




Create Price Lists in Equitrac

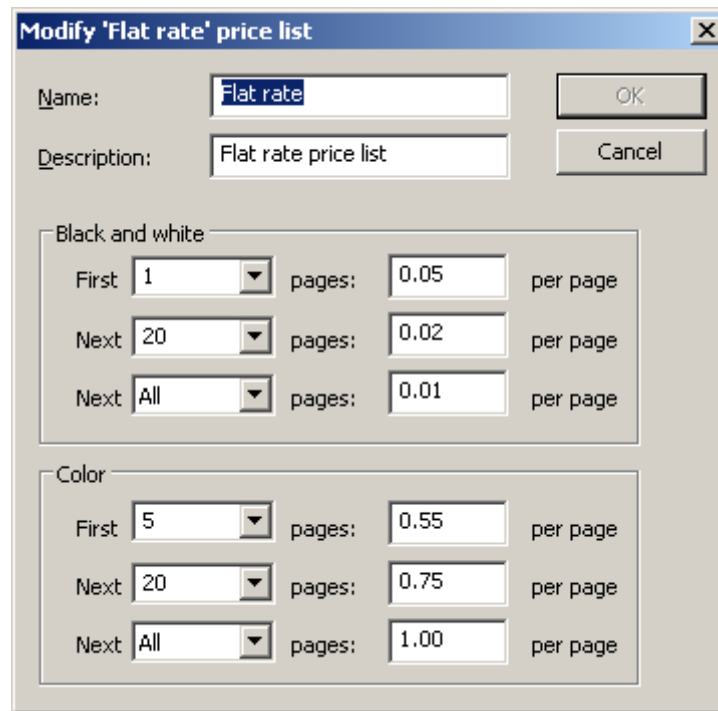
Instructor Led Training
Chapter 3 – Exercise F

Topics include:

- [Create or Modify a Basic Print/Copy Price List](#)
- [Create an Advanced Price List for a Black and White Printer](#)
- [Create an Advanced Price List for a Color Printer](#)
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Create or Modify a Basic Print/Copy Price List


1. Start **Equitrac System Manager** and connect to your accounting server.
2. In the left pane, click .
3. In the right pane, click **Flat rate**; a “Modify ‘Flat rate’ price list” dialog box appears.




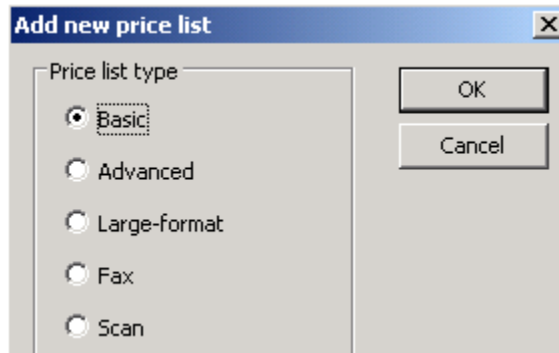
Section	Category	First	Next	Next	pages	per page
Black and white	First	1			0.05	
	Next	20			0.02	
	Next	All			0.01	
Color	First	5			0.55	
	Next	20			0.75	
	Next	All			1.00	

4. Modify each field until they appear as above.

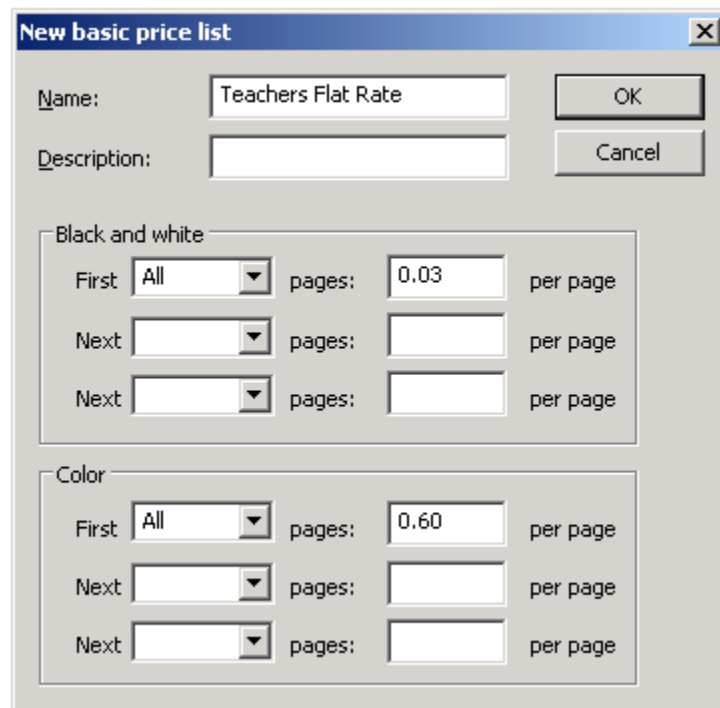
NOTE: The drop-down arrow can only be used to insert “All” in a field. To enter a value, you must first left-click the field and then manually type the value.


5. Click the  button when finished.
6. In the right pane, click **<Add...>** to create a new Price List.

7. In the Add new price list dialog box, click the **Basic** radio button; and then click the  button.




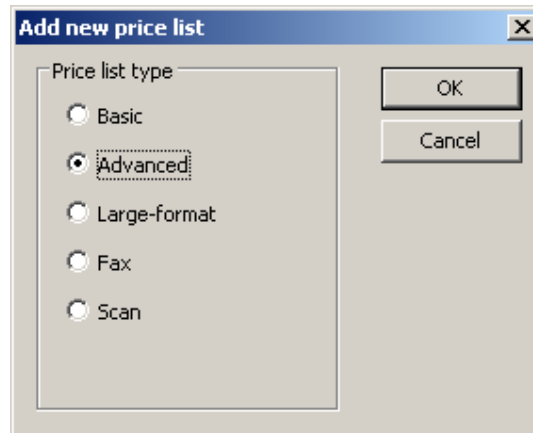
8. In the **Name** field, type **Teachers Flat Rate**.




9. In the **Black and white** section, click the **First** drop-down arrow and then select **All**.
10. In the **per pages** field, type **0.03**.
11. In the **Color** section, click the **First** drop-down arrow and then select **All**.
12. In the **per pages** field, type **0.60**.
13. Click the  button; the two price lists appear on the list.

Create an Advanced Price List for a Black and White Printer

1. In **Equitrac System Manager**, click  in the left pane.
2. In the right pane, click <Add...> to create a new Price List.
3. In the Add new price list dialog box, click the **Advanced** radio button; and then click the  button.

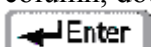


4. In the **Name** field, type **B&W MFP**.
5. In the **Base price** field, type **0.05**.
6. Double-click the **Price** field for the **Punching** Finish operation, type **0.01**, and then press the  key; the cursor advances to the next price field in the list.
7. Repeat this process to enter the applicable price for each of the finishing operations listed below. Leave the Stitching and Wrapping Finishing operations as 0.00.

The image shows a "Job attributes" dialog box. At the top, there is a "Base price:" label followed by a text field containing "0.05" and a "Surcharges..." button. Below this is a table with three columns: "Finishing operations", "Price", and "Basis".

Finishing operations	Price	Basis
Punching	0.01	per job
Binding	0.20	per copy
Stapling	0.01	per copy
Folding	0.01	per copy
Trimming	0.02	per copy

8. In the **Default page price** field, type **1.00**.
9. To add a row to the **Default page price list**, click <Add...>.

To modify an entry in any column other than the Price column, left-click the entry, left-click the drop-down arrow, and then left-click the desired setting. To modify an entry in the Price column, double-click the **Price** field, manually type the numeric value, and then press the  key.

10. Refer to the chart below to define the following prices.

Page detail pricing
Default page price: 1.00

Type	Size	Color	Duplex	Tray	Media	Price
Any	Any	No	Yes	Top	Standard	0.09
Any	Any	No	Yes	Middle	Letterhead	0.21
Any	Any	No	No	Top	Standard	0.05
Any	Any	No	No	Middle	Letterhead	0.15

<Add...>

When complete, the price list appears as follows:

Modify 'B&W MFP' price list

Name: B&W MFP

Description:

Job attributes

Base price: 0.05

Surcharges...


Finishing operations	Price	Basis
Punching	0.01	per job
Binding	0.20	per copy
Stapling	0.01	per copy
Folding	0.01	per copy
Trimming	0.02	per copy

Page detail pricing
Default page price: 1.0000


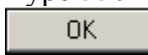
Type	Size	Color	Duplex	Tray	Media	Price
Any	Any	No	Yes	Top	Standard	0.09
Any	Any	No	Yes	Middle	Letterhead	0.00
Any	Any	No	No	Top	Standard	0.05
Any	Any	No	No	Middle	Letterhead	0.15

<Add...>

11. Click the **Surcharges...** button.
12. Click **<Add...>** in the **Account surcharge** section.
13. Type **5501** in the **Account name** field, leave the **Account type** field as Billing code, and then click the **Verify** button. Click the **OK** button when it becomes available.
14. Left-click the entry in the **Action** column, left-click the drop-down arrow, and then left-click **Fixed**.

15. Double-click the entry in the **Value** column, type **1.50**, and then press the  key.

16. Click <**Add...**> in the **Account surcharge** section.

17. Type **5502** in the **Account name** field and click the  button. Click the  button when it becomes available.

18. Double-click the entry in the **Value** column and type **75**; press the  key.

NOTE: Percentage values must be entered as whole numbers, not as decimal values. For example, 75% is entered as 75, not .75.

19. Refer to the chart below to define the remaining surcharges.


Name	Action	Value
5503	Percentage	75
5504	Percentage	75
5505	Fixed	1.25
5506	Fixed	1.50


In this example, users assigned the billing code of Science, English or Physed will be charge a discounted rate of 75%. Users assigned the billing code of Math, History or Geography will be charged a flat fee. Users who are not assigned any billing code or who are not assigned one of the billing codes listed above will be charged full rate.


20. Click <**Add...**> in the **Time surcharge** section.

21. Double-click the value in the **Day** column and type **sat-sun**.

NOTE: Enter days as three characters. Use a hyphen (-) or comma (,) to define a range of days (for example, Mon-Fri), or separate days (for example, Mon, Wed, Fri).

22. Double-click the value in the **From** column, type **18:00**, and then press the  key.

23. Double-click the value in the **To** column, type **24:00**, and then press the  key.

24. Double-click the value in the **Value** column, type **85**, and then press the  key.

In this example, any user who prints a document on Saturday or Sunday between the hours of 6:00pm and midnight receives a discounted rate of 85%, regardless of the billing code assigned. Users assigned an Account surcharge receive the Time surcharge in addition to the Account surcharge.

After completing the above exercises, the Surcharges dialog box appears as follows:

Surcharges

RIP/print charges

Job size: per MB RIP time: per minute

RIP surcharge: per page Print time: per minute

Account surcharge



Account	Type	Action	Value
5501	Billing code	Fixed	0.00
5502	Billing code	Percentage	75
5503	Billing code	Percentage	75

Time surcharge



Day	From	To	Action	Value
sat-sun	18:00	23:00	Percentage	85

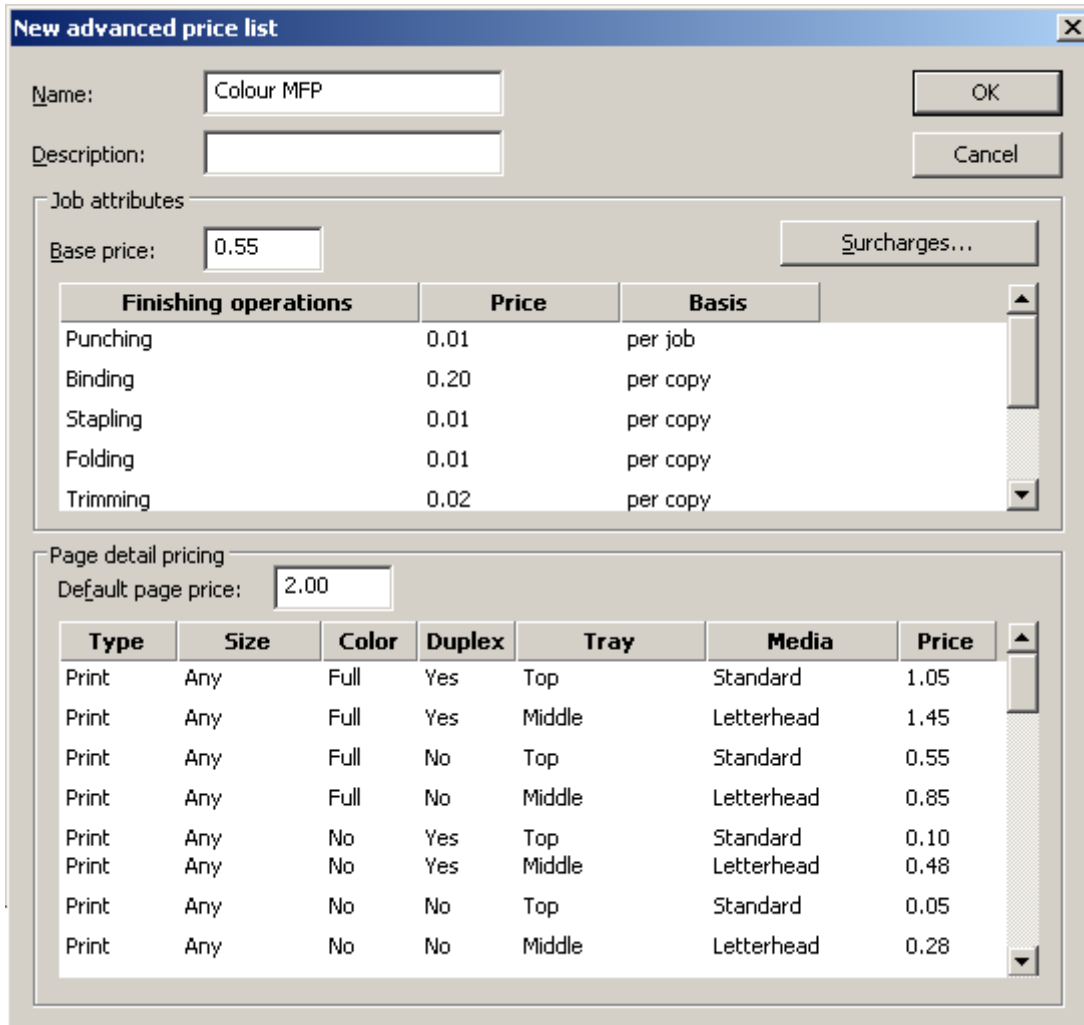
[<Add...>](#)

OK Cancel

25. Click the  button to close the Surcharges dialog box.
26. Click the  button to close the Price List dialog box.

Create an Advanced Price List for a Color Printer

1. In **Equitrac System Manager**, click  in the left pane.
2. In the right pane, click **<Add...>** to create a new Price List.
3. In the Add new price list dialog box, click the **Advanced** radio button; and then click the  button.
4. In the **Name** field, type **Color MFP**.
5. Modify the **Finishing operations** and **Page detail pricing** sections as defined in the screenshot. No Surcharges should be defined.



New advanced price list

Name: OK Cancel

Description:

Job attributes

Base price: Surcharges...

Finishing operations	Price	Basis
Punching	0.01	per job
Binding	0.20	per copy
Stapling	0.01	per copy
Folding	0.01	per copy
Trimming	0.02	per copy

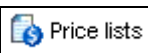
Page detail pricing

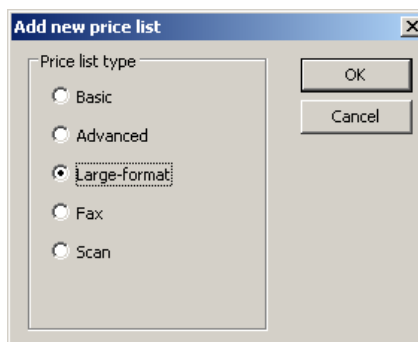
Default page price:

Type	Size	Color	Duplex	Tray	Media	Price
Print	Any	Full	Yes	Top	Standard	1.05
Print	Any	Full	Yes	Middle	Letterhead	1.45
Print	Any	Full	No	Top	Standard	0.55
Print	Any	Full	No	Middle	Letterhead	0.85
Print	Any	No	Yes	Top	Standard	0.10
Print	Any	No	Yes	Middle	Letterhead	0.48
Print	Any	No	No	Top	Standard	0.05
Print	Any	No	No	Middle	Letterhead	0.28

- Click the  button.

Create a Price List for a Plotter

- In **Equitrac System Manager**, click  in the left pane.
- In the right pane, click <Add...> to create a new Price List.
- In the Add new price list dialog box, click the **Large-format** radio button, and then click the  button.



Add new price list

Price list type

☐ Basic
☐ Advanced
☒ Large-format
☐ Fax
☐ Scan

OK Cancel

4. In the **Name** field, type **Plotter**.
5. Modify the **Finishing operations** and **Page detail pricing** sections as shown below. No Surcharges should be defined.

New large-format price list

Name: OK Cancel

Description:

Job attributes

Base price: Surcharges...

Finishing operations	Price	Basis
Punching	0.0000	per job
Binding	0.0000	per copy
Stapling	0.0000	per copy
Folding	0.0000	per copy
Trimming	0.0000	per copy

Page detail pricing

Default page price: per Roll width:

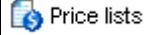

Color	Duplex	Tray	Media	Price
Full	No	Any	Any	15.00

[<Add...>](#)

6. Click the  button.

Create a Secondary Basic Price List

The creation of a secondary basic price list allows you to track “actual” versus “charged” costs of printing. The price defined in the secondary price list is the “actual” cost to you to print a single page. This cost would include such costs as paper, toner, lease, etc. By comparing the “actual” cost to print a page to the “charged” cost, you can determine a net profit or loss on a per page basis.



1. In **Equitrac System Manger**, click  in the left pane.
2. In the right pane, click **<Add...>** to create a new Price List.
3. In the Add new price list dialog box, click the **Basic** radio button, and then click the  button.

4. In the **Name** field, type **Basic Secondary**.
5. In the **Black and white** section, set the **First** field to **All** and type **0.002** in the per pages field.
6. In the **Color** section, set the **First** field to **All** and type **0.0030** in the per pages field.



The screenshot shows a dialog box titled "New basic price list". It has a "Name" field with the text "Basic Secondary" and a "Description" field which is empty. To the right of these fields are "OK" and "Cancel" buttons. Below the fields are two sections: "Black and white" and "Color". Each section contains three rows of input: "First", "Next", and "Next" (likely a typo for "Third" in the original). Each row has a dropdown menu and a "pages:" field followed by "per page". In the "Black and white" section, "First" is set to "All" and "pages" is "0.002". In the "Color" section, "First" is set to "All" and "pages" is "0.003".

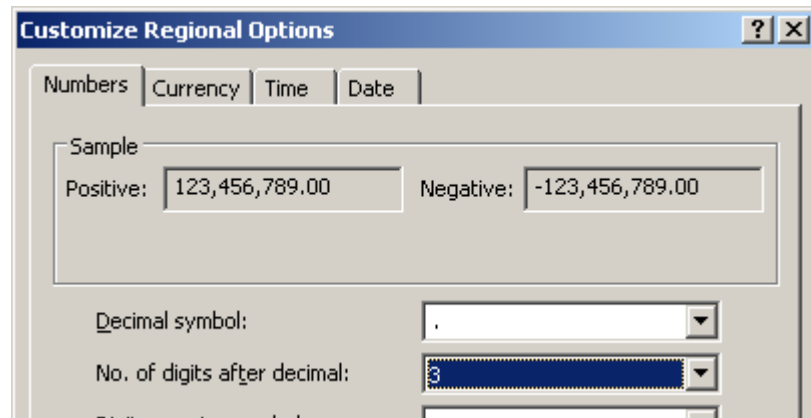
7. Click the  button.

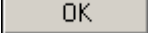
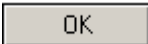
Configure the Account Precision to Three Decimal Places

1. In **Equitrac System Manager**, click  **Configuration** in the left pane.
2. In the **Accounting** section in the right pane, click **Account precision**.
3. In the **Calculate document cost to** field, change the decimal value to **3**. Do not change the currency setting.
4. Click the  button.
5. Exit Equitrac System Manager.

The screenshot shows a dialog box titled "Accounting precision". It has a "Precision" section with a label "Calculate document cost to:" and a dropdown menu set to "3" followed by the text "decimals". Below this is an unchecked checkbox labeled "Override currency symbol for end user display:".

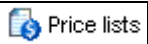
6. On your virtual server, click the  button and then click **Control Panel**.
7. Click **Regional and Language Options**; a dialog box appears.
8. Click the **Regional Options** tab and then click the  button.
9. In the Customize Regional Options dialog box, change the value in the **No. of digits after decimal** field to **3**.

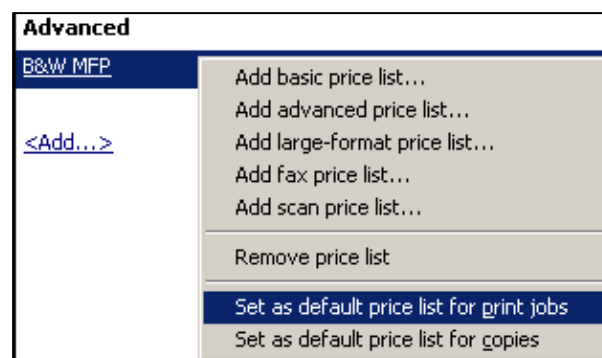


10. Click the  button.
11. In the Regional and Language Options dialog box, click the  button.

Assign a Default Price List

The default price list is used in the event another price list has not been assigned to the printer. You can define a different default price list for coping and for printing.


1. In **Equitrac System Manger**, click  in the left pane.



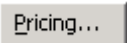
2. On the right hand side, right click **B&W MFP**, and then click **Set as default price list for print jobs**. The **B&W MFP** price list will now be used on any print job sent to a printer that does not have a price list assigned.

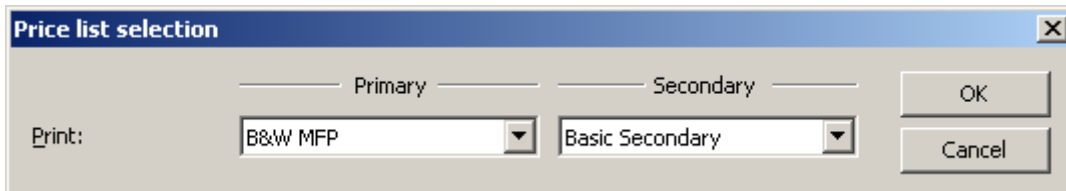
Apply a Price List to a Printer

A price list can be applied at any level of a device (for example, device, port, or queue), but only one price list can be applied per level. In the event multiple price lists are applied (for example, the port and print queue each have a price list assigned), the lowest object assigned takes precedent (for example, the price list assigned to the print queue takes precedence over the price list assigned to the port).

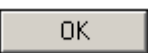

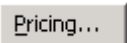
1. Start **Equitrac System Manager** and click  in the left pane.
2. In the right pane, expand each physical device listed until you can see the port queue of each printer.

Name	Server	Description	ID	Type
[-] <u>SecondFloor</u>			SecondFloor	Physical device
[-] <u>EQ_SecondFloor:Temp</u>	EQSERVERXX		Temp	Port
<u>PrnSecFL</u>	EQSERVERXX			Print queue
<u>Auto-generated devic...</u>	EQSERVERXX		0004b5002057	Control terminal
[-] <u>FirstFloor</u>			FirstFloor	Physical device
[-] <u>EQ_FirstFloor:Temp</u>	EQSERVERXX		Temp	Port
<u>PrnFrFL</u>	EQSERVERXX			Print queue
[-] <u>ColorPrinter</u>			ColorPrinter	Physical device
[-] <u>EQ_ColorPrinter:Temp</u>	EQSERVERXX		Temp	Port
<u>PrnColor</u>	EQSERVERXX			Print queue
[-] <u>BWPrinter</u>			BWPrinter	Physical device
[-] <u>EQ_BWPrinter:Temp</u>	EQSERVERXX		Temp	Port
<u>PrnBW</u>	EQSERVERXX			Print queue

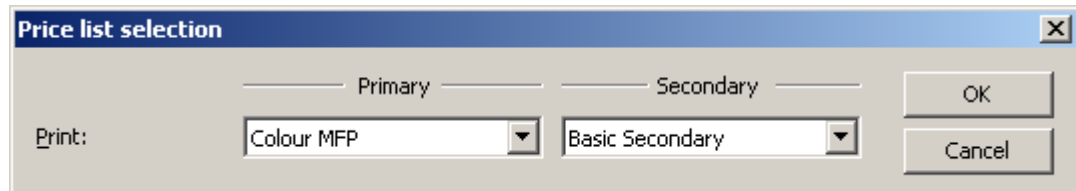
3. Click **PrnBW**; the Print Queue Summary dialog box appears.
4. Click the  button.
5. Click the **Print** drop-down arrow in the Primary column and then select **B&W MFP**.
6. Click the **Print** drop-down arrow in the Secondary column and then select **Basic Secondary**.



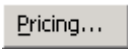


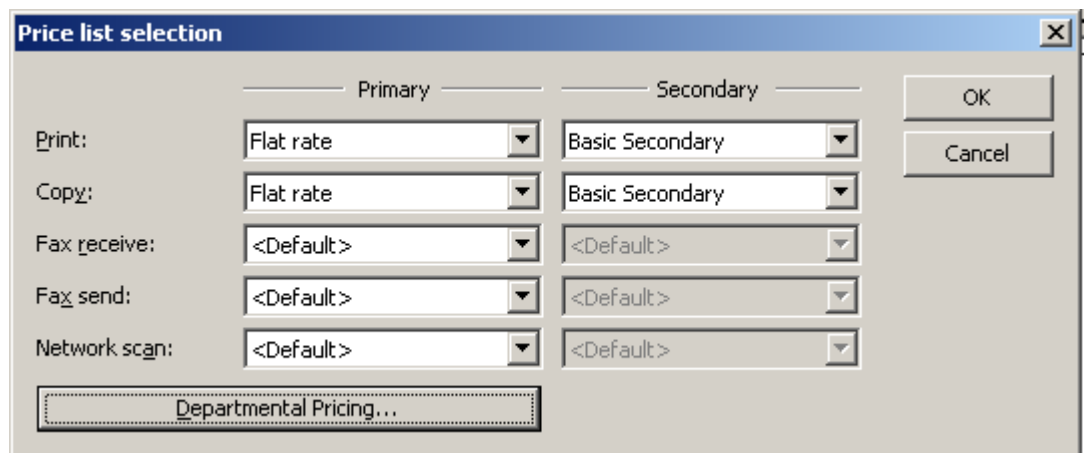
The dialog box titled "Price list selection" has a close button (X) in the top right corner. It contains two columns: "Primary" and "Secondary". Below the column headers, there are two dropdown menus. The "Primary" dropdown is currently set to "B&W MFP". The "Secondary" dropdown is currently set to "Basic Secondary". To the right of the dropdowns are two buttons: "OK" and "Cancel".



7. Click the  button to close the Price list selection dialog box.
8. In the Print Queue Summary dialog box, click the  button.
9. Click **PrnColor**.
10. Click the  button.

11. Click the **Print** drop-down arrow in the Primary column and then select **Color MFP**.
12. Click the **Print** drop-down arrow in the Secondary column and then select **Basic Secondary**.

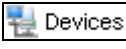
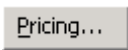



13. Click the  button to close the Price list selection dialog box.
14. In the Print Queue Summary dialog box, click the  button.
15. Click the **BWPrinter**.
16. Click the  button.
17. Click the **Print** drop-down arrow in the Primary column and then select **Flat rate**.
18. Click the **Print** drop-down arrow in the Secondary column and then select **Basic Secondary**.
19. Click the **Copy** drop-down arrow in the Primary column and then select **Flat rate**.
20. Click the **Copy** drop-down arrow in the Secondary column and then select **Basic Secondary**.

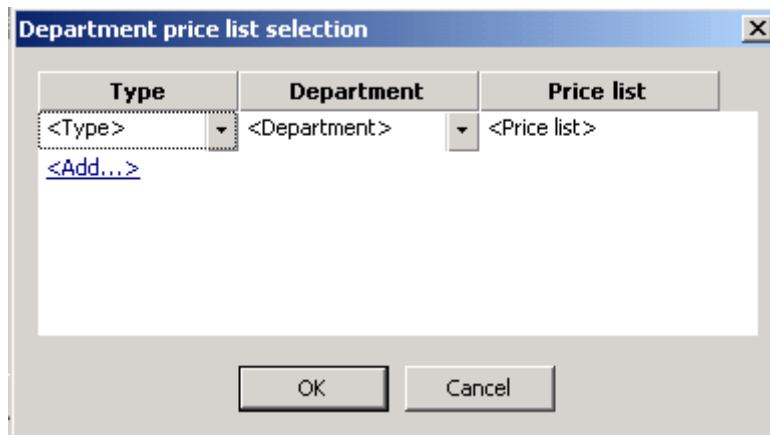





21. Click the  button.
22. In the Port Summary dialog box, click the  button.
23. Repeat these steps for the **ColorPrinter** physical device, and assign the **Flat rate** and **Basic Secondary** price lists.

Apply a Price List to a Department

1. Start **Equitrac System Manager** and click  in the left pane.
2. In the right pane, click **PrnBW**.
3. Click the  button.

4. Click the  button; the Department price selection dialog box appears.
5. Click **<Add>**.



6. Click the **<Type>** drop-down arrow and then select **Print**.
7. Click the **<Department>** drop-down arrow and then select **Teachers**.
8. Click the **<Price list>** drop-down arrow and then select **Teachers Flat Rate**.
9. Click the  button.
10. In the Price list selection dialog box, click the  button.
11. In the Port queue summary dialog box, click the  button.