PRINTIQ RELEASE NOTES

v47.1 Release

printIQ.com

What's new in our v47.1 release

The latest printIQ release is packaged up and it's ready to go! The team has been hard at work over the last six months working on the v47.1 update, and we're delighted to present it to you over the coming months.

Delivering a new product release at printIQ takes a village style approach from the entire team. We have worked hard on this update, and we hope that you find something that makes a difference in your printIQ experience.

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DIGITAL FLEXO FULFILLMENT LABEL MAIL OFFSET PACKAGING SIGNAGE WIDE FORMAT

Estimating & ordering updates

QUOTING (OP-T868)

Manage your own Custom Quote Templates

kb article

Your number one feature request is now wrapped up and ready to use.

Custom quote templates allow you to simplify and speed up the estimating process. It allows you to preset information, add default values and hide information not required for a specific job type. Up until now, it has required the printIQ team to add and maintain these for you.

We are therefore delighted to deliver this feature within the application which passes the control over to you and your administrators. You will see a screen based interface that we have made as simple as possible to use. Our goal has been to deliver a usable tool that covers all the common use cases. In saying that, there will inevitably be options that the tool does not support. The printIQ team remains available to assist you where necessary.

QUOTING (OP-T883)

Re-order products in the cart

kb article

A common feature request has been the ability to control the order of products as they appear on the quote. It is especially important for larger quotes with multiple changes prior to acceptance.

Following the change, you now have the option of re-ordering the products which is then reflected on the quote letter, on the checkout screen and in the shopping cart. As you add, remove or modify items on the quote, you now have the option to control the order.

We hope that this reduces the time spent re-entering products when the order that products appear in is important to your customers.

REQUEST FOR QUOTE (OP-T892)

New columns on the RFQ board

The sometimes over-looked Request for Quote workflow board has had a makeover with new columns added showing the job title and Reference from the request. We have also added the last job that the customer accepted with the aim of giving staff some line of sight over order history.

Lastly, the board now supports wide view and custom columns.

FREIGHT (OP-T867)

Carton overrides added to Simplified Sessions

We have expanded the simplified session screens to include the configuration of carton and the number of items per carton for improved freight handling. In previous versions we added this control to the product catalogue. In this version, we have extended this to include the control within the simplified session definitions that drives simplified quoting.

In simple terms, it gives you additional options to control how a job is to be packed into cartons.

Production updates

CAPACITY PLANNER (OP-T874)

New Capacity Planner filters and search options

kb article

Some common feedback from schedulers is that the information shown on cards is not enough to make decisions on what jobs to group together. As a result, scheduling is more time consuming as you need to drill into a card to make this call.

To improve this, we have added additional filter options to be able to search for and highlight jobs with common elements. This will make it even easier to be able to group and plan jobs together that may have the same stock, stock size or even finishing options. As you search, you will see cards highlight where they match the search. Cards can then be moved together.

You can access the functionality directly from within the Capacity Planner or alternatively, it is available from the All Jobs Board or from Job Details.

TEMPLATE CREATOR (OP-T866)

Maintain your own Job bags and purchase orders

Following the success of the quote and invoice template launch, we have extended the tool to support more templates. Production job bags, inventory purchase orders and outsource purchase orders have been added into the PDF Template Creator and are available for you to control layout and formatting.

WORKFLOW BOARDS(OP-T885)

Adding new columns to the Job Section board

With expanding on adding more information to the boards we have made a small change to the Job Section board by adding the three reference columns to the screen.

WORKFLOW BOARDS(OP-T903)

Factory location added to workflow boards

We have added the 'Factory Location' selector to the Imposition, Job Series, Operations and Sales Order workflow boards This allows customers operating multiple factory locations to drill down to a specific location.

WORKFLOW BOARDS (OP-T877)

Delivery type added to the Dispatch board

kb article

We appreciate your feedback in this area and as a result, we have added some additional information to the Dispatch board.

As part of the updates, a new column and status have been added for "Delivery Types". This is to assist in being able to search for and sort by the type of delivery you are using.

IQstore and inventory updates

The goal of the R&D team at printIQ is to combine logical workflow backed up with great development. One area that we have focused on is inventory replenishment and how IQstore, warehousing and production can work together more cohesively. You will see several changes within this and coming releases that delivers our big picture plan.

Our plan is to deliver the full workflow in three phases with v47.1 being phase one. In v47.2 and v48, you will see more functionality that builds on phase one to deliver automated replenishment and a tighter link between an IQstore inventory item and your production facility.

INVENTORY (OP-T878)

Transfer into inventory workflow

kb article

In this release, you will see a new, transfer into inventory workflow that introduces a new board that tracks the job once it hits 'Finished Production' within the factory. At this point, the job moves to the new board and gives you more control relating to how the product is transferred into stock.

The workflow supports partial quantities where you ship part of the order to the customer and transfer the balance into inventory.

We have launched what we have completed within this release with more to come in v47.2.

QUOTING (OP-T898)

Automated back order process

kb article

As the use of IQstore continues to grow, the demand for automation grows with it. The management of back orders is often difficult to track as goods are receipted or manufactured within your factory.

To help improve the workflow, we have developed an automated process that places the order on or off back order. The order will start on back order where there is insufficient stock. As goods are receipted or manufactured, the order will automatically come off back order so they can be picked.

The goal is to reduce touchpoints and to improve transparency within the warehouse and factory floor.

IQSTORE (OP-T901)

IQstore replenishment workflow

kb article

Within this release, you will see phase one of our replenishment workflow. This initial phase lays out the foundations for two further phases that are underway now.

The first thing you will notice is that the sales order details screen has had a makeover with a fresh, new layout and some added functionality.

As part of the update, you can now track progress of the job in production, directly on the sales order itself. As the job finishes production and is transferred into inventory, the sales order gets updated given that a link between the two has been established.

Options on the sales order board and details screen allow you to manually tag a sales order with the related job(s).

You will notice that the simplified job upload CSV has had new inventory codes and warehouse locations added. This helps to drive the workflow so you can preset the details in the upload which is then used in the transfer into inventory process.

We felt that rolling these changes out added enough value to warrant a split release. We have lots more to come so stayed tuned for phase two

REFERENCES (OP-T893)

Inventory item references added to templates

We have included the recently developed inventory item references to the quote letter, packing slip and picking list markup templates. Please contact the support team for more information.

Accounting updates

INVOICING (OP-T896)

Partial invoicing and Deposit workflow

We have completed an overhaul of our sales invoice process to add new functionality and workflows that many of you have been requesting.

We now support partial invoicing which allows you to complete invoicing in stages, particularly for larger jobs. This is a setting based option that you may opt in for and we have added further controls to ensure you do not over-invoice orders. You will also notice a new invoice status display that provides an improved view of what invoices have been generated.

We have also introduced the concept of deposits on an order. This feature allows you to invoice a portion of the order upon commencement and the balance is invoiced upon completion. We have followed accounting principles in the treatment of the deposit, and it is reversed out when the final invoice is generated.

kb article

SALES TAX (OP-T887)

Avalara and TaxJar added to quoting

We have continued to develop the sales tax integration with both Avalara and TaxJar (used in the US). In this latest version, we have added the option to calculate sales tax at the estimating stage which allows you to add sales tax onto the quotes that you send your customers. We continue to re-calculate at the point of invoicing as these are the actuals and may differ from the quote.

INVOICING (OP-T940)

QBO integration multi-site functionality

For those customers operating multiple businesses within the same version of printIQ, we have added support to push information to different instances of QBO.

This will mean you can now run a separate set of books for each of your printIQ business sites.

SALES TAX

Improved tax handling for US QBO versions

Within the US version of QBO, sales tax can only be set at the invoice level. In contrast, printIQ allows you to set sales tax differently for each line item on the invoice. We do this to support the different tax regimes where sales tax on raw materials, labor and shipping etc can be different within the same job.

To fill this gap, an option has been added to handle tax in a more precise format for US versions of QBO. Tax can now be optionally passed as a separate, single summarised line on the invoice. When using this option, you will see no tax calculated on each of the invoice line items and the total tax is then written as an additional line.

This allows for you to use a tax integration within printIQ to look up tax, and still pass the correct amount of tax to QBO. Please contact the support team for more information.

General updates

OPERATIONS (OP-T869)

Upload operations for faster setup

kb article

Over time, the functionality relating to operations has grown which, in some cases, has added to the complexity and clutter on the maintenance screen.

To help with this and to continue our focus on faster setup, operations can now be exported to a csv, updated and imported back into printIQ.

The process can be used to create and update operations and is a great option when combined with the Component record upload.

IQAPPROVE (OP-T882)

Uploading multiple proof files

The file upload for proofs has been tweaked, so that you are now able to select multiple files and upload them at the same time, instead of needing to do them one by one.

OUTSOURCE PORTAL (OP-T899)

Outsource portal updates

kb article

There is a new message to notify your suppliers, either when giving you a price for an estimate, or when viewing details of work that has been outsourced to them, to let them know of other related products. The intention is to make the supplier aware of other products that should be considered when completing their quote. This text will be customisable and removable.

TASKING (OP-T873)

New activity option added to Tasks

kb article

We have updated the tasking feature in printIQ. This includes a refresh of the tasking management screen as well as the addition of a new 'Task Activity' screen where users can create their own task types.

UPLOADS

References added to CSV uploads

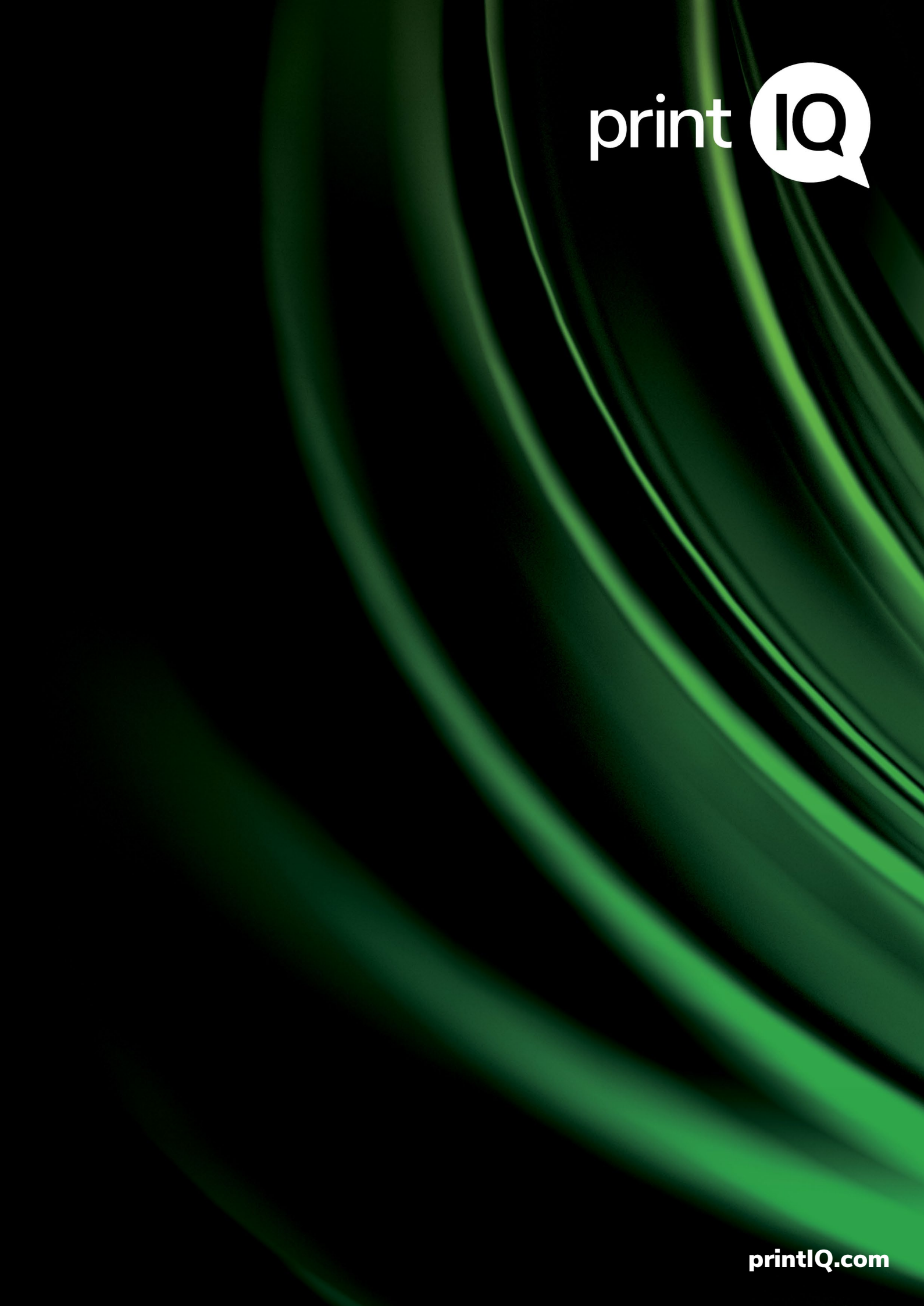
When uploading quotes or jobs using the Simplified or Custom Quote CSVs, you are now able to specify values for any of your configured quote product references. The result is the ability to preset references onto the uploaded quote or job.

UPLOADS

Updates to the single use address import

We have made some changes to the way that single use addresses behave. The aim being to make the logic relating to single use and standard addresses consistent.

When uploading a CSV with the same single-use address on multiple products, shipping will be combined into a single delivery instead of shipped individually.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