

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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Price Lists Types

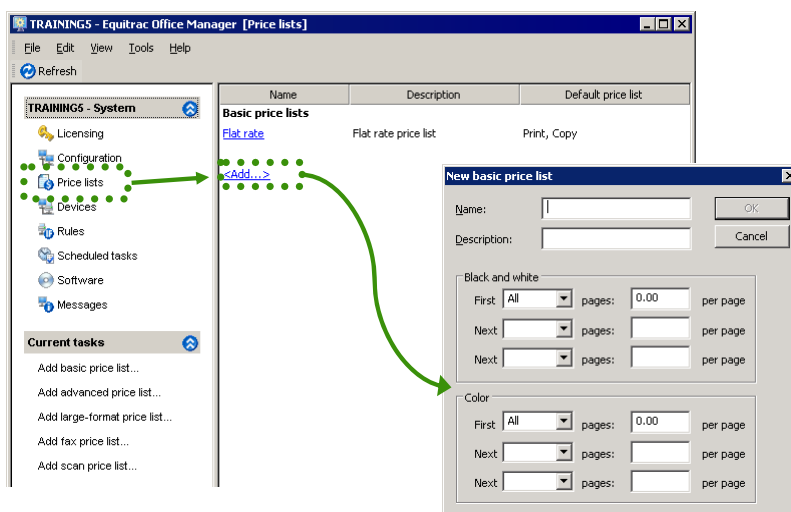
Price List Type	Purpose	General Use For
Large-Format	Assign costs based on area or linear charge pricing for wide format jobs	Plotters and wide-format printers
Fax	Assign costs for fax jobs by page or by minute, and optionally, by prefix	MFPs
Scan	Assign costs for scan jobs per type and page attributes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

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Creating Price Lists



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Flat Rate Price Lists

The screenshot shows the TRAININGS - Equitrac Office Manager [Price lists] window. The left sidebar contains a tree view with 'Basic price lists' expanded, showing 'Flat rate' and '<Add...>'. The main window displays a table with columns 'Name', 'Description', and 'Default price list'. The 'Flat rate' entry is selected, showing 'Flat rate price list' in the description and 'Print, Copy' in the default price list. A green arrow points from the 'Flat rate' entry in the tree view to the 'Modify 'Flat rate' price list' dialog box. The dialog box has fields for 'Name' (Flat rate) and 'Description' (Flat rate price list). It also has sections for 'Black and white' and 'Color' pricing, each with 'First', 'Next', and 'Next' entries, each with a 'pages' field and a 'per page' label.

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Basic Price Lists

The screenshot shows the TRAININGS - Equitrac Office Manager [Price lists] window. The left sidebar contains a tree view with 'Current tasks' expanded, showing '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 ...', and 'Set as default price list for ...'. The 'Add basic price list...' entry is selected. A green arrow points from the 'Add basic price list...' entry in the tree view to the 'New basic price list' dialog box. The dialog box has fields for 'Name' (Simple Pricing) and 'Description'. It also has sections for 'Black and white' and 'Color' pricing, each with 'First', 'Next', and 'Next' entries, each with a 'pages' field and a 'per page' label.

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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:

Modify "Flat rate" price list

Name: Flat rate OK Cancel

Description: Flat rate price list

Black and white

First 50 pages: 0.01 per page

Next 50 pages: 0.02 per page

Next All pages: 0.03 per page

Color

First All pages: 0.05 per page

Next pages: per page

Next pages: per page

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 ...

New advanced price list

Name:

Description:

Job attributes

Base price: [Surcharges...](#)

Finishing operations	Price	Basis
Punching	0.00	per job
Binding	0.00	per copy
Stapling	0.00	per copy
Folding	0.00	per copy
Trimming	0.00	per copy

Page detail pricing

Default page price:

Type	Size	Color	Duplex	Tray	Media	Price
Add...						

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Create an Advanced Price List

Step 1: Finishing Operations

New advanced price list

Name:

Description:

Job attributes

Base price: [Surcharges...](#)

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

Page detail pricing

Default page price:

Type	Size	Color	Duplex	Tray	Media	Price
Add...						

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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...						

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Create an Advanced Price List

Step 3: Surcharges

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...				

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Calculating Advanced Pricing

Page Detail Pricing or Default Price

$$\begin{array}{r}
 + \\
 \text{Finishing} \\
 + \\
 \text{Surcharges} \\
 + \\
 \text{Job Base Price} \\
 = \\
 \text{Total Cost}
 \end{array}$$

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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:

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						
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

$$\begin{array}{rcl}
 105 \text{ pages} \times 0.05 & = & 5.25 \\
 30 \text{ pages} \times 0.25 & = & 7.50 \\
 1 \text{ job stapled} & & \\
 \quad \times 0.02 & = & 0.02 \\
 \text{Base Price} \times 0.25 & = & 0.25 \\
 \text{Total} & = & 11.77 \\
 \times 10 \text{ copies} & = & \mathbf{117.70}
 \end{array}$$

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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 ...

New large-format price list

Name: OK Cancel

Description:

Job attributes

Base price: 0.00 Surcharges...

Finishing operations	Price	Basis
Punching	0.00	per job
Binding	0.00	per copy
Stapling	0.00	per copy
Folding	0.00	per copy
Trimming	0.00	per copy

Page detail pricing

Default page price: 0.0005 per **Square inch** Roll width:

Color Duplex **<Add...>**

Media Price

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Calculating Large Format Pricing

$$\begin{aligned}
 &\text{Size of Image} \times \text{Price by Square or} \\
 &\text{Linear Roll Width Or Default Price} \\
 &+ \\
 &\text{Finishing} \\
 &+ \\
 &\text{Surcharges} \\
 &+ \\
 &\text{Job Base Price} \\
 &= \\
 &\text{Total Cost}
 \end{aligned}$$

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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 ...

New fax price list

Name: OK Cancel

Description:

Base price: 0.00 Surcharges...

Prefix	Per page	Per minute
Default	0.00	0.00
Add...		

Up

Surcharges

Account surcharge

Account	Type	Action	Value
Add...			

Time surcharge

Day	From	To	Action	Value
Add...				

Cancel OK

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Calculating Fax Pricing

$$\begin{array}{r}
 \text{Numbers of Pages} \\
 \cdot \\
 \text{Number of Minutes} \\
 + \\
 \text{Surcharges} \\
 = \\
 \text{Total Cost}
 \end{array}$$

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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: Surcharges...

Price per page

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

Surcharges

OCR surcharge: (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

$$\begin{array}{r}
 \text{Price per Page} \\
 + \\
 \text{Surcharges} \\
 + \\
 \text{Job Base Price} \\
 = \\
 \text{Total Cost}
 \end{array}$$

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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...		

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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

Physical device summary - [172.17.111.15]	
Definition	
Name:	172.17.111.15
Hostname/IP address:	172.17.111.15
Description:	
Manufacturer:	<Not available>
Model:	<Not available>
Monthly volume:	
Speed:	
Type:	Physical device

Price list selection		
	Primary	Secondary
Print:	<Default>	<Default>
Copy:	<Default>	<Default>
Fax receive:	Color/HP Printers	<Default>
Fax send:	Flat rate	<Default>
Network scan:	<Default>	<Default>

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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

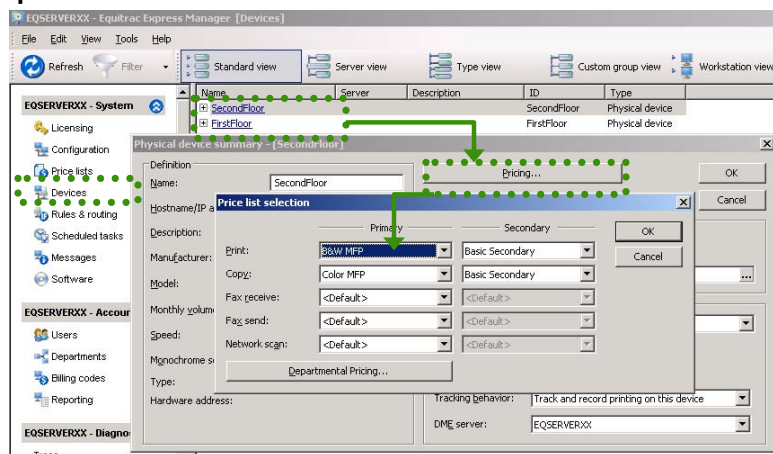
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Dual (Primary and Secondary) Pricing

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



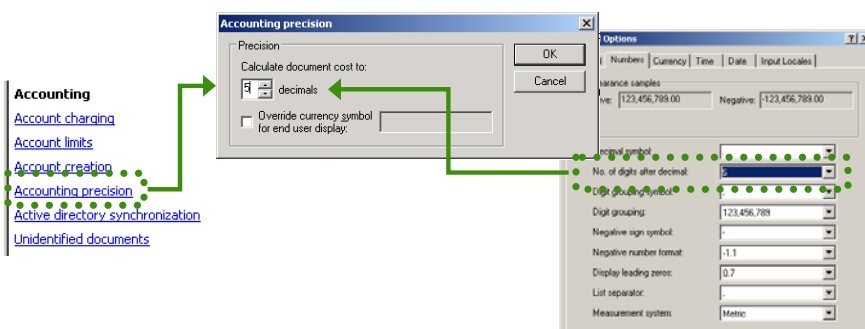
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Accounting Precision

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



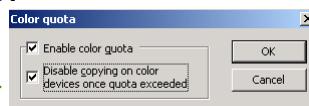
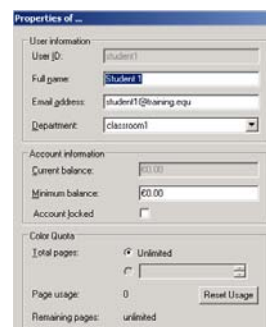
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Color Quotas

- 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



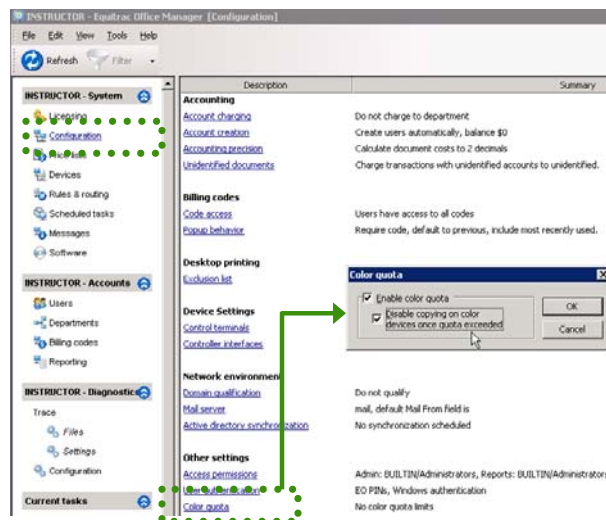
Disables access to all color copy devices!

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Enable Color Quota for Print and/or Copy



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Define Color Quota on a User Account

Properties of ...

User information

User ID: instructor

Full name: instructor

Email address: instructor@training.equ

Department: <none>

Account information

Current balance: \$0

Minimum balance: \$0

Account locked: ☐

Color Quota

Total pages: ☐ Unlimited ☒ 75

Page usage: 0

Remaining pages: 75

Set manually on the user account profile

Set using a Scheduled Task

New task

Name: Set Color Quota

Description:

Suspended: No

What to run

Task type: Set Color Quotas

Quota: 100

Department: <All Users>

When to run

Schedule: Start date: 04-Jun-06 Start time: 10:55:14 PM

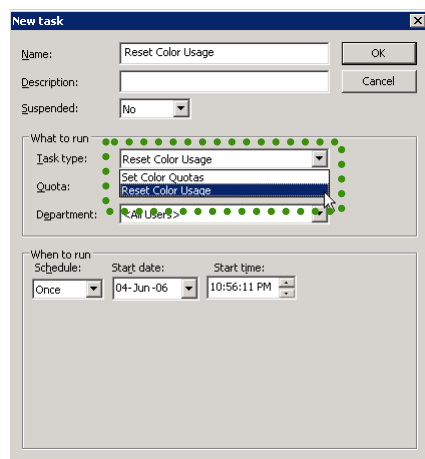
Once

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Create a Color Quota Reset Schedule



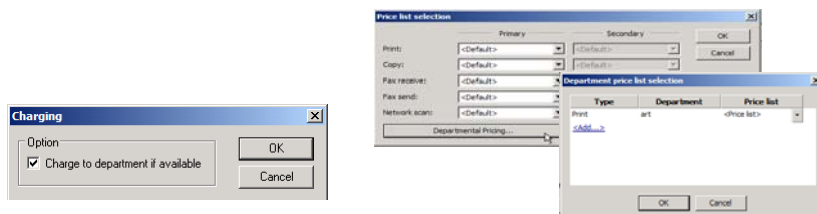
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Departmental Pricing

- 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!

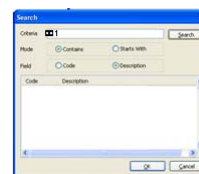
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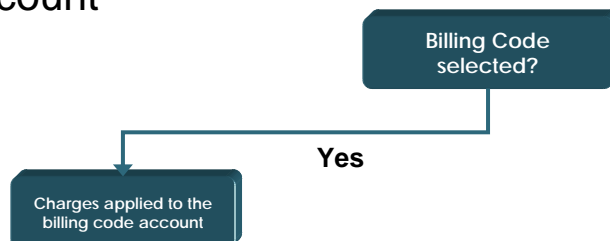
Departmental Pricing

- 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)



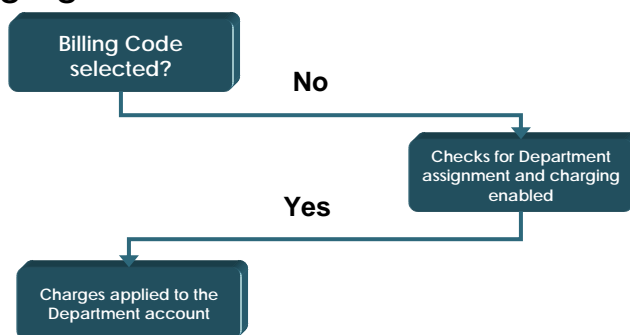
Using Charge Accounting

- 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



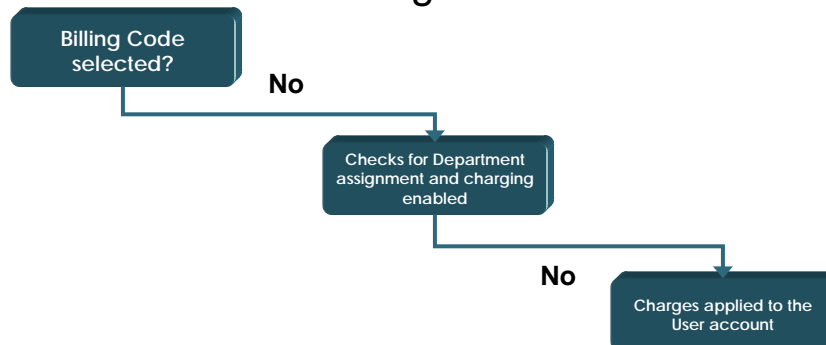
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Using Charge Accounting

- ☞ 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



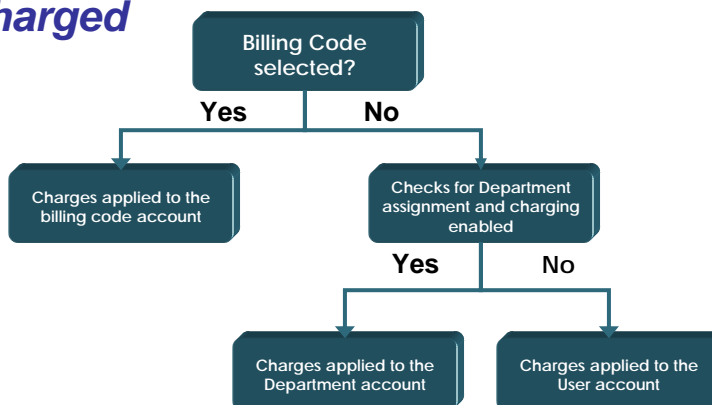
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Use Charge Accounting

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



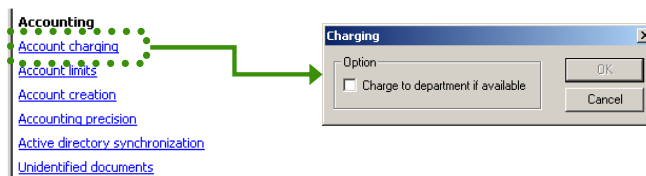
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Account Charging

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



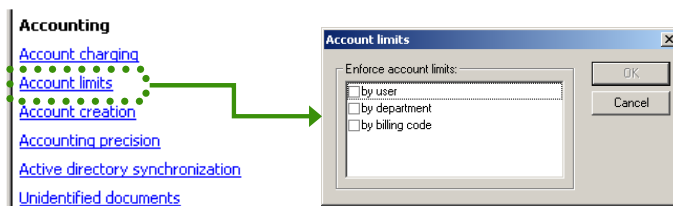
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Account Limits*

- ☞ 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**

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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**

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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

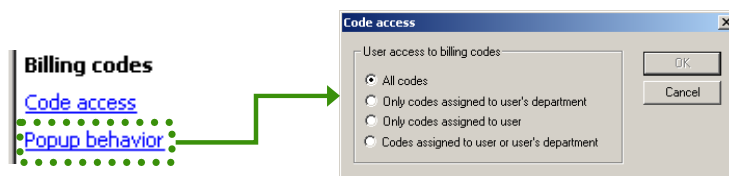
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Cost Allocation Using Billing Code Access

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



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Cost Allocation Pop-Up Behavior

The screenshot shows the 'DENALI-2003 - Equitrac Office Manager [Configuration]' window. The left sidebar has 'DENALI-2003 - System' expanded, with 'Configuration' selected. The main pane displays 'Accounting' settings. A 'Pop-up behaviour' dialog box is open, showing 'Billing code' settings. A green arrow points from 'Pop-up behaviour' in the left sidebar to the dialog box.

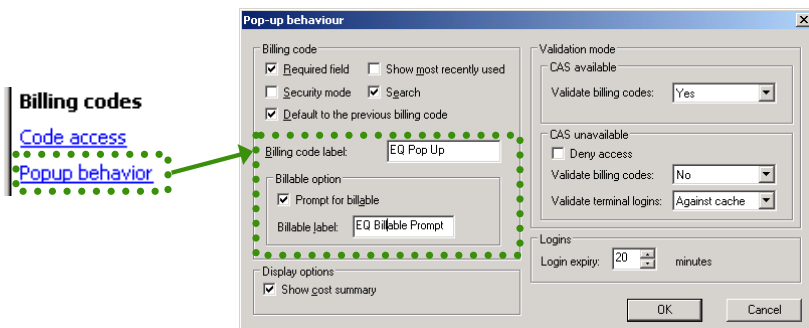
Cost Allocation Pop-Up Behavior

- Set the requirements for selecting a billing code

The screenshot shows the 'Pop-up behaviour' dialog box. The 'Billing code' section is highlighted with a green dotted border. A green arrow points from 'Billing codes' in the left sidebar to the dialog box.

Cost Allocation Pop-Up Behavior

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



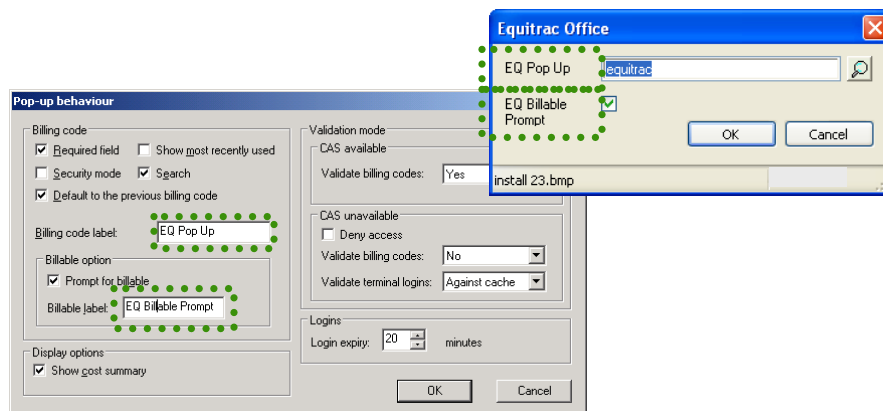
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Cost Allocation Pop-Up Behavior

- The configuration elements control what appears on the client workstation



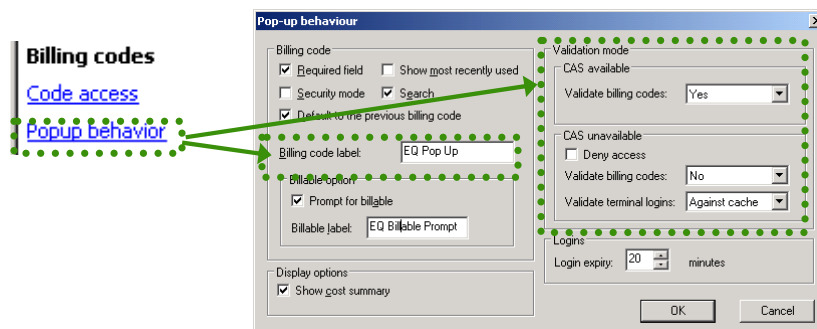
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Cost Allocation Validation Mode

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

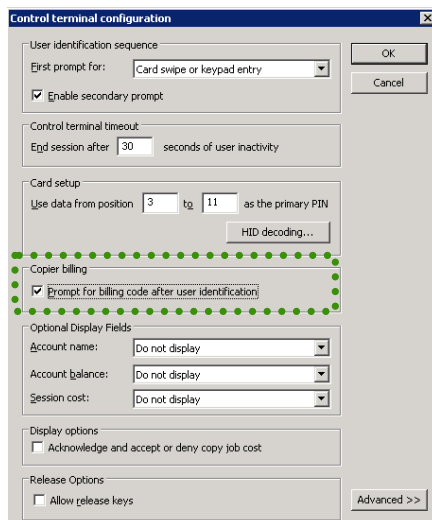


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Use Billing Codes for Copying



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Use Billing Codes for Copying

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



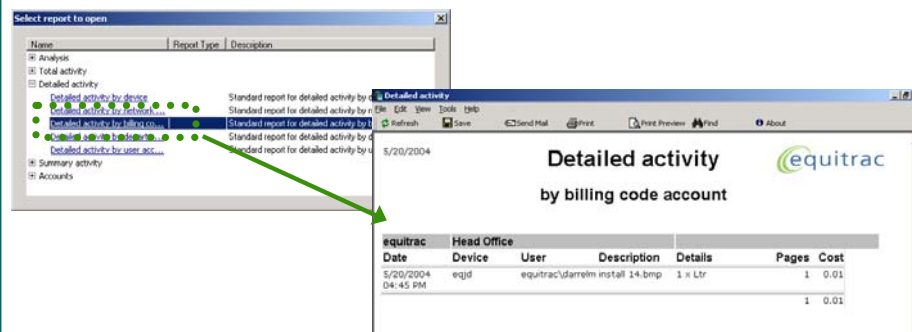
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Run a Billing Code Report

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



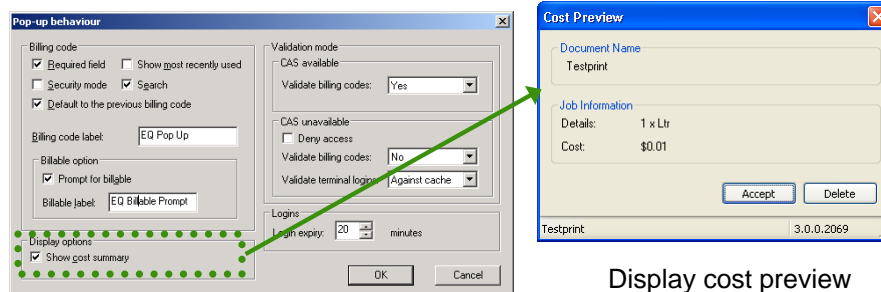
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Cost Preview Windows

- 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?

