

PRINTIQ RELEASE NOTES

v47.2 Release

Product insights and achieving a balance

Delivering a successful product to a broad and sometimes diverse customer base isn't the simplest task. It involves a lot of research, and listening followed by some tough decisions on how to achieve a balance with resource allocation.

As a product team, our goal is to deliver a well rounded product where we find great solutions and remove blocks for our customers, our staff and the overall market.

Generally, we see four work streams that we categorize into buckets. History tells us that we must achieve a balance across all four buckets in order to be successful. The four buckets are:

R&D: This is our core research and development program which is funded by IQ. The goal is to determine the best product direction based on the market, our customers, staff and other stakeholders.

Customers: Customers have a critical part to play in the product roadmap. The product team don't need to be super smart, they just need to listen and observe. We plan our roadmap based on customer feedback and via the paid RFC route for more specific requests.

Improvements: printIQ is a large product that is both broad and deep. The Improvements bucket is about polishing, fine-tuning and re-working existing functionality and removing technical debt to improve the current product for customers and staff

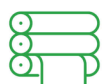
Integrations: 90% of our implementations involve integration of some type. Integration and automation has, and continues to be what sets printIQ apart from other products. It's impossible for printIQ to be everything to everyone so the integration toolbox delivers the autonomy, automation and connectivity in our customer's unique way.

The latest printIQ release is part of our big picture roadmap with several features being part of a larger, phased approach. As normal, with v47.2 being a point release, it's not part of a full roll-out. It's targeted at customers with specific changes included but, in saying that, it's also available for anyone, especially if there's things in it that you're excited about trying out!

We hope that you find some golden nuggets or maybe just some updates that make your life a little easier each day.



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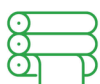
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Show Piece

ALL JOBS BOARD

Want less Red? New priority job options, New columns and job ordering

We have improved the way that priority jobs are managed to give you more options on how they can be identified. New options for viewing priority jobs have been added where you can replace the red row highlight with a priority flag column and also a clock that counts down the time remaining to due date/time.

In addition, you can retain the board sort order so that priority jobs simply appear in the due date order along with every other job. This is in contrast to priority jobs being fixed to the top of the board regardless of order.

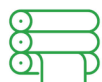
We have added options to colour code the countdown column and an alert icon shows once the countdown crosses defined thresholds, i.e., 15 minutes prior to due date/time. The colours and options can be adjusted on the Customise screen and also on the Production Admin page which is found on the Admin -> Configure menu.

The priority flags are also available on the Pre Production and Production boards. We hope you find the new functionality useful and a little easier on the eyes!

The screenshot shows the 'ALL JOBS BOARD' interface. At the top, there are filters for 'SITES: All Sites' and 'CUSTOMER: All Customers'. Below this, there are tabs for 'JOB STATUSES (14/21)', 'PROOF STATUSES (9/9)', 'OUTSOURCE STATUSES (9/9)', and 'INVOICE STATUS (0/3)'. A row of status buttons includes 'Awaiting Payment', 'Awaiting Artwork', 'Design Ready', 'Pre-Press Ready', 'Proof Ready', 'Imposition Ready', 'RIP Ready', 'Planning Ready', 'Platemaking Ready', 'Print Ready', 'Laminating/Coating Re...', and 'Quillotine Ready'. Below these are more status buttons like 'Fold/Bind Ready', 'Additional Finish Re...', 'Wide Format Finish...', 'Outsourced', 'Finished Production', 'Distribution Ready', 'Complete', 'On Hold', and 'Cancelled'. There are also checkboxes for 'My Jobs Only', 'Awaiting Pick', 'Include draft', and 'Draft only'. A search bar and a 'Saved Filter: Production ALL' are visible. The main table has columns for Job No, Series, Customer, Contact, Title, Description, Factory Location, Due Date, Qty, Inv, Disp, and Status. A red box highlights a 'Priority job' icon in the 'Job No' column. Another red box highlights the 'Due Date' column, which shows a countdown clock (e.g., 1:46 hrs) and an alert icon. A third red box highlights the 'Due Date' column header, which has a dropdown menu with options for 'FIFO', 'LIFO', and 'DUE DATE'. The table contains 14 rows of job data.



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ALL JOBS BOARD

New job ordering option

To help improve the management of jobs, we have added a new sort option on the board for Due Date. You will see this alongside the FIFO and LIFO sort option.

We have also continued to add more column options which can be added for each user depending on how they work.

ALL JOBS BOARD

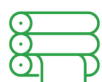
New filter option for Factory Locations

For those customers operating multiple Factory Locations, we have added a new filter option that may be helpful when you need to know about jobs with a specific status.

We have made changes to the board filters that allow defined job statuses to be visible regardless of the factory location you are viewing. For example, if you have a job status to identify re-worked jobs or priority pre press, you can set these statuses to display even when the job is being produced at a different location.



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Estimating & ordering updates

QUOTING (OP-T951)

Making the label estimating workflow more die centric

kb article

Feedback from our label users is that we need to make the estimating process more focused around the die. While we already have a die library feature that allows you to start by searching and selecting a die, we have extended the workflow to place the die information 'front and centre' at the top of the Custom Quoting screen.

As you select the die and choose options, you will see a new summary view of what has been selected. The aim is to improve the information that is presented as you complete the estimate.

In the upcoming v48 release, we're also working to extend the workflow so that the die details are auto populated to relevant fields within the quote removing the need for any double entry of fields within the quote. This will fulfil our goal of centralizing all this information in one place with a single selection

QUOTING (OP-T928)

Managing stock price overrides from quote to PO

kb article

With stock price volatility being here to stay, we have created a new workflow that is designed to help you record, track and purchase stocks where you have negotiated a special price for your order.

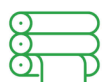
QUOTING (OP-T948)

Expand/Collapse stock groups

We have enhanced the stock selector to allow the expanding and collapsing by the 'stock group' to make locating the required stock easier and faster. It will mostly benefit customers with large numbers of stock records where it's sometimes difficult to see the wood for the trees



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RFQ Board (OP-T947)

New IQStore pricing option - Price per X items

kb article

We have added a pricing option to IQStore that supports a price per X items. It will allow you to configure a price for more than a single item. For example, instead of pricing at 0.0035 per item, you can now set this as 3.50 per 1000 items.

FREIGHT (OP-T936)

Product numbering sequence added to the cart

kb article

In the shopping cart, all items will now be numbered. This is to help improve the identification of items within a quote. Now, if a customer asks, "Please make changes to Item #6", you will know immediately what item to change.

When you combine this with the recently added ability to re-order the products in the cart, we hope that it gives you more control over the layout of your quotes, especially so when you are dealing with large numbers of products.

FREIGHT (OP-T926)

PDF template creator enhancements

kb article

Based on your feedback, we have made some changes to our markup templates and we are continually adding template options. We have added the ability to set the size of the template header and footer components.

Production updates

ALL JOBS BOARD & SALES ORDER BOARD (OP-T952)

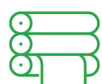
Visibility of linked orders & jobs

With increasing numbers of customers utilizing both manufactured and fulfillment items on the same order, we are working on combining the two and improving the way you can manage an order with the two types of products.

As a simple starting point, we have added a new column to the Sales Order board to show you how many jobs need to be shipped with the order. In addition, we have added the same feature to the All Jobs board to show you the number of sales items that need to be shipped with the job.



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Up next is a new Order summary board which we are working on now. the aim is to present a view of the entire order with all the products, regardless of type. It's designed to show you the status of each item and work as a gateway to access all of the elements of the order.

FREIGHT (OP-T937)

New placeholders added to the dispatch emails

We've added Delivery Option and Delivery Quantity placeholders to all shipping / dispatch emails

Accounts updates

INVOICING (OP-T941)

Credit limit checks in Xero

kb article

We have continued to develop our accounting integrations with the latest change being the ability to complete credit limit checks against a customer account in Xero prior to an order being placed.

A credit limit check sees a comparison of the current balance in the accounts receivable ledger plus any WIP plus the order about to be placed which is then verified against the amount defined as the credit limit for that account. In the event that the new order will exceed the credit limit, the order won't proceed.

One important thing to note with Xero is that the value of the credit limit is not available for access from their API. Many other software developers have requested this feature but to date, it hasn't been added. For this reason, the credit limit amount must be maintained within the printIQ customer account. We connect to Xero to retrieve the current account balance which is used in the comparison.

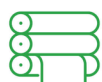
QUOTING (OP-T949)

Additional Information on Purchases Orders

Based on your feedback, we have added more information to the inventory purchase orders. Inventory POs will now display a conversion from weight to the lineal measurement (Feet/metres) for rolls. For sheets purchased in packs or in bulk, we display the individual sheet counts. The aim is to improve visibility over what you are ordering.



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General updates

IQSTORE (OP-T909)

Improved tracking on Inventory transfers

kb article

For 'Internal Transfer' jobs, from within the jobs dispatch tab, we have added the option to print identification labels that can then be adhered to the items for improved tracking

IQSTORE (OP-T911)

Delivering the next phase of IQstore updates

As part of our ongoing updates to IQStore, v47.2 delivers phase two where we have added some more options to improve the user experience. Check out the KB but at a glance, you will see:

- There's a new button to take you directly to the inventory item.
- A 'See Bigger' option to zoom in on the item image.
- We've added a simple but useful option to copy the item code to the clipboard.
- The item code and quote number has been added to the sales order details screen.
- The ordering screen now remembers your List or Gallery view preference.
- We have added the Item thumbnail to the Picking list, Packing slips and Delivery Docket

We're now onto the final phase of this overhaul which delivers improved editing capabilities and new replenishment workflows, so, keep an eye out for this in the next release.

ADMIN (OP-T934)

Create email templates for each site

kb article

As the number of customers operating multiple businesses from within a single instance of printIQ increases, we are improving the control you have over branding and collateral.

Within this release, we have added the ability to have a different email template for each business site. It can work in conjunction with the option of running different domain names for each business and allows you to configure the set of emails that are sent internally or to customers.



EMAIL TEMPLATES

Job status alert emails

The new job status email feature fires when a job hits a defined status. There is an email template for each status so you can be specific around the content and layout of each status change. As with all email templates, they can be used internally or sent to customers and are a great way to add communication into your workflow.

The emails can be customized from the Email template admin screen where you will see an email template for each status. They are de-activated by default so start by turning on the ones you want to use.

TURNAROUND TIMES

Overhaul of turnaround times

One of the main features of this release is an overhaul of how turnaround times are managed within printIQ. Currently, there are 3 ways to configure TAT ranging from a fixed turnaround for every job, turnaround configured on the product category and finally, within a legacy screen when you can be extremely granular.

The Re-vamp includes a number of changes, some of which are outlined in more detail below. The end result is that we have consolidated TAT to be managed at the product category level which we believe achieves a balance between good functionality and easy setup. In future releases, we will also look to deprecate the legacy TAT setup relating to shifts.

As part of this release, we have added support for TAT measured in hours to give you more flexibility, especially when offering a same day priority option. This change affects both priority and standard turnaround times.

TURNAROUND TIMES

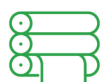
Priority turnaround added to tree nodes

As mentioned above, we have added the concept of priority turnaround times to Product Categories (tree nodes) so that they sit alongside standard turnaround times. This is an optional feature and when set, will override the standard turnaround if priority is selected during ordering.

To compliment the priority TAT set at the tree node level, we have added some exclusions to give



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you more control over when priority is applied. At a press, stock and operation level, you will notice an Exclude from Priority flag. If selected, and if your job meets this criteria, we override the priority TAT and simply apply the standard TAT.

For example, you may not want to offer priority when the item is outsourced, when it is on a specific substrate that you need to order in or when the product has a high end embellishment that may mean a faster TAT is not possible.

TURNAROUND TIMES

Factory locations with operating hours

We have extended the information managed within Factory Locations to include operating hours. This includes managing standard operating hours, public holidays and adhoc closures and outages.

Turnaround times also take operating hours into account when defined on Product Categories. This means that you will notice due dates falling within operating hours only and on a positive, it eliminates the 3am due dates!

TAT can span multiple days when the order is placed later in the day. In this scenario, we take both the closing and opening times into consideration when setting the due date. We even added an order cutoff time so that orders created after this time will have the timer start at the next business days' opening hour.

Operating hours are managed on the Factory Locations screen.

TURNAROUND TIMES

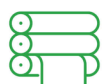
Adding value with priority surcharges

As there's no such thing as a free lunch, we have added the ability to charge a premium for priority turnaround. Within the Product Category, you will see several charging options based on a fixed price, price per unit and percentage markup.

For those customers using the SmartSite module, the priority TAT surcharges are supported on the widgets.



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PRODUCT CATEGORIES

A new type of tree node

We have added a new sub-category option which allows you to be more granular when setting up your tree nodes. It's a little tricky to get your head around but once you do, you'll see the value it adds.

A sub category is added simply by adding the same tree node type, i.e. filter or product as a child category to an existing tree node. When the two nodes match, a sub category is automatically created and you will notice significantly less information to enter.

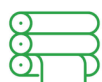
The feature means that you can create sub categories and place products within the sub categories but when ordering, your staff and customers will only see them presented at the parent category level. They will never see the sub category during ordering.

The "why" is because many of you have requested that we provide solutions for being more specific around invoice descriptions, TAT, general ledger codes and sales tax exclusions relating to products. At the same time, you don't want more clicks to drill down into tree nodes.

For example, you may setup sub categories for standard and priority TAT products with them all presented under one category. Further, you may have some products that are tax free while others have standard sales tax. Again, you can configure each on a separate sub category but then present them together when ordering.



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Integration updates

Integration continues to be a growth area with some very impressive connections being created every week by customers and our integration team.

Below is a summary of the new touchpoints and options that have been added in this release. For more information, check out the Swagger details and the knowledge base.

IQLINK

IQ Link now supports cancelling a job

Following on from the recent overhaul of the IQLink module, we have added a new feature that improves the 2-way communication between you and your supplier.

In the event that a supplier cancels the IQLink job that you have outsourced to them, the process can now automatically cancel the purchase order back in your version of printIQ. The feature is optional so over to you whether or not it will add value for your business.

WEBHOOKS

New fields added to the consignment webhook

We have added new fields to the webhook that can be fired when a new consignment is created. The new fields are JobKey, SalesOrderKey and SalesOrderItemKey. The intention is that with these keys, you can call additional APIs to retrieve or update data as part of your integration.

APIs

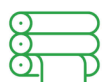
New Shipping APIs

We have continued our focus on delivering an integration layer that gives you the autonomy and flexibility to build your own solutions. As part of this drive, we have created a new freight integration endpoint from printIQ, enabling tech-savvy users to build their own plugins between printIQ and external freight providers for rating and consignments.

OPO

Improve purchase order automation

Due to popular demand, we have extended the automation relating to outsourced purchase orders. Currently, an OPO can automatically be sent to a supplier when an operation on the job is marked as outsourced.



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