

Price and Cost Management



Instructor Led Training

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Chapter 3-Exercise E

Price Lists Types

Price List Type	Purpose	General Use For
Basic	Assign basic per page costs for monochrome and color pages on printers and copiers	Basic print and copy transaction tracking
Advanced	Assign costs for extended job and page attributes including paper size, type of paper, paper tray, and duplexing.	Advanced printers, color printers and MFPs

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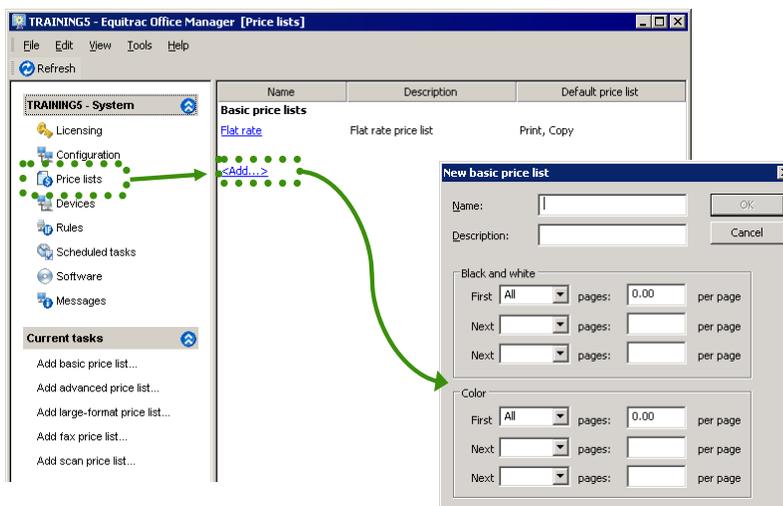
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Price Lists Types

Price List Type	Purpose	General Use For
Large-Format	Assign costs based on area or linear charge pricing for wide format jobs	Plotters and wide-format printers
Fax	Assign costs for fax jobs by page or by minute, and optionally, by prefix	MFPs
Scan	Assign costs for scan jobs per type and page attributes	MFPs

Creating Price Lists



Flat Rate Price Lists

The screenshot shows the 'TRAININGS - Equitrac Office Manager [Price lists]' window. On the left, a tree view shows 'Basic price lists' expanded to 'Flat rate'. A table lists the 'Flat rate price list' with a description of 'Print, Copy'. A green arrow points from the 'Flat rate' entry to a 'Modify 'Flat rate' price list' dialog box. The dialog box has the following fields:

- Name: flat rate
- Description: Flat rate price list
- Black and white section:
 - First: All pages: 0.01 per page
 - Next: pages: per page
 - Next: pages: per page
- Color section:
 - First: All pages: 0.01 per page
 - Next: pages: per page
 - Next: pages: per page

Buttons for 'OK' and 'Cancel' are present.

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Basic Price Lists

The screenshot shows the 'Current tasks' list on the left, with 'Add basic price list...' selected. A green arrow points from this task to a 'New basic price list' dialog box. The dialog box has the following fields:

- Name: Simple Pricing
- Description:
- Black and white section:
 - First: 50 pages: 0.002 per page
 - Next: All pages: 0.01 per page
 - Next: pages: per page
- Color section:
 - First: All pages: 0.06 per page
 - Next: pages: per page
 - Next: pages: per page

Buttons for 'OK' and 'Cancel' are present.

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Calculating Basic Pricing

First X number of black and white pages
 +
 Remaining X number of black and white pages
 - OR -
 First X number of color pages
 +
 Remaining X number color pages
 =
 Total Cost

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Calculating Basic Pricing

Based on the price list below, 10 copies of a 105 page job would be charged as follows:

50 pages x 0.01 = 0.50
 50 pages x 0.02 = 1.00
 5 pages x 0.03 = 0.15
 Total = 1.65
 X 10 copies = **16.50**

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Advanced Price Lists

Current tasks

- Add basic price list...
- Add advanced price list...
- Add large-format price list...
- Add fax price list...
- Add scan price list...
- Remove price list
- Set as default price list for ...
- Set as default price list for ...

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Create an Advanced Price List

Step 1: Finishing Operations

Finishing operations	Price	Basis
Punching	0.02	per job
Binding	0.50	per copy
Stapling	0.02	per copy
Folding	0.05	per copy
Trimming	0.05	per copy

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Create an Advanced Price List

Step 2: Page Detail Pricing

Page detail pricing
Default page price: 0.25

Type	Size	Color	Duplex	Tray	Media	Price
Any	Any	Any	Any	Any	Any	0.00
<Add...>						

Page detail pricing
Default page price: 1.00

Type	Size	Color	Duplex	Tray	Media	Price
Print	Letter	No	Yes	Any	Any	0.05
Print	Letter	Full	No	Any	Any	0.35
Print	Letter	No	No	Any	Any	0.30
<Add...>						

Create an Advanced Price List

Step 3: Surcharges

RIP/print charges
Job size: 0.00 per MB RIP time: 0.00 per minute
RIP surcharge: 0.00 per page Print time: 0.00 per minute

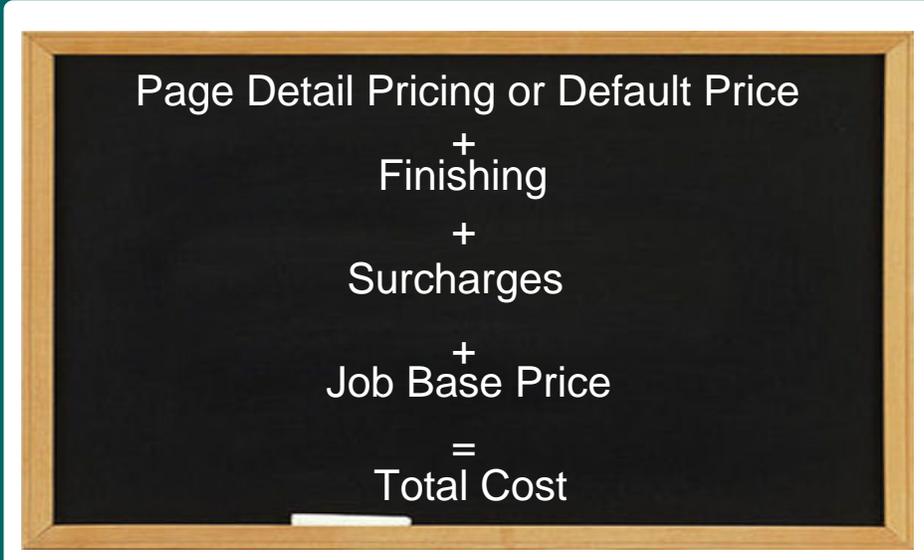
Account surcharge

Account	Type	Action	Value
Teacher	User	Percentage	(10.00)
<Add...>			

Time surcharge

Day	From	To	Action	Value
Mon-Fri	08:00	17:00	Percentage	10.00
<Add...>				

Calculating Advanced Pricing



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Calculating Advanced Pricing

Based on the following price list, 10 copies of a 135 page job that contains 105 black and white pages and 30 color, letter sized, duplexed, and stapled pages would be charged as follows:

The screenshot shows a software window titled "New advanced price list" with several sections:

- Job attributes:** Base price: 0.25
- Finishing operations:**

Finishing operations	Price	Basis
Punching	0.02	per job
Binding	0.50	per copy
Stapling	0.02	per copy
Folding	0.01	per copy
Trimming	0.05	per copy
- Page detail pricing:** Default page price: 0.25

Type	Size	Color	Duplex	Tray	Media	Price
Print	Letter	Full	Yes	Any	Any	0.25
Print	Letter	No	Yes	Any	Any	0.05
Print	Letter	Full	No	Any	Any	0.35
Print	Letter	No	No	Any	Any	0.30

105 pages x 0.05	=	5.25
30 pages x 0.25	=	7.50
1 job stapled		
x 0.02	=	0.02
Base Price x 0.25	=	0.25
Total	=	11.77
x 10 copies	=	117.70

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Large Format Price Lists

Current tasks

- Add basic price list...
- Add advanced price list...
- Add large-format price list...**
- Add fax price list...
- Add scan price list...
- Remove price list
- Set as default price list for ...
- Set as default price list for ...

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Calculating Large Format Pricing

Size of Image x Price by Square or
Linear Roll Width Or Default Price

+

Finishing

+

Surcharges

+

Job Base Price

=

Total Cost

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Fax Price Lists

Current tasks

- Add basic price list...
- Add advanced price list...
- Add large-format price list...
- Add fax price list...**
- Add scan price list...
- Remove price list
- Set as default price list for ...
- Set as default price list for ...

Prefix	Per page	Per minute
Default	0.00	0.00

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Calculating Fax Pricing

Numbers of Pages

·

Number of Minutes

+

Surcharges

=

Total Cost

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Scan Price Lists

Current tasks

- Add basic price list...
- Add advanced price list...
- Add large-format price list...
- Add fax price list...
- Add scan price list...
- Remove price list
- Set as default price list for ...
- Set as default price list for ...

New scan price list

Name: OK Cancel

Description:

Base price: 0.00 Surcharges...

Price per page

Destination	Black/White	Color
Email	0.00	0.00
File		
DMS		
Desktop		
Unspecified		

Surcharges

OCR surcharge: 0.00 (per page)

Account surcharge

Account	Type	Action	Value
<Add...>			

Time surcharge

Day	From	To	Action	Value
<Add...>				

Cancel OK

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Calculating Scan Pricing

Price per Page

+

Surcharges

+

Job Base Price

=

Total Cost

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Set the Default Price List

- Define your own the Default price list

Name	Description	Default price list
Print/Copy price lists		
Basic		
Flat rate	Flat rate price list	Print, Copy
Advanced		
MFP_List_1	Color For Legal and Letter	
<Add...>		

Apply the Price List

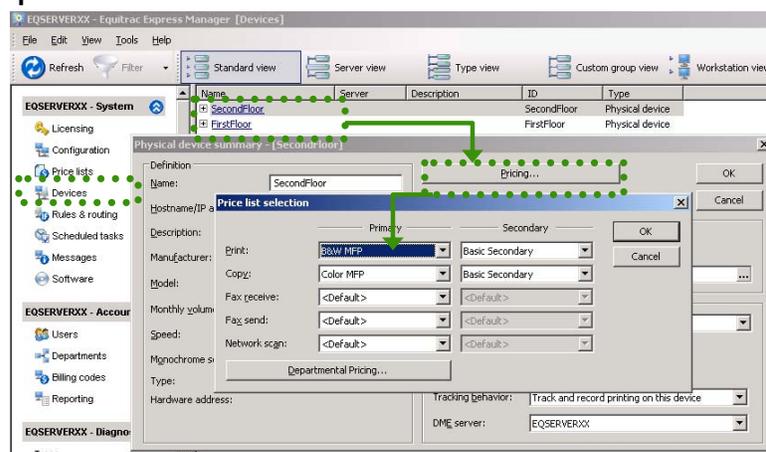
- Assign the price list to a physical device, port or printer
- Priority is given to the Print queue, Port, then Physical Device; bottom to top

Primary and Secondary Pricing

- Primary and secondary pricing allows you to track two separate costs for one device.
- For example:
 - Set primary pricing as “charge to customer”
 - Set secondary pricing as “actual operating costs”
 - Report on both and compare
- Pricing can be set at the physical device, port, or queue level

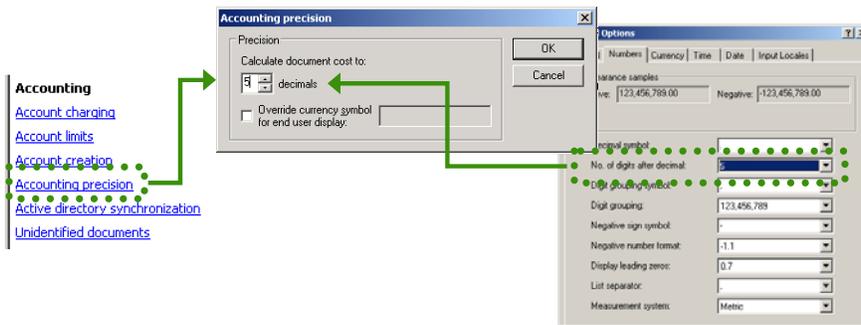
Dual (Primary and Secondary) Pricing

- Define the “price” and the “real” cost of a print transaction



Accounting Precision

- Calculate printing costs up to 5 decimal places
- Regional Settings on the server must match the number of decimal points defined for accounting precision



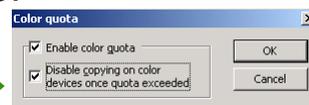
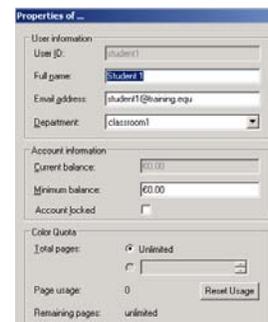
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Color Quotas

- Limit color output by user
- Allow access to color devices while controlling usage
- Eliminate risk of color abuse
- Facilitate the sale of color-enabled devices
- Set color quota per user
- Enable color quota on the server



Disables access to all color copy devices!

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Enable Color Quota for Print and/or Copy

The screenshot shows the 'EQUITRAC - Equitrac Office Manager [Configuration]' window. On the left is a tree view with categories: INSTRUCTOR - System, INSTRUCTOR - Accounts, and INSTRUCTOR - Diagnostic. Under 'System', 'Color quota' is highlighted with a green dotted border. A green arrow points from this link to a 'Color quota' dialog box. The dialog box contains:

- Enable color quota
- Disable copying on color devices once quota exceeded
- OK button
- Cancel button

 The background configuration window shows various settings like Accounting, Billing codes, Desktop printing, Device Settings, Network environment, and Other settings.

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Define Color Quota on a User Account

The first screenshot, titled 'Properties of ...', shows user and account information. Under 'Color Quota', 'Total pages' is set to 75. The second screenshot, titled 'New task', shows a task named 'Set Color Quota' scheduled to run once on 04-Jun-06 at 10:55:14 PM. The task is configured to run 'Set Color Quotas' with a quota of 100 for '<All Users>'. A green dotted border highlights the 'What to run' section in the 'New task' dialog.

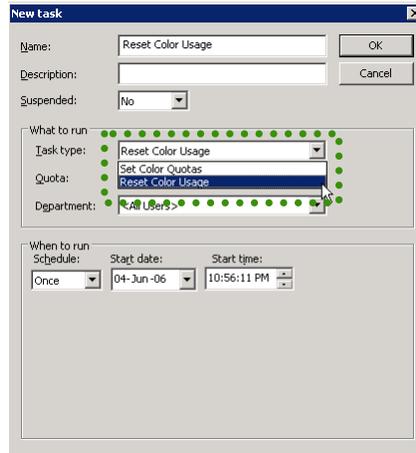
Set manually on the user account profile

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Create a Color Quota Reset Schedule



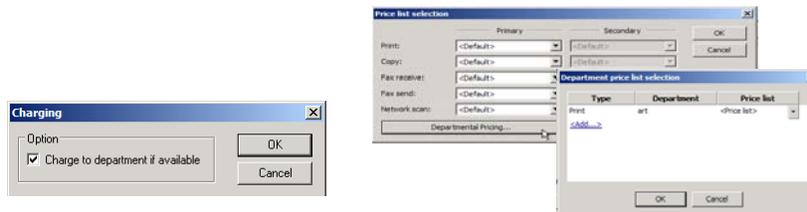
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Departmental Pricing

- Apply a price list to a printer for a specific Department
- Apply many price lists to one printer
- Users must belong to a department to use Departmental Charging



Ensure Departmental Charging has been enabled!

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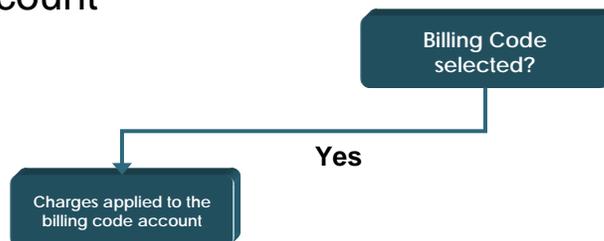
Departmental Pricing

- Define the Accounting Policy determines which defines which account (user, department, or billing code) is charged for a transaction.
- This process should be determined prior to installation so that required components are installed (i.e. Workstation Client for Client Billing)



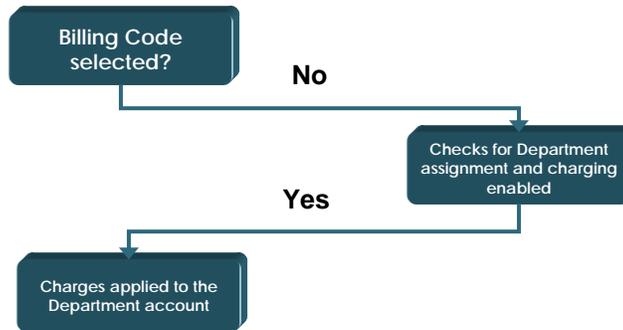
Using Charge Accounting

- If a billing code is selected using either the Client Billing pop-up or at the PageCounter terminal, transactions are charged to the specified billing code account



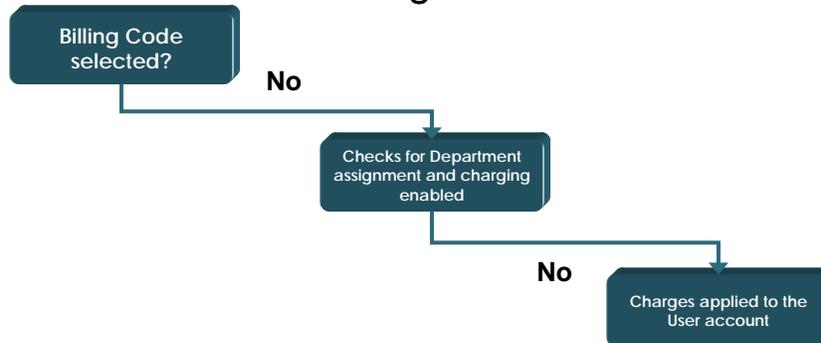
Using Charge Accounting

☺ If the user does not select a billing code, transactions are charged to the user's assigned department, if department charging is enabled



Using Charge Accounting

☺ If a billing code is not selected, and department charging is not enabled, and the user is not a member of a department, the user account is charged



Use Charge Accounting

C The **user** is **always tracked**, the accounting policy determines which account is **charged**

```

    graph TD
      A[Billing Code selected?] -- Yes --> B[Charges applied to the billing code account]
      A -- No --> C[Checks for Department assignment and charging enabled]
      C -- Yes --> D[Charges applied to the Department account]
      C -- No --> E[Charges applied to the User account]
    
```

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Account Charging

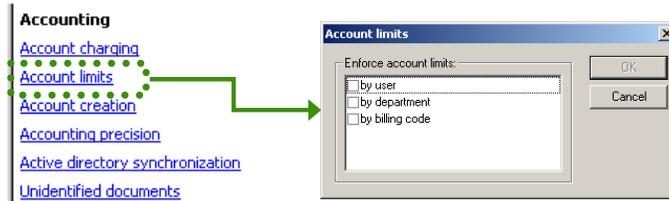
- C Enable the feature to charge departments instead of users
- C Users are tracked, but funds are deducted from the department
- C Disable the feature to charge users directly

The screenshot shows the 'Accounting' menu with 'Account charging' selected. An arrow points to the 'Charging' dialog box, which has an 'Option' section with a checkbox labeled 'Charge to department if available'. The 'OK' and 'Cancel' buttons are also visible.

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Account Limits*

- ☪ Selectively enforce limits if Charge by Department is enabled
- ☪ Function is dependent on who is being charged for the print



***Feature is only available in Equitrac Express**

Account Limits*

- ☪ The Cost Job Before Printing option must be enabled when using account limits. This processes the entire job prior to checking the appropriate account for available funds



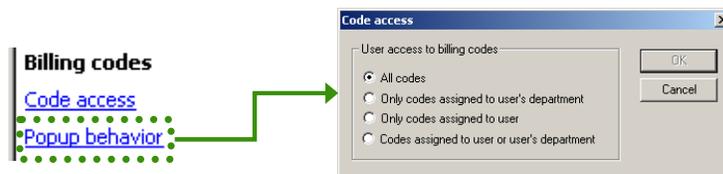
***Feature is only available in Equitrac Express**

Cost Allocation Using Billing Codes

- ☞ Charge a job to a customer, a project or a job number
- ☞ Can be enabled for print and copy tracking
- ☞ Can be integrated with embedded devices

Cost Allocation Using Billing Code Access

- ☞ Specify user access to billing codes when a user submits a transaction



Cost Allocation Pop-Up Behavior

The screenshot shows the DENALI-2003 - Equitrac Office Manager [Configuration] window. The left sidebar lists various system settings like Licensing, Configuration, Price lists, etc. The main pane shows a list of settings under 'Billing codes', including 'Pop-up behaviour'. A 'Pop-up behaviour' dialog box is open, showing options for 'Required field', 'Security mode', 'Search', and 'Default to the previous billing code'. The 'Billing code label' is set to 'EQ Pop Up'. The 'Validation mode' section includes 'CAS available' (Yes), 'CAS unavailable' (Deny access), 'Validate billing codes' (No), and 'Validate terminal logins' (Against cache). The 'Logins' section shows 'Login expiry' set to 20 minutes. The 'Display options' section has 'Show cost summary' checked. The bottom of the window shows 'Chapter 3-Exercise E', '© 2008 Equitrac Corporation. All rights reserved.', and '41'.

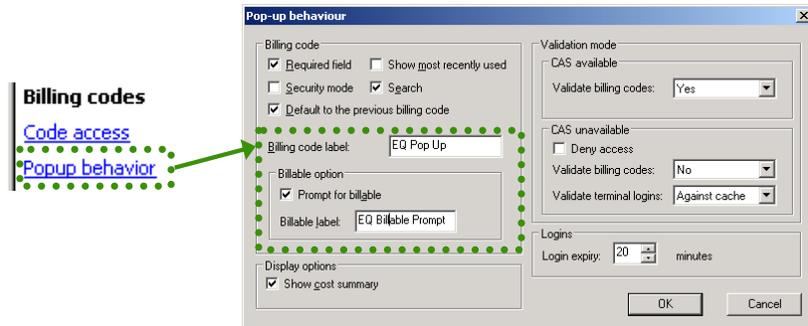
Cost Allocation Pop-Up Behavior

Set the requirements for selecting a billing code

This image is a close-up of the 'Pop-up behaviour' dialog box. A green dotted box highlights the 'Billing code' section, which includes the following settings: 'Required field' (checked), 'Show most recently used' (unchecked), 'Security mode' (unchecked), 'Search' (checked), and 'Default to the previous billing code' (checked). The 'Billing code label' is 'EQ Pop Up'. Below this, the 'Billable option' section has 'Prompt for billable' (checked) and 'Billable label' 'EQ Billable Prompt'. The 'Display options' section has 'Show cost summary' (checked). To the left of the dialog box, there are three text labels: 'Billing codes', 'Code access', and 'Popup behavior', each with a green dotted box and an arrow pointing to the corresponding section in the dialog box. The bottom of the window shows 'Chapter 3-Exercise E', '© 2008 Equitrac Corporation. All rights reserved.', and '42'.

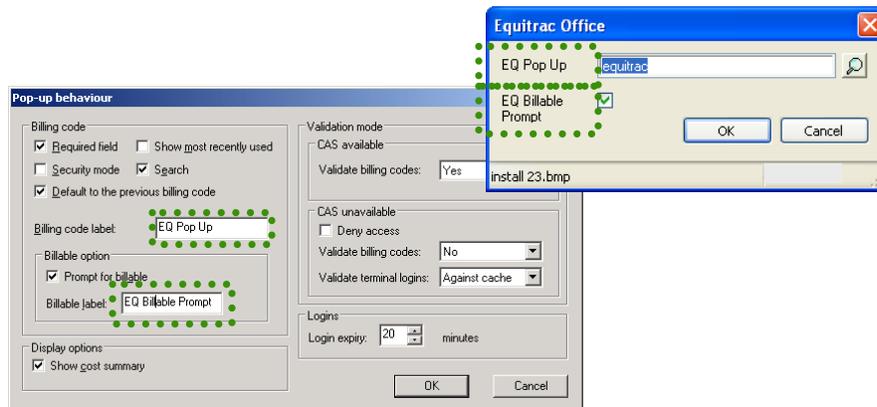
Cost Allocation Pop-Up Behavior

Configure the appearance of the billing code pop-up dialog box



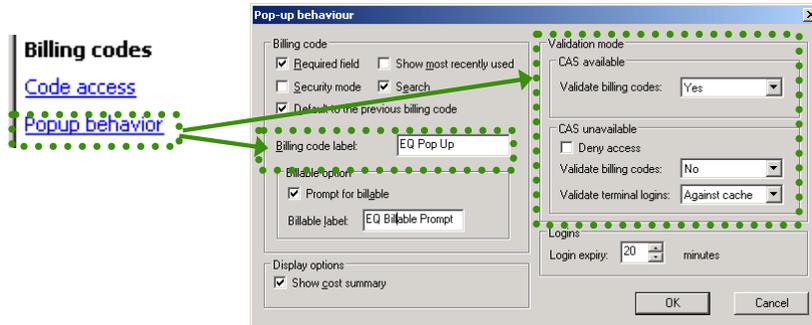
Cost Allocation Pop-Up Behavior

The configuration elements control what appears on the client workstation

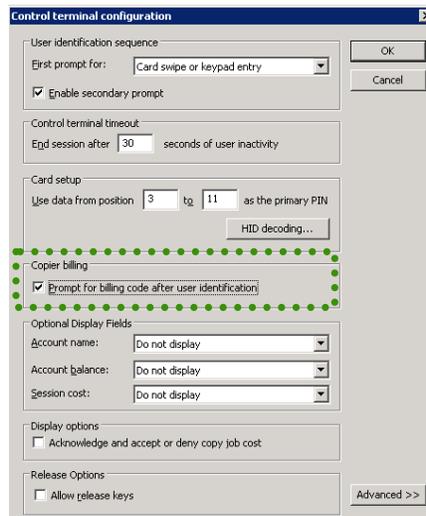


Cost Allocation Validation Mode

Configure how billing codes are accessed when the CAS is available and unavailable



Use Billing Codes for Copying



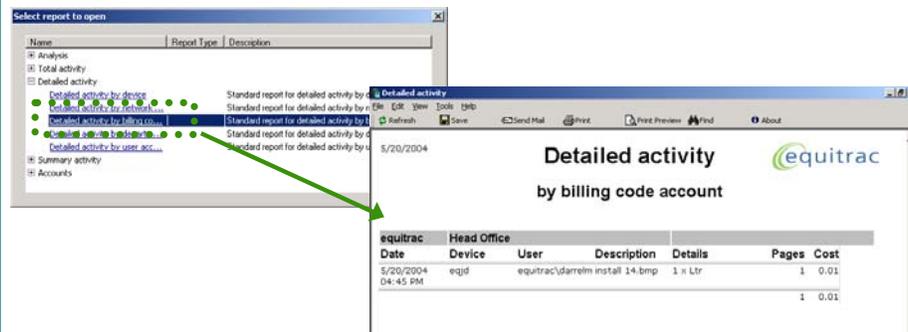
Use Billing Codes for Copying

At a PageCounter terminal, logon and enter the billing code when prompted



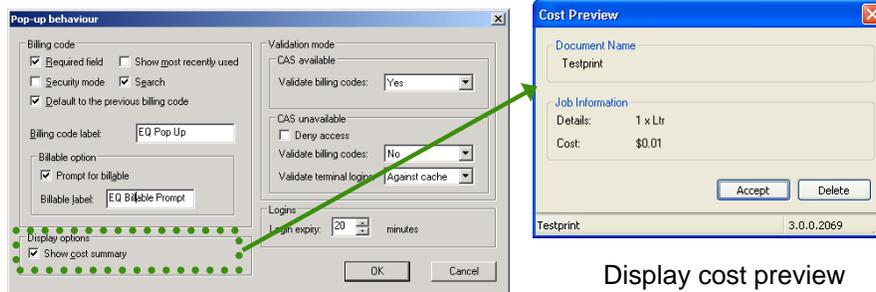
Run a Billing Code Report

In Equitrac System Manger, select Reporting > Detailed Activity > Detailed Activity by billing code account



Cost Preview Windows

- Enable the cost summary option (option is installed during client install)
- User can Accept or Delete when printing cost



Enabled the feature in System Manager

Display cost preview before printing

Questions?

