PRINTIQ RELEASE NOTES

v49 Release

including v48.1 & v48.2

LET'S TALK

For more information about our products and services,email us at **letstalk@printiq.com** or put in a request to the **service desk**

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GROW
SCALE
SUCCEED

Estimating & ordering updates

QUOTING

Option to calculate shipping at a later point

kb article

You now have the option for your quotes to not attempt to calculate shipping prices until you ask for it. Shipping prices can now be requested and returned once your users click a button for it on the Quote Details screen. Please reach out to printIQ support to configure this option.

QUOTING

Improved Performance with Larger-Product Quotes

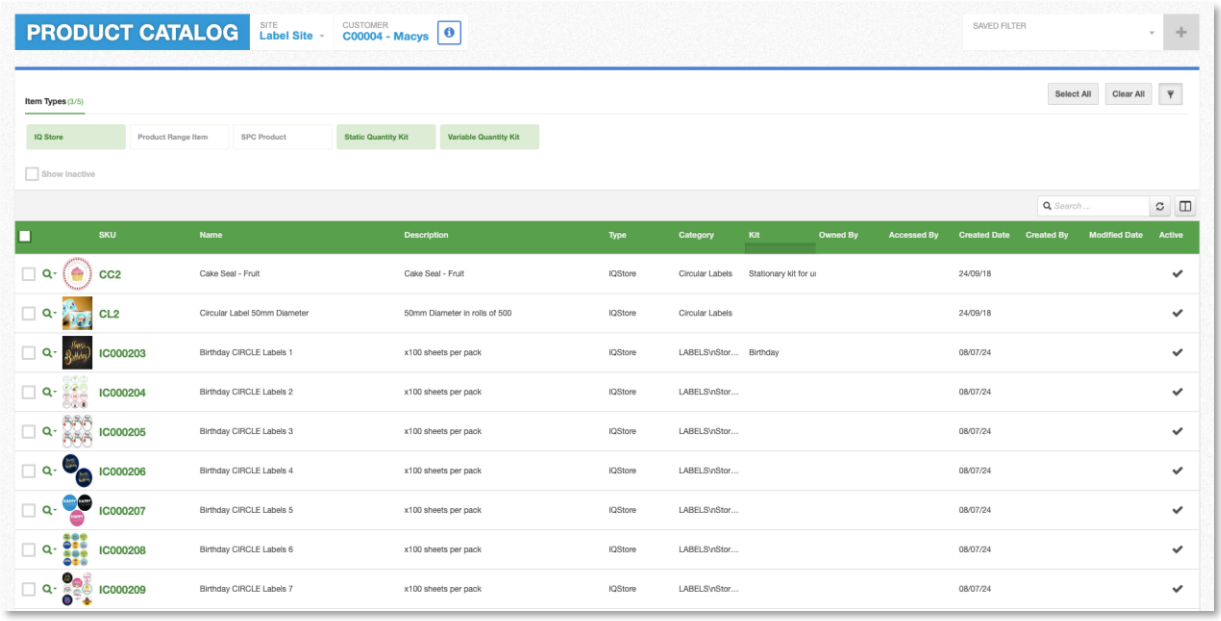
We have worked to make the system run faster and smoother, primarily in the estimating space, when working with quotes with a large number of products.

QUOTING

New Product Catalog Board

We have created a new 'Product Catalog Board' as a central point for the management and ordering of catalog items (these include Store Items, Product Range Items, Single Product Creation Items and Kits). This board is designed with your Staff and Customers in mind as this board is available for customers to order from.

This is a useful tool for all sectors especially our label printers who have a large range of SKU's available for their customer to order.



QUOTING

Product Catalog (formerly Dynamic Catalogue)

'Dynamic Catalog' has had a revamp! This feature is now known as a 'Product Catalog' and 'Dynamic Catalog Items' are now 'Product Catalog Items'.

Along with the rebrand comes a range of additional features such as linking the range to an existing Single Product Creation (SPC) session. This removes the restriction of having every range linked to a unique production session. Now a single SPC and be linked to multiple ranges. Edit the master SPC session and all ranges linked will now quote with the updated specs.

Ranges can also be pulled into a custom quote format. This can be used as a base to start the quote. Additional operations can now be added to the base for more custom work.

Each individual item/SKU can be managed and ordered directly from the new Product Catalog board.

This will act like a library for you and your customer to see all items/SKU's that you have available for them to reorder.

QUOTING

Markup template type - Product Specification Sheet

We have added the option from an inventory item, Product Catalog Item, Store item and SPC session to produce a PDF specification document.

This will show important information related to the item such as Item Code, Name, Description, weights, Notes and other specific fields including an image.

These can be used as a document to send out with the shipped order or as an identifier in job bags or stock help in store.

QUOTING

Enhancing performance for promotional products

The ordering of promotional products on simplified has been improved to handle products with more items than before, without needing to wait for the promotional product to load. Improvements have also been made to loading of promotional product type categories, to be faster when they contain many items.

QUOTING

Dynamic promotional product descriptions

Instead of requiring a description to be entered for your promotional products, you will now be able to leave this blank. The description will be generated from the items and quantities selected during ordering instead.

QUOTING

Better pricing controls when adjusting promotional product orders

At quote and production stage, we have added visibility of each items pricing and display any custom % or $ value pricing adjustment made against each item.

When a job is already in production and the customer requires additional items added to the order, this allows the user to add the additional items to the order and clearly display any adjustment made previously, allowing the user to match the adjusted pricing.

QUOTING

Easier access & control of product information

We have added two new columns to the Orders, All Jobs, Pre/Production and Imposition boards for 'SKU' and 'Die description'.

Additionally, we have added the ability to 'Clone' a Single Product Creation session. This will allow users to base a new item off an existing SPC and modify it to create a new product.

QUOTING (OP-T1119)

New quoting options for the 'Runs Calculator'

We have expanded the options inside the quote based 'Runs Calculator' to provide more automation on how runs are split out when using multiple kinds.

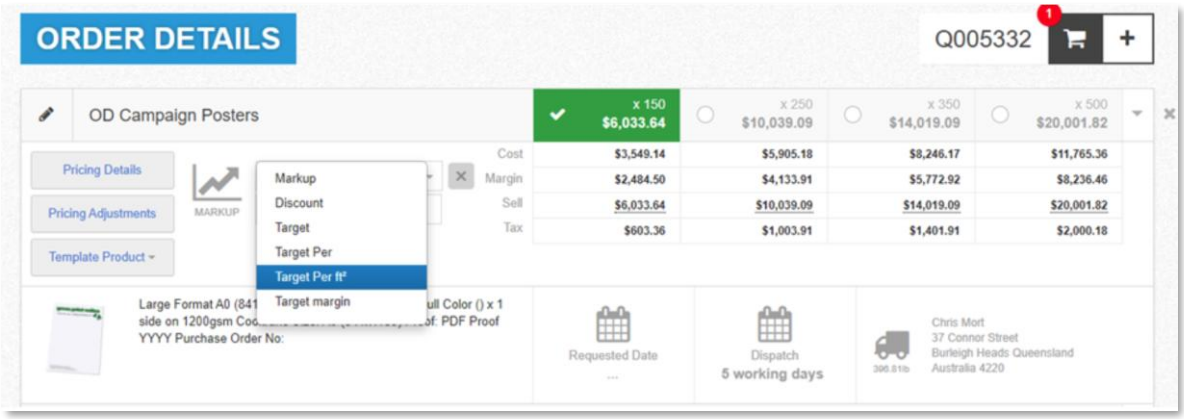
This allows improved runs splitting for both offset and digital workflows. You can also specify the max number of overs allowed and this will be considered when the runs are split out.

QUOTING

Target price per square foot / metre

kb article

We have extended the markup options within quoting to support a target price per square foot or metre. The pricing adjustment can be applied to both the wholesale and retail price and is a simple way to achieve a more market driven price.



QUOTING

Quote question updates for inks

We have extended quote questions related to processes to improve the way PMS colors are managed. The updates introduce the ability to separate the PMS colors on the front and back which also flow through onto product descriptions.

QUOTING

Enhanced die-based quoting

kb article

For labels and packaging customers, we have made further enhancements to the die centric ordering workflow. The changes see the introduction of a Confirm Die button which takes the information stored on the die and pre-populates these in your custom quote. We have added new imposition component records to support these changes.

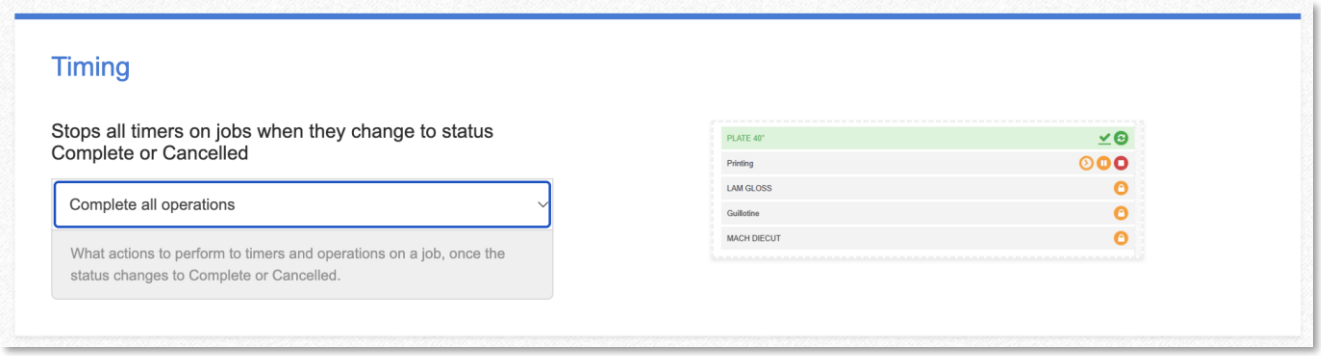
Our goal being to remove some of the clicks and make estimating faster, once you have selected a die.

Production updates

PRODUCTION

Automatically stop all timers when job is complete or cancelled

We have added an option to automatically complete all timers, or all running & paused operations, or have no effect once the job status moves to complete or cancelled. This can be configured from the "Settings" page in the "Customise" menu under Admin.



PRODUCTION

Additional Column Filters to Production Boards

kb article

Additional filtering has been added to the pre production and production boards, This will allow you to easily filter job lists by fields such as a stock, stock size, colour and job type.

PRODUCTION

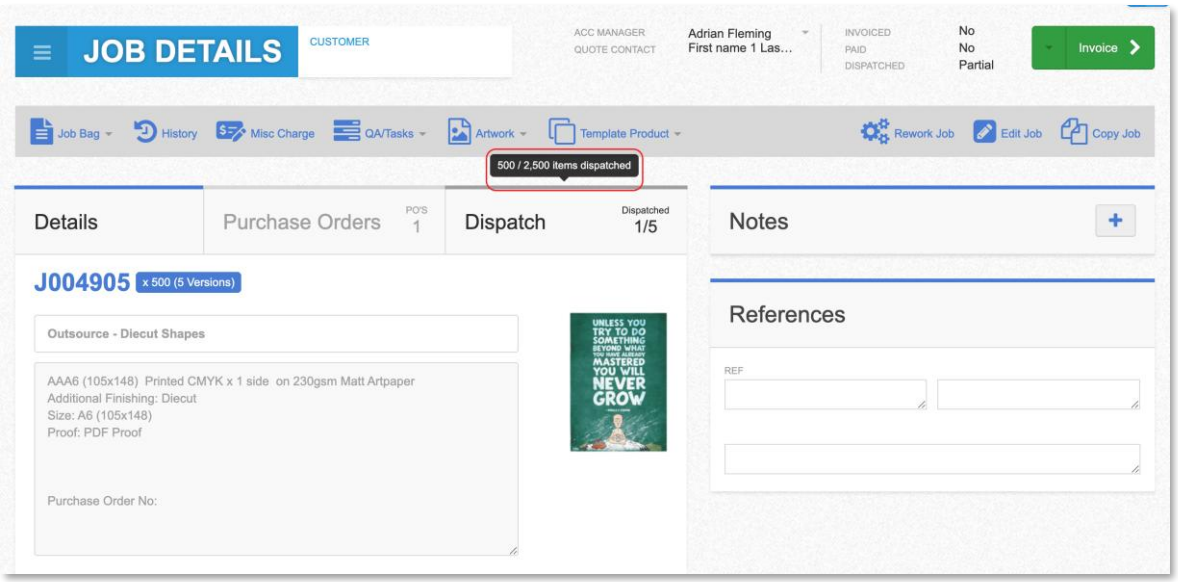
'Series' columns added to Operations Board

We have added additional columns for the 'Series' code and description to the operations board

PRODUCTION

Job details 'Dispatched' quantity tooltip

A quantity tool tip has been added in the dispatch tab to show the currently dispatched quantity. You don't need to go into the dispatch tab to see how shipping is going - just hover.



PRODUCTION

kb article

Production board time display

We have changed the time display for TOT (Total Operation Time), TST (Total Section Time) and TPT (Total Production Time) from a decimal display to an HH:MM display, to make it clearer when working with minutes.

ORDERS BOARD

Shop Floor users access to Proof Details

We have added to the user type of 'Shop Floor', access to Proof Details. This includes the ability to view and download a pdf on any approved proofs to aid in the production of jobs on the factory floor.

PRODUCTION

Ability to add 'Notes' to a job from the All Jobs board

You will now be able to add notes to a job without needing to open the job itself. Under the 'spyglass' menu on all jobs board, you will be able to click the 'Notes' action, and add, remove and edit notes directly from the board.

PRODUCTION

Adding Supporting Documents into the Supplier Portal

We have added the ability, when submitting supporting documents on a job that will be outsourced to a supplier, to be able to drag a file to supporting documents and make it publicly available for the supplier that will complete the job in the same step.

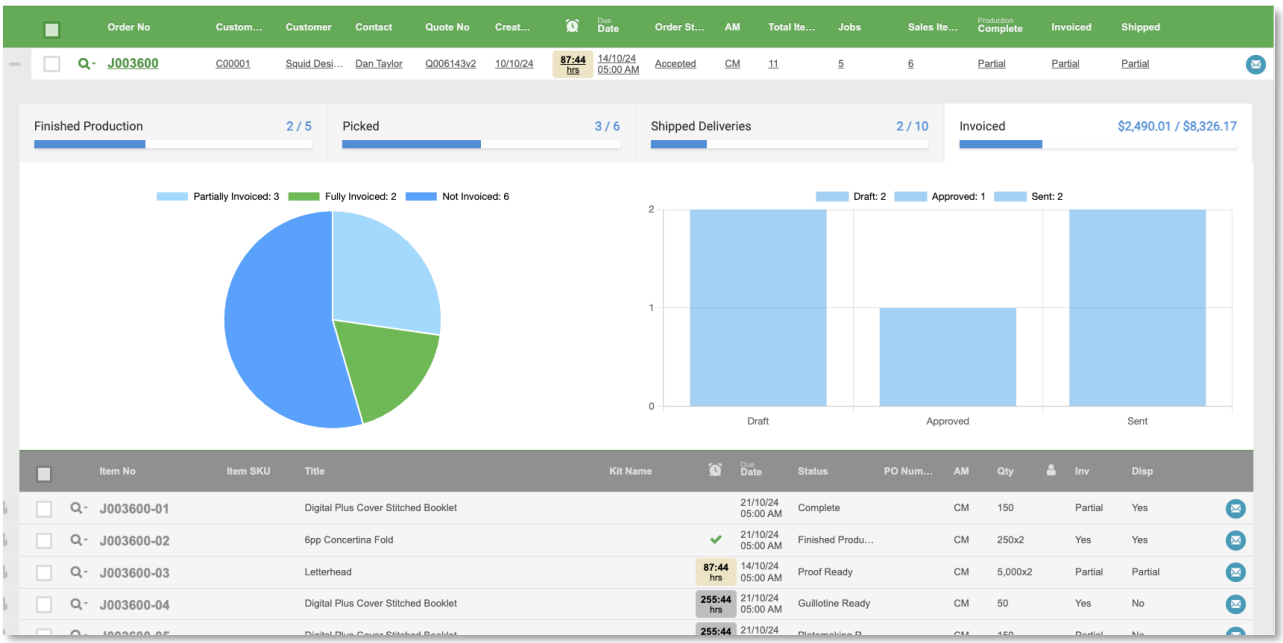
ORDERS BOARD

New Tiles added to the Orders board

kb article

Following on from the introduction of the Orders board in v48, we have added new tiles to give a more visual and graphical view of an order. In this release, we have 4 interactive tiles that display the lifecycle of the order from production through to shipping and invoicing.

The Orders board is designed to give you a summary view of a customer's order as a starting point. From there, you can drill down into individual jobs or sales orders for more details. The tiles are designed to enhance the board from a visual summary perspective.



PRODUCTION

More auto pick options for improved control

For those customers using the Auto Pick feature for raw material inventory, we have added more options to match the different ways of working. The new options allow you to prioritize picks in locations that can fulfil the entire pick. In addition, you can select it to only auto pick within a single warehouse and lastly, you can set the auto pick to work using FIFO across all inventory locations. Check out the knowledge base for more details.

PRODUCTION

Automated supplier selection on purchase orders

kb article

Follow popular request, we have completed the last link in the selection of the supplier on the outsource purchase order. The process starts on the component record where you can define a supplier and pricing for an operation. The selected supplier is added to the purchase order without the need to open and confirm these details.

PRODUCTION

Timezone support for Capacity planner

kb article

We have added timezone support to the Capacity planner for those customers operating multiple factory locations, in different timezones. Each factory location now has separate timezones and operating hours. From there, planners and production staff simply work in their own timezone.

IQ Store & Inventory updates

PRODUCTION

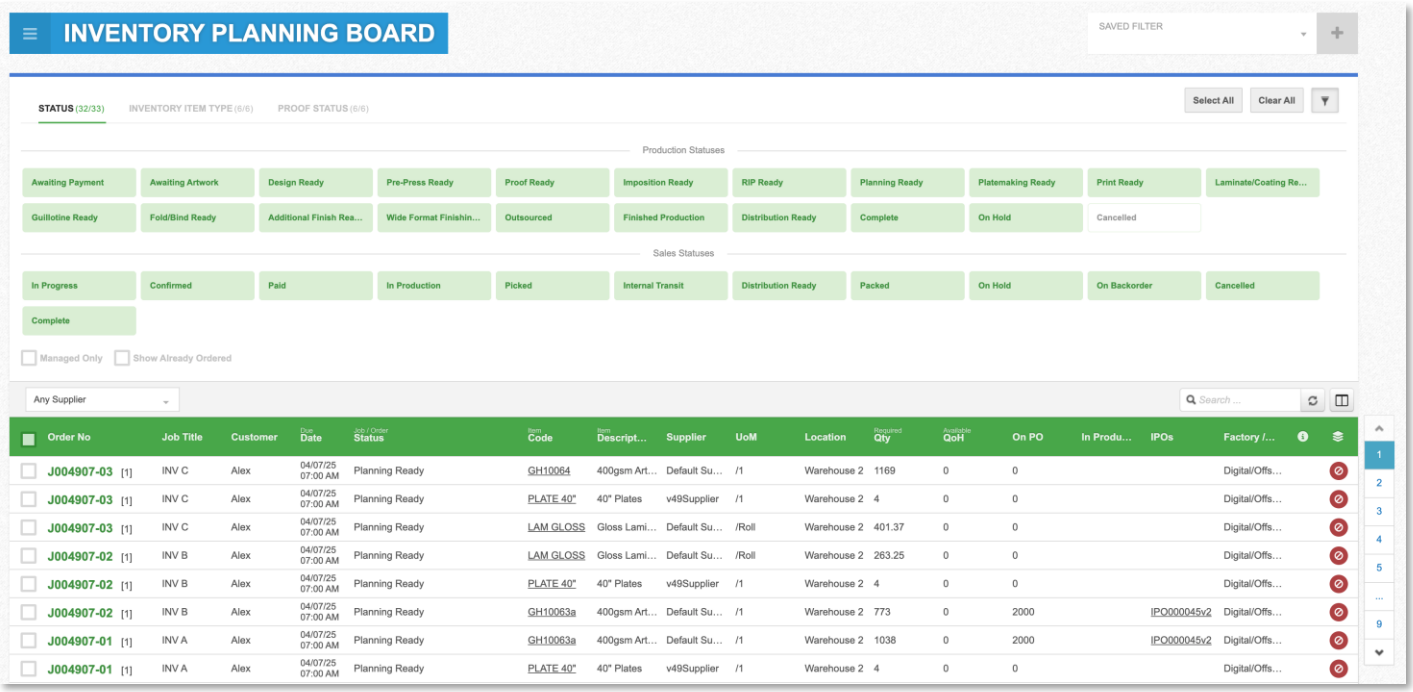
Inventory Purchasing / Planning Board

kb article

We have been asked for this one a few times from clients around the globe and it is great to be able to introduce you to the Inventory Planning Board.

We have been working on a place for you to see everything you need to buy for your upcoming orders in relation to Materials attached to the Product Job or the store Item. You will have a list of required items and quantities.

This board will allow you to group many jobs together that are using the same material or set the board to filter for a specific Supplier and look to consolidate all items together and let the system group multiple orders together for the same stock.

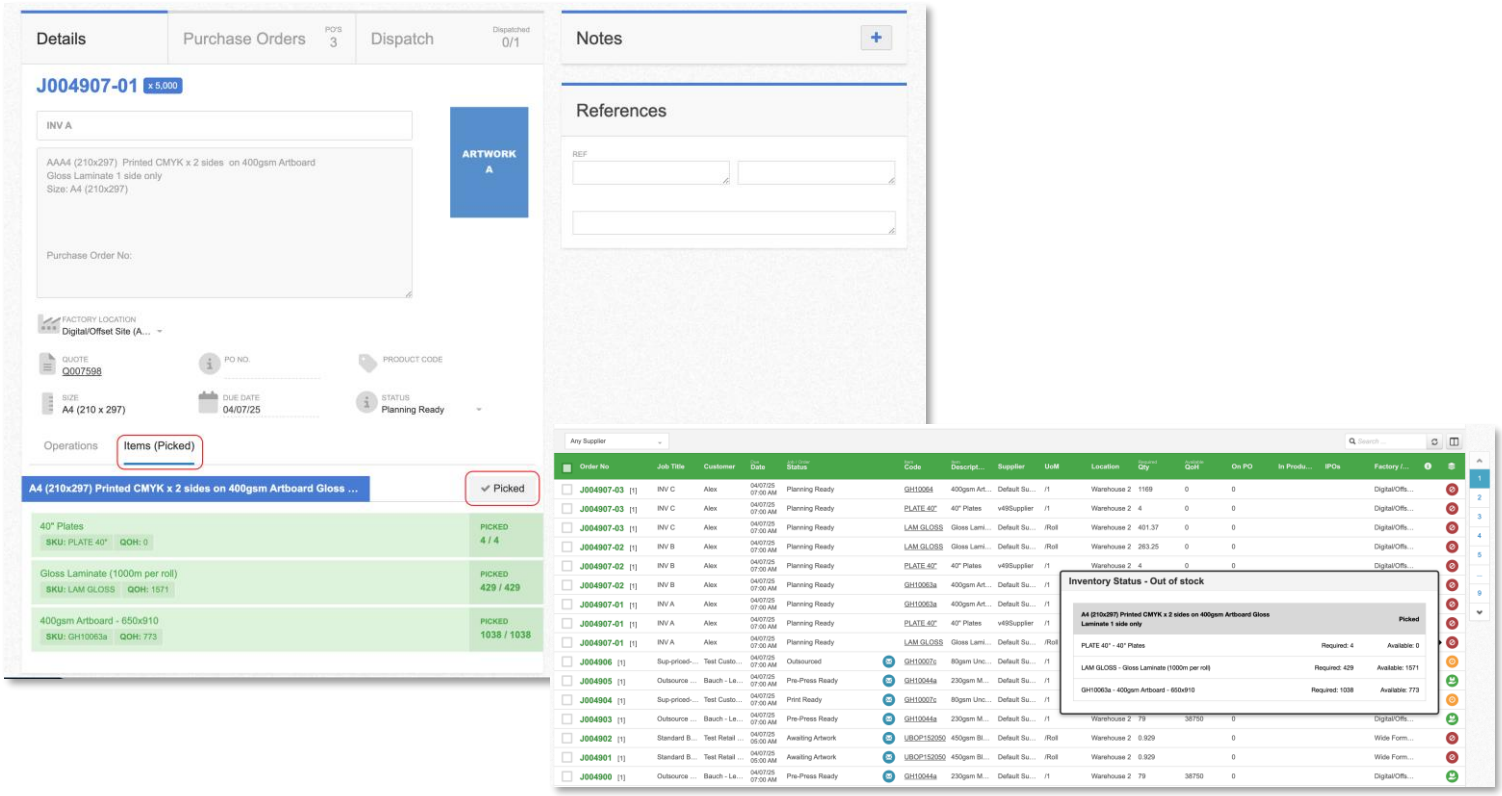


PRODUCTION

Inventory Status

kb article

We have added the idea of an Inventory Status to your jobs. This indicator will tell you whether you have enough to produce your job, whether you need to place an order with your supplier, or if your job has already been picked. This will even work with promotional products, notifying you if you have enough stock to print onto. You will be able to filter by Inventory Status on all the boards you will need to, and save these in your saved filters for the business to use.



SYSTEM

Placing promotional products on backorder

kb article

We have extended the promotional product functionality to allow for a product to be split into multiple parts using the backorder process. If you only have part of the stock on hand to produce the order, you will now be able to split this into 2 orders, then produce, ship and invoice the two separately!

TERMINOLOGY

The Sales Orders Board title customization

The title of the "Sales Orders" board can now be changed! If the "Sales Orders" board isn't what you call it in your business, this can now be swapped out with your preferred term - maybe Pick and Pack Board? Up to you!

IQ STORE

Ability to upload PDF files to create a Sales Item thumbnail

When you are creating a new IQ Store item, sometimes you only have a PDF on hand of the product. With requests from several of our customers, you will now be able to upload a PDF file and printIQ will create an image and a web-optimized thumbnail and will use this for the item.

Freight updates

FREIGHT

Single-use blind shipping addresses

kb article

When adding a new origin address for blind shipping, you are now able to mark this as "Single Use", only to be used for this order, to avoid cluttering up your system with addresses you don't need to use a second time.

FREIGHT

Third-party account shipping upgrade

kb article

We have added functionality to the "third party account number" functionality when using the shipping control. You will now be able to add new account numbers on the fly, and be able to save multiple account numbers against your customer records. This will enable you to blind-ship using your end customer's account numbers, or to ship to multiple regions using different third party accounts. This functionality is currently supported with UPS and FedEx integrations.

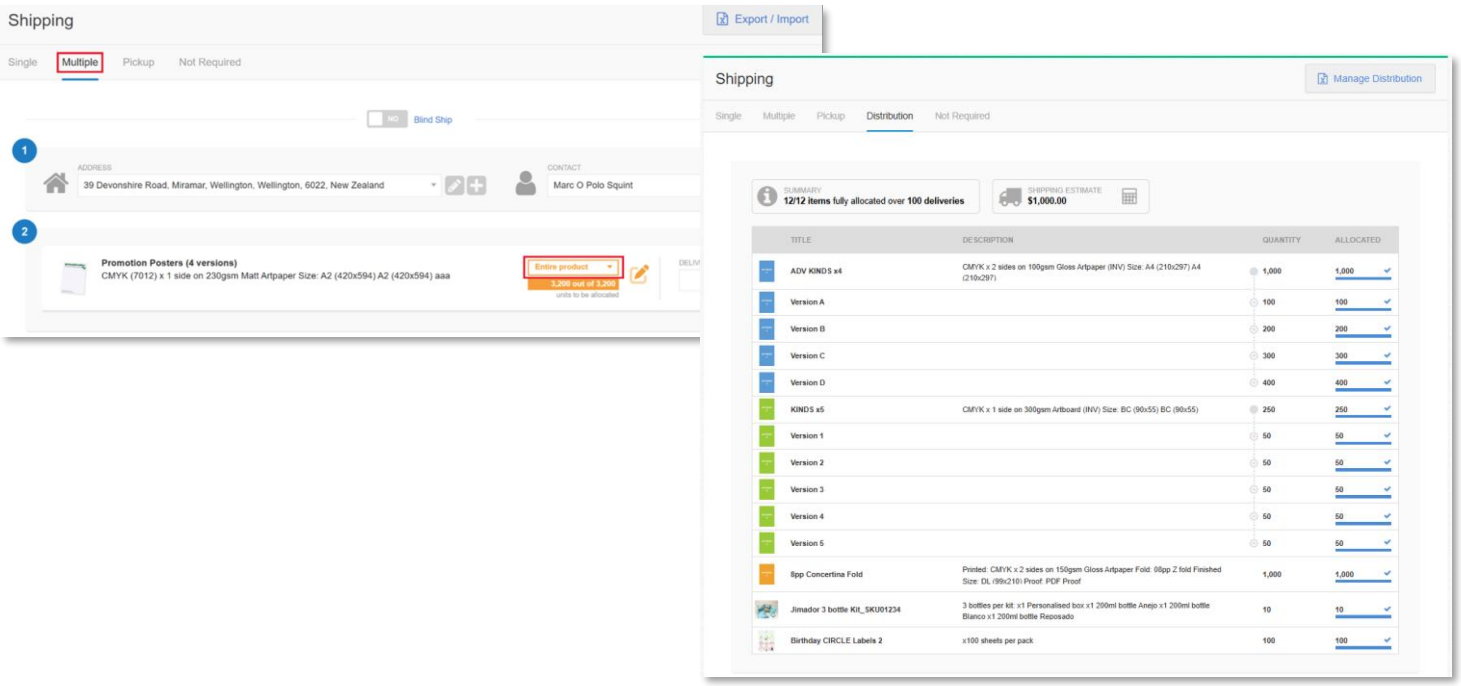
FREIGHT

Shipping via Distribution Lists (volume based)

We have expanded shipping/freight at the quote and job level to handle the 'Mass Distribution' of goods. This feature caters for jobs that require deliveries to hundreds of different addresses. At quote or job stage, a distribution list can be uploaded via a csv file.

This creates a list style view of all deliveries that can be in one of two status options, 'Awaiting Distribution' and 'Distribution Ready'.

The deliveries can be filtered and managed in batches as they are ready to send out.



FREIGHT

Additional handling for UK freight rules

The upload and download of shipping rates have been improved, to be able to handle large amounts of postcodes, such as the UK requires. Postcodes and rates have been split into separate uploads, so updates don't require all postcodes and rates to be imported when you only need to do a small adjustment.

FREIGHT

Adding 'Freight Cost' to the Awaiting Invoice board

A column has been added to the Awaiting Invoice board to be able to see what the cost of shipping is on an order before you create the invoice. You can use this to make informed decisions on what will be invoiced, without having to create the invoice yet.

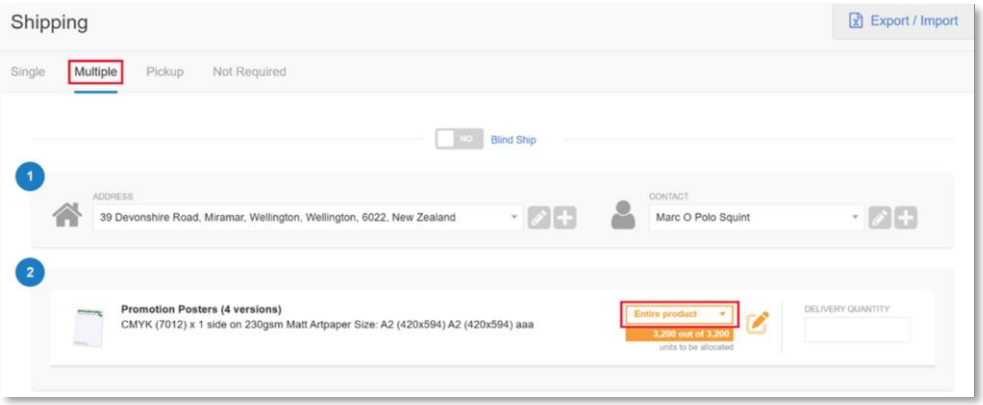
FREIGHT

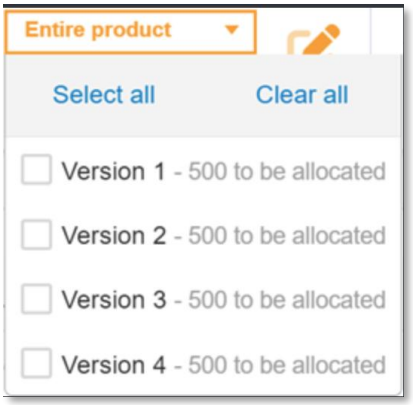
Kinds / Version based shipping

kb article

In this release, we have addressed one of the more popular requests. The improvements allow you to separate and manage kinds / versions from quoting through to the delivery. You will see new options that allow you to identify and tag each kind / version to a delivery address. From here, your shipping details work off this data with box labels and packing slips displaying all the details.

This update is a pre-cursor to our mass shipping project which is part of our v48.2 release. This provides further enhancements for orders with large numbers of deliveries.





FREIGHT

Direct integration to NZ Post

For our kiwi customers, we have created a direct integration with NZ Post. The integration is a real time, API based connection that delivers address verification, pricing and consignment creation. The delivery labels are generated by NZ Post and passed back to printIQ in PDF format.

From a tracking perspective, we have added information to the customer facing orders page and the dispatch confirmation email.

Please contact your Account Manager to discuss the Freight Integration Module for this option.

FREIGHT

Carton logic now includes pack sizes

An adjustment has been made to the logic that defines how products are packed into cartons. The update sees pack-based products no longer split across a carton. While it may increase the number of cartons used, the consensus was that it was more realistic and accurate.

Finance Updates

INVOICING

Invoice consolidation performance

Invoice consolidation has been rewritten from the ground up, to enhance performance. Previously, consolidation could take quite a while when consolidating hundreds of invoices, if you were doing a month-end invoice for the customer. This now performance in a much faster time, meaning you have to spend less time waiting for consolidation, and more time managing your business.

INVOICING

Notes on the Invoice and Awaiting Invoice boards

Invoice notes will now show on both the awaiting invoice board and the manage invoices board. You will now be able to hover to read relevant notes at a glance instead of needing to open a new screen to read them.

INVOICING

Automatically invoicing once an order is shipped.

Getting sick of manually creating an invoice for every job once it's gone out the door? Now, you will be able to set up printIQ to automatically create the invoice once your order has been shipped, email it to the customer, and even push it to your accounting package. This functionality will be customizable per customer, so you can still do your corporate accounts manually each month and leave all the small invoices to be sent automatically.

INVOICING

Customizable references to capture additional payment data

You will now be able to add up to 30 references for your users and customers to capture additional data when processing a payment through printIQ. These can be restricted to specific payment types, and can be optionally set as required, so you can ensure you're getting the information you need, regardless of how you're taking your payments.

INVOICING

Improved performance for larger invoices

We have continued our focus on improving performance in v48.1. As part of this update, you will see a drastic improvement when saving large invoices. This is driven by an increase in customers adding 1000+ lines to a single invoice. Following the re-write, we have been able to reduce the load by up to 90%.

The changes also impact the invoice consolidation process which is now significantly faster. While there's no visible changes to the invoice process, it's simply more efficient with reduced waiting time and impact on other users.

INVOICING

Sage50 updates through HyperX

With the help of our friends over at HyperX, we've been able to solve the long-standing issue with VAT and rounding. The HyperX team have created a new endpoint that allows us to define the exact amount of tax, so we avoid the frustrating issue of invoices being a penny different to what was sent to the customer.

The new endpoint mimics the Sage50 Batch Transaction Post and replaces the previously used Transaction record. Contact the support team for more details on this one.

INVOICING

Invoice an entire order from the orders board

As part of the new Orders board, an option to invoice the entire order has been added. The board gives you a summary of progress, at the order level, with the ability to drill down. The option to invoice the order appears once you select an order. The process takes all jobs and sales orders on the order and consolidates them onto a single invoice.

General updates

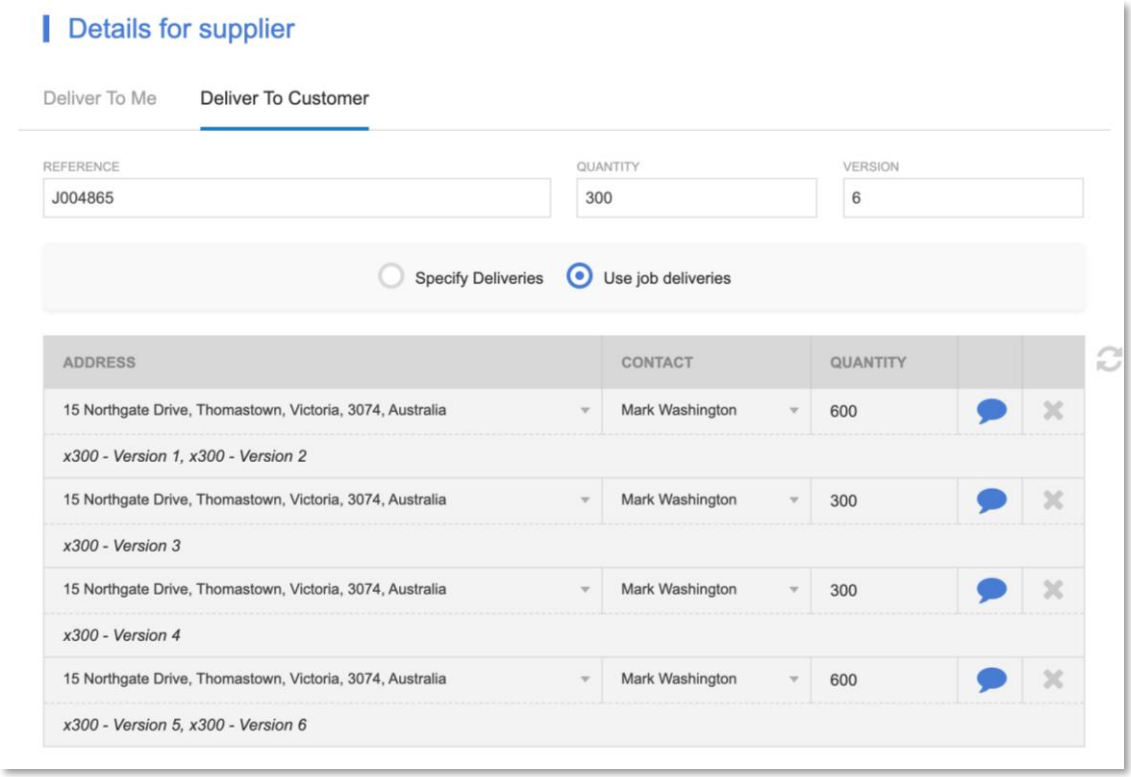
Outsource Purchase Order

Multiple Addresses on Outsource Purchase Orders

kb article

With an ever-changing market and the reliance to deliver orders to multiple address directly from your supplier, it has become apparent that the Outsource Purchase Order section required some additional functionality.

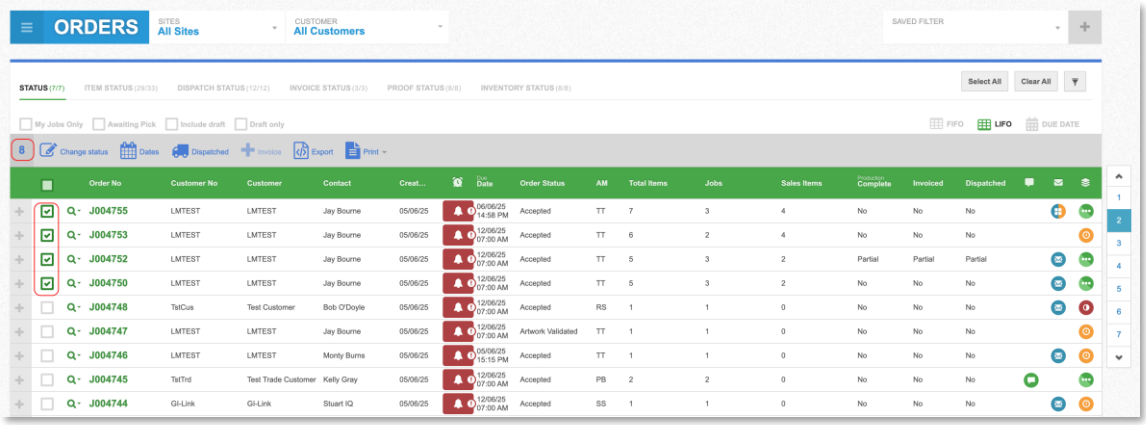
Outsource purchase orders have been extended to allow multiple deliveries to customers, and to use the job's deliveries instead of needing to manually enter them. This functionality is also available to view on the Supplier Portal so your supplier can manage the delivery inside to portal to update your delivery information.



SYSTEM

Remembering checkbox selection on previous workflow board pages

Your checkbox selection will now be remembered when going back or forward through the pages on your workflow boards. Now you will be able to go through a few pages looking for that specific job to update, without losing your current selection!



SYSTEM

Add a 'records per page' selector to workflow boards

Users will be able to show more records per page on workflow boards, allowing you to show more on a single page that you have previously been able to.

PAYMENTS

Ability to handle ACH, Surcharges and Terminal payments through Banquest for North America

The Banquest payment gateway has had an upgrade and is now able to handle more types of payments and surcharges. You will be able to take ACH payments or send the payment to a local terminal to have your customer pay by card in person. It will also handle surcharges per card type, so you can charge a different percentage for each credit card merchant. The surcharge will need to be set up with Banquest and will be reflected on your printIQ invoice payment.

CUSTOMER

Improved logging of customer information

kb article

To help keep track of all the sensitive customer information maintained within printIQ, we have added new logging functionality to record these changes for future reference.

The updates are displayed in the Customer History page, and they display the before and after snapshot of each customer record. It not only covers the more sensitive fields like payment terms and account status but also extends to the majority of fields you see on Customer Details, addresses and contacts.

CUSTOMER

Restricting access to customer billing addresses

We have added a new, optional setting that can remove the ability to edit the customer's billing address and contact details, from within a quote. When enabled, these details can only be modified on the Customer Details screen.

The reason for the change is to prevent accidental updates that can have a serious impact on your interaction with customers. The potential problem occurs when you use the same address for both billing and shipping and changing one, affects the other. The setting is turned off by default so contact support to have it enabled.

Integration & Exports

INTEGRATION

Capacity Planning API Access

We have added endpoints to enable integrations to be build between printIQ's Capacity Planner and external planning applications. If you ware wanting to discuss this further and use a third party provider for your production, please discuss this with your Account Manager or raise a support ticket so a discussion can be had.

INTEGRATION

Support added for UPS & FedEx reference fields

You are now able to configure many common printIQ fields to be pushed to specific fields on your UPS or FedEx shipments, when using our Automated Shipping module. You can configure multiple data pieces to be sent to separate fields per carrier integration.

INTEGRATION

kb article

Confirm CarbonConnect job usage

The CarbonConnect module has been upgraded to record what carbon has been used when a job is accepted. You will be able to report on this out of your connected carbon provider's dashboard.

INTEGRATION

kb article

API Support for Promotional Products & Apparel

Support for promotional products and apparel has been added to our standard GetPrice API endpoint, to allow ordering of these items from integrations.

INTEGRATION

Allow printing to carrier-specific printers for UPS & FedEx labels

Our label printing extension has been extended to allow printing of labels to different printers based on which carrier is supplying the label, for both FedEx and UPS labels.

INTEGRATION

Ability to pass payment information when creating an order through the API

We have extended both the GetPrice and AcceptQuote endpoints to optionally capture payment information when you are marking the order as invoiced and paid. You will be able to pass a payment type and reference, which will then be reflected on the payment on the invoice created for that order.

INTEGRATION

New webhook when a sales order item's order status changes

A new webhook has been added, which will be sent out when the status of a sales order changes. One webhook will be sent per item on the order, so your system receiving the payload can perform actions for each item individually, without the need for additional processing beforehand.

INTEGRATION

CUI Upload Engine - SFTP + TLS Session Resumption

We have added additional support into printIQ's file upload engine. The latest version now supports even more types of SFTP servers. It can also handle TLS session resumption if your FTP server requires it.

INTEGRATION

Pageflex web2print integration

We are pleased to launch our 2-way integration with Pageflex. The integration utilizes the new Kapua middleware application to receive incoming orders and pass back status updates.

As part of the punchout, we have standard touchpoints including order creation, linking artwork and status updates.

INTEGRATION

Adding support for NodeJS in Switch

Following the move by Enfocus Switch to move to a different scripting language, we have re-built our standard Switch workflows in the NodeJS format. The scripts were made available earlier in the year but they now rollout with all new Switch integrations provided by IQ.

Almost without exception, customers modify the standard printIQ scripts. For this reason, we're unable to simply add the new NodeJS scripts to your existing workflow. It's also important to note that your existing scripts will continue to function, in many cases though, they will be disabled for editing within Switch.

We're here to help so please let us know your plans for upgrading and how we can assist.

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