

The Campaign Work Type in JOBZ!

Most JOBZ! users are familiar (or should be!) with the concept of a Project, which is a collection of Jobs that all print together. This has proven to be a very effective way to batch process several orders from a customer that happen simultaneously. All you need to do is give each Job the same Project name, then Unite the Project, and work with the Found Set of Jobs to produce your paperwork.

Each Job in a Project has its own specs and pricing and order entry, and each aligns neatly with an estimate number and eventual invoice. But it can become unwieldily when the number of pieces increases.

So there is a feature that appeared in JOBZ! v13 that approaches this challenge in a different way. Instead of a collection of Jobs, there is a single Job with a collection of "Line Items" within that Job. It can easily handle 50 separate pieces. All you need to do is specify Campaign as the Work Type, and the magic begins to happen.

Please review the following screen shots and output documents, and you should be equipped to give it a try. Don't be shy about it, you can't break anything. Also feel free to call for help.

Thanks for using JOBZ!

Jim Taylor Developer Nov 16, 2015

#	Qty	Description	Items	Each	Price
1	10,000	Buckslip A 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items can be re-sorted by changing the item numbers		\$0.1746	\$1,745.70
2	10,000	Letter A 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Items can be cloned to make similar items (++)		\$0.4868	\$4,867.50
3	20,000	Brochure, A/B 3-5/8 x 8-1/2" 5/5: 4C + PMS 80# Gloss Book 12 page self cover, Saddle Stitched Web 1,000 dpi Send the RFE to Estimating, then add estimate costs		\$0.4759	\$9,518.30
4	10,000	Reply Card A 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Enter a multiplier or accept the default 1 for each item		\$0.1851	\$1,851.00
5	10,000	Buckslip B 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items are priced as cost times multiplier as normally		\$0.1746	\$1,745.70
6	10,000	Letter B 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Total quantities, costs and markups are all calculated		\$0.3570	\$3,569.50
7	10,000	Reply Card B 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Then click "Use this price and go to QUOTE"		\$0.1851	\$1,851.00
8	20,000	Envelope A/B #10 Envelope 4/0: 4C Process 80# Vellum Offset Print and convert, standard #10 QUOTE screen displays totals. Proceed to Proposal		\$0.1219	\$2,437.50
9	20,000	Insert and Mail Insert by version, 4 pieces, A and B, then Mail From ORDER screen > Sales Order to Production		\$0.5908	\$11,815.50
		Total Items	9	Total Qty	120,000
				Total Price of Line Items	\$39,401.70

Go To = 1 / 1 = << < > >> Organize Actions Output Find...

SPEX QUOTE ORDER SCHEDULE AC'S INVOICE ADMIN HELP Clear X Find X

1 2 3 4 + Mail G

In Estimating Record # 01-21796

Company 24 Seven Sales Contact 36499 Invoice Contact Otto Matic Invoice Cust # 36499

1999 S. Bascom Ave. Suite 700 Campbell CA 95008 408-666-7356 support@carpedata.com

Job Title JOBZ! Campaign Work Type (Label) Project Name Unite Camp2016

Description A Single Job with Multiple Line Items Simply select Campaign as the Work Type >>> Campaign

Note Is product intended primarily for children 12 and under? Campaign

The Campaign Work Type in JOBZ! allows you to specify as many as fifty line items, all within a single job. Each line item is composed of its own specifications, costs and markups, with calculated totals. Easily produce all the normal JOBZ! workflow documents.

Quantities *M New Request Revised For: Job Type

Qty. Size Inks Paper Other... New Job

RFE Date Estimate Due Estimate # Job #

11/16/15 11/17/15 (Time)

Sales Rep Southern California Previous Job #'s

Jim Taylor

Team Rep

Representing Carpe Data

Estimator joan@carpedata.com

Joan Baez

CSR/Plan. george@carpedata.com

George Martin

Clear Schedule

Files Thu

Proofs Fri 1

Press Mon

Mail

December Ship Tue

1st Deliv

1st Delv Qty

Deliv Wed

December Invoice Thu

Envelope

Implementation

Indigo

Packaging

POP

Prep Only

Wide Format

SPEX 2 will display a grid. Start at the top, with the first item. Add new items as needed, numbering them in the best order. Re-number as needed- click on the background to re-sort.

Scrolling window displays 10 rows of about 50 available

Go To = 1 / 3 = << < > >> Organize Actions Output Find...

SPEX QUOTE ORDER SCHEDULE AC'S INVOICE ADMIN Campaign Excel

1 2 3 4 + Mail Personalize SPEX

In Estimating 24 Seven - JOBZ! Campaign Work Type - A Single Job with

Line Items Include Proposed Schedule in Proposal ☒

Items

Your personal drop-downs

#	Qty	Size / Finishing	Ink Colors	Product Name	Material / Equip - Rez - Note	\$ Cost	X	= \$ Each	= \$ Price
1	10,000						1		
++	X	11 x 8-1/2" landscape							
		3-11/16 x 8-1/2"							
		5-1/2" x 8-1/2"							
		6 x 9"							
		8-1/2 x 11"							
		8-1/2 x 3-11/16"							
		9 x 12"							

On this screen, don't worry about typing more than seems to fit in a field. It is quite flexible.

Re-number and then click on the background to re-sort.

Item # →

Clone item ++ →

Delete item X →

#	Qty	Size / Finishing	Ink Colors	Product Name	Material / Equip - Rez - Note	\$ Cost	X	= \$ Each	= \$ Price
1	10,000	3-5/8 x 8-1/2"	4/4: 4C Process	Buckslip A	80# Dull Book		1		
++	X	Trim to size			Litho 600 dpi				Items can be re-sorted by changing the item numbers
2	10,000	8-1/2 x 11"	4/0: 4C Process	Letter A	70# Vellum Text		1		
++	X	Trim to size and letterfold			Litho 600 dpi				Items can be cloned to make similar items (++)
3	20,000	3-5/8 x 8-1/2"	5/5: 4C + PMS	Brochure, A/B	80# Gloss Book		1		
++	X	12 page self cover, Saddle Stitched			Web 1,000 dpi				Send the RFE to Estimating, then add estimate costs
4	10,000	3-5/8 x 8-1/2"	2/2: Black + PMS	Reply Card A	100# Dull Cover		1		
++	X	Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub			Litho 600 dpi				Enter a multiplier or accept the default 1 for each item
5	10,000	3-5/8 x 8-1/2"	4/4: 4C Process	Buckslip B	80# Dull Book		1		
++	X	Trim to size			Litho 600 dpi				Items are priced as cost times multiplier as normally
6	10,000	8-1/2 x 11"	4/0: 4C Process	Letter B	70# Vellum Text		1		
++	X	Trim to size and letterfold			Litho 600 dpi				Total quantities, costs and markups are all calculated
7	10,000	3-5/8 x 8-1/2"	2/2: Black + PMS	Reply Card B	100# Dull Cover		1		
++	X	Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub			Litho 600 dpi				Then click "Use this price and go to QUOTE"
8	20,000	#10 Envelope	4/0: 4C Process	Envelope A/B	80# Vellum Offset		1		
++	X	Print and convert, standard #10							QUOTE screen displays totals. Proceed to Proposal
9	20,000			Insert and Mail			1		
	X	Insert by version, 4 pieces, A and B, then Mail							From ORDER screen > Sales Order to Production

Items 9 Total Item Qty (will be set to Estimating Qty 1 upon proceeding.) Hide Totals on RFE & Proposal Total Cost + MU = Total Price

On this screen, feel free to enter more text than seems to fit. Enter up to about 50 items. Use the scroll bar to see more items. Start a new item in the first blank row or by duplicating an item with the "++" button. Items sort automatically by Item#. Feel free to change them. Click outside the box to re-sort. Enter a Cost for each line item and a Multiplier (e.g.: 1.5) to calculate the Price. Or, enter a Cost and Price. Multiplier will be calculated. "Each" will be calculated automatically based on Price / Qty. Quantities and Prices will add up automatically. Click outside the box to re-total.

Use this price and go to QUOTE

When you have specified as many as 50 items, using the scroll bar to view 10 at a time, finish with SPEX 3 and 4, specifying the job as a whole.

Then Output > Email RFE as usual.

REQUEST FOR ESTIMATE

Litho Print

Joan Baez

New Request

Record # 01-21796

11/17/15 9:38 AM

From: Jim Taylor Carpe Data	Due: 11/17	Files 11/26/15
Customer: 24 Seven Serge Protector 408-666-7356 Cust.#: 36499	Est: 01-21796	Proofs 11/27/15
	Job: 10193-15	Press 11/30/15
	Type: New Job	Ship 12/1/15
	Prev:	Deliv 12/2/15

Title	JOBZ! Campaign Work Type
Description	A Single Job with Multiple Line Items
Note	The Campaign Work Type in JOBZ! allows you to specify as many as fifty line items, all within a single job. Each line item is composed of its own specifications, costs and markups, with calculated totals. Easily produce all the normal JOBZ! workflow documents.
Proofs	High-resolution Imposition, PDF
Furnished	High-Res PDF files sent via FTP
Finishing	Various
Packaging	None required; prepare to mail
Freight	FOB Origin To Inventory
Proposal Notes	A Campaign is a single job with as many as 50 individual line items, each with specs, costs and selling prices. All are presented on the normal JOBZ! workflow documents- RFE, Proposal, and SOP.

(+/- 0%) Quantity	<u>120,000</u>
Customer Samples	10
Press Approval	Not required
Production Note	The JOBZ! Campaign Work Type allows you to handle those jobs with a lot of moving parts.

#	Qty	Description	Items
1	10,000	Buckslip A 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items can be re-sorted by changing the item numbers	
2	10,000	Letter A 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Items can be cloned to make similar items (++)	
3	20,000	Brochure, A/B 3-5/8 x 8-1/2" 5/5: 4C + PMS 80# Gloss Book 12 page self cover, Saddle Stitched Web 1,000 dpi Send the RFE to Estimating, then add estimate costs	
4	10,000	Reply Card A 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Enter a multiplier or accept the default 1 for each item	

#	Qty	Description	Items
5	10,000	Buckslip B 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items are priced as cost times multiplier as normally	
6	10,000	Letter B 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Total quantities, costs and markups are all calculated	
7	10,000	Reply Card B 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Then click " Use this price and go to QUOTE "	
8	20,000	Envelope A/B #10 Envelope 4/0: 4C Process 80# Vellum Offset Print and convert, standard #10 QUOTE screen displays totals. Proceed to Proposal	
9	20,000	Insert and Mail Insert by version, 4 pieces, A and B, then Mail From ORDER screen > Sales Order to Production	

Total Items 9 **Total Qty** 120,000

When you have the costs from Estimating, come back to this screen and enter them in the \$ Cost column. Enter a multiplier as a decimal, or accept the default “1” (= no markup, list price).

Selling Item Lot and Unit prices will be calculated, and totals will be calculated below.

Line Items

Items

#	Qty	Size / Finishing	Ink Colors	Product Name	Material / Equip - Rez - Note	\$ Cost	X	= \$ Each	= \$ Price
1	10,000	3-5/8 x 8-1/2"	4/4: 4C Process	Buckslip A	80# Dull Book	1,587			
++	X	Trim to size							
2	10,000	8-1/2 x 11"	4/0: 4C Process	Letter A	70# Vellum Text	3,245	1.5	0.4868	4,867.50
++	X	Trim to size and letterfold							
3	20,000	3-5/8 x 8-1/2"	5/5: 4C + PMS	Brochure, A/B	80# Gloss Book	8,653	1.1		
++	X	12 page self cover, Saddle Stitched							
4	10,000	3-5/8 x 8-1/2"	2/2: Black + PMS	Reply Card A	100# Dull Cover	1,234	1.5	0.1851	1,851.00
++	X	Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub							
5	10,000	3-5/8 x 8-1/2"	4/4: 4C Process	Buckslip B	80# Dull Book	1,587	1.1	0.1746	1,745.70
++	X	Trim to size							
6	10,000	8-1/2 x 11"	4/0: 4C Process	Letter B	70# Vellum Text	3,245	1.1	0.3570	
++	X	Trim to size and letterfold							
7	10,000	3-5/8 x 8-1/2"	2/2: Black + PMS	Reply Card B	100# Dull Cover	1,234	1.5	0.1851	1,851.00
++	X	Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub							
8	20,000	#10 Envelope	4/0: 4C Process	Envelope A/B	80# Vellum Offset	1,875	1.3	0.1219	2,437.50
++	X	Print and convert, standard #10							
9	20,000			Insert and Mail		7,877	1.5	0.5908	11,815.50
++	X	Insert by version, 4 pieces, A and B, then Mail							

Items

Total Item Qty (will be set to Estimating Qty 1 upon proceeding.)

9

120,000

Hide Totals on RFE & Proposal

\$30,537.00

\$8,864.70

\$39,401.70

Total Cost

+ MU =

Total Price

129.03%

Use this price and go to QUOTE

Cost

X

Multiplier

= Unit Price

= Item Price

Totals

When you are finished with the pricing, click link: “Use this price and go to QUOTE”

The QUOTE screen will display the Totals.
Just add options if needed, and proceed to
Output > Email Proposal PDF as usual.

SPEX		QUOTE		ORDER		SCHEDULE	
		VA		+ Mail		Breakout Prices [\$/\$]	
Pending		24 Seven					
01-21796		120,000					
Estimate Total Cost		30,537.00					
<u>Add'l Ms:</u>							
Multiplier		129.0%					
= Base		39,401.70					
Target or Cost/M		39,401.70					
+ House							
2							
Price		39,401.70					
Each							
/ M							
+ M							
<u>Option\$</u>							
+ Postage		\$4,600.00					
+ List Processing		\$1,650.00					
 X Total		45,651.70					
MU		8,865					

The Proposal follows, as well as the SOP
(Sales Order to Production) which is produced
in the normal way, with a Campaign Addendum
as the final page. Enjoy!

Nov 17, 2015 Est# 01-21796 Job# 10193-15

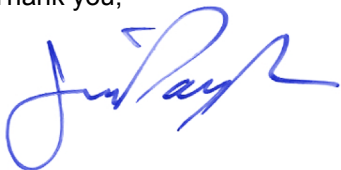
support@carpedata.com 408-666-7356

Proposal For: Serge Protector, 24 Seven

Title	JOBZ! Campaign Work Type
Description	A Single Job with Multiple Line Items
Note	The Campaign Work Type in JOBZ! allows you to specify as many as fifty line items, all within a single job. Each line item is composed of its own specifications, costs and markups, with calculated totals. Easily produce all the normal JOBZ! workflow documents.
Proofs	High-resolution Imposition, PDF
Furnished	High-Res PDF files sent via FTP
Finishing	Various
Packaging Freight	None required; prepare to mail FOB Origin To Inventory
Proposal Notes	A Campaign is a single job with as many as 50 individual line items, each with specs, costs and selling prices. All are presented on the normal JOBZ! workflow documents- RFE, Proposal, and SOP.
(+/- 0%) Quantity	120,000
Price	\$39,401.70
+ Postage	\$4,600.00
+ List Processing	\$1,650.00
Total	\$45,651.70

Proposed Schedule	Files	Proofs	Press	Ship	Deliv
	Nov. 26	Nov. 27	Nov. 30	Dec. 1	Dec. 2

Thank you,



Jim Taylor
Carpe Data

Accepted by: Serge Protector

For: 24 Seven

X _____ Date

Terms of sale: Net 30. The attached terms & conditions are a material part of this quotation and include a limited warranty, disclaimers of warranties, and a limitation of customer's damages and remedies. Acceptance of this offer shall include acceptance of all of the terms & conditions. All applicable taxes will be added to the prices herein. Prices are subject to change based on availability of materials, press time and current price of paper. Quotations over 30 days old are subject to review. Record # 01-21796

#	Qty	Description	Items	Each	Price
1	10,000	Buckslip A 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items can be re-sorted by changing the item numbers		\$0.1746	\$1,745.70
2	10,000	Letter A 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Items can be cloned to make similar items (++)		\$0.4868	\$4,867.50
3	20,000	Brochure, A/B 3-5/8 x 8-1/2" 5/5: 4C + PMS 80# Gloss Book 12 page self cover, Saddle Stitched Web 1,000 dpi Send the RFE to Estimating, then add estimate costs		\$0.4759	\$9,518.30
4	10,000	Reply Card A 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Enter a multiplier or accept the default 1 for each item		\$0.1851	\$1,851.00
5	10,000	Buckslip B 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items are priced as cost times multiplier as normally		\$0.1746	\$1,745.70
6	10,000	Letter B 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Total quantities, costs and markups are all calculated		\$0.3570	\$3,569.50
7	10,000	Reply Card B 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Then click <u>"Use this price and go to QUOTE"</u>		\$0.1851	\$1,851.00
8	20,000	Envelope A/B #10 Envelope 4/0: 4C Process 80# Vellum Offset Print and convert, standard #10 QUOTE screen displays totals. Proceed to Proposal		\$0.1219	\$2,437.50
9	20,000	Insert and Mail Insert by version, 4 pieces, A and B, then Mail From ORDER screen > Sales Order to Production		\$0.5908	\$11,815.50
		Total Items	9	Total Qty	120,000
				Total Price of Line Items	\$39,401.70

SALES ORDER TO PRODUCTION 11/16/2015
 CARP Litho Print George Martin
 Record # 01-21796 11/17/2015 9:14:50 AM

Sales Rep: Jim Taylor Invoice Cust #: 36499 Customer: 24 Seven Serge Protector 408-666-7356	Job: 10193-15 Est: 01-21796 PO: 23245 Type: New Job Prev:	Files 11/26/15 Proofs 11/27/15 Press 11/30/15 Ship 12/1/15 Deliv 12/2/15
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Title JOBZ! Campaign Work Type
Description A Single Job with Multiple Line Items
Note The Campaign Work Type in JOBZ! allows you to specify as many as fifty line items, all within a single job. Each line item is composed of its own specifications, costs and markups, with calculated totals. Easily produce all the normal JOBZ! workflow documents.
Size Various

Proofs High-resolution Imposition, PDF
Furnished High-Res PDF files sent via FTP
Finishing Various
Packaging None required; prepare to mail
Freight FOB Origin To Inventory

	Order Quantity (+/- 0%)	Selling Price	Cost	Sell @
	120,000	\$39,401.70	\$30,537.00	129.0%
Press Approval	Not required	\$328.3475 /M	+ Postage	\$4,600.00
Match Color To Screen	Proofs & PMS Book		+ List Processing	\$1,650.00

Production Note The JOBZ! Campaign Work Type allows you to handle those jobs with a lot of moving parts.

DELIVERY INSTRUCTIONS 24 Seven - JOBZ! Campaign Work Type

Customer: 24 Seven	Est #: 01-21796	Rep: Jim Taylor
Job Title: JOBZ! Campaign Work Type	Job #: 10193-15	Date: Nov 17, 2015
	Record #: 01-21796	
	PO #: 23245	

Sales Samples: 10 each version to Sales Rep.	Customer Samples: 10
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General Delivery Notes: Mail entire order and provide ten samples of each version to customer.

Samples & Delivery Destinations:
10 Samples Each Version Ship: 12/1/2015 Due: 12/2/2015 Via: Messenger 24 Seven Serge Protector 408-666-7356 1999 S. Bascom Ave. Suite 700 Campbell CA 95008 Serge accepts deliveries only after 9 a.m

Order Qty: 120,000 (+/- 0%)
Destined: 0
Difference: 120,000

Customer Contact:
 24 Seven
 Serge Protector
 1999 S. Bascom Ave. Suite 700
 Campbell CA 95008
 408-666-7356

Proofs ATTN:
 24 Seven
 Serge Protector
 1999 S. Bascom Ave. Suite 700 Campbell CA 95008
 408-666-7356 support@carpedata.com

Invoice ATTN:
 Otto Matic
 24 Seven
 1999 S. Bascom Ave. Suite 700
 Campbell CA 95008

CAMPAIGN ADDENDUM

Est: 01-21796

Job: 10193-15

Title	24 Seven - JOBZ! Campaign Work Type
Description	A Single Job with Multiple Line Items
Note	The Campaign Work Type in JOBZ! allows you to specify as many as fifty line items, all within a single job. Each line item is composed of its own specifications, costs and markups, with calculated totals. Easily produce all the normal JOBZ! workflow documents.
Proofs	High-resolution Imposition, PDF
Furnished	High-Res PDF files sent via FTP
Finishing	Various
Packaging Freight	None required; prepare to mail FOB Origin To Inventory

#	Qty	Description	Items
1	10,000	Buckslip A 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items can be re-sorted by changing the item numbers	
2	10,000	Letter A 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Items can be cloned to make similar items (++)	
3	20,000	Brochure, A/B 3-5/8 x 8-1/2" 5/5: 4C + PMS 80# Gloss Book 12 page self cover, Saddle Stitched Web 1,000 dpi Send the RFE to Estimating, then add estimate costs	
4	10,000	Reply Card A 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Enter a multiplier or accept the default 1 for each item	
5	10,000	Buckslip B 3-5/8 x 8-1/2" 4/4: 4C Process 80# Dull Book Trim to size Litho 600 dpi Items are priced as cost times multiplier as normally	
6	10,000	Letter B 8-1/2 x 11" 4/0: 4C Process 70# Vellum Text Trim to size and letterfold Litho 600 dpi Total quantities, costs and markups are all calculated	
7	10,000	Reply Card B 3-5/8 x 8-1/2" 2/2: Black + PMS 100# Dull Cover Trim with single perf at 5 inches, for 3-1/2 x 3-5/8" stub Litho 600 dpi Then click <u>"Use this price and go to QUOTE"</u>	
8	20,000	Envelope A/B #10 Envelope 4/0: 4C Process 80# Vellum Offset Print and convert, standard #10 QUOTE screen displays totals. Proceed to Proposal	
9	20,000	Insert and Mail Insert by version, 4 pieces, A and B, then Mail From ORDER screen > Sales Order to Production	

Total Items **9**Total Qty **120,000**