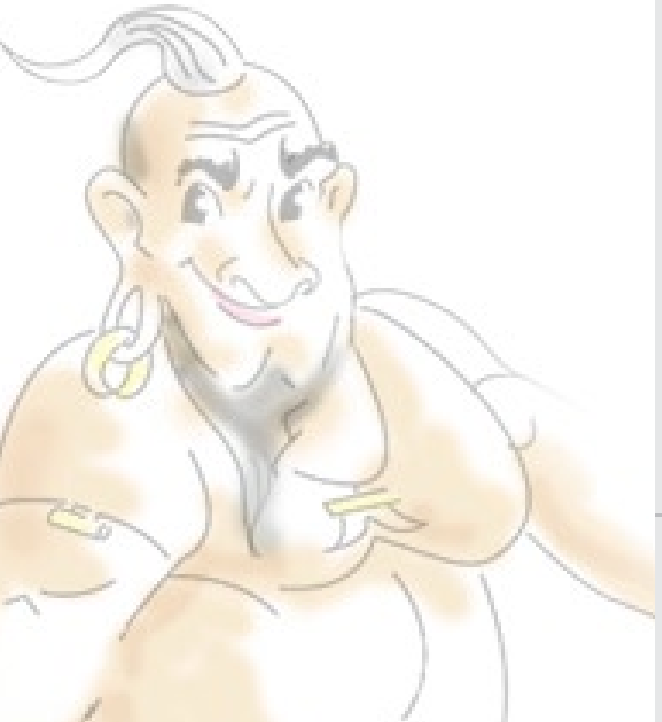
Devalipi Software

pressgenie v2

User Guide



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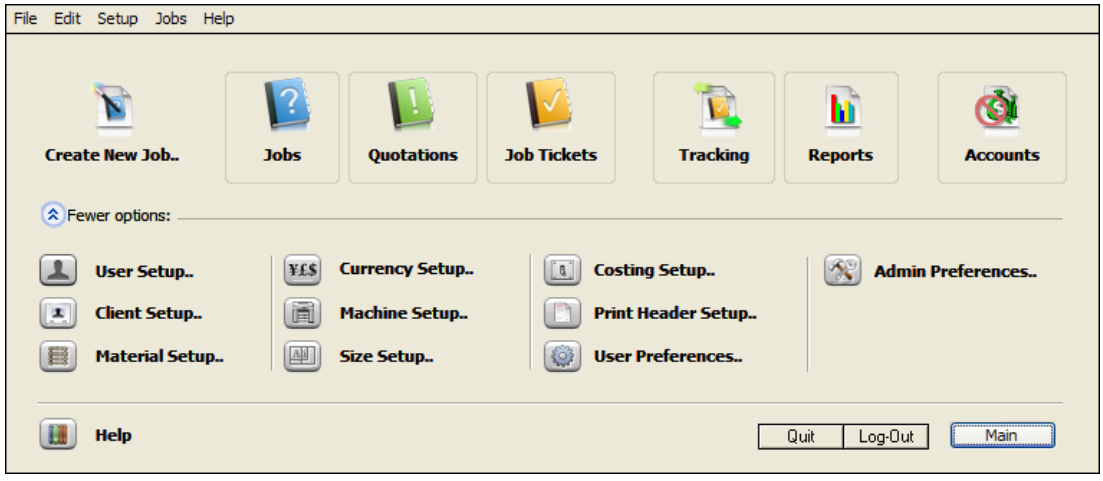
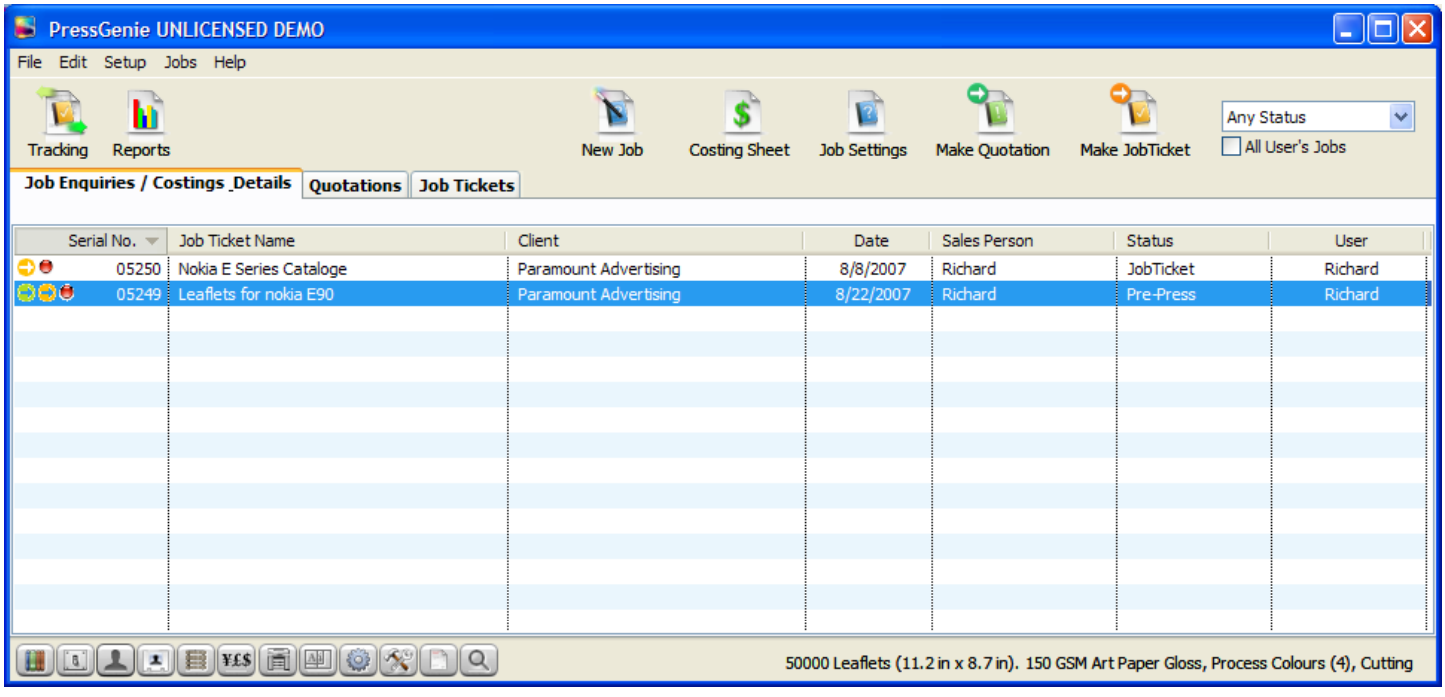
Devalipi pressGenie v2

Reference Guide

What is PressGenie ?

PressGenie is a **Job Management System** including **Estimation, Quotation, Job Ticket** creation. It is a user friendly, easily configurable and multiuser software system that runs on Windows 98 / 2000 / XP / Vista & Mac OS 9 / OSX (PPC/Intel).





How to install PressGenie

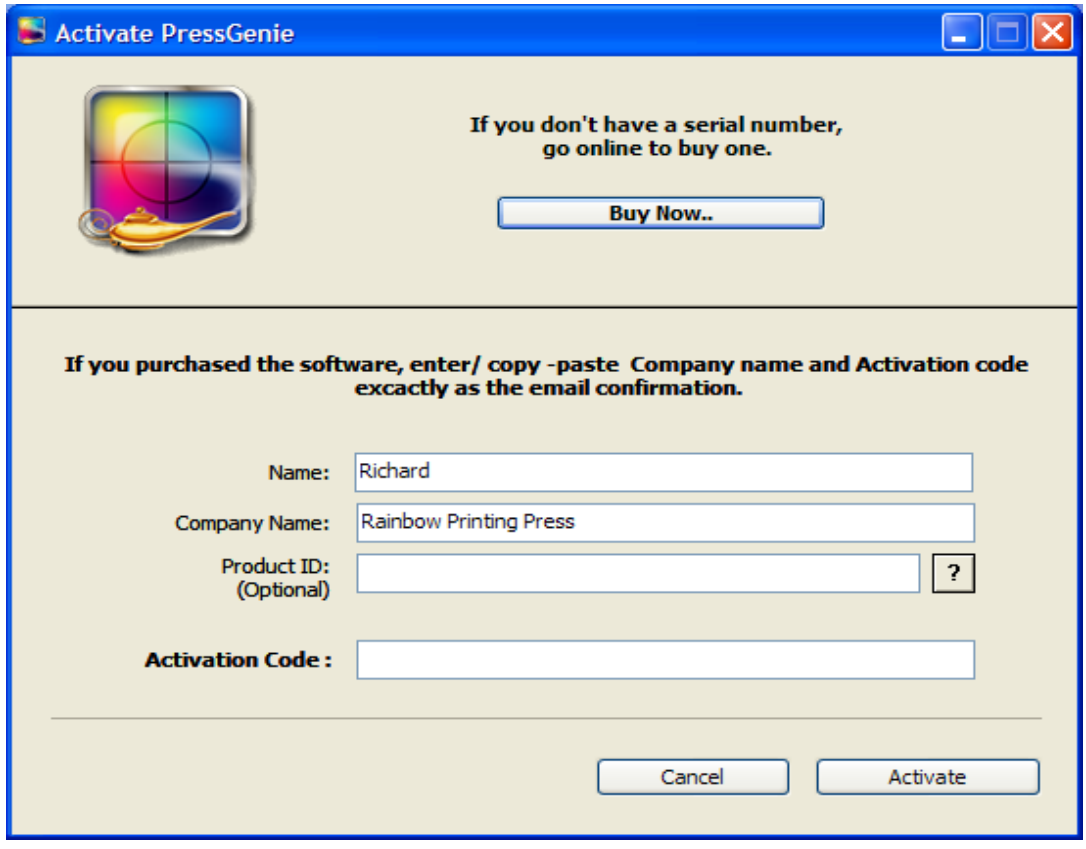
Windows: Run The PressGenie Installer by Clicking the PressGenie Installer Icon

Macintosh: Copy the PressGenie Application to a suitable (Applications folder recommended) location in your Hard Disk.

1. Launch PressGenie application.
2. When the PressGenie startup window appears, click on the '**Purchase**' Button.
2.(demo) Click the '**Let me try first**' Button for full working **demo** for a month.
3. Click the '**Buy Now**' button to go **Devalipi Online Store**. Purchase The **Activation Code** from the site. You will get the Activation code within one working day (depend on the local holidays and time zone) by mail
4. In the Registration window, enter your **Name**, **Company Name** and **Activation Code** exactly as they appear in the Activation mail. Then click the Activate button. If your registration is not accepted, you probably mistyped your Name, Company Name or Activation Code. You might try copying these items from this e-mail message to the clipboard and then pasting them into the appropriate fields.

Make sure you are giving the company name exactly how you want in your printed statements

It is not possible to activate PressGenie other than your supplied Company name using the given activation code



The basic concept of PressGenie is to give **100% accurate**, **effortless** and **Time Saving Estimation & Job Management system** for printing houses.

PressGenie has three main sections.

Costing (Estimation / Job Entry)

Quotation Management.

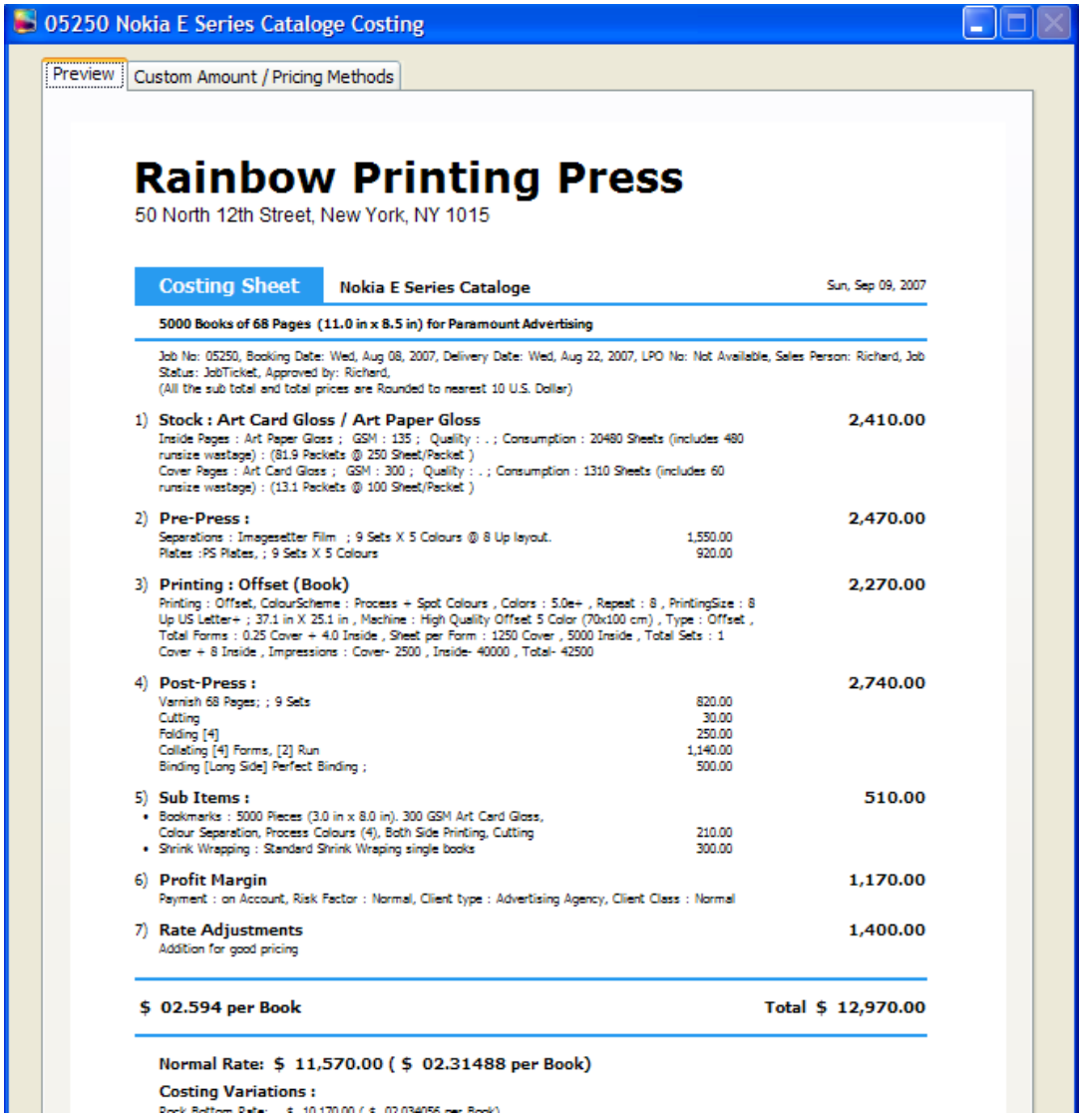
Job Tickets for final production.

There may be some confusion about Costing Sheet and Quotation. Coasting Sheet is a internal document about the detailed rates & expenses of the job. This document is strictly for internal use. On the other hand the Quotation is an offer for the client, that you will do the job at the quoted price and terms.

The Basic sections need to know to manage a job in PressGenie

1 Job entry / Costing

In this part, you enter **job details** in a **Wizard style** window. You only need to click and select the options for the job required. After completing the **job entry**, you can view the detailed **Costing Sheet.** If you thing rates for some sections needs to the changed,

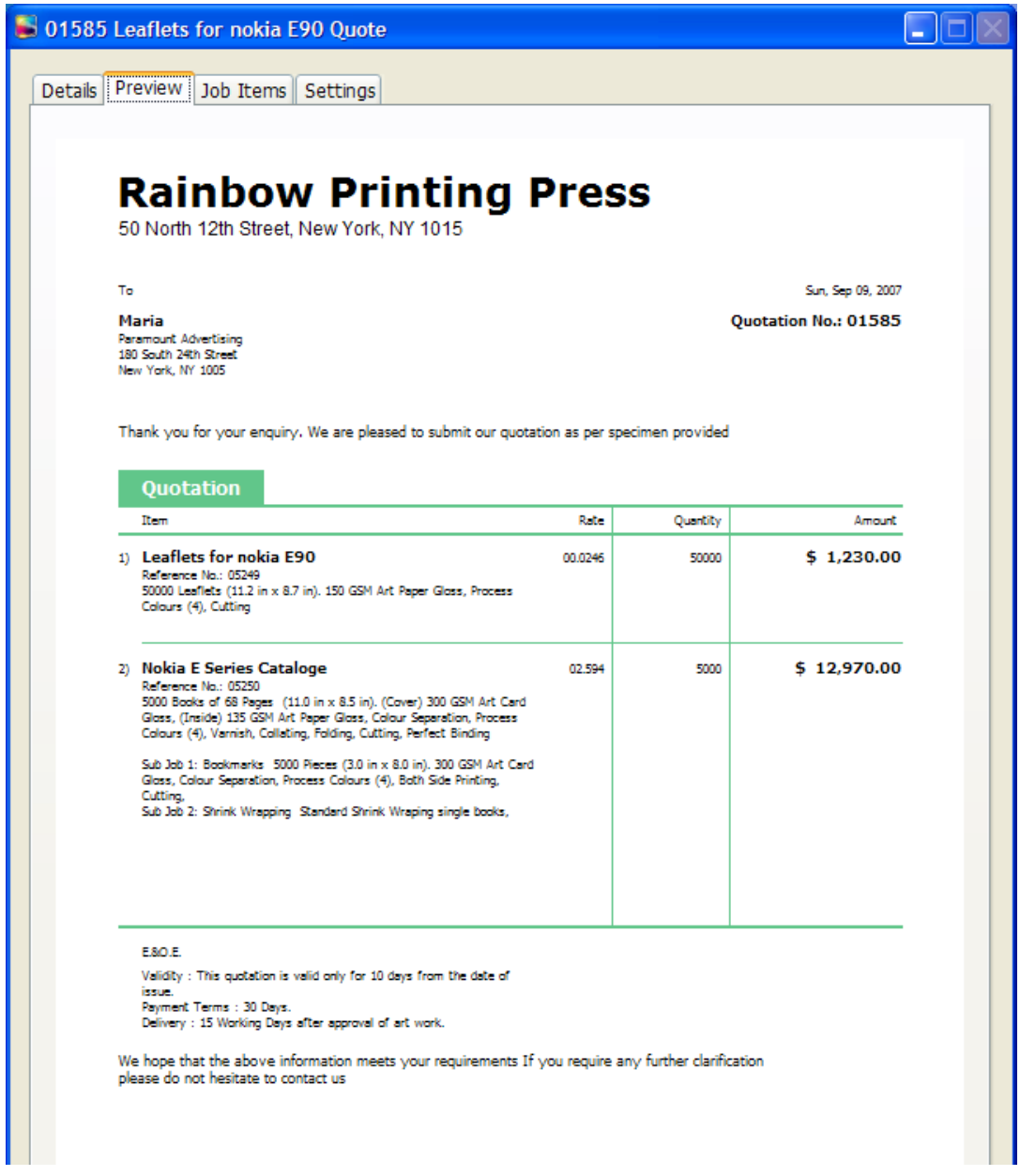


To make a new job entry. Click the '**New Costing**' button on the **main window** tool bar or **Starting Panel** window

2 Quotation

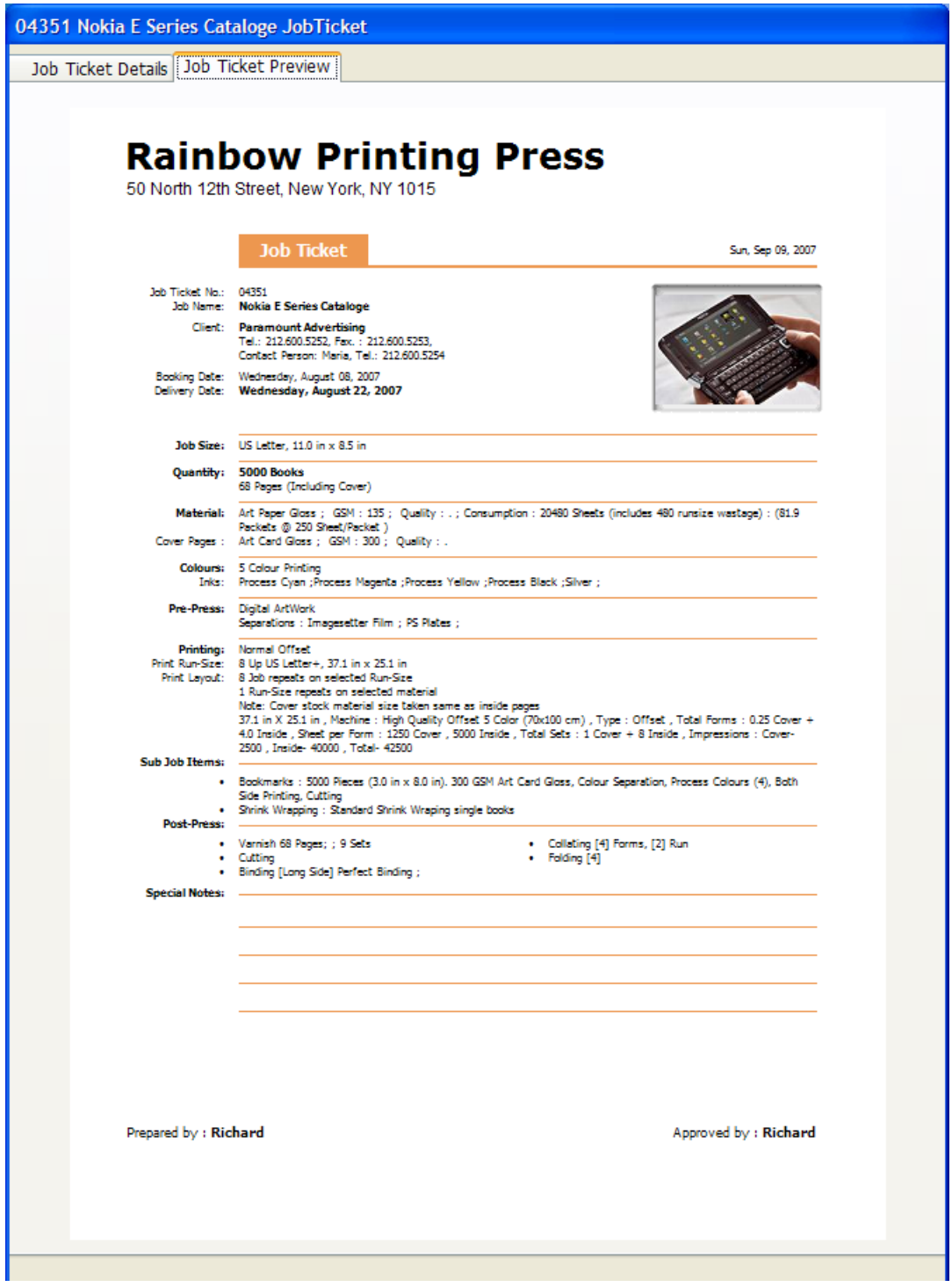
In this step you will make the **Quotation for Client**.

To make a new Quotation, select any approved job you created in the first step and click the make Quotation button on the Main window tool bar. Now PressGenie will create a new Quotation for the selected job. On the quotation window you can include more jobs in that quotation or change the details, terms & conditions etc..



3 Job Ticket

After you got the conformation for the quoted rates and terms from the client, you can make the Job Ticket. To make **Job Ticket** select the job (costing) in the costing tab and click the '**Make Job Ticket**' button on the tool bar. Then PressGenie will create a Job Ticket with full details about the job for final production.



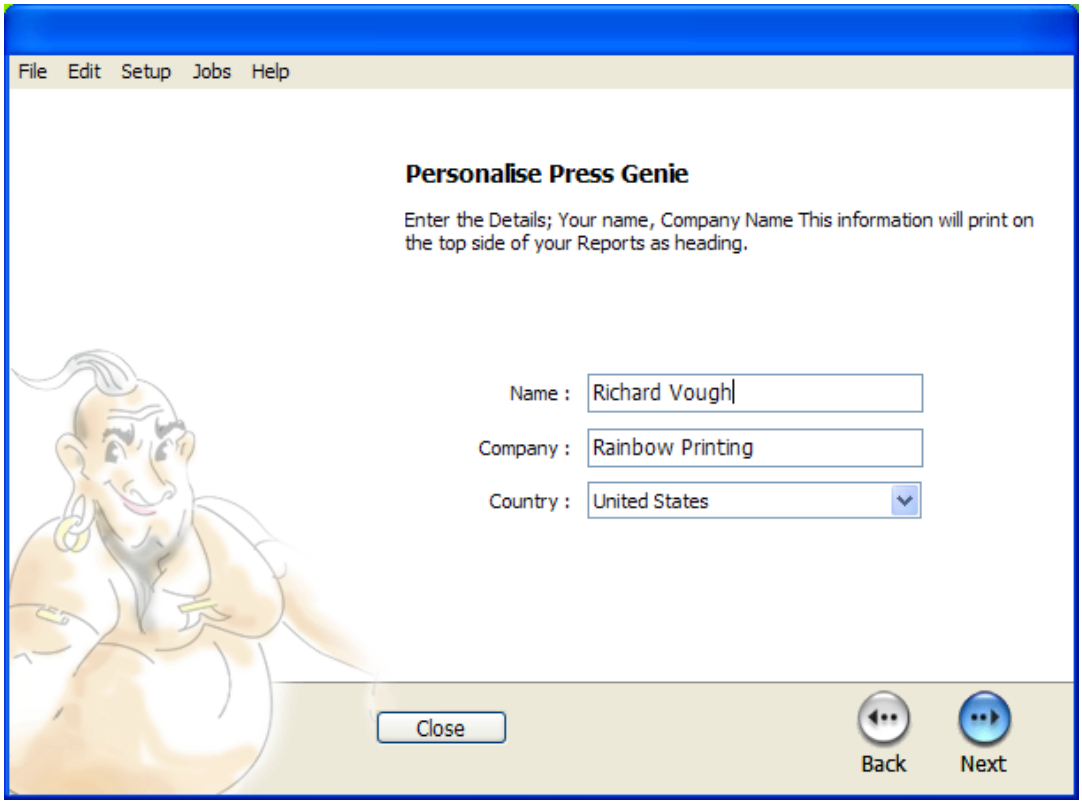
PressGenie in Detail

The company name will show on all printouts as your organization name.

The master password is the password for the user 'Administrator'.

Personalization

First time you open press genie, you will be guided to a **Personalization Window**. In this window you enter your Name, Company name, Country setting and the Administrator password.



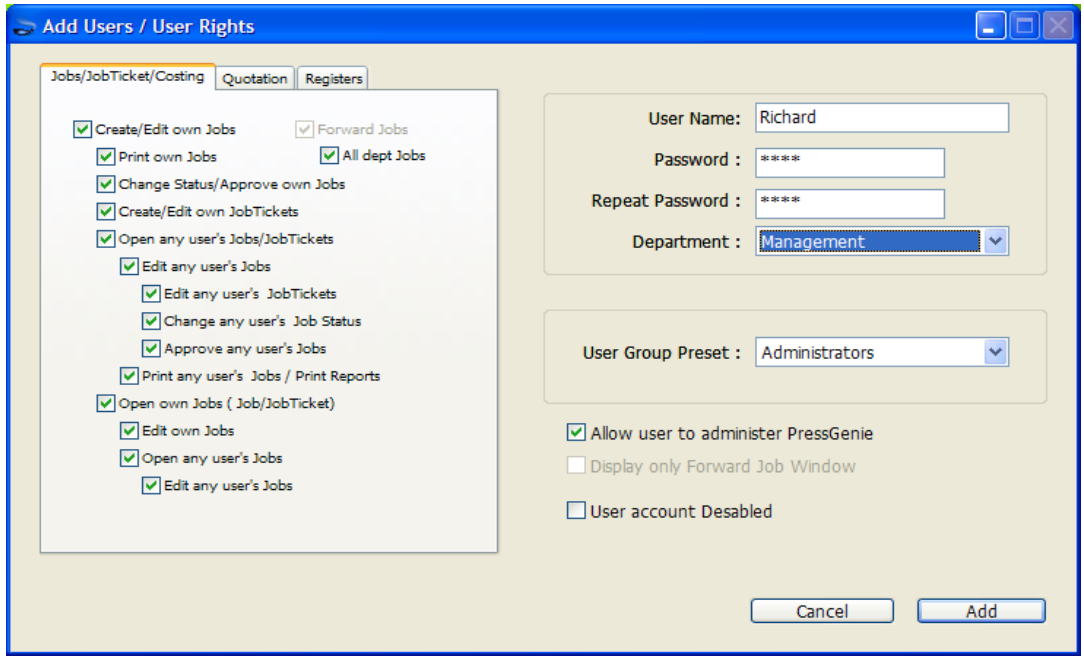
In previous session you can select the database location. Use '**Default**' to select the default location (same as the application location) or you choose a **New Location** or select an **Existing Database** . After completing this section you will get a log-in window. You enter your **Administrator** (master) password to log-in initially.

The next scene is a **Basic Setup** window. From here you can setup some basic things or you can skip all this setups by clicking '**Setup Later**' button .

User preferences

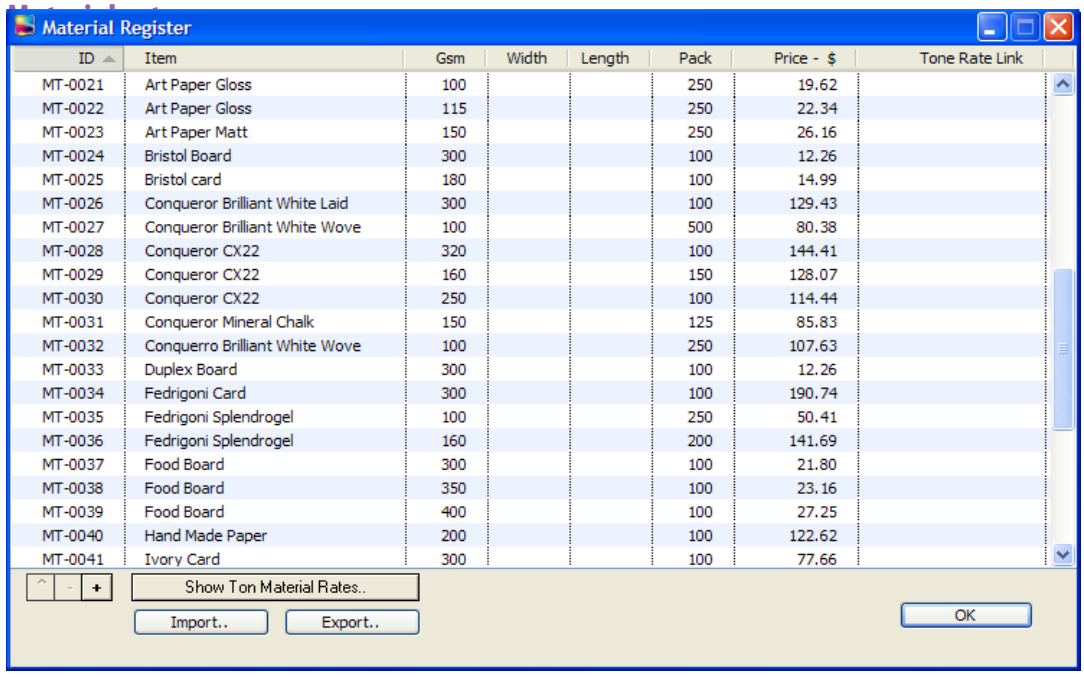
You can add new users or change the user rights from here. By adding user names and password you can allow a user to login as a separate user and settings with

If you want to get report for a particular machine or operator, you need to add that machine name or machine operator as a user and forward jobs to that particular user then take the report using the report window.



configurable / limited user rights you can also add printing machines / operators to track their jobs (read **Tracking** section for details).

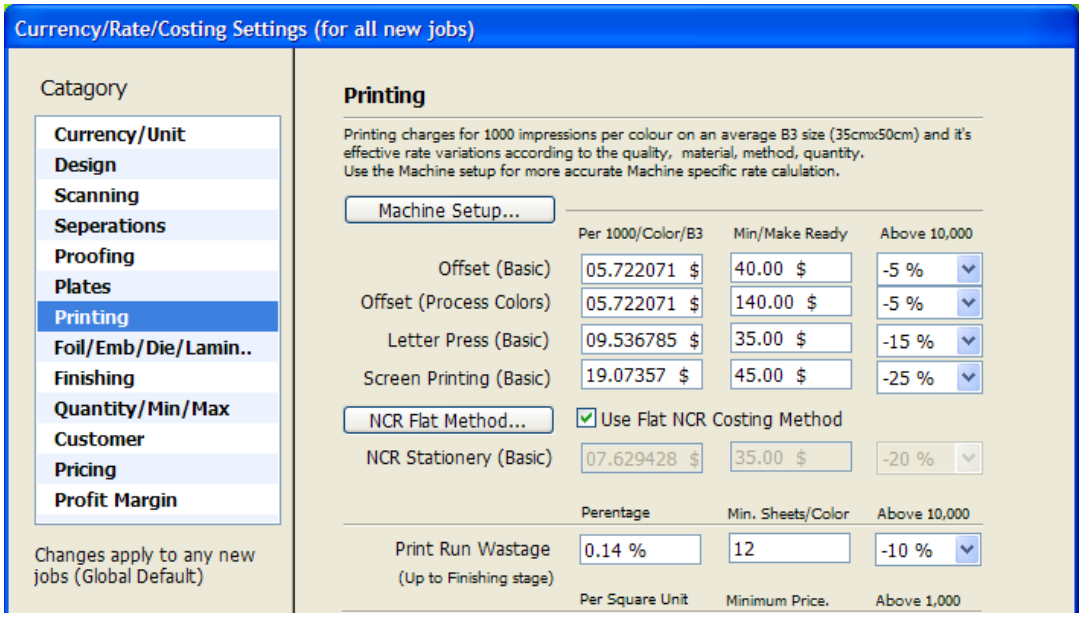
You can enter the paper prices as Metric Ton rates using the Ton material window then link any material to that particular Ton material and get the prices for different grammage material automatically.

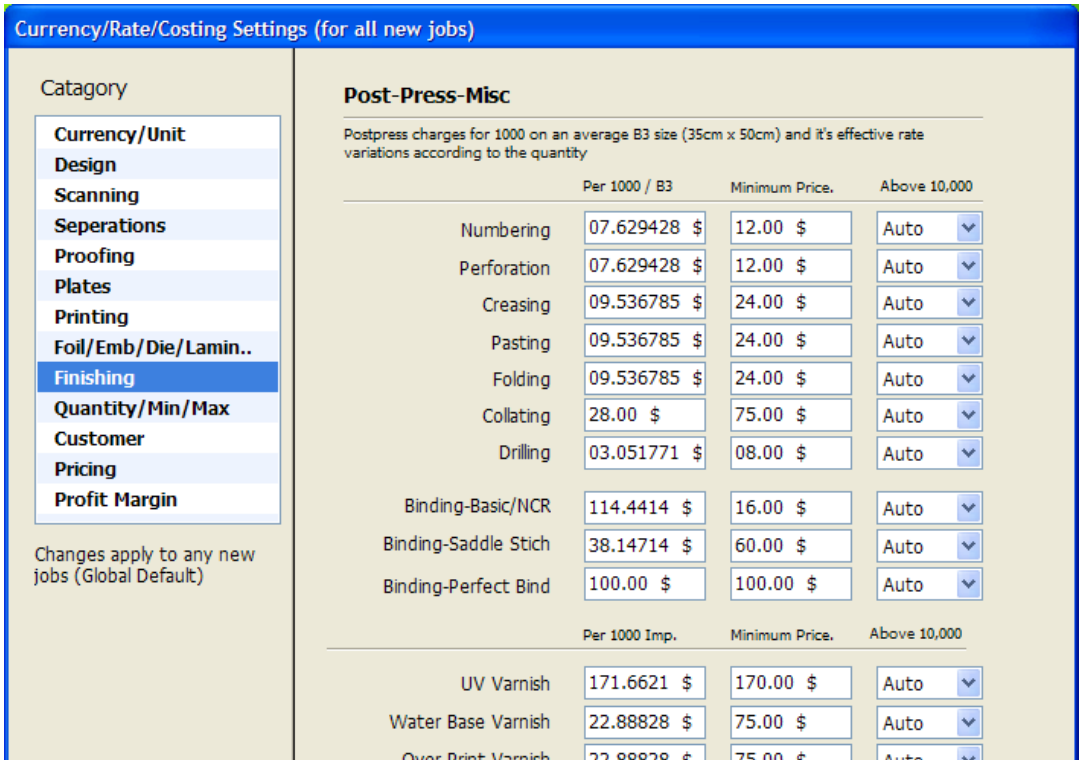


You can enter the **Material** details here. Materials can be linked to ton rates. To do so select a link to the ton material list.

Costing preferences

This is the main setup window for **Costing**. You can enter individual rates for each printing processes or accept the original rates as default .

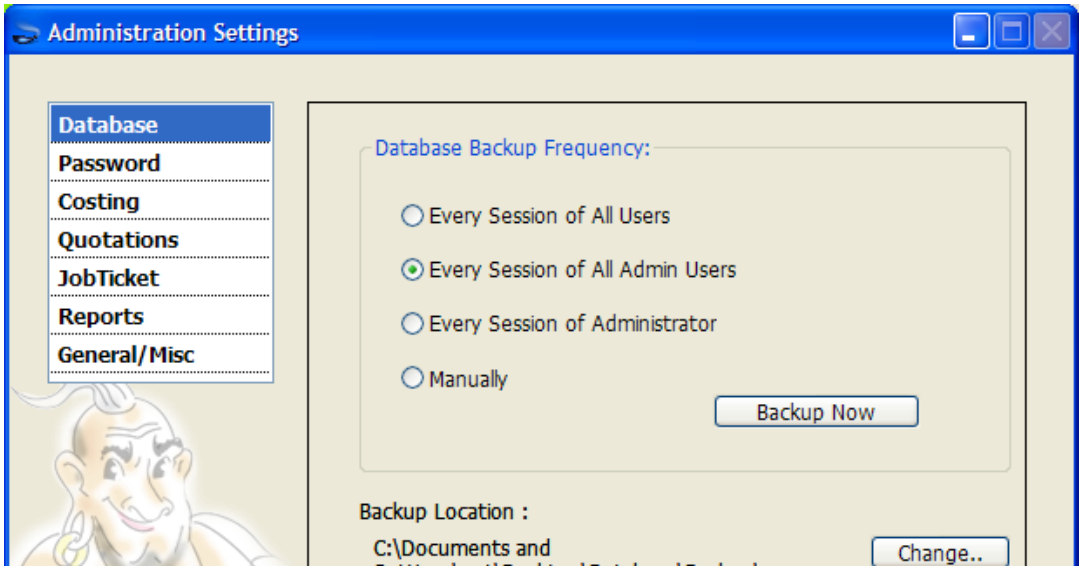




If you open the costing preferences when a job already open. The preferences will affect the opened job only.

If no job has opened then the setting will be applied globally. Any new jobs will take this settings as default.

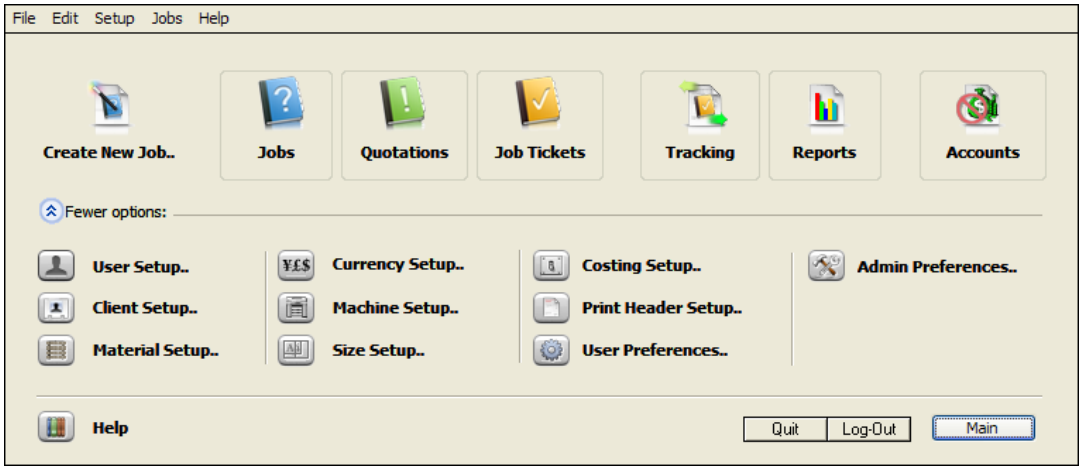
Administrator preferences



This is the window for **Administrative** setup including administrator password & back-up.

Starting Panel window

If you create a new user, The user can only use the Tracking window. All other options are disabled by default. The Administrator need to add rights to get the access privileges



From this window select any button to continue

1. Create new job : Create new job entry/costing

2.Jobs /Costing : Go to the job/costing listing

3.Quotation : Go to the Quotation listing.

4.Job tickets : Go to the job ticket listing

5.Tracking : Go to Tracking windows you can find the status of the job/Quotation/ Job Tickets (pre-press, printing, finishing, delivered etc.)

6.Reports: From this window you can check various reports base on salesman, depart-

ment, date, job, quotation, job ticket etc;

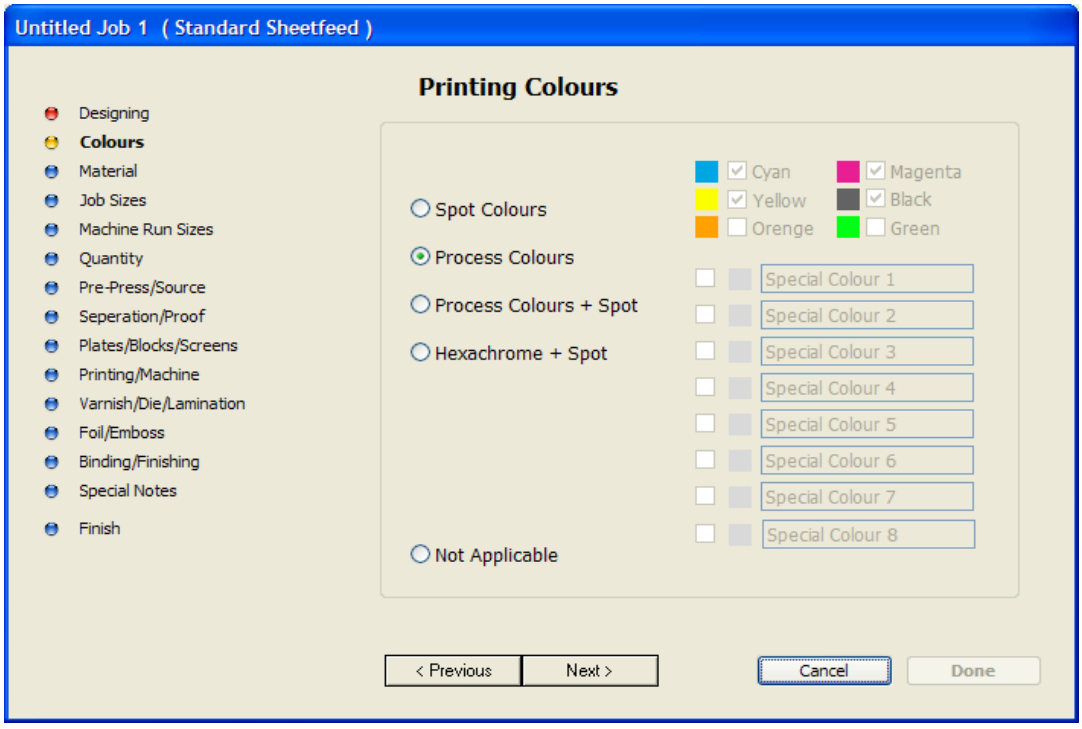
Frequently asked Questions (How to.....)

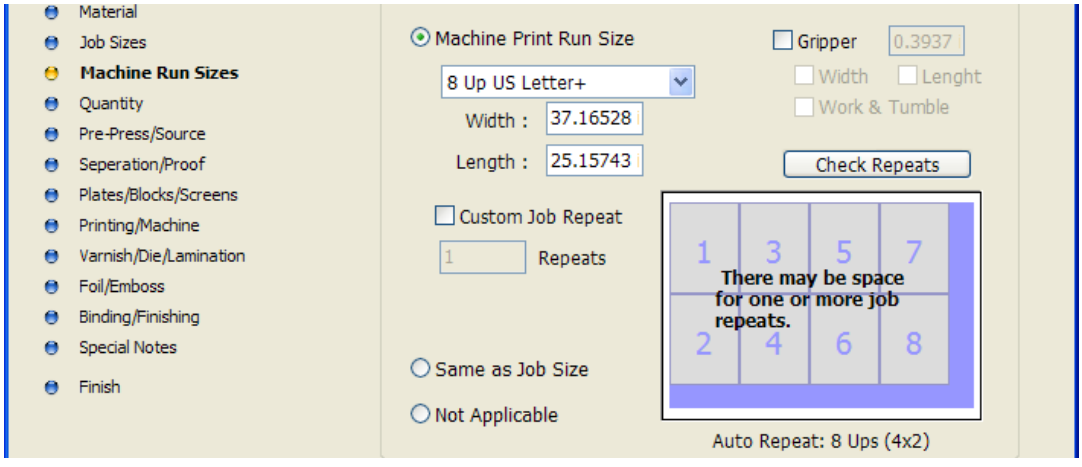
How I create a new Job / Costing ?

Click the '**New Job**' button on the **Starting Panel** window or **Job Listing** window. Then the **Client Selection** window will appear. Select the client from the list or create a new client and select it.

The next window will be '**Job Type**' window. Choose the Job Type (**Sheet-feed, book, NCR** etc.) or select a previously saved **Templates**.

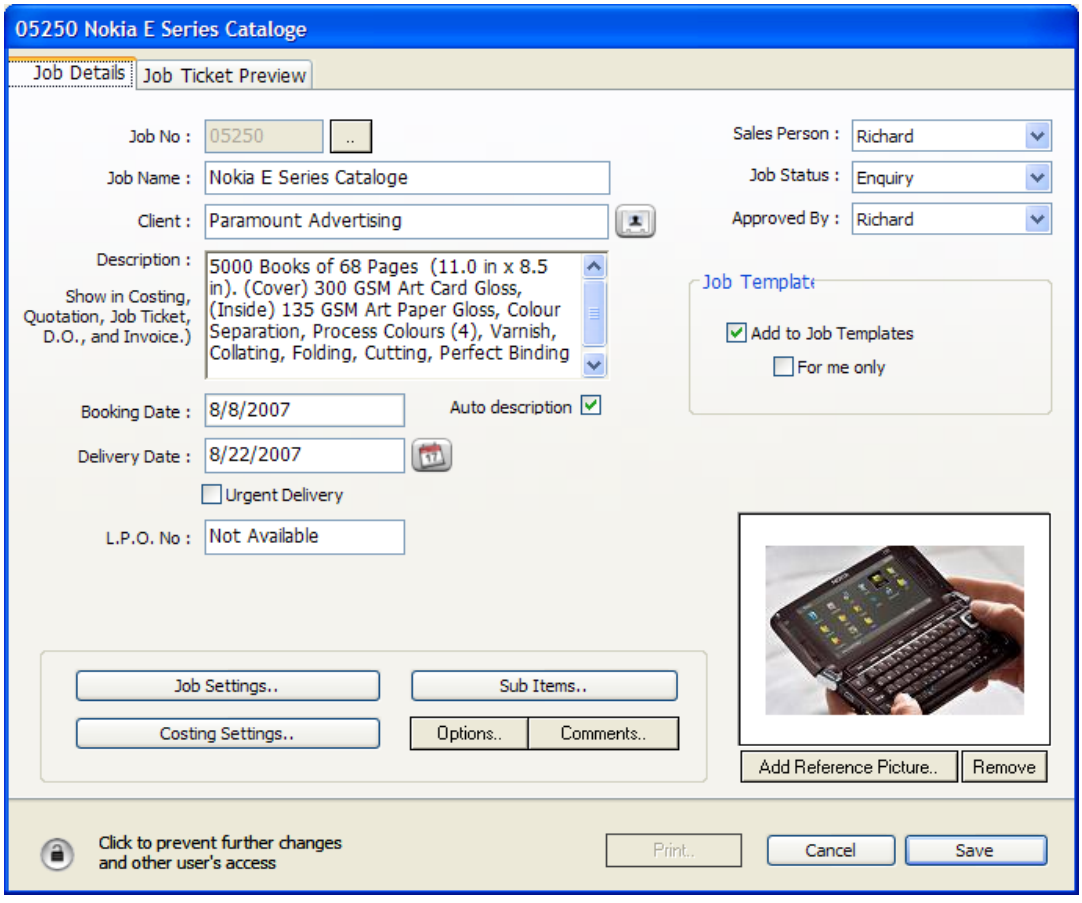
Then the **Job Setup wizard** will appear. With this window you select the options you





want or select '**Not Applicable**' if don't. After naming the job on the last wizard option click '**Finish**' button to complete the job settings.

Next window will be the **Item Details** window



You can select/change Job Number, Client, Date, Sales Person, Status, Approval, Reference Picture, Save as Template, Job Settings, Costing Settings, Sub Job Items, Job Options, Job Details etc..

Sub Job Items (Optional)

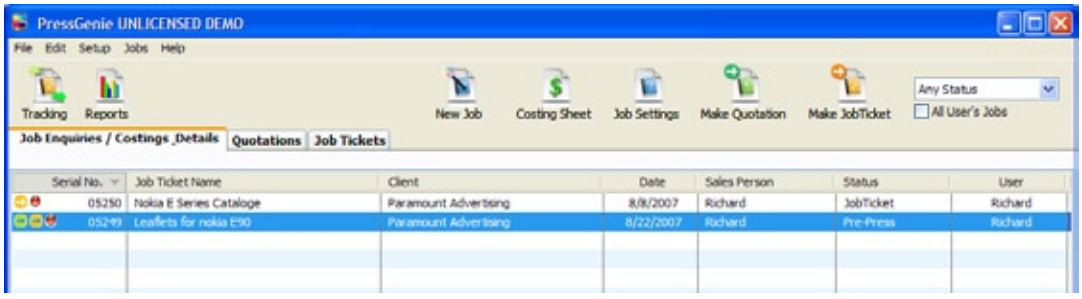
Use the '+ Add Sub Item Manually' to add items which require no costing calculation or detailed job ticket like photography charges, Transportation charges.

Some times your job may require two or more material or steps or type of printing to complete the job. For example, a paste on pocket for a folder, Some black & white forms in a process color book, Photo shoot charges for a brochure, Transportation charges, Some outsourcing charges etc.. Click the '**Sub Job Items**' button to add new sub job. On the **Sub Job Items** window you can add two types of **Sub Jobs**.

Use '**+ Add Sub Items**' button to add sub jobs in a wizard style job setting window with

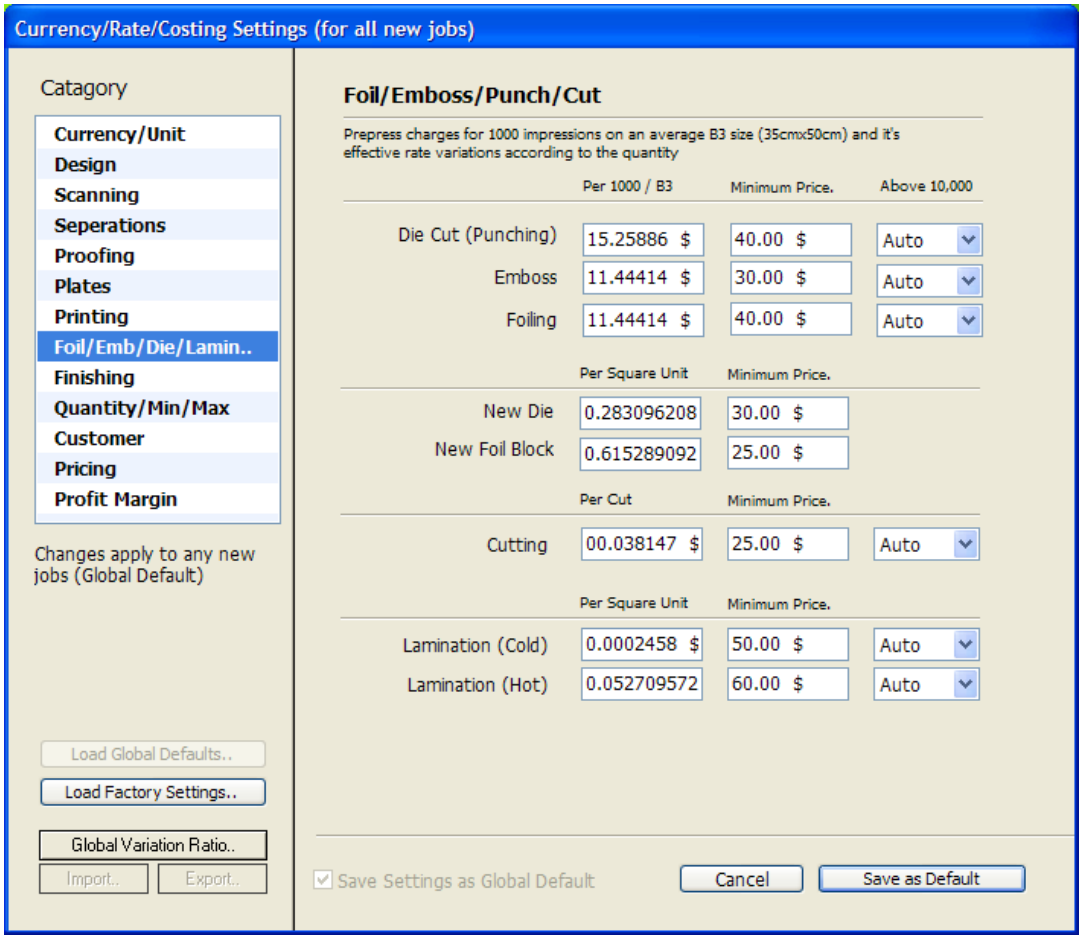
fully **Automatic Costing** and job ticketing. Then click the '**Save**' button to complete the job.

How I View the Costing ?



Just double click on the job on the **Job listing** window or click the '**Costing Sheet**' button to view the detailed **Costing Sheet**

How I edit the rates in the costing sheet ?

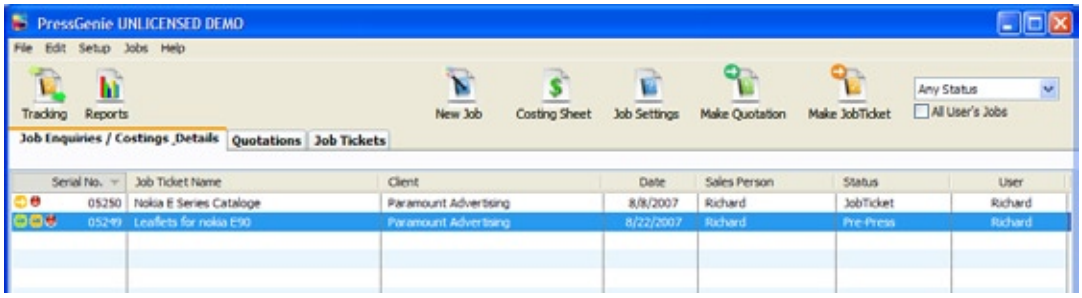


If you open the costing preferences when a job already open. The preferences will affect the opened job only, if no job has opened the setting will be applied globally. Any new jobs will take this settings as default.

Costing Sheet rates are calculated **automatically** by PressGenie using the **Costing setup**. If you want to alter the rates, click the '**Job Setting**' button to open the item window and click the '**Costing Preference**' button to open the **Costing Settings** window. Save the changes and open **Costing Sheet** to view the changes.

You can also enter a **Fixed Total Price** for the job by entering a **fixed amount** on the '**Custom amount/pricing method**' tab on the costing sheet window. This rate will over-ride all auto generated values. From this tab you can change the Amount Rounding Style Pricing Method , Payment mode, Delivery Mode, Risk Factor etc..

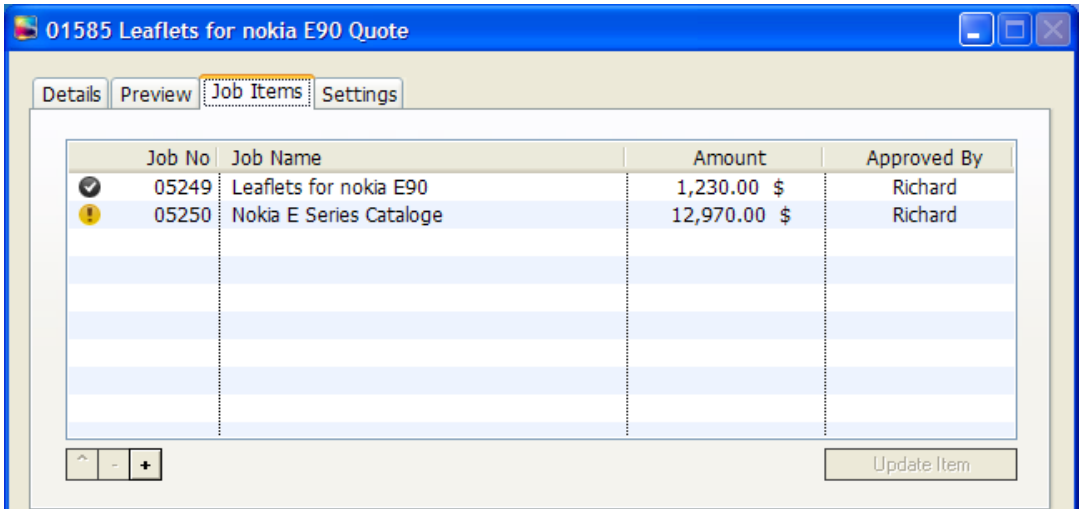
How I make a Quotation for a client ?



To change the default terms & condition and other texts in a quotation, open Admin preferences and edit the texts on the Quotation tab

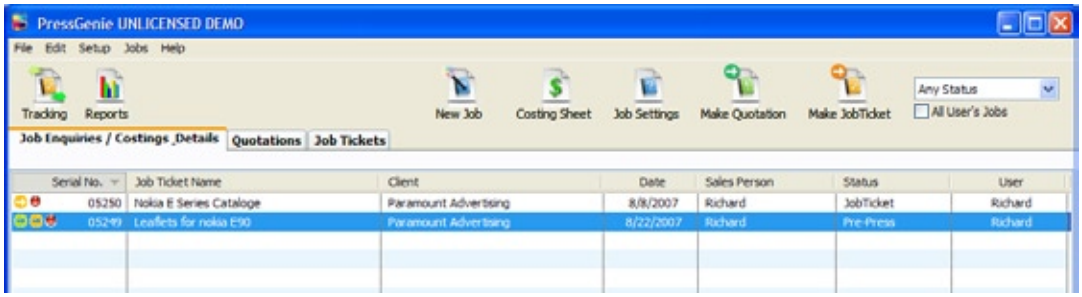
To make a Quotation, Select a listed job and click the '**Make Quotation**' button. Then the **Quotation Setup** window will appear. Then save the Quotation window to complete the process. In order to make Quotation from a Job, the job should be approved first. In the Quotation window you can also change some the other settings.

How I add another job to an old Quotation ?



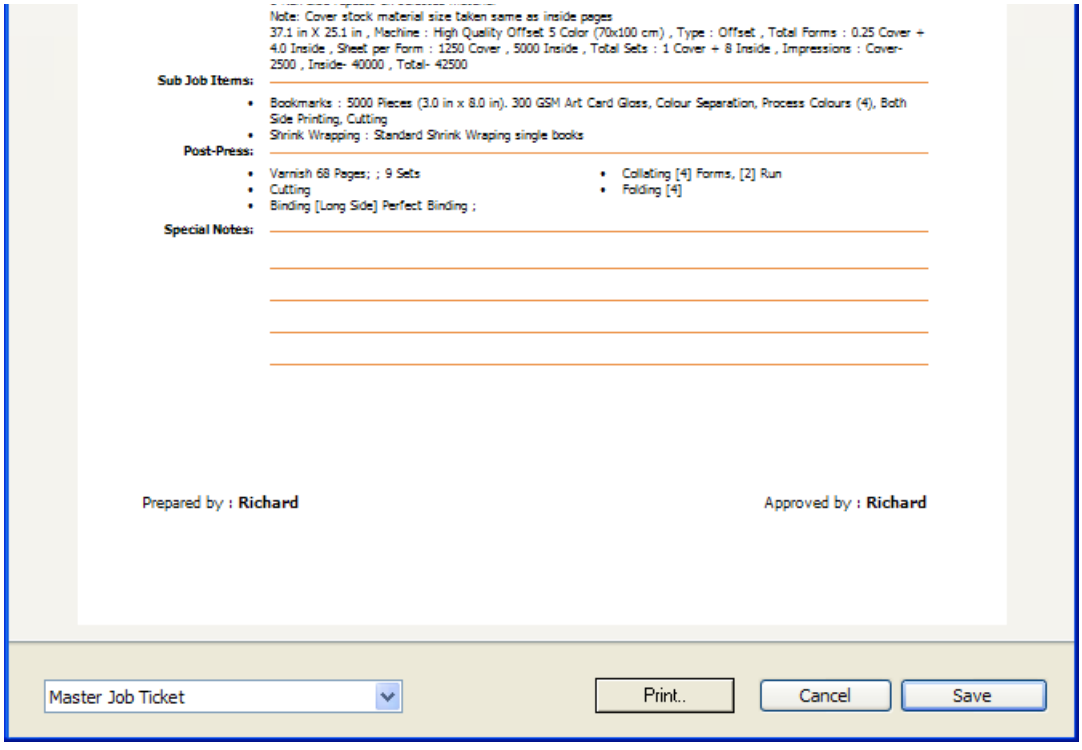
Open the old Quotation. Click the Job Item tab and click the add (+) button to select one or more **approved jobs** from the list.

How I make a Job Ticket ?



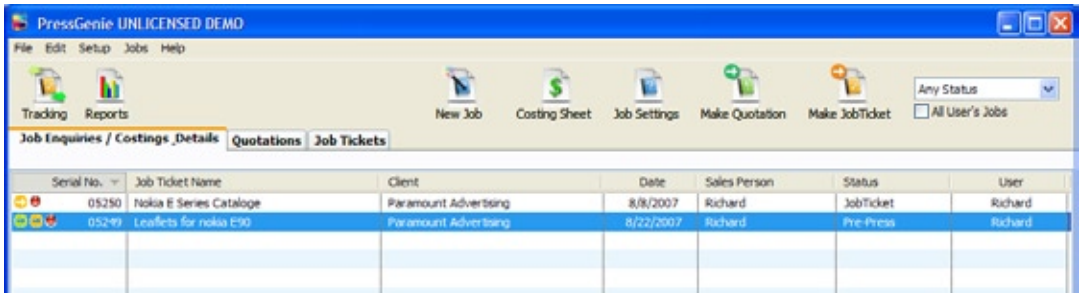
Select the job you want to make Job Ticket. Make sure the Job is approved. Then clicked the Make '**Job Ticket**' button to create a new Job Ticket.

How I Print a Sub item Job Ticket ?



Open the Job Ticket to get the Job Ticket Item window. From there you can select the **Sub Item** using the **Job Ticket Item menu**

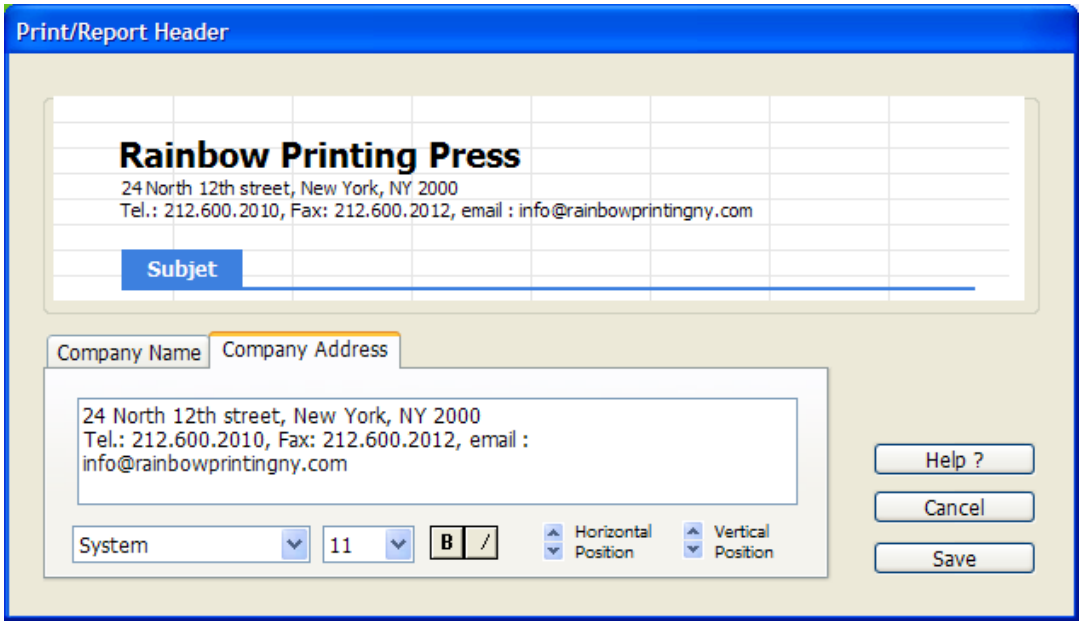
How I track the status of a Job



If you want to give access a user to give control to change status of the job in all department, select the option 'All Departments' in User rights tab on user preferences.

To open the **Tracking Window,** click the '**Tracking**' button on the **Starting Panel** window or the **Main Listing** window. In the **Tracking** window you can find the job using different filters.

How I print my company name statements



Click the '**Print Header Setup**' button on the **Startup Panel** window to open the **Header Setup** window. You can configure your Company Name, Address and Company Logo how you want to print on the statements.

If you want to get report for a particular machine or operator, you need to add that machine name or machine operator as a user and forward jobs to that particular user then take the report using the report window.

How I create a Printing Machine operator's monthly report ?

To get **Report** for a particular **Machine or Operator,** you need to add that Machine name or Machine operator as a user before, so you can forward jobs to that particular user then take the report using the report window using different filters.

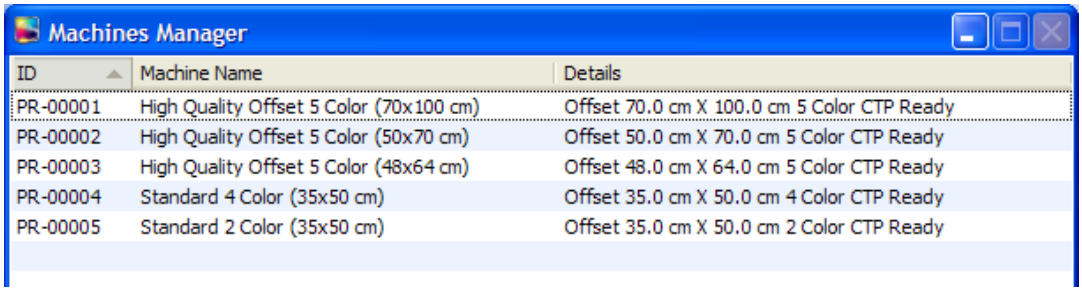
How I create a sales person's monthly report ?

Open the **Report Window** by clicking the '**Report**' button on the **Starting Panel** window or the main listing window. In the report window you can make reports using different filters.

How I run PressGenie from more than one Location (Multi-User)

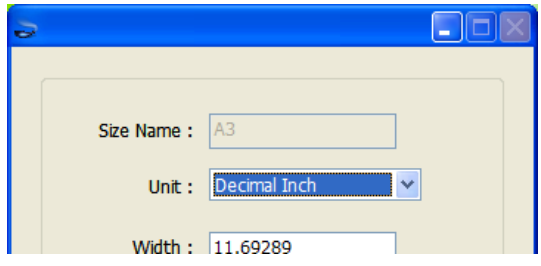
On the **Log-On window** click the '**Database**' button to enter the **Database Setup** window. Select or create a database on a **shared volume** accessible for different computers. Repeat this setup on all machines (Use the same database location on all machines) to setup a **Multiuser PressGenie Environment**.

How I apply different printing charges for different machines



Add Printing Machines using the '**Machine Setup**' button in the **Starting Panel** or Small **Tool bar**.

How I use/manage Currencies and Sizes



Manage currencies, sizes using '**Currency Setup**' button in the **Starting Panel** or **Small Tool Bar** and **Size Setup** for sizes .

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