

RATES AND PROCESSES

How to Add a Rates Item

There are various ways of setting up records in the Rates file, depending on the size and complexity of your company, and what reporting is required.

In a smaller system, activity rates are often made up of machine initials and the initials of the function being performed, eg RYOBI.MR for Ryobi Make Ready. To separate activity rates from paper stocks, it is common to begin all stock codes with a Z, the paper type, then the size, and any other detail needed, eg ZNCRA1CB, or ZNCR640900CB for carbon back NCR A1 (640 x 900). The code length is limited to 15 characters.

In a large system, it is important that department and cost centre set up are discussed with your computer consultant, as the rates codes need to set up in a logical way in order to be most useful.

To add a new rates item, click on the Misc button, then the Rates button, to display the list of rates. Click New and enter the new Rates Code into the Create New Record box that pops up. You must enter a rates code (use a meaningful code that you can relate to - eg. GTO.MR for GTO Make Ready). NOTE: The maximum field length is 15 characters. Click OK to proceed or Cancel to not add the new rates item.

Use Copy data from current record (only if required).
Click Create.

Enter the description of the rates item. This is what will appear in your master file list. For a paper rate, key in the size (e g.: 650 x 910) and the GSM of the paper.

Click on what type of rates code you are entering. (For example, for sheet paper click on sheet paper - the pack size if applicable should also be entered).
Enter an inventory code if you use these for purchasing, and a supplier code and their inventory code.

Enter the *rate* for this item. This can be entered as a dollar amount (eg. 60 for hourly \$ rate for artwork) or an hourly rate per quantity -eg 60/2000 - number of units (2000) to be performed per hour (at hourly rate of \$60).

If multiple rates have been purchased, a break may be inserted to allow a change in the number of units per hour or the actual cost per hour. (Eg. If the number of units per hour is to be increased to say 4000 after the first 2000, then the break would be entered as 2000 and the next rate would read 60/4000 and so on).

Enter *Price per* as required. Click on 1000 if a paper rate per thousand was entered, but for other items such as scans in the example screen, *each* may be more appropriate.

A *minimum* may be entered if required.

Enter a *prompt* that will advise the estimator what should be entered to arrive at the cost for the work being performed.

The *department / cost centre code* must be entered. This is the code that was entered at original system Setup for the particular department. The actual rate of the work being performed may be entered to allow discounting.
Enter any *notes* relating to this item, as required.

Multiplier radio buttons: only one of these can be activated
Nothing: Used when calculating items such as artwork, plates, etc.
Purchase sheets: Whenever purchase sheets are to be used in a calculation
Press sheets: Whenever press sheets are to be used in a calculation
Weight: Currently uses weight of purchase sheets for freight, etc
Area: Used when for example, calculating ink

Paper cost:

Length:

Order qty: Whenever the quantity ordered is to be used in calculation

Pro rata:

Manual item: When manual figures are to be entered for say outside work

Est. cost:

Factor: Used for calculation such as ink

Check boxes (as many of these as required can be checked)

Include set up waste: Used if required for example with machine running

Include running waste: Used if required for example with machine running

Include trim waste: Not currently used

Photocopy type costing: Used if multiple rates module purchased and total quantity ordered is to be costed at cheaper rate (eg: 20c for 1-50, 10c over 50 - therefore if 20 ordered cost would be \$4, if 60 ordered cost would be \$6). Note that this can introduce an anomaly where 40 cost \$8 but 60 only cost \$6

Multi run: Multi run is where say 2 runs of 1000 are treated as a 2000 run, with the minimum and multi rates applied to the 2000.

For example, if you had a rate of \$20 / 1000 for the first 500, then \$15 / 1000 and a minimum charge of \$25, with multi run on the calculation is 2000 run so $\$20 \times 500/1000 = \10 for the first 500

(The $\$15 \times 1500/1000 = \22.50 for the next 1500, which totals \$32.50, which is greater than the minimum.)

[Without multi run the calculation is $\$20 \times 500/1000$ fir the first 500, then $\$15 \times 500/1000$ (\$7.50) for the next 500 which totals \$17.50 (less than the minimum \$25), so we charge 2 minimum runs of \$25, a total of \$50].

Apply in lifts of: Used for calculating for example guillotine work where lifts are say in 250

All sections: Use when multiple parts are to be calculated. (Eg: when 3 types of paper are used in invoice books and one machine run is to be applied to the three parts)

Rates, How to Find

Click Misc, then the Rates button, to display the list of rates

If this is the first time you've selected Rates the "Select" screen will be displayed. Once you've made your selection, click OK (NB clicking Cancel will display no rates) and show all, which will enable you to access all records in the selection.

You should make sure you have all records in the grid before you try to find the rates item you want.

Select the column you want to find the record in, (eg description, or code) and key in the code or description. The system will move to the closest record. If it is not on the selection, click Find, and enter the code or name you are looking for.

You can change the way you find the records by clicking the drop down box, which will give you various ways of finding the record you want. You can use rates code, alternate code, or description. Once you have entered the code, the record will be displayed. Click Add to List to add it to the List.

If you do not enter the correct code or name, the list screen will display again, and you may need to make your selection again (using Select - see below) to include a wider range of rates items, or use the slider bar to find it manually.

Once you have found the rates item you want, click Details to display the details for that item.

To change your selection, click Select, then Reset to clear any previous selections, change your selection, and click OK. Then click show all if the record you want is not displayed. (To change the way the records are sorted within the selection, click the column heading or use Sort - see Sort Methods)

Creating a new Process and Rates

A process AND a rate must be set up to enable QEQ to operate correctly.

- Any new rates required for this process need to be set up first.
- Select the existing process that you wish to copy.
- Select <New Process>” from the Process Details screen.
- Enter the process code and click the <Copy Details> option. This will create the process and the necessary rates
- Enter / change details as required.
- Select the type of Process you are creating (for example “Finish”).
- Change the Type if necessary and enter the Process Description (for example “Saddle Stapling”).

If you are adding a new “Print” type process, you will also need to check/correct the maximum and minimum machine sizes for Printcost Xpert to refer to.

Enter the <Number of Colours>, the <Default Overs> and the <Default Wastage>.

*Add *C to multiply by the number of colours front or *B to multiply by the number of colours both sides and *S to multiply by the number of sections – if applicable. (For example, “100*B*S” in the Default Overs field will calculate the number of overs required as 100 multiplied by the number of colours both sides multiplied by the number of sections.)*

Other multipliers allowed to include values only if the imposition is of a particular type:

**W for Work and Turn*

**T for Work and Tumble*

**D for perfecting (Duplexing)*

- Check the <Process can Perfect> box if you are adding a new “Print” process for a multi colour press that you use to perfect print.
- Check the <Insert Process in Open Mode> box if you would like to be able to change the rates of this process (for this job / quote only) when it is selected on the QEQ (Quick Entry Quoting) screen.

For example, check this box for any process that you would like to see the calculations that Printcost Xpert has made, such as for “Print” type processes.

- Check the <Insert Process in Sort Order> box to use the <Order> field. With this option, each process is given an order number, so Printcost can slot each process into the correct order when a quote is being created.

For example, although you may select the process “Creasing on Cylinder” after you have completed the rest of the quote, Printcost will slot this process in the correct order with the other processes.

- Check the <Not Allowed in a Printing Part> box if the process you are adding is a “Finishing” type process, and is therefore to apply to the whole job not to just one printing part.
- Check the <Not Allowed in the Finishing Part> box if the process you are adding is a “Print” or “Other” type Process that is applicable only to one printing Part.

For example, the “Die Cutting” Process may only be applicable to the cover (say “Part 2”) of a job and not applicable to the text (say “Part 1”) of the job.

- Check any of the <Xpert should not consider...> boxes if you are adding a “Print” type process and do not want Printcost Xpert to use this process when calculating the best way to print this type of job.
- Now add, remove or change any rates as required.

Rates Suffixes

The suffix of a rate is used by Printcost Xpert to determine the type of cost for “Print” and “Print-con” (continuous type printing) process types.

For example, any rate with an extension code beginning with “M” is understood by Xpert to be a fixed makeready or set up cost. Then, depending on the type of Process that the rate is attached to, Xpert will suggest the number of makeready or set ups required.

The rate for “GTO52-4COL.M”, for example, will be multiplied by the number of colours (and sides, if not work & turn). Note that the rate for “FOLDER.M” will simply default to “1” (as “Finishing” and any other process types ignore the extension code).

It is possible to have more than one rate with the same type of extension code. For example, “GTO52-4COL.P” may be for Metal Plates and “GTO52-4COL.P1” may be for Paper Plates. In this case, you would probably want Xpert to default to suggesting only one type of plate – and then manually override the default each time you wish to use another type of plate. If this rate is to be a default, you should check the box to the left of the rate description on the Process Details screen.

Rates Suffixes available for the "Print" Process Type are:

F	F ilm
P	P late
PV	P late for Seal V arnish (required if chargeable)
M	M akeready or Set Up
MD	D rying Time (for work & turn/tumble jobs)
MP	M akeready for P erfecting
MS	M akeready S pot Varnish (used if different to the "M" cost)
MV	M akeready Seal V arnish (used if different to the "M" cost)
R	Machine R unning
W	W ash Up
I	I nk
V	V arnish
D	Any rate where the default entry required is "1"

Actual Rates

Actual rates are used to enter real costs, and may be different from rates in the Rates file (even if the codes are the same). Actual rates are optional, but recommended. Where actual rates have been created for items in a job or quote, the actual costs are shown on the job summary and invoice screens.

The difference between actual and estimated is shown on the Compare screen, and some reports also list the difference between estimated and actual.

You can accept either the estimated or the actual costs for invoicing purposes, and these can be changed once accepted, prior to invoicing. Normally all items have actual rates set up for them, apart from paper stocks.

To Add Actual Rates:

If no actual rates file exists, all items in the rates file can have an actual rate created for them by using the Z function on the rates toolbar. This will only work for the first creation of the actual rates file, not for any later changes to the file. A further function (Z111) allows you to create actual rates records for each rate selected that has no actual rates code, and there is a button on the rates detail screen to create a single actual rate from the current rate.

If no actual rates item exists for one rates item, clicking the arrow randell on the actual rates code field opens the actual rates list screen, where you can create an actual rates item. The detail is not copied from the rates file - it needs to be set up manually in the actual rates file, but you can use the Control C (copy) and Control V (paste) functions to enter the information in the actual rates fields. Actual rates can be updated when using Update Rates on the Summary screen.

To add a new actual rates item

Click <Printshop> <Actual Rates>

Select the rate you want to use if you want to base the new rate on an existing rate

<New>

Enter the new Code

Tick <Copy Details from Current Record> if using this. <OK>

Enter the description for the new item

Select the type of actual rates item (normally either Labour / Machining Productive or Non-Productive).

Enter the rate, per and the cost centre.