How To Run The WIP Report

- 1. Log into Presswise with your user name and password. (tpc.mypresswise.com)
- 2. You will need to locate your salesID:
 - a. How To Find Your User Id#:
 - i. Click on the admin tab
 - ii. Click on Users (very bottom of the page on the left side of your screen.
 - iii. Click on your sales rep and their salesID number will appear.
- 3. Click on the Report button found on the black ribbon running across the top of the page. It is the third button from the right.

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Orders -	Production -	Shipping - Sal	es - Customers	- Vendors - F	Purchasing - Inv	rentory - Accour	nting -	Reports	Admin	Support -	
On Hold	Files Needed	14 DESIGN	3 NOW / NF	3 REVISIONS	REORDER	INTERACTIVE)		
4.	Select Cu	istom Repo	rts								
	Orders - F	Production - Ship	oping - Sales -	Customers - V	endors - Purch	asing - Inventory	Acc	ounting -	Reports	Admi	

ACCOUNTING REPORTS	ORDER REPORTS
Accounting Codes Report	Job Cost Report
Customer Activity Report	Jobs by CSR - byDate
Customer Aging Report w/Statements	Jobs by CSR - byDate, byProduct
Orders Closed Manually	Jobs by CSR - byDate, byProduct, byOrder
Open Credit Card Authorizations	Jobs by CSR - Summary
Open Invoices	Order and Shipment - Detail
Sales and Cost Margins	Order and Shipment - Summary
Sales Order Margins	Reprint Report: CLOSED Orders
Sales Tax Data: CLOSED Orders	Reprint Report: OPEN Orders
Sales Tax Data: OPEN Orders	Shipments by Order
	Work In Progress: Jobs
ADMIN REPORTS	
Orders: Written Per Day	PRODUCTS
Payment Transactions	Product Lisage - Detail

5. Select Daily TPC WIP Report

Custom Reports		
+ Create a New Report		Back to Reports
ACCOUNTING REPORTS	ORDERS REPORTS	
Accounting Codes Report	Daily TPC WIP Report	✿∥□前
Customer Activity Report	Jobs by CSR - byDate	
Customer Aging Report w/Statements	Jobs by CSR - byDate, byProduct	
Orders Closed Manually	Jobs by CSR - byDate, byProduct, byOrder	
Sales and Cost Margins	Jobs by CSR - Summary	
Sales Tax Data: CLOSED Orders	Jobs in Mailing	🗙 🥒 🗇 🏛
Sales Tax Data: OPEN Orders	Reprint Report: CLOSED Orders	
	Reprint Report: OPEN Orders	
ADMIN REPORTS	Shipments by Order	
Address Repair Tool	Work In Progress: Jobs	
Orders: Written Per Day		
Payments	ESTIMATING TASKS	

6. Put in your sales reps user ID. This will be their ID number, not their name. (For example, Holly is user 15.)

Orders -	Production	•	Shipping -	·	Sales -	Customers	•	Vendors	•	Purchasir
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Reports	Daily TPC WIP Report

			SEARCH CONDITIONS
¥	SalesmanID:	= *	
1	CsrID:	= ~	
	AccountName:	= *	
	OrderID:	= *	
	DueDate:	between	and

- Q Search
- 7. Click Search

8. Click on Export to Excel

+ Export to Excel	Share this report			
	Share this report			
50 result(s)				
	accountN	lame	orderID	OrderStatu
SAINT FRANCIS MAR	KETING DEPT.		200236	Ready
NOTRE DAME EDUCA	TION FUND FOUNDATION	1	200152	Production
NOTRE DAME EDUCA	TION FUND FOUNDATION	1	200152	Production
FIRST MISSOURI STA	TE BANK		200002	Waiting Approval
FIRST MISSOURI STA	TE BANK		200002	Waiting Approval
Notre Dame Booster			200012	Waiting Approval
NOTRE DAME EDUCA	TION FUND FOUNDATION	1	200040	Waiting Approval
NOTRE DAME EDUCA	TION FUND FOUNDATION	1	200061	Waiting Approval
NOTRE DAME EDUCA	TION FUND FOUNDATION	1	200061	Waiting Approval
OAUNT EDANOIO MAD			200200	Deserve Destaux

9. Your report will look like the following:

accountName	orderID OrderStatus	date-b-dueDate	salesmanID	csrlD JobStatus	productDesc
NOTRE DAME EDUCATION FUND FOUNDATION	200152 Production	2020-07-02	15: Holly Banken	7 Closed	Postcard 4.25 x 5.5
NOTRE DAME EDUCATION FUND FOUNDATION	200152 Production	2020-07-02	15: Holly Banken	7 Pending	Prepress
FIRST MISSOURI STATE BANK	200002 Waiting Approval	2020-07-06	15: Holly Banken	7 Pending	Pop Up Tent
FIRST MISSOURI STATE BANK	200002 Waiting Approval	2020-07-06	15: Holly Banken	7 Pending	Prepress
Notre Dame Booster	200012 Waiting Approval	2020-07-06	15: Holly Banken	7 Pending	Prepress - booster card
NOTRE DAME EDUCATION FUND FOUNDATION	200040 Waiting Approval	2020-07-21	15: Holly Banken	7 Pending	Brochure
NOTRE DAME EDUCATION FUND FOUNDATION	200061 Waiting Approval	2020-07-24	15: Holly Banken	7 Pending	2020 Alumni Magazine
NOTRE DAME EDUCATION FUND FOUNDATION	200061 Waiting Approval	2020-07-24	15: Holly Banken	7 Pending	Prepress
SAINT FRANCIS MARKETING DEPT.	200280 Production	2020-08-04	15: Holly Banken	7 Queued	CORO 4 MIL SINGLE SIDED - GOLF CART SIGNS
SAINT FRANCIS MARKETING DEPT.	200280 Production	2020-08-04	15: Holly Banken	7 Queued	CORO 4 MIL SINGLE SIDED - BEVERAGE CART SIGN
ς ΛΙΝΙΤ ΓΩΛΝΙΛΙς ΠΕΛΙ ΤΗΛΛΩΓ ΩΥΣΤΡΙΑ ΓΩΠΝΙΩΛΤΙΩΝΙ	100151 Draduation	שע ענענ	15: Hally Daalaa	7 Chinned	Howe ALTERIAN

10. Print your WIP and submit to Hanna by 9:00am each morning. Sales Rep and Assistants Guide to Understanding Their Wip

- Rep: Scan the OrderStatus column for any jobs listed in NEW. Circle or highlight any discrepancies.
 - Admin: It is your duty to task the order correctly to ensure it is moving within the system.
- Rep: Scan the OrderStatus column for any jobs listed in AutoNew. Circle or highlight any jobs listed in these statuses.
 - Admin: It is your duty to ensure any jobs in AutoNew have moved on to Production and have not been moved to any Exception ques. A job with an exception will not be listed as such on your WIP.
- Rep: Scan the CSR column and ensure your csr's name or ID is listed for each job on the WIP.
 Circle or highlight any discrepancies.
 - Admin: If your name/csrID is not listed on every order on the WIP, any discrepancies must be immediately changed in the order.

Rep: Check the OrderStatus and JobStatus on all order out jobs. They should read Production in the order status and outsourced in the jobstatus. If it says pending or qued in the JobStatus column, your outsourced order has not been placed with the vendor. Circle or highlight any discrepancies.

 Admin: Discrepancies must be brought to Order Out's attention for an immediate resolution. Jobs approved before 10:00am and 2:00pm should be placed same business day. If your job was approved at noon on Tuesday it should read Production in the order status and Outsourced in the JobStatus.

Order Status	And what it means
New	Your ticket has been recently created but has not been tasked to
	art. Any order sitting in NEW is not
	moving through the system.
PrePress Review	Your job is currently in art
Ready	Your job has been proofed out to
	the rep and admin only from the
	art department
Waiting Approval	Your Job has been proofed to your
	client by either admin or sales rep
AutoNew	Your job has been approved
Production	Your job has reached Production
Shipped	Your job is completed and has
	shipped and/or delivered to your
	customer.

JobStatus	And what is means		
Pending	Your job has been approved and is		
	slotted for plates or high-resing		
Qued	Your job has been plated and/or		
	high-res and is ready for ordering		
	or printing.		
Outsourced	Your outsourced job has been		
	ordered		
Print	Your job is being printed		
Cut	Your job is in bindery		
Finished	Your job is ready to be prepared		
	for delivery		
Boxed	Your job is complete and packaged		
	for delivery		
Closed	The production aspect of your job		
	has been completed and has		
	shipped or delivered.		
Closed	Your job has completed and has		
	been archived.		

DAILY WIP CHECKLIST

Date:_____

ADMIN	TASK
INITIALS	DANGER! Do you have any jobs listed as "NEW" or "HOLD"? <u>This means:</u> Your job is stuck and not
	Moving.
	DANGER: DO YOU have any jobs in EXCEPTIONS ? <u>This means.</u> Four job is stuck and not moving.
	Do you have any jobs that have been in prepress review (new art) for more than 48 hours?
	Do you have any jobs that have been in waiting for approval for more than 30 days? <u>This means</u> : The client must be billed for design time if they aren't moving forward with the job.
	Are all your NOW and NO FLEX jobs on schedule? Are you communicating with customer support for assurance?
	Do all of your NOW and NO FLEX jobs have a 9, 10, 11, 13, 14 or 16 beside them? If not: Your job could slip through the cracks.
	ALERT! Look at all jobs that have a "Ready" status. <u>This means:</u> Your job has not been proofed out to the customer. Once the job has been proofed out it should read "Waiting Approval."
	Do you have any jobs that have been in revisions for more than 24 hours?
	Do you have any jobs that have been in outsourced/pending for more than 24 hours?
	ALERT! Check the jobs that are in "Production" and say "Pending." Art plates at 10:00am each morning. No job should be in the "Pending" status for more than 24 hours.
	Do you see any jobs on your WIP that you know have already delivered or are past due? If so, contact customer support immediately for resolutions or closure.
	Are any orders missing from WIP that were submitted before 2pm the previous day?
	Do you have any orders that are not on the list that came in via phone or walk up?
	Are any orders missing from WIP that were submitted after 2pm the previous day?
	Are you missing any vendor proofs?
	STOP!!! COLLECT!!! Or put on HOLD! If your customer is COD and you have not collected ½ down, order must be put on HOLD.
⊥ Additional N	l otes: