On Order

Recommended starting values for most print companies:

- Order Prefix: [ORD](#) or [JOB](#)
- Purchase Order Prefix: [PO](#)
- Invoice Prefix: [INV](#)
- Show Cost On Internal PDF: on
- Show Margin On Internal PDF: on
- Require Proof Approval Before Production: on if customer proof approval is mandatory
- Auto Generate Schedule On Order: on

If your shop never wants production scheduled until someone manually reviews the job, turn off auto-generate schedule. Otherwise leave it on.

2. Team Members And Roles

Go to [Settings > Users & Access](#).

Create every real person who affects quoting, customer ownership, production, or reporting.

Available roles are:

- Owner
- Admin
- Production Scheduler / Manager
- Sales Rep
- CSR
- Sales Rep + CSR
- Operator

Actual Labor Rate Per Hour

Set [Actual Labor Rate Per Hour](#) for each person if you want time tracking and actual costing to reflect real labor cost.

This is important for print shops because:

- operators often have different actual wages
- installers may cost more than production helpers
- prepress staff may cost more than general operators

If you skip this, the system falls back to broader labor-rate assumptions instead of using person-specific actual cost.

Recommended Initial Role Mapping

Use this as a practical starting point:

SHOP ROLE	SYSTEM ROLE
Owner / GM	Owner
Office admin with broad access	Admin
Production lead or scheduler	Production Scheduler / Manager
Outside or inside sales	Sales Rep
CSR / project manager	CSR
Salesperson who also runs jobs	Sales Rep + CSR
Press operator / finisher / installer	Operator

Report Access

Turn on report permissions only for people who need them:

- Standard Reports
- Report Builder

- Accounting Reports
- Dashboards
- Invoice Reports

3. Accounting Basics

Go to [Settings > Accounting](#).

Do this before heavy quoting so tax and profitability behave correctly.

Tax Rates

Use [Tax Rates](#) to load or enter the tax rates you actually charge.

Each rate can include:

- county
- municipality
- state rate
- county rate
- city rate
- combined rate
- effective date

Best practice:

- build tax rates before customer setup
- assign the correct default tax rate on each taxable customer
- use tax-exempt only when the customer truly is exempt and the exemption number is on file

Accounting Preferences

Use [Preferences](#) to set:

- payment methods accepted
- late fee percent
- grace period
- fiscal year start month
- export format
- default income account
- default COGS account
- aging report email settings

This is mostly accounting behavior, but printing companies should still set it up early so invoices and reporting are consistent.

Overhead And Profit

Use [Overhead & Profit](#) to enter the real monthly burden of running the shop:

- rent or mortgage
- utilities
- insurance
- admin and office salaries
- sales base salaries
- management salaries
- software

- marketing
- other fixed cost
- total production floor square footage
- total shop power
- working days per month
- working hours per day
- labor burden factor
- target monthly revenue
- target gross margin
- target net profit
- unassigned overhead allocation method

For print shops, this section matters because machine cost analysis and profitability are only credible if these values are not fake.

Good starting principles:

- use realistic wages, not ideal wages
- use conservative throughput
- use actual occupancy cost
- use a labor burden factor that includes payroll burden and benefits

After overhead is set, review each major machine in its cost calculator and compare the current sell rate against the suggested rate.

4. Catalog Categories

Go to [Settings > Catalog > Categories](#).

Categories are for organizing the catalog. They are not the production department.

Use categories for reporting and catalog structure, such as:

- Materials / Vinyl
- Materials / Banner
- Materials / Rigid
- Materials / Paper
- Machines / Wide Format
- Machines / Digital Press
- Processes / Cutting
- Processes / Laminating
- Hardware / Grommets
- Hardware / Frames

Important:

- [Category](#) is catalog organization.
- [Production Department](#) is scheduling.

Do not try to use category as your job-flow department.

5. Vendors

Go to [Settings > Catalog > Vendors](#) .

Create vendors before materials, outsourced processes, or hardware so those records can point to the right supplier.

Recommended vendor data:

- vendor name
- account number
- terms
- primary contact
- email
- phone
- address
- notes

Typical print-shop vendors:

- media vendors
- laminate vendors
- substrate vendors
- hardware suppliers
- outsourced finishers
- freight and installation partners

6. Materials

Go to [Settings > Catalog > Materials](#).

Materials represent the physical stock you buy and consume.

The system supports two stock types:

- [Sheet](#)
- [Roll](#)

Laminates are usually created as [Roll](#) materials, not as a separate stock type.

What To Create As Materials

Common examples:

- adhesive vinyl rolls
- banner rolls
- canvas rolls
- poster paper rolls
- foam board sheets
- coroplast sheets
- ACM sheets
- styrene sheets
- magnetic material
- laminate rolls

Key Material Fields

Set these carefully:

- Category
- Name
- SKU
- Vendor
- Stock Type
- Sheet Width, Height, Cost for sheet stock
- Roll Width, Length, Cost for roll stock
- Unit Of Measure
- Waste Factor %
- Bleed
- Gutter
- Trim Margin
- Weight Per Sq Ft
- Color
- Finish
- Thickness
- Notes

How Print Shops Should Think About Material Setup

For wide-format shops:

- create separate materials for each common roll width and finish
- do not combine different widths into one record
- create separate laminate material records by finish and width
- use realistic waste, especially for short-run jobs

For sheetfed shops:

- create each sheet size separately
- create separate coated, uncoated, synthetic, and specialty stocks
- use actual sheet cost, not carton cost unless you convert it

For rigid-media shops:

- create each substrate thickness and size separately
- do not combine 3 mm and 6 mm board in one material

Inventory Note

If you plan to use the Inventory module, mark materials for inventory tracking and maintain accurate receipts and adjustments. If you do not track stock, you can still use materials for quoting only.

7. Machines

Go to [Settings > Catalog > Machines](#) .

Machines are the main production-cost engine for print shops. Build these carefully.

Machine Setup Should Include

- Category
- Production Department
- Name
- Machine Code
- Active flag
- Pricing Model
- Rate Per Hour, Per Click, Per Sq Ft, Minimum Charge, or other pricing inputs
- Setup Time
- Max Print Width
- Max Print Length
- Speed in the throughput unit that makes sense
- Requires Operator
- Operator Rate Per Hour
- Notes

Category Versus Department

Use them differently:

- [Category](#) : how the machine is grouped in the catalog
- [Production Department](#) : where the machine belongs in scheduling

Example:

- Category: [Wide Format Printers](#)
- Department: [Printing](#)

Choosing A Pricing Model

Use the pricing model that matches how you actually sell and estimate:

- [hourly](#) for machines quoted by time
- [click](#) for click-based devices
- [sqft](#) for square-foot pricing
- [per_piece](#) for equipment where per-piece logic makes more sense
- [flat](#) for flat setup-style charges
- [lnft](#) when linear-foot pricing is the right basis

Choosing A Speed Unit

Use the speed field that matches how the machine actually runs:

- [Speed \(sq ft/hr\)](#) for many printers, routers, laminators, and broad-area finishing equipment
- [Speed \(linear ft/hr\)](#) for roll workflows where length is the better driver

- Speed (pieces/hr) for cutters, folders, pack-out stations, or any piece-based step

If a printer is charged hourly and output is really based on square feet, do not force pieces/hr. Use sq ft/hr.

Good Machine Examples

Wide-format printer:

- Department: Printing
- Pricing model: hourly or sqft
- Speed: sq ft/hr
- Requires operator: yes

Roll laminator:

- Department: Laminating
- Pricing model: hourly or lnft
- Speed: linear ft/hr or sq ft/hr

Flatbed cutter:

- Department: Cutting
- Pricing model: hourly or per_piece
- Speed: pieces/hr or sq ft/hr depending on how you sell it

Pack-out bench:

- Department: Packing
- Pricing model: hourly
- Speed: pieces/hr

Machine Cost Calculator

For each major machine, open the cost calculator and fill in:

- purchase price
- salvage value
- useful life
- maintenance
- equipment insurance
- machine footprint
- power draw
- utility rate
- voltage

This helps determine whether your machine sell rate is actually covering burden.

8. Processes

Go to [Settings > Catalog > Processes](#).

Processes are non-material production charges and production steps.

Common print-shop processes:

- lamination
- mounting
- contour cutting
- trimming
- sewing
- hemming
- grommeting
- drilling
- weeding
- transfer tape
- kitting
- packing
- shipping prep
- installation
- design
- file repair
- press proof

Key Process Setup Fields

- Category
- Production Department
- Name
- Process Code
- Pricing Model
- Rate
- Setup Charge
- Minimum Charge
- Time Per Unit
- Is Outsourced
- Vendor
- Outsource Cost
- Notes

Department Assignment Matters

If you want auto-scheduling to run by department order instead of by machine-specific logic, assign every machine and every schedule-relevant process to a production department.

Examples:

- contour cut process -> Cutting
- laminate process -> Laminating
- hand apply tape -> Handwork
- kitting process -> Kitpacking
- boxing process -> Packing
- delivery staging -> Shipping

Outsourced Processes

Use **Is Outsourced** for work such as:

- trade bindery
- outsourced installs
- specialty finishing
- embroidery
- outsourced die cutting

If it is outsourced, set the vendor and outsource cost.

9. Hardware

Go to [Settings > Catalog > Hardware](#) .

Use hardware for non-stock accessories or attachable billable components such as:

- grommets
- standoffs
- easel backs
- frames
- hooks
- pole pockets if priced as an add-on piece
- cable kits
- mounting brackets
- zip ties if you bill them

Set:

- category
- name
- vendor
- unit of measure
- cost per unit
- optional sell price per unit
- minimum quantity

10. Labor Rates

Go to [Settings > Catalog > Labor Rates](#) .

Use this for role-level labor assumptions and defaults.

Examples:

- Prepress Artist
- Press Operator
- Finishing Operator
- Installer
- CSR

Then, for higher accuracy on actual time cost, also set [Actual Labor Rate Per Hour](#) on each user record.

The clean model is:

- labor rate table = shop-level standard assumptions
- user labor rate = person-specific actual cost

11. Margin Groups

Go to [Settings > Catalog > Margin Groups](#).

Create margin groups that reflect how your shop prices different work.

Example structure:

MARGIN GROUP	USE FOR
Standard	Normal retail work
Premium	Rush, specialty, complex work
Wholesale	Trade customers and resellers
Custom	Special-account pricing

Each margin group should have:

- margin percent
- minimum dollar margin
- description

These can then be assigned to customers and used as the base estimating posture.

12. Prepress Charges

Go to [Settings > Catalog > Prepress Charges](#) .

This is where you build reusable quote-time prepress options.

Recommended Core Prepress Types

At minimum, most print shops should create:

1. [Standard Prepress](#)
2. [File Prep](#)

Recommended setup:

- [Standard Prepress](#)
- pricing model: [flat](#)
- auto apply to each item: on
- show separately on quote: based on your preference
- [File Prep](#)
- pricing model: [per_version](#)
- auto apply to each item: on
- show separately on quote: based on your preference

How it works in the quote builder:

- standard prepress applies once per quote item
- file prep multiplies by the number of versions or files on that item

You can also create optional prepress types for:

- color correction
- variable data setup
- straight reprint
- reprint with change
- CNC file setup
- proof creation
- design time

Best Practice

Make the default automatic charges represent what truly happens on almost every job.

Do not auto-apply rare charges. Only auto-apply the baseline shop behavior.

13. Rush Charges

Go to [Settings > Catalog > Rush Charges](#) .

Rush rules are order-level or quote-level urgency charges.

Each rush rule has:

- name
- description
- percent charge
- minimum charge
- sort order
- active flag

The rule uses whichever dollar value is higher:

- the percentage-based rush amount
- the minimum rush charge

Example rush policy:

RULE	PERCENT	MINIMUM
Same Week Rush	10%	\$150
48 Hour Rush	20%	\$300
Next Day Rush	35%	\$500

If your rush policy depends on promise date, create the few standard rules you actually sell instead of making every quote unique.

14. Production Departments

Go to [Settings > Production > Departments](#).

Departments are now the right place to define production flow at a print-shop level.

This is where you set the departments the scheduler should sequence through.

Recommended department list for many print shops:

- Printing
- Cutting
- Laminating
- Mounting
- Sewing
- Finishing
- Handwork
- Kitpacking
- Packing
- Shipping
- Installation

Set [Sort Order](#) in the order you want work to generally progress.

Example:

SORT ORDER	DEPARTMENT
10	Printing
20	Laminating
30	Cutting
40	Mounting
50	Finishing
60	Handwork
70	Kitpacking
80	Packing
90	Shipping

Important:

- categories organize records
- departments drive production flow

15. Shop Hours

Go to [Settings > Production > Shop Hours](#).

Set:

- shop open time
- shop close time
- working days

Then add closures for:

- holidays
- planned downtime
- maintenance windows
- plant shutdowns
- resource-specific blackout dates

If your shop runs a real second shift but the system is only set to daytime hours, scheduling will look wrong. Set hours to match reality.

16. Production Resource Schedule

Go to [Settings > Production > Production Resource Schedule](#).

Use this to override default availability for:

- machines
- schedule-relevant processes

This is where you reflect that a specific cutter, laminator, or process is only available on certain days or times.

Examples:

- install crew only available Monday through Friday
- second cutter only runs during first shift
- outsourced process unavailable on weekends

17. Schedule Settings

Go to [Settings > Production > Schedule Settings](#) .

Set:

- auto-schedule new orders when converted from quote
- auto-assign primary operator when scheduling
- respect operator skill level
- default view
- start hour
- end hour
- time slot size
- show completed tasks
- task overrun alert minutes
- warn if unscheduled days before due

Recommended starting settings:

- auto-schedule on: on
- auto-assign primary operator: on if your operator assignments are maintained
- respect operator skill level: on
- slot size: 15 or 30 minutes depending on shop complexity

18. Operator Skills

Go to [Settings > Production > Operator Skills](#).

Assign operators to the machines they can run and set:

- skill level
- whether they are a primary operator

This matters if you want scheduling to assign the right person to the right equipment instead of treating every operator as interchangeable.

For example:

- Operator A: primary on flatbed printer
- Operator B: primary on roll printer
- Operator C: skilled on Zund, backup on laminator

19. Job Flow Rules

Go to [Settings > Production > Job Flow Rules](#).

This is where you define the default production sequence.

Rules can sequence by:

- department
- machine type
- process category

For most print companies, department-based rules are the cleanest setup.

Example rule for a wide-format shop:

1. Printing
2. Laminating
3. Cutting
4. Handwork
5. Packing
6. Shipping

Example rule for rigid board work:

1. Printing
2. Mounting
3. Cutting
4. Finishing
5. Packing
6. Shipping

Best practice:

- use department steps for most of the flow
- only use machine-type or process-category steps when you truly need more specific logic

20. Process Sequences

Go to [Settings > Production > Process Sequences](#) .

Use process sequences when a specific kind of item needs a special flow that differs from the default rule.

Sequence templates can step by:

- department
- machine type
- exact process

Use this for recurring special workflows, such as:

- print -> laminate -> contour cut -> weed -> transfer tape -> pack
- print -> mount -> trim -> crate
- prepress -> proof -> print -> install

Do not overbuild this area at the start. Create the common default first, then add templates only for recurring exceptions.

21. Job Statuses

Go to [Settings > Production > Job Statuses](#).

Set the shop language you want your team to use for orders and production states.

Keep statuses simple and operationally clear. Too many statuses usually create confusion instead of control.

22. Estimating Defaults

Go to [Settings > Estimating > Default Values](#).

This page controls the quoting posture the system assumes when estimators start a new quote.

Set:

- Bleed
- Gutter
- Trim Margin
- Waste Factor
- Quote Valid For
- Default Margin Group
- Quote Loading %
- Auto-calculate imposition
- Show material cost breakdown in quote builder
- Show machine time in quote builder
- Warn when margin falls below minimum
- Require a machine selection on every quote line

Recommended starting point for many print shops:

- set bleed, gutter, and trim to your common production assumptions
- set waste to a realistic shop average, not a best-case guess
- set quote validity to what sales actually promises
- leave warning below margin on
- require machine selection if you want disciplined estimating

23. Volume Discounts

Go to [Settings > Estimating > Volume Discounts](#).

Use volume discounts when your shop systematically discounts by:

- quantity
- square footage
- a specific customer
- a specific material or process context

Only build structured discounts you actually intend sales to follow. If everything is custom, this area becomes noise.

24. Customer Setup

Go to [Customers > New Customer](#).

Customer setup is critical because quotes and orders inherit customer defaults.

What Quotes And Orders Pull From The Customer

The system uses the customer as the source of truth for:

- sales rep
- CSR
- default customer contact
- tax rate
- tax exempt status
- margin group
- commission percent
- automatic discount percent
- quote loading percent
- volume discount rule

If those values are wrong on the customer, your quotes and orders will start wrong.

Customer Record Best Practice

Set the following:

- Company Name
- Account Status
- Account Code
- Category
- Website
- Billing address
- Shipping address
- Sales Rep
- CSR
- Credit Terms
- Credit Limit
- Default Currency
- Default Sales Tax Rate
- Tax Exempt and exemption number if applicable
- Requires PO Number if the customer needs it
- Invoice and statement delivery rules
- Filing number if you use it
- Margin Group
- Margin %
- Minimum Margin \$
- Commission %

- Automatic Discount %
- Quote Loading %
- Volume Discount Rule if applicable
- Notes

Contacts

After creating the customer, add customer contacts and make sure one is the default contact.

That default contact is what quote and order headers will use.

If you skip contacts, the quote can still exist, but the communication side of the record will be incomplete.

Practical Customer Types

Retail customer:

- standard or premium margin
- normal tax rule
- no automatic discount unless intentional

Trade reseller:

- wholesale margin group
- maybe no sales rep commission
- maybe automatic discount

Large corporate account:

- default CSR assigned
- requires PO number
- statement delivery configured
- agreed quote loading or account-specific discount if applicable

25. Creating Quotes The Right Way

Go to [Quotes > New Quote](#) .

Header Setup

At the top of the quote:

- choose the customer first
- confirm the correct default contact appears
- confirm the inherited sales rep and CSR
- fill in [Job Name](#)

[Job Name](#) is the overall quote name. It should describe the entire job, even if the quote has multiple items.

Examples:

- Spring Window Campaign
- Trade Show Booth Package
- Fleet Graphics Rollout
- Restaurant Menu Reprint

Line Item Setup

Each quote line is an item within the overall job.

Use:

- [Item Description](#) for what that specific item is
- printing selection
- size
- quantity and versions breakdown rows

The system totals quantity from the quantity/version rows. Build those carefully.

Examples:

- 500 qty x 2 versions = 1,000 total units
- 5 signs x 4 files = 20 total units

Prepress In Quotes

If prepress types are set to auto-apply:

- standard prepress is applied once per item
- file prep is multiplied by versions or files

This is the correct behavior for many print shops and should be part of the default quote build if that reflects your real operation.

Materials, Machines, Processes, And Hardware

Use the catalog records you created earlier:

- material for stock
- machine for production charge
- processes for finishing, outsourced work, or production steps

- hardware for billable accessories

Try not to estimate with one-off numbers when a reusable catalog record should exist.

Rush In Quotes

If a rush rule applies, select the correct rush option so the quote reflects the urgency premium.

26. Converting Quotes To Orders

When a quote is approved:

1. convert it to an order
2. confirm the order due date
3. confirm the shipping plan
4. confirm the production sequence

If **Auto Generate Schedule On Order** is on, the schedule should build automatically from the order.

27. How Scheduling Should Work For A Print Shop

The clean intended flow is:

1. quote line uses machine and process choices
2. those records are assigned to production departments
3. job flow rules sequence the departments
4. the schedule creates tasks in department order
5. operator skills and availability influence assignment
6. operators clock time against those tasks

To make this work well:

- every important machine should have a department
- every schedule-relevant process should have a department
- shop hours must be real
- machine and process availability must be maintained
- primary operators should be assigned

If you leave department blank everywhere, scheduling falls back to older machine-type and process-category behavior. That can work, but department-based setup is the better shop-wide model.

28. Time Tracking And Actuals

Go to [Time](#).

Operators can clock into scheduled tasks and clock out when they complete or pause work.

This is how the system captures:

- actual time
- actual labor cost
- actual task progress

For good actuals:

- make sure operators are assigned correctly
- make sure each operator has the right user role
- set actual labor rate on each operator if you want true labor cost

This is especially useful for:

- finding underquoted steps
- proving a department bottleneck
- checking whether setup assumptions are wrong

29. Inventory

Use the Inventory module only if you want stock-on-hand tracking.

Inventory becomes useful when you:

- buy common media in volume
- receive stock against POs
- want low-stock alerts
- want on-hand visibility by material

Inventory includes:

- dashboard
- tracked materials
- material detail
- manual adjustments
- low-stock and out-of-stock alerts

If your shop does not want perpetual inventory, you can ignore this module and still use materials for estimating.

30. Purchase Orders

Go to [Purchase Orders](#) .

Use POs when you need to buy:

- materials
- hardware
- outsourced production

POs can be linked to jobs and order lines, and received quantities can feed inventory and job costing.

Good use cases:

- special substrate for one customer job
- outsourced install
- trade bindery work
- custom hardware package

31. Invoices And Accounting Flow

After production and shipment:

1. create invoice from the order
2. confirm taxes and totals
3. send using the customer's delivery rules
4. record payment

Make sure:

- customer tax status is correct before quoting
- invoice prefix is set
- payment methods are configured

32. Reports

Use [Reports](#) after the operational setup is clean.

The report builder supports datasets for:

- jobs and orders
- invoices
- payments
- customers
- quotes
- purchase orders
- vendors

Practical reports for print companies:

- quotes won vs lost
- orders due this week
- revenue by customer
- balance due by customer
- purchases by vendor
- tax-exempt customers
- sales rep activity

For dashboard interpretation, quote intelligence, report-builder usage, and how to act on reporting data, use the separate [Reporting And Intelligence Guide](#) as the operating reference.

33. Recommended Department Model For Common Print Shops

Wide-Format Sign Shop

Recommended departments:

1. Prepress
2. Printing
3. Laminating
4. Cutting
5. Mounting
6. Finishing
7. Packing
8. Shipping
9. Installation

Digital Print And Copy Shop

Recommended departments:

1. Prepress
2. Digital Printing
3. Cutting
4. Folding
5. Binding
6. Packing
7. Shipping

Trade Show / Display Shop

Recommended departments:

1. Prepress
2. Printing
3. Laminating
4. Cutting
5. Sewing
6. Assembly
7. Kitpacking
8. Packing
9. Shipping
10. Installation

34. Recommended First Pass Setup For A Typical Wide-Format Shop

If you want a practical first-pass setup instead of perfect data, do this:

1. Set company info, branding, prefixes, and auto-schedule on order.
2. Add all employees and put actual labor cost on managers, prepress, operators, and installers.
3. Add tax rates.
4. Add vendors.
5. Add your top 20 materials only.
6. Add your main printer, laminator, cutter, and pack-out area.
7. Add the core processes you sell every week.
8. Add **Standard Prepress** and **File Prep**.
9. Add 3 rush rules.
10. Add departments.
11. Build one clean default job flow rule.
12. Set shop hours and closures.
13. Add operator skills.
14. Add your margin groups.
15. Set estimating defaults and overhead.
16. Add your top customers and contacts.
17. Build test quotes and one full test order.

That is enough to go live without overengineering phase one.

35. Common Setup Mistakes

Avoid these:

- using category instead of department for scheduling
- not assigning default customer contacts
- leaving customer tax and commission defaults blank
- creating materials without real dimensions and cost
- using unrealistic machine speeds
- forgetting machine departments
- forgetting process departments
- not creating a default job flow rule
- putting rare prepress charges on auto-apply
- skipping operator skills but expecting smart scheduling
- skipping overhead but expecting reliable profitability
- treating every exception as a permanent catalog record

36. Go-Live Checklist

Before your team starts using the system for real jobs, confirm all of this:

- company info is correct
- branding is correct
- numbering prefixes are correct
- tax rates are loaded
- overhead is entered
- payment preferences are entered
- all active staff are created
- operator labor rates are set
- main vendors are loaded
- key materials are loaded
- main machines are loaded
- key processes are loaded
- standard hardware is loaded
- margin groups exist
- prepress charges exist
- rush rules exist
- departments exist
- shop hours are correct
- closures are entered
- operator skills are entered
- at least one default job flow rule exists
- customers are loaded
- contacts are loaded and default contacts are set
- one full test quote has been created
- one quote has been converted to an order
- schedule generation has been tested
- one time entry has been clocked
- one PO has been created and received if using purchasing
- one invoice has been created
- one report has been reviewed

37. Best-Practice Operating Rules

Once you are live, keep these rules:

1. Customer defaults are maintained by sales or CSR ownership.
2. New materials, machines, processes, and hardware are added to the catalog before estimators improvise them repeatedly.
3. Department assignments are mandatory on new machines and schedule-relevant processes.
4. New recurring rush or prepress behavior is configured once in Settings instead of manually recreated on every quote.
5. Operators clock into real tasks instead of using generic time buckets whenever possible.
6. The shop reviews actuals against estimates every month and adjusts speeds, setup times, or rates when needed.

38. If You Want The Simplest Mental Model

For a print company, think of the system like this:

- Customers define who you are selling to and what defaults apply.
- Catalog defines what you can sell and how it costs.
- Estimating defines the default quoting logic.
- Production defines how work flows through the shop.
- Quotes define what the customer is being offered.
- Orders define what the shop is actually making.
- Time, purchasing, inventory, and invoicing define what actually happened.
- Reports tell you whether the business is working.

If you keep each area clean and do not mix responsibilities between them, the system will stay understandable as the shop grows.

39. Recent Platform Additions

The system has expanded materially since the earlier manual sections were written. The most important additions are below.

Production Library And Product Catalog

[Catalog](#) is now presented as [Production Library](#).

This area now covers:

- materials
- laminate
- hardware
- machines
- processes
- import center
- product catalog templates

The [Product Catalog](#) is for prebuilt sellable products. A product template can now:

- prefill material, machine, process, hardware, and sizing assumptions
- support customer-optional or customer-locked usage
- support calculated pricing, fixed total pricing, or fixed unit pricing
- launch directly into quote or order entry

Use this when the shop sells repeatable items such as standard banners, posters, yard signs, kits, or recurring programs.

Inventory Control

Inventory now supports:

- on-hand quantity by material
- manual adjustments
- PO receiving into stock
- job allocations / reservations
- actual material usage capture
- spoilage / overrun capture
- cycle counts
- valuation reporting

The main daily planning report for materials is:

- [Inventory > Daily Requirements](#)
- direct route: </inventory/requirements>

That report shows, per job and component:

- job number
- customer
- due date
- component type
- material / laminate / hardware
- quantity needed

- job allocated quantity
- inventory reserved quantity
- current on-hand quantity
- current available quantity

Use this report every day for purchasing, staging, and production planning.

AI Platform

There is now a reusable AI layer with:

- provider and model settings
- prompt templates
- request / response logging
- structured JSON validation
- retries and fallback behavior
- human review queue
- feature-by-feature enable / disable controls

Current AI consumers include:

- natural-language quote intake
- win probability explanations
- promise date reasoning

AI setup lives in:

- [Settings > AI > Infrastructure](#)
- [Settings > AI > Prompt Templates](#)
- [Settings > AI > Review Queue](#)

Predictive Promise Date

Promise dates are no longer only manual commitments.

The system now supports:

- optimistic date
- recommended date
- high-risk date
- capacity-based reasoning
- risk level
- manager override notes when committing earlier than recommended

Related settings live in:

- [Settings > Production > Schedule Settings](#)

Dashboard And Production Meeting

The main dashboard is now a live operations command center.

It includes:

- KPI health strip
- production war board
- bottleneck / risk panel

- financial pulse
- fast links to due-today, due-tomorrow, all-orders, and production meeting

The daily review screen is:

- [Production Meeting](#)
- direct route: </production-meeting>

Use that screen at the 9:00 AM meeting to review all work due today and tomorrow.

Customer Portal

The customer portal now supports:

- live order stage tracking
- milestone timeline
- customer file upload
- reorder requests

Portal admin settings live in:

- [Settings > Customer Portal](#)

Accounting Sync

Accounting integrations now have a dedicated framework for:

- QuickBooks Online
- Xero
- customer sync
- invoice sync
- payment sync
- invoice status sync
- reconciliation and conflict review

Settings live in:

- [Settings > Accounting > Integrations](#)

Treat accounting sync as a controlled rollout until sandbox testing is complete.

40. Current System Setup Requirements

The sections above still describe the core shop setup sequence. The items below are the current platform requirements that must also be configured if you want the whole system to behave the way the code now supports.

Staff Login And Access

For production or owner use on the real deployed system, staff access should be configured through:

- [Settings > Team Members](#)

Important rules:

- the owner should have an active username and password
- the owner should confirm the organization workspace slug before first staff login
- all real staff logins should be assigned to named users instead of sharing one login
- dashboard, reports, accounting, and admin access should be granted intentionally by role

On development systems, login can be relaxed temporarily. On real deployments, use staff login.

Module Navigation

Enabled modules and add-ons now appear as their own sections in the far-left workspace navigation.

That means staff should be trained to open module workflows from the left nav instead of hunting for scattered launch buttons inside settings pages.

Examples:

- [CRM](#)
- [Planning Impos](#)
- [Wegmans Small Format](#)

Owners and admins should confirm that only the modules intended for the account are enabled, and that the team knows where each module now lives in the workspace shell.

Owner-Only Business Data Import

The system now includes an owner-only import center for initial data loading.

Use:

- [Settings > Business Data > Import Center](#)

Supported bulk uploads:

- customers
- contacts
- quotes
- quote lines
- orders
- order lines
- invoices
- invoice lines

Recommended import order:

1. customers and contacts

2. quotes
3. orders
4. invoices

Do not start production work until the owner has confirmed that imported customers, contacts, open work, and invoices match the source system closely enough to operate from.

Microsoft 365 Outbound Email

Outbound email is now configured through Microsoft 365 Graph for the whole MIS.

Use:

- [Settings > Notifications > Email Delivery](#)

Required values:

- from address
- quote request recipients
- Microsoft tenant ID
- Microsoft client ID
- Microsoft client secret
- Microsoft sender mailbox

This configuration is used across:

- quotes
- invoices
- CRM quote requests
- portal notifications
- digest-style system mail

Do not invite staff until a test email succeeds from this screen.

Job Status Setup

There are now two different status layers in the system:

- order lifecycle status
- production status

Order lifecycle status covers the whole job:

- [new](#)
- [in_production](#)
- [on_hold](#)
- [ready](#)
- [shipped](#)
- [delivered](#)
- [invoiced](#)
- [cancelled](#)

Production status is process-specific and comes from live tracked tasks:

- [Printing In Progress](#)
- [Printing Paused](#)
- [Finishing Done](#)

- [Proof / Approval](#)

Production status setup lives in:

- [Settings > Production > Process Statuses](#)

Use that page to map shop-facing production statuses to actual production processes. The order status remains the lifecycle rollup for the whole order.

NCR / Quality Setup

The MIS now includes NCR tracking.

Use:

- [Production > NCRs](#)

NCRs can also be launched from:

- order detail
- item detail
- live task work ticket

Before using NCRs in production, confirm:

- the NCR schema is applied
- the NCR template PDF exists on the app server
- the upload root for NCR PDFs is writable
- the team understands when to use an NCR instead of just writing a note

Production Command Screens

The system now expects the shop to use the command-center views operationally, not just as office summaries.

Core screens:

- [/dashboard](#)
- [/orders/due-today](#)
- [/orders/due-tomorrow](#)
- [/orders/all](#)
- [/production-meeting](#)

These screens now show both:

- order lifecycle status
- live production status

That allows the team to read a row as:

- [Order In Production](#)
- [Production Printing In Progress](#)

instead of only seeing the broad order-level status.

Report Builder

The report builder now behaves more like a database-set ad hoc reporting tool.

Users with report-builder permission can:

- choose a report base
- choose exposed fields from that base and related records

- order the selected columns
- save the report definition
- save runtime search prompts such as date, date range, customer, and PO number

Before relying on it operationally, confirm that the owner or reporting lead understands:

- which bases are available
- which staff should have report-builder permission
- which saved reports should be standardized for management use

Planning Impos

Planning Impos should now be launched from MIS jobs instead of relying on external job imports.

Use:

- the **Planning Impos** button on order lines
- the **Planning Impos** button on item screens
- the **Planning Impos** button on live work tickets

The planner can also load a job by typed job number and item letter.

Wegmans Small Format

If the Wegmans Small Format module is enabled, the MIS now expects staff to use the module from the left workspace nav instead of treating it like a separate app.

The module includes its own workspace screens for:

- order entry
- tracking
- order status
- press files
- materials and processes
- store directory
- settings

Do not migrate historical tracker data until the MIS module is fully validated with live-safe test data.

CRM

The CRM module is now part of the platform when enabled.

Use:

- **CRM > CRM Dashboard**

Before using CRM in production, confirm:

- reps are assigned correctly
- follow-up ownership is clear
- Outlook / Microsoft calendar connection expectations are documented internally
- quote request review responsibility is assigned to estimating or management