

efi Productivity Suite 



PrintSmith™ Vision
User Guide

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EFI PrintSmith Vision User Guide

July 2018 Version 4.1.0

Document Version 1.0

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Introduction

About PrintSmith Vision

PrintSmith™ Vision is a browser-based print management system for commercial printers, trade printers, copy shops, and quick printers. To help you run your business efficiently and profitably, PrintSmith Vision combines estimating, invoicing, billing, point of sale, and accounts receivable in a single product.

PrintSmith Vision supports commercial printers, trade printers, copy shops, and quick printers. It provides the features needed in commercial printing (like support for web presses, signatures, and large format presses) without requiring that you use or understand features that do not apply to your business. As your business grows and changes, however, PrintSmith Vision is flexible enough and powerful enough to grow with you.

About Estimates and Invoices

Estimates are quotes you give to prospective customers indicating what you will charge for the work they want you to perform.

Invoices show the actual price of the job and then serve as a bill for the work you performed.

Note Because estimates and invoices in PrintSmith Vision are so similar, this manual often uses the term *document* to refer to them.

An estimate or invoice may include more than one job, and typically also includes some charges related to the work involved, for example, a charge for design work, ink, cutting, or boxes.

In many situations estimates are unnecessary. If you know you have the job, you can just create an invoice for the customer. For complex work, however, estimates help you determine an accurate selling price as well as give you a way of submitting bids based on different quantities and different stock. If the customer accepts your quote, you convert the estimate to an invoice, meaning the estimate is won; If the customer rejects the quote, the estimate is archived (as part of the customer's estimate history) and considered a loss.

Tip For small simple jobs, you can use POS (point of sale) in PrintSmith Vision to record a sale and print out a cash register style receipt. In this case, you typically bypass invoices altogether since the cost of preparing the invoice could exceed the amount of the order.

The content of estimates and invoices is very similar, as is the procedure for creating them. Estimates and invoices each have their own numbering system, however, and they are handled differently in the system.

Warning If you use pre-printed forms for your estimates or invoices, they should not be numbered; PrintSmith Vision automatically assigns numbers to both estimates and invoices.

Accurate estimating is a key part of the sales cycle. In PrintSmith Vision, you can create a simple quote quickly, as well as perform sophisticated estimating when you are bidding for jobs. PrintSmith Vision comes with a completely defined pricing system with definitions and functions for everything from prepress to packaging. This pricing system can be adapted to your business so you are not defining the system from scratch.

You can price products, services, or materials using any combination of pricing methods such as flat rate, cost plus markup and/or rate, hourly rates, variable markups, and price lists. You can use the pre-press and bindery charges supplied by EFI, adapt them, or create your own. Likewise, you can use or adapt the stock, press, digital definitions, and price schedules supplied by EFI or create your own.

About Cash Register

Cash Register in PrintSmith Vision provides all the functions you normally expect of a dedicated cash register. You can enter sales and payments, keep a record of each transaction, print receipts, process credit cards, and open a cash drawer.

Note Integrated credit card processing, the cash drawer, and the receipt printer are optional purchases.

Because the cash register is part of PrintSmith Vision rather than a dedicated machine, PrintSmith Vision can provide a detailed breakdown of each transaction by date/time, the person who performed it, what was done, and the account to which the transaction was posted. If you have an external cash register, you can use POS to enter the totals from the register into PrintSmith Vision; this information then becomes part of the detailed sales analysis that is typically performed each day.

Even if you have no need for a cash register, the cash register program serves as a link between estimating and accounts receivable by tracking each estimate and the status of all jobs in progress and those awaiting pickup or delivery. When an invoice is delivered to a customer and picked up in PrintSmith Vision, it is automatically posted to accounts receivable and added to the full account history for each customer.

About Pending Documents

When you first create a new document, PrintSmith Vision puts it on the *pending list*. This list includes all the “active” invoices and estimates in your shop, and is displayed in the Pending Documents window. This window is your “command center” in PrintSmith Vision for working with active documents.

Tip You can also view a summary of the pending list from a mobile device.

Eventually, each document in the Pending Documents window is removed as follows:

- You convert estimates to invoices if you get the job, or void (cancel) or archive them if you do not get the job. You can track archived estimates in estimate history.
- As work on invoices is completed, you *pick up* the invoices and indicate they were paid. You can track picked up and paid invoices in the history that PrintSmith keeps for accounts.

The documents in estimate or account history are “locked” since they form part of the audit trail PrintSmith Vision maintains. All details in the document are retained, however, and you can copy these documents to *new* estimates or invoices. You can update the pricing with the latest prices when you copy a document, but all the descriptive information and notes you made on the job (the location and condition of the artwork, special pricing instructions, and so on) are retained.

When you copy a document from history, PrintSmith Vision keeps track of the source document. For example, the old document number is displayed in the document window and printed on job tickets. If you file artwork by document number, and get a repeat order, the job ticket has the old document number so you can locate the artwork.

About Purchase Orders and PO History

Many jobs require items such as paper or ink that you must purchase. To help you manage the purchasing process, you can create purchase orders in PrintSmith Vision for the kinds of supplies or outside services that you typically need for the jobs you produce. Purchase orders can be created in the Invoice program and in PO history.

The PO history program will show you the current and closed purchase orders. Here you can view a specific purchase order and modify or change the status. There are several column headers that can be used to filter or search for purchase orders.

About Quick Access

Quick Access provides a view of the status of orders taken by the logged in user or for the entire plant. Quick Access includes:

- Estimate, invoice totals and total orders for the previous day and current day.
- Year to date and month to date totals of orders, sales, and journal entries.
- Lists of invoices due today, overdue, and in proof.
- A list of estimates still in a pending state, with the ability to open and review them. When an estimate is open, you can convert it to an invoice so you can go ahead and produce the job and bill the customer.
- A log of the communication that has taken place with customers, with the ability to follow up on issues.

About Work in Progress

Work in Progress displays the open jobs or documents. There are several options to filter the documents including those that are outsourced and for Fiery production. You can set up new filters or use the ones already setup based on due date. The jobs and documents can be set up by color to identify past due, pickup ready, hold or those with a firm wanted by date.

From here you can access the jobs and documents and see the detail. You can also send jobs to Fiery production if that is part of your workflow.

PrintSmith Vision: EFI-Hosted vs. Customer-Hosted

PrintSmith Vision can either be hosted by EFI (cloud-based) or hosted by you at your facility.

• EFI-hosted

When EFI hosts PrintSmith Vision for you, PrintSmith Vision is installed on a server in the EFI hosting center, not in your facility. This cloud-based option means that EFI takes care of the hardware and software infrastructure for you, as well as the installation of PrintSmith Vision, updates, backups, and so on.

• Customer-hosted

If you are hosting PrintSmith Vision, the PrintSmith Vision server is at your facility so you control the hardware and software infrastructure and are responsible for installing and updating PrintSmith Vision, performing backups, and so on.

Most PrintSmith Vision procedures are the same whether EFI is hosting PrintSmith Vision or you are hosting it, but some procedures are different and some apply only to EFI-hosted or only to customer-hosted installations. *PrintSmith Vision - EFI-Hosted Guide* explains what is different in EFI-hosted installations. If EFI is hosting PrintSmith Vision, be sure to use this guide together with other guides like this *PrintSmith Vision – Setup and User Guide*. Other guides will indicate when a feature or procedure applies only to customer-hosted installations (not EFI-hosted).

Contact Information

EFI Support

Web Site:	https://customer.efi.com/support
US Phone:	1.855.EFI.4HLP 480.538.5800
UK Phone:	+44 (0) 800.783.2737
EU Phone:	+49.2102.745.4500
E-Mail:	Printsmith.support@efi.com

Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.8

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
US E-Mail:	ProfessionalServicesOperations@efi.com
Outside US E-Mail:	EMEAProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations and upgrades. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.

System requirements

Client Requirements

PrintSmith Vision Client Requirements (one on which PrintSmith Vision is not installed) are:

- Operating system: Windows 7, 8, or 10
- Macintosh OS X 10.13 (High Sierra) or higher
- Memory: 4 GB minimum (more memory will improve performance)

- **Browser Requirements**

OS	Browser	Browser Version	Comments
Windows 10 Professional Windows 2008 R2 Standard	Google chrome	Version 68.0.3440.75 (64 bit)	Certified
	Mozilla	61.0.1 (64-bit)	Certified
	Microsoft Edge	40	Certified
Mac OS 10.13 (High Sierra)	Safari	11.0 (13604.5.6)	Certified
	Chrome	Version 65.0.3325.181 (64 bit)	Certified
iOS 11.0.3 (15a432) iPad	Safari	11.0 (13604.1)	Certified
	Chrome	62.0.3202.60	Certified

Monitor and Resolution Requirements

PrintSmith Vision is designed to be viewed and used on a large monitor with high resolution:

- 19-inch monitor
- Minimum resolution of 1280 x 1024

Note: Important If you are using a laptop, to see estimates and invoices in full, the height (second number) must be at least 1024 pixels.

PrintSmith Vision Basics

How PrintSmith Vision Works

The computer where PrintSmith Vision and its database are installed is known as the *server*. If EFI is hosting PrintSmith Vision for you, the server is in the EFI hosting center; if you are hosting PrintSmith Vision, the server is at your location.

To run PrintSmith Vision, you use a browser from a client computer. For information about supported browsers and client computers, see the *PrintSmith Vision – Release Notes* or the *PrintSmith Vision - Installation and Upgrade Guide*.

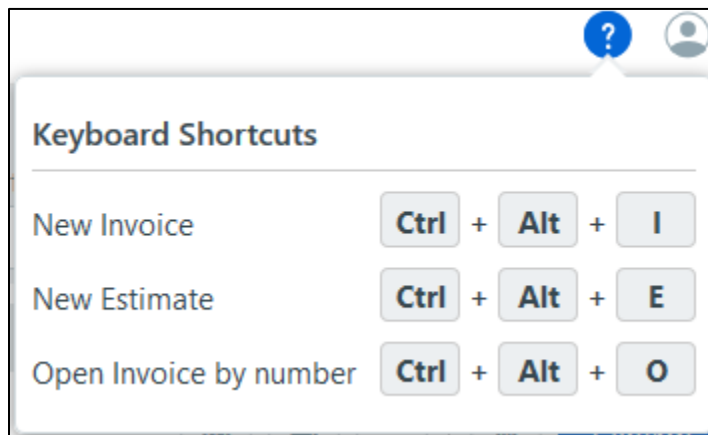
Important When PrintSmith Vision is customer-hosted, the server computer must be configured *not* to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a "server down" message, and will be unable to use PrintSmith while the server is in sleep mode. When PrintSmith Vision is customer-hosted, you can also run PrintSmith from the server itself.

Keyboard Shortcuts

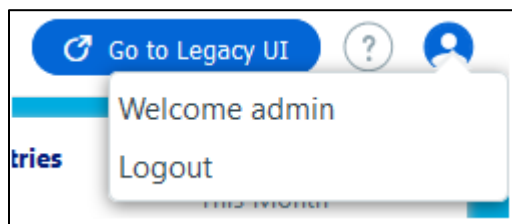
If you like to use the keyboard to accomplish tasks, several keyboard shortcuts are available. A keyboard shortcut is a combination of keys that you press at the same time, for example, CTRL+C means you press the CTRL key and c at the same time.

Note On a Macintosh computer is the equivalent of CTRL on a Windows computer, and OPTION is the equivalent of ALT.

When a keyboard shortcut is available for a command on a menu, it is displayed next to the command, for example, CTRL+ALT+I for **Invoice > Create Invoice**.

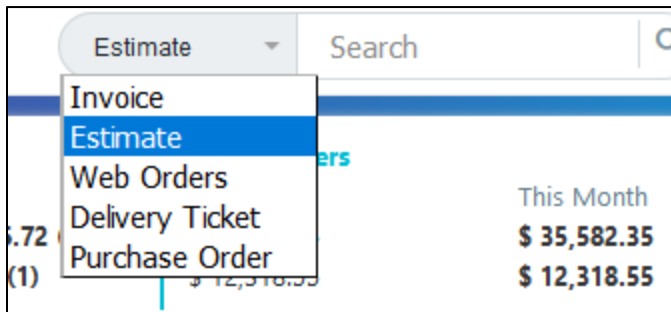


Here is where you can logout or go to the Legacy UI version



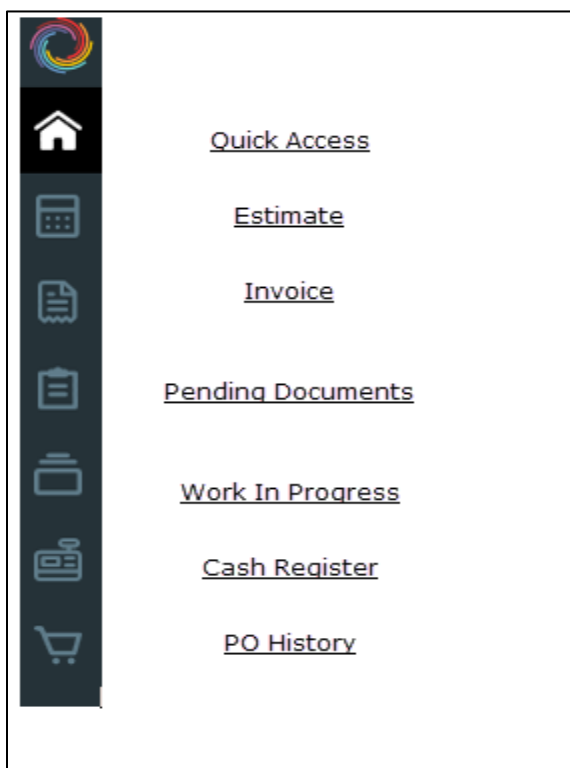
Searching

For each program there is a search feature. You can search for different documents by using the dropdown.

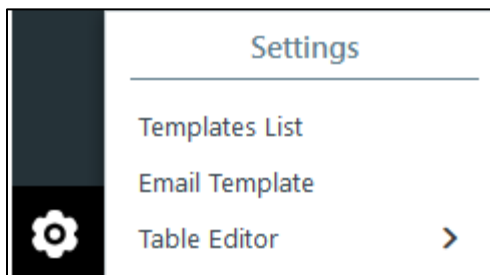


Navigation

This panel allows you to access the different programs.

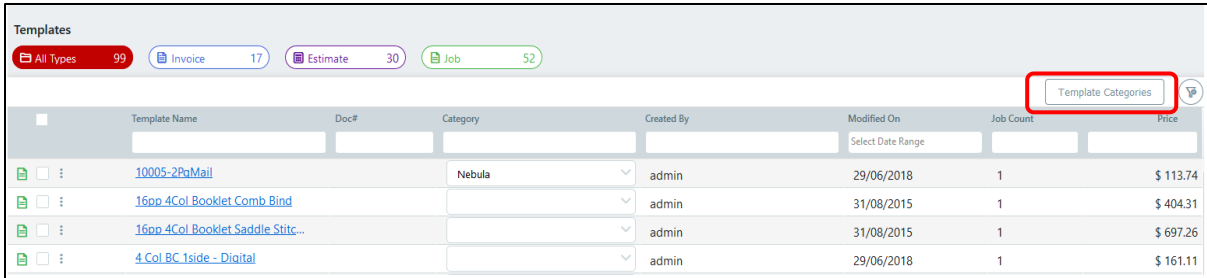


At the bottom of the navigation panel there are other options.

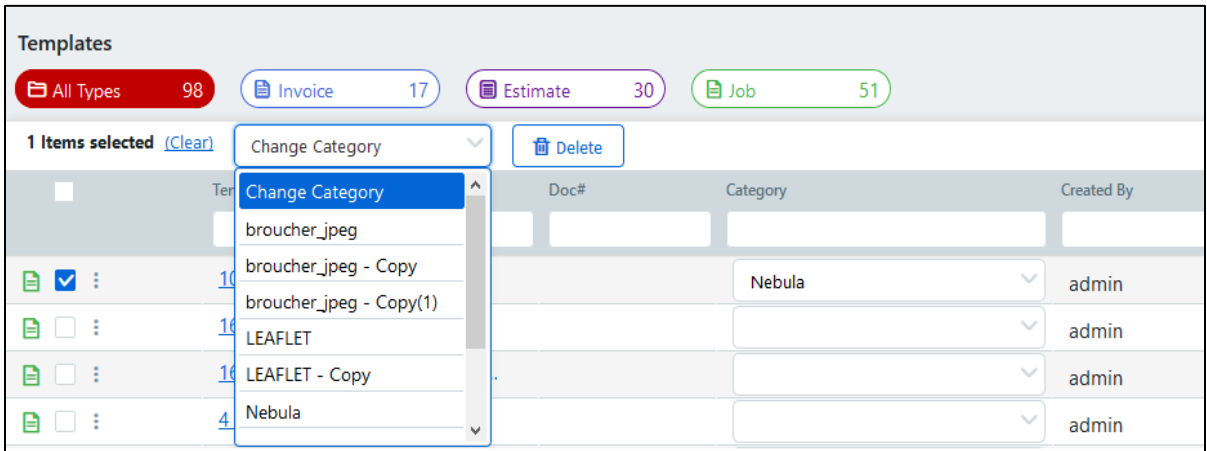


Template List

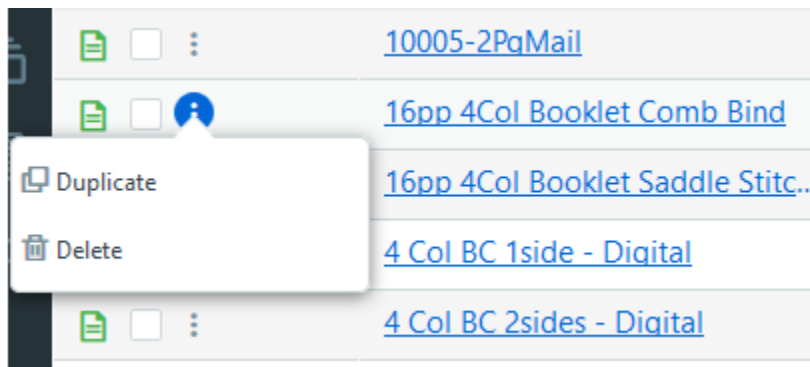
Templates List will take you where you can see all the existing templates. You can identify which type of template it is by the icons, Invoice, estimate or job or choose to view all templates. The user can search for templates by using the column headings.



If you select a template, then you have the option to delete or change the category you want the template grouped under.

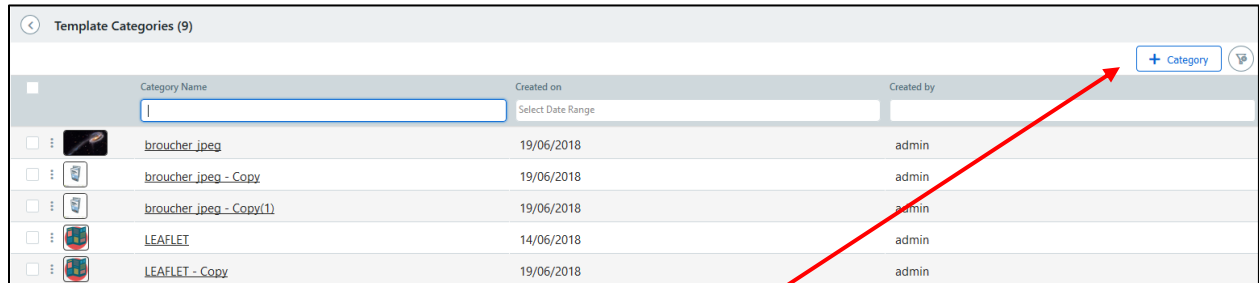


You can also duplicate or delete the template using the icon next to the check box.



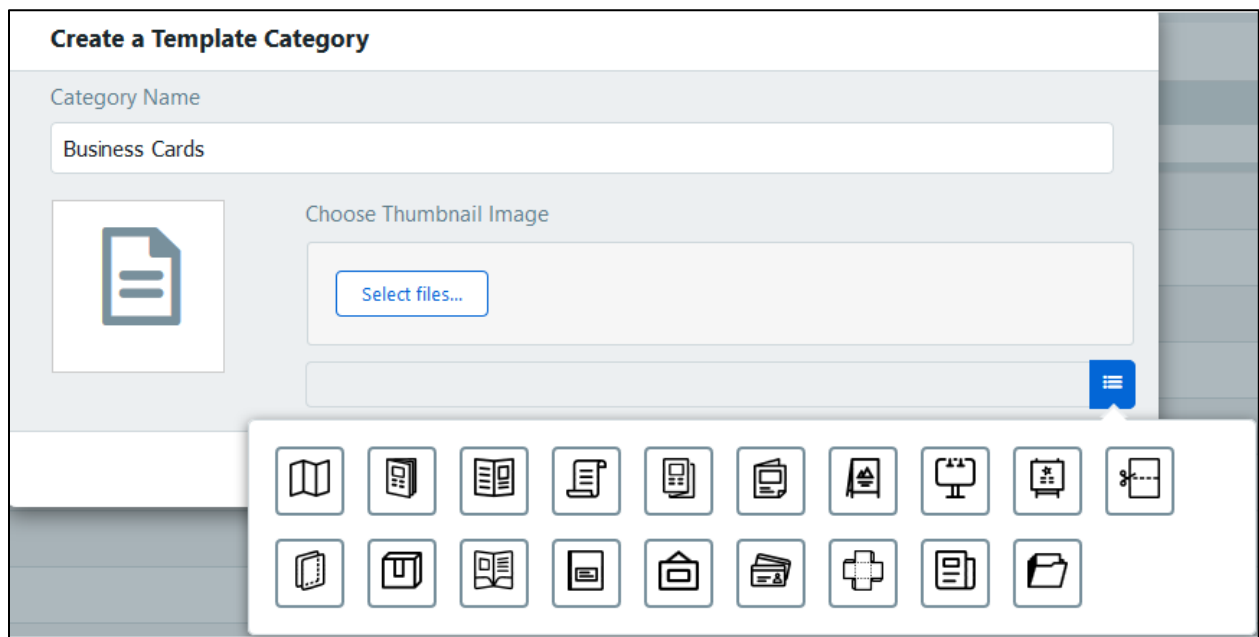
Template Category

If you select Template Category you will be taken to a screen that list the categories. Here you can search for a specific category using the columns at the top.



Category Name	Created on	Created by
broucher.jpeg	19/06/2018	admin
broucher.jpeg - Copy	19/06/2018	admin
broucher.jpeg - Copy(1)	19/06/2018	admin
LEAFLET	14/06/2018	admin
LEAFLET - Copy	19/06/2018	admin

You can also create a new category by selecting the + Category button. That will take you to a new screen where you can add a category. You can also add an image to the category and a layout.



Create a Template Category

Category Name
Business Cards

Choose Thumbnail Image
Select files...

Grid of 18 icons representing various document and layout templates.

Email Template

Email Template will give you three types of template for your emails, Invoice, Estimate or Purchase Order. Using the place holder drop down you can select the information specific to that email that you want to send. Select the place holder and then select Insert. You can add images to the email. You can see a preview of the email before sending.

Invoice Template

Email Template

Invoice
Estimate
Purchase Order

Normal ▾ Sans Serif ▾ **B** *I* U **A**

Hi [ContactFirstName].

Thankyou for your recent order with us.

Please find attached your Invoice [DocumentNumber].

If you are The Accounts Contact and paying via EFT, please use the invoice number as the reference.

Kind Regards,

Place Holder

Document Total ▾

Insert

Load Flex Email Template

Add Image

Account Name ▲

Account Number

Document Number

Document Wanted Date

Document Total

Document Title

Document SalesRep

F025-141361	Wind mill kraft
F025-141359	A & A Arbor Tree Service Pty Ltd

ing Estimates (67)

 Customer Log

Estimate Template

Email Template

Invoice
Estimate
Purchase Order

Normal ▾ Sans Serif ▾ **B** *I* U **A**

Hi [ContactFirstName].

Thank you for choosing Snap, please find attached your Quotation [DocumentNumber] for [DocumentTitle] as per your request. If you have any questions or if there is anything you would like me to clarify or add please feel free to contact me via the details included below.

If your order is urgent please contact us by phone as soon as is possibly convenient so we can arrange our production schedule to accommodate your order, otherwise an email reply with your confirmation and when you would require it to be completed by would be all we need to schedule your order.

Thank you for your enquiry and we look forward to hearing from you soon.

Kind Regards,

Place Holder

Document Total ▾

Insert

Load Flex Email Template

Add Image

Account Name ▲

Account Number

Document Number

Document Wanted Date

Document Total

Document Title

Document SalesRep

F025-141361	Wind mill kraft	06/12/2017
F025-141359	A & A Arbor Tree Service Pty Ltd	06/12/2017

ing Estimates (67)

 Customer Log

Cancel Preview Save

Purchase Order Template

Email Template

Invoice Estimate **Purchase Order**

Normal Sans Serif B I U A

Hi [ContactFirstName].

Please find the attached Purchase Order #[PONumber] for your reference.
 Please make order out to C/O:
 PO Contact Name (Authorised purchasing officer): [BuyerName]
 PO Contact Email: [BuyerEmail]
 PO Contact Phone: [BuyerPhone]

If you have any questions pertaining to the attached PDF please feel free to contact us via the details included below.

Kind regards.

Place Holder Document Total

Table Editor > Vendor

Once the user has upgraded to 4.1.0 the vendor and supplier table are merged and displayed as one table in HTML, labeled Vendor. Going forward the supplier table will be listed as Vendor table in purchase order in HTML. A user using HTML will not be able to edit/delete the vendor details and supplier details in Flex.

Table Editor will take you to a short cut menu where you can enter or edit vendor information. Selecting the plus + will allow you to add a vendor or you can select an existing vendor from the drop down.

NOTE You can only add vendors from this screen.

Edit Vendor Details

Vendor:

Name: Company Name:

Street 1: Street 2:

City: State:

Country: Zip:

Phone: Email:

Fax:

[> Contact Details](#)
[> Miscellaneous](#)

Opening other portions of the screen will allow you to enter contact detail or miscellaneous information.

Note you must check the box “Use in Purchase Order” in order for this vendor to be displayed on the vendor list in the purchase order program

Logging in to PrintSmith Vision

When you log into PrintSmith Vision you will be given the option of using the Legacy version or HTML5 version which is referred to as Fast-track. For some functions you can still use the Legacy version. When you log in to PrintSmith you will first see this screen.

The screenshot shows a login screen with a blue and cyan gradient background. At the top, it says "Welcome, to new Fast Track UI Experience!" followed by "All your favorite features organized in a more intuitive way". Below this are three circular icons: a computer monitor, a hand touching a tablet, and a person with a clock. Each icon has a corresponding title and description: "Advanced experience" (User-focused clutter free UI), "iPad/tablet support" (Responsive UI), and "Faster, Reliable" (Faster response). At the bottom, there are two buttons: "Login to Legacy" (white with blue border) and "Login to Fast Track" (solid blue). A checkbox labeled "Don't show this on every Login" is also present.

Selecting the option to “Login to Legacy” will take you to the Legacy version. If you select “Continue to the Fast-track version you will be taken to this sign in screen. You can use the “Don’t show this on every login check box if you only use one version.

NOTE You can still move from Fast-track to Legacy from each program.

The screenshot shows the login screen with a dark blue background. At the top is the "efi PrintSmith Vision" logo. Below it are two input fields: "User Name" with "Username" entered and "Password" with "Password" entered. A green "Login" button is centered below the fields. At the bottom, it says "Version 4.0 4.1.0.1785" and "Copyright © 1985-2018 by Electronics for Imaging, Inc. All Rights Reserved."

After signing in you will be taken to the Quick Access screen

Quick Access

The Quick Access screen provides a view of the status of all records in the shop. If you only want to see your records then select "Show only my records". This will change the display to only the records of the current user.

NOTE The headings of the different widgets will change to indicate if they are displaying the SHOP information or MY information if "Show only my records" is selected.

Quick Access includes:

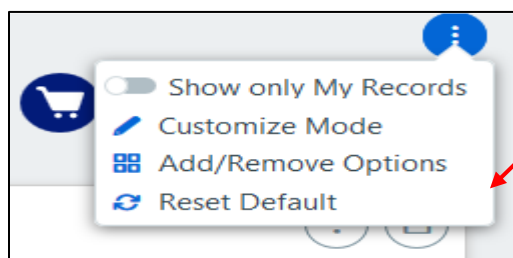
- Quick Access to other applications
- Invoices Due Today
- Invoices Overdue
- Location as set in the Dash Board preference
- Pending Documents
- Customer log

The Quick Access screen can be modified to change the widgets and shortcuts displayed.

The screenshot displays the PrintSmith Vision Quick Access dashboard. At the top, there are summary cards for Estimates, Invoices, Total Orders, Sales, and Journal Entries. Below these are quick access buttons for Create Estimate, Create Invoice, Pending Documents, Work in Progress, Cash Register, and PO History. The main area contains several data tables:

- Shop Due Today(1)**: Table with columns Invoice#, Account, Taken By, Amount.
- Shop Overdue(571)**: Table with columns Invoice#, Account, Taken By, Due Date.
- Shop Location On Proof(15)**: Table with columns Invoice#, Account, Taken By, Item#.
- Shop Pending Estimates(3)**: Table with columns Created On, Estimate, Account, Description, Taken, Amount.
- Shop Customer Log(43)**: Table with columns FOLLOW-UP, follow up, Created by, Customer, Follow-up by, Year.

You can modify this display.



Across the top you can see the quick access buttons that will take you to the different applications. Customize mode allows you to select the widgets you want to see on your dashboard. You can remove widgets by selecting the red X next to the widget.

Customize Home - Change placement for Quick access option or Dashboard Widgets or Remove them by clicking on the right hand icon.

Quick Access

Due Today (0) Overdue (178)

Using the Add Remove Options you can select which widgets you want to be displayed.

Add Remove Options

Quick Access

- Create Estimate
- Create Invoice
- Pending Documents
- Work in Progress
- Cash Register
- PO History

Widgets

- Due Today
- Overdue
- On Proof
- Pending Estimates
- Customer Log



You can also reset the standard default widgets

On each individual widget you can select to have the widget removed from the dashboard. The Show All button will take you to the pending documents screen where it will display the documents for that widget.


Shop Overdue(571)

Invoice#	Account	Date
F025-140859	Keith Soames Real Estate Horn... JohnW	27/10/2017
F025-141063	None AndrewP	31/10/2017
F025-141087	Sydney Adventist Hospital JasonO	02/11/2017
F025-140730	Smartline Adelaide AndrewP	03/11/2017
F025-141329	WALK-IN AndrewP	03/11/2017

The customer log widget will display actions that you have scheduled for accounts.

 **Shop Customer Log(43)** 

FOLLOW-UP

 [141612](#) EMAIL 18/06/2018

follow up

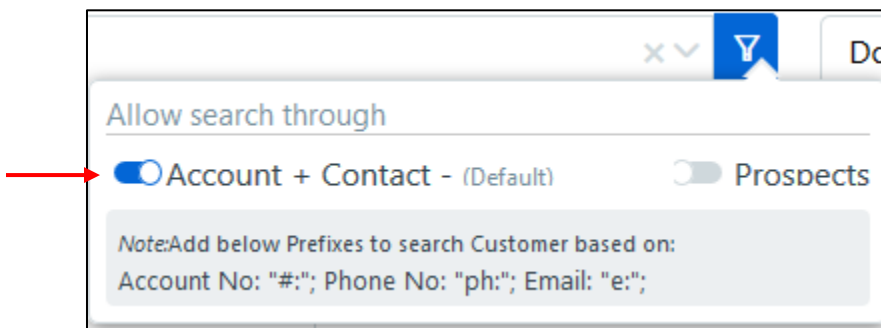
Created by	admin	Follow-up by	Veer
Customer	None	Follow-up date	18/06/2018

Estimating

Creating Estimates

Creating a New Estimate

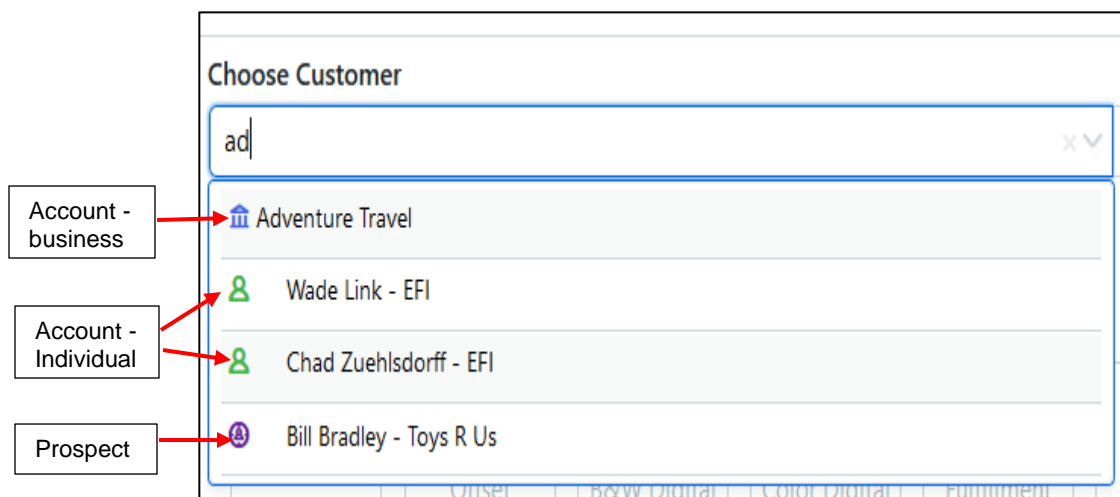
You can search for the account by account number, phone number or email address using the search code listed below.



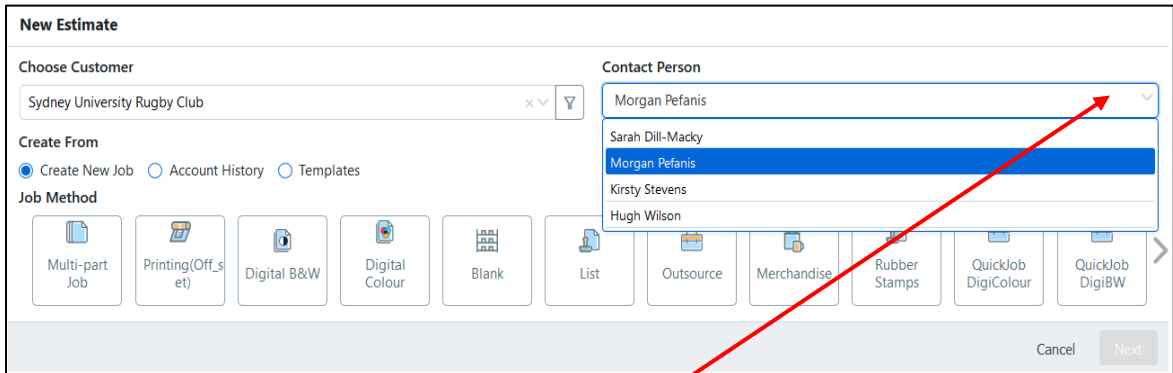
When searching with Account + Contact selected and Prospects unselected you will only see accounts.
 With Account + Contact unselected and Prospects selected you will only search Prospects.
 With both selected you will search for both Accounts and Prospects.

Prospects have not yet done business with you, but you hope to turn them into customers. Customers have done business with you, and invoices have been created for them. Once you create an invoice for a prospect, that prospect is automatically converted to a customer. If customers become inactive, they can be turned into prospects again.

You can identify the type of account by the symbol next to the name.



When you select the account, the program will automatically enter the default contact person.



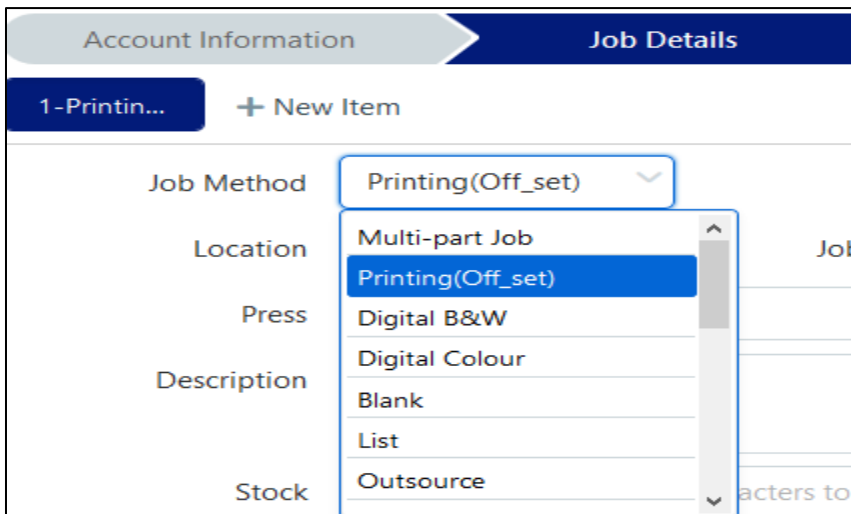
You can select a different contact by using the drop down

There are different options for creating a new estimate depending on your preference settings. Under Preference > HTML you have the option of selecting Template Category View. With this unchecked you will have the option of creating an estimate from a *new job*, *account history*, *job templates* or *invoice/estimating templates*. With this checked the options will change to a *new job*, *account history* or *template*. When you select template, you will be shown a list of template categories that you can use to find a template. For more information on “Creating Template Categories” see page 14.

Create New Job

After selecting New Job, you will see several options as to Job Method. Once you have selected the job method you will see a job detail sheet specific to the job method you selected. In this example the job method was Printing Offset.

The job method is already filled in from the selection on the first screen but you can change it here if needed.



1. Select the product. Products are set up under Admin > Table Editor

2. You can identify if this product is finished by selecting the toggle.
3. You can identify if this product is to be brokered.
4. You can select the location from the drop-down list. Production locations are set up under Admin > Table Editor

5. Next enter the press and description.

6. Using the drop down you can select the stock to be used. When you select the stock the parent size will automatically be filled in from the stock information.
7. Complete the run size, finish size, folded size, original sheets and UP/ON. With this information an image of the layout will be displayed.

You can also identify if the material is special order. If you need help in identifying the stock you can use the stock picker and paper calculator functions. You should also pick the run method.

Stock Picker

You will have the ability to pick the stock from a pre-defined list. You can use the blank fields at the top of the screen as filters to find material.

Stock Picker													
Group	<input type="text"/>	Type	<input type="text"/>	Advance Filter	Reset	Special Order							
Stocks (358)													
Stock Name	Weight	Size	Color	Generic C...	Finish	Thickn...	Grade	CWT	Vendor	Stock Nu...	Produ...	Qty o...	C
Vanguard Window #10	24	9.5 x 4....	White	White	0			272.74	Ingram	5460	0	0	
Vanguard #10	24	9.5 x 4....	White	White	0			235.63	Ingram	5457	0	0	
Vanguard #10	24	9.5 x 4....	White	White	0			142.76	Ingram	5454	0	0	
Valley Forge Parchment C...	60	6.5 x 9.5	Soft Iris	Pink	0			299.34	Xpedx	0839-40090	5321	0	0
Valley Forge Parchment C...	60	6.5 x 9.5	Sterling Sil...	Gray	0			299.34	Xpedx	0839-40095	5318	0	0

Paper Calculator

This will help in determining the amount of parent sheets needed and the material cost. You enter the specifications and the system will calculate the amount of material needed for the job.

Paper Calculator

Sheets Out
0 out of 0 = 0

Cuts to Run: Cuts to Finish:

Parent Size:

Run Size:

Finish Size:

Work and Tumble

Back Trim, Parent

Trim Four Sides

Disable FSC options

Run to Finish Grain:

Grip Edge/Gap ☑

Size: Top Left

Folio Edge ☑

Size: Left Top

Colour Bar ☑

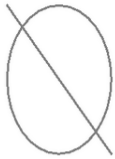
Size:

White Space ☐

Gutter ☐

Bleed ☑

Parent, Finish | Parent, &Run | **Run, &Finish**



Job Summary

Starting Size	Size Out
Sheets Out 0	Cuts: 2
Grip Edge (Top/Bottom)	Folio Edge (Top/Bottom)
Grain Direction NEITHER	Color Bar Size 0.25
Swing/Combo Cut No	Waste 0.00%

Special Order

If the stock for the job is not part of your inventory then you can select the option for Special Order. This allows you to specify a special-order material. Here you can enter the material specifications.

If user wants to add the special-order stock into Stock definition for re-use then he needs to enable “Use in future” option.

Special - Create New Stock

Stock Details

Stock Name

Stock Method Sheet Stock

Stock#

Stock Type Business Papers

Parent Size

Color

Weight

Finish

Coated None 1 Sided 2 Sided

Sheet/Carton Carton Weight M Weight

Min. Order Charge for entire Order

Cut/100 Min. Cut Chg.

Price & Quantity

Use in future

Vendor

Default Metric Exclude from Web updates

Basic Size 17 x 22

Normal Run Size

Generic Color

Thickness Caliper

Grade

After completing the first screen, the second screen allows you to enter cost information for different quantities.

Special - Create New Stock

Qty Adjustments

Costing Unit #Sheets/Sets Cost is in Sets

Quantities	Cost	CWT	Markup	List/M
<input type="text" value="1,000"/>	<input type="text" value="0.04"/>	<input type="text" value="0.00"/>	<input type="text" value="1.50"/>	<input type="text" value="0.00"/>
<input type="text" value="5,000"/>	<input type="text" value="0.04"/>	<input type="text" value="0.00"/>	<input type="text" value="1.45"/>	<input type="text" value="0.00"/>
<input type="text" value="10,000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.40"/>	<input type="text" value="0.00"/>
<input type="text" value="15,000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.35"/>	<input type="text" value="0.00"/>
<input type="text" value="20,000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.30"/>	<input type="text" value="0.00"/>
<input type="text" value="25,000"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1.25"/>	<input type="text" value="0.00"/>

Price Expiry

Select Done when you are complete and the information will be copied to the job detail screen.

Inks

You can identify the number of colors, passes and washes for the front and back of the material. You can also select or type in the ink to be used from the dropdown.

Finish Size: A6

Original Sheets: 1

Press: 0

Run Method: Sheet Wise Work & Turn

	Colors	Passes	Washes	Ink
Front	1	1	0	
Back	0	0	0	

Color dropdown options: Black, Blue, Cyan, Magenta, Red, Yellow

You can type in a PMS ink in the small box displayed in the line. That ink will be displayed in the short cut menu and selecting the plus sign will enter that ink in the line.

Search: pms 300+

NO DATA FOUND.

Input: 300

Add/Modify Special Pages

You may have pages that are different than the rest of the pages. It could be some color pages where the rest are black and white or it may be an insert.

Here you can define the special pages and add them to the job detail

Special Pages + Add Pages

Page number or range: Ex: 2-7

Type: B&W

Description: [Empty]

Stock type: [Empty]

Stock Color: [Empty]

Sides: Simplex

Print Services ⓘ

Buttons: Cancel, Add, Done

Add Charges

You can add Charges to the job using the “Add New” button available in the Job Details Screen.

Note When you are adding charges or modifying any existing charges, make sure to click on **Confirm** button and **Done** button to save the charges to the Job.

Job charges (Job# : 1)

Add New Charge

> Fuel Surcharge	Price (\$)	4.00	<input type="button" value="Delete"/>
> AG Packaging Fee	Price (\$)	0.00	<input type="button" value="Delete"/>

Job Notes

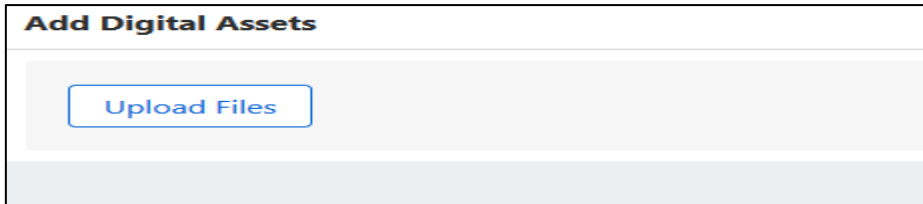
Selecting Job Notes will take you to a screen where you can add job ticket notes. “Add Time Stamp” will put the date and time with the notes.

Job Ticket Notes

Enter Special Instructions for Job Tickets

Digital Assets

The Digital Assets option will allow you to upload digital files.



Delete button

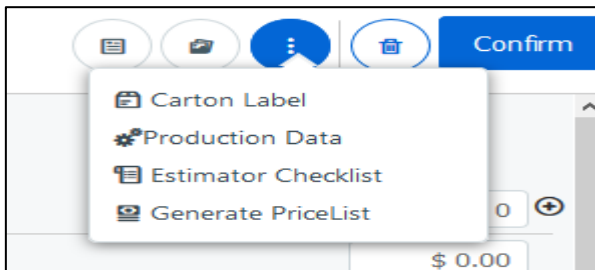
User can delete individual job from the job details screen using Delete button

Note: When a user deletes the job and confirms they are taken to Estimate/Invoice summary screen.

Confirm

Once the information has been entered selecting Confirm will save the job information and you can move to the estimate summary screen.

There are several command options available when you create a job.



Carton Labels:

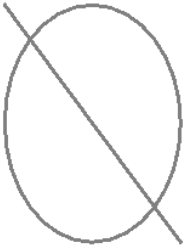
You can create labels for the containers that hold the finished job. You can also define the format of these labels.

The image shows a detailed configuration screen titled "Carton Labels". At the top right, there is a "Label Format" dropdown menu set to "Carton Labels". Below this, there are several input fields: "Total Qty" (with a dropdown arrow), "Items Per Box" (value: 0), "Number of Boxes" (value: 1), "Odd Last Qty" (value: 0), "NO. Start to End" (values: 1, 1), and "Label to Skip From" (value: 0). A "Label Text" area contains the placeholder "You can enter any text here you like." and two buttons: "Today's Date" and "End Date". Below the text area are several toggle switches: "Job Description", "Invoice Reorder", "Invoice Title", "Estimated Weight", "Attention Name", "Customer Name", "Address", and "P.O. Number". At the bottom, there is a "Print Page Setup" section with options for "Standard" or "Custom" paper size (set to "LETTER"), "Width" (612), "Height" (792), "Pixels" (dropdown), and "Orientation" (set to "Portrait", with "Landscape" also visible).

Reviewing production data

While in the Job window, you can click **Production** from the command list to open the Production Data window. Here you can review production and pricing information for the job.

Production Data

Bought in Size <input type="text" value=""/>	Out <input type="text" value="1.00"/>	
Press/Run Size <input type="text" value=""/>	Area <input type="text" value="0.00"/>	
Brought in Cost <input type="text" value="0.00"/>	Per <input type="text" value="1.00"/>	
Production Run <input type="text" value="0"/>	Markup <input type="text" value="2.00"/>	
Requires (Parent Sheets) <input type="text" value="0"/>		
Sheets Purchased <input type="text" value="0"/>		
Copier <input type="text" value="Digital B&W 8.5x11 / 8.5x14"/>		
Copier Speed (impressions/minute) <input type="text" value="200.00"/>		

Set Up Time	<input type="text" value="0:00"/>		Cost	Mark Up	Price
Run Time	<input type="text" value="0:00"/>	Stock	0.00	0.00	0.00
Wash up Time	<input type="text" value=""/>	Labor	0.00	0.00	0.00
			Itemized Markup		0.00

Cancel Confirm

Estimator Checklist

PrintSmith Vision includes an “estimator checklist” so you can review the entire job – from specification creation to production – in one place. You can click **Estimator Checklist** from the command list

Estimator Checklist: Job 1 (0)			
Items List			
Job Description Digital B&W	Run Time 0:00	Ordered On 10/24/2017 3:02 AM	Washup Time 0:00
Customer Barts Electric Co.	Stock N/A	Taken By N/A	Target Adjust N/A
Contact Andrea Stumpf	Stock Number N/A	Sales Rep JH	Finished Size N/A
Document Number 0	Vendor N/A	Wanted By N/A	Folded Size N/A
Press Definition Digital B&W 8.5x11 / 8.5x14	Bought in Size N/A	Colors Front 1	Sheets 1
Machine Name OCE	Run Size	Colors Back 0	Signatures 1
Setup Time 0:00			Num Up/On 1/1
Job Comment			
Items Table			

Price List

Once the detail is entered you can create a price list

Offset Printing		
Stock	Vellum Wausau Exact Offset - Text 60.0# Color	
Finish Size	8.5 x 11	
Press	Offset 11"/14"	
Special Options		
Pre Press Charges	N/A	
Production	N/A	
Bindery	Fuel Surcharge, AG Packaging Fee,	
Qty	Price	Price per Each
100	25.81	0.2580
150	27.17	0.1810
200	28.36	0.1420
250	29.87	0.1190
300	32.33	0.1080
350	34.69	0.0990
400	37.17	0.0930

From Account History

If you select Account History, then you will see a list of account historical invoices or you can select from historical estimates. This is helpful for reprint jobs where the price may or may not have changed. You can narrow the search by using the search fields at the top of the list to select from the posted date, invoice or estimate number, description, cost or sales rep.

New Estimate

Choose Customer:

Contact Person:

Create From: Create New Job Account History Job Templates Templates

Account History (551)

Posted On	Invoice #	Description	Total Cost	Sales Rep
14/03/2018 7:33 pm	1061	Real Estate Flyers	\$ 200.89	Neil
22/02/2018 9:31 pm	1021	VDP Business Card - Lars Monohan bus card	\$ 128.51	Dave
22/02/2018 9:11 pm	1057	JF Demo Feb 4 2018	\$ 2,322.89	Bill
22/02/2018 9:11 pm	1060	VDP Business Card - BC-XeroxPrep03_JP	\$ 393.96	Dave

You will then see a new screen with the information from the historical invoice or estimate

PrintSmith Vision | Estimate | Search

⚠ Estimate is not saved, go to Estimate summary and click "Save"

Estimate Prefix: -new- Suffix: | User: Jim Chiaramonte | Job: B&W Digital

Account Information > Job Details > **Estimate Summary**

Price definitions (media and charges) may have changed, would you like to update price definitions for this invoice?

Item	Product	Description	Price	Qty	Unit Price	Item Fee	Item Tax
> 1	<input type="text" value="B&W Digital"/>			25	\$ 0.20		\$ 5.00

If the prices have changed since the invoice or estimate was originally created you will be given the option to update the price definitions.

You can select the product from the drop down list.

Item	Product	Description
> 1	<input type="text" value="B&W Digital"/>	A Members Handbook (Rumbi

Self Publishing
Marketing Services

The quantity will default from the original estimate or invoice but you can change it. The price will automatically be recalculated based on the new quantity.

Price	Qty
-	100

From Templates

This feature allows you to create an estimate from a previously defined invoice or estimate template.

New Estimate

Choose Account/Prospect/Contact:

Contact Person:

Create From

Create New Job
 Account History
 Job Templates
 Templates

Templates (2)

Name	Invoice #	Created By	Created Date
digital copies	1044	admin	26/01/2018 7:46 pm
real estate	19	admin	26/01/2018 7:47 pm

If you have your flag set not to show template categories then you will see the screen above with the options for Job Templates and Templates.

If you select for the Template Category View then the initial screen will not display Job Templates but instead will just show the option for Template and display Template Categories. Selecting the category will filter out any templates that are not part of that category.

First select the category and then the template. You also have the option to show all Templates.

Create From

Create New Job
 Account History
 Templates

Template Category

- Show All
- broucher_ipeg
- broucher_ipeg - Copy
- broucher_ipeg - Copy(1)
- LEAFLET
- LEAFLET - Copy

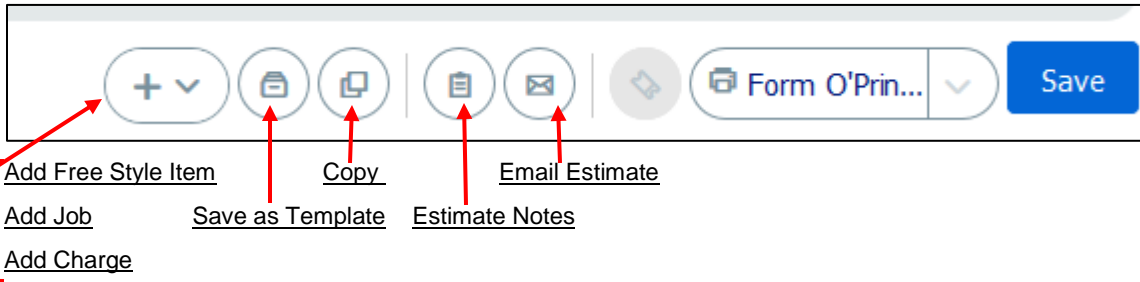
Template Type	Template Name	Invoice #	Created By	Created Date
All				
Invoice	aakashlock		admin	15/03/2018
Invoice	Allied Mills Name Plate		JohnW (old)	29/02/2016
Invoice	Aussie wind 36pp + cover	130876	JohnW (old)	31/03/2016
Invoice	Fuji Xerox Monthly Storage	130176	SallyT	19/02/2016
Invoice	Fuji Xerox Pick n Pack	130177	SallyT	19/02/2016
Invoice	FX Agents Business cards		SallyT	18/02/2016
Invoice	Mcconnell hour RC		JohnW (old)	10/02/2016

1 - 20 of 92 items

After selecting the invoice or estimate template, the new estimate screen is opened. If there has been a price change in any of the operations or material since the original invoice or estimate was done you will get an alert and you can decide to have the new estimate updated with the new price or keep the old price.

Estimate Summary

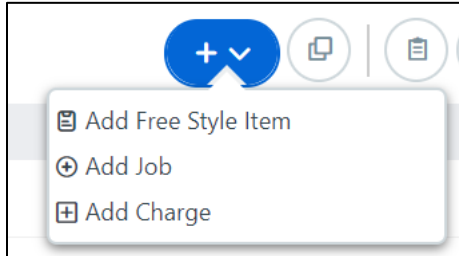
There are several features available from the estimate summary screen.



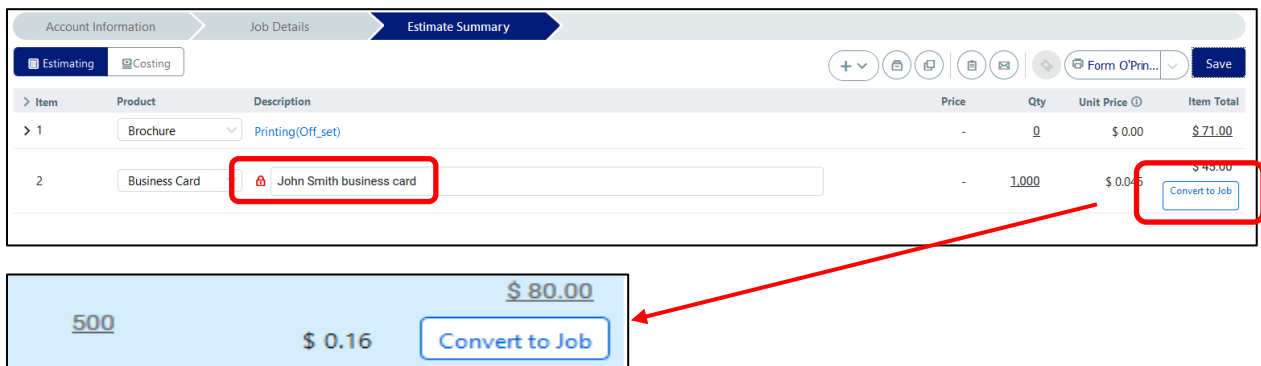
Adding Free Style Items, Jobs or Charges to an Estimate

Add Free Style Item

Sometimes you may have a situation where a customer is ready to place an order but they do not want to wait while you enter all the information needed to create a job. This works well if it is something basic such as a business card or stationery where you know the price and the specs. You can provide the customer with an invoice and then later fill in the job specifications. In this situation, you will select 'Add Free Style Item'



After adding Free Style job and saving the estimate you will get the option to convert to job. The Price of the Free Style job is automatically locked. To make changes to the job you will need to unlock the item by clicking on the lock.



After converting the job, you will be directed back to the job detail screen.

Note User is not allowed to Add charges to Free Style job before saving and converting to a job. However, once the job is converted they can add the charges.

On the job detail screen, you can change the job method and add the required job information, you can also mark the job has Finished and Brokered.

Job Method: FreeStyle (dropdown) Product: Self Publishing (dropdown) [i] Finished Brokered

Adding a job will take you a screen where you can select how you want to add a job. It has all the same options as the original new job screen.

Add job

Add Job

Choose Account/Prospect/Contact: Contact Person:

Create From: Create New Job Account History Invoice Product Type Library Invoice Template

Account History (30)

All Times This Month Last Month This Quarter This Year Last Year Open Orders

Posted On	Invoice #	Description	Total Cost	Sales Rep
7/20/2011 12:00 AM	60048	Rumbi - A Members Handbook	\$ 58.62	SH
3/29/2010 12:00 AM	55014	Rumbi - A Members Handbook	\$ 75.43	SH
10/20/2009 12:00 ...	53308	Rumbi - A Members Handbook	\$ 94.24	SH
8/7/2009 12:00 AM	52676	Rumbi - A Members Handbook	\$ 83.31	SH
7/23/2009 12:00 AM	52508	Rumbi - A Members Handbook	\$ 83.31	SH

1 - 20 of 30 items

See the information on “Adding a job” starting on page 22. After adding the job, it will be reflected in the total estimate.

Add Charges

Note When you are adding charges or modifying any existing charges, make sure to click on **Confirm** button and **Done** button to save the charges to the Estimate.

Save as a Template

1. Select if you are creating an estimate or job template.
2. Enter the template name
3. Select the template category from the dropdown.

If you create a job or estimate and anticipate using it in again you can create a job or estimate template. A job template consists of a single job and all the setup and finishing charges for that job. An estimate template contains all of the information from the original estimate. Templates can be used many times. You can create an estimate from a template and then make changes to that estimate as needed.

You can also create templates for multi-part jobs. In this case, the template contains the overall job, its charges, and the parts (jobs) that make up the overall job, as well as their charges. For any repetitive jobs, templates save time and reduce errors.

Note To see how to “Create Template Categories” see page 14.

Templates can also be associated with customer accounts (on the **Templates tab** in the Customer window). This facilitates the process of selecting a template when working with an account.

Copy to a new estimate

This option allows you to copy the entire estimate over to a new estimate. You will get a warning if you have not saved prior to copying.

Email Estimate

Selecting this option will first save the estimate if it is not already saved and then open an email window with a preset message.

Email

From:

To: ⓘ

Cc: ⓘ

Subject:

Attachment: [Estimate #196.pdf](#)

Normal | Sans Serif | B I U A [color] [background color] [list] [link] [unlink] [code] [link icon]

Hi Doug,

Thank you for choosing Snap, please find attached your Quotation 196 for B&W Digital as per your request. If you have any questions or if there is anything you would like me to clarify or add please feel free to contact me via the details included below.

If your order is urgent please contact us by phone as soon as is possibly convenient so we can arrange our production schedule to accommodate your order, otherwise an email reply with your confirmation and when you would require it to be completed by would be all we need to schedule your order.

Thank you for your enquiry and we look forward to hearing from you soon.

Kind Regards,

Estimating Notes

You can enter estimating notes

Note Pad

Who:

Phone:

What:

How Many: What Size:

Paper:

Show Note Pad when document opens

Notes:

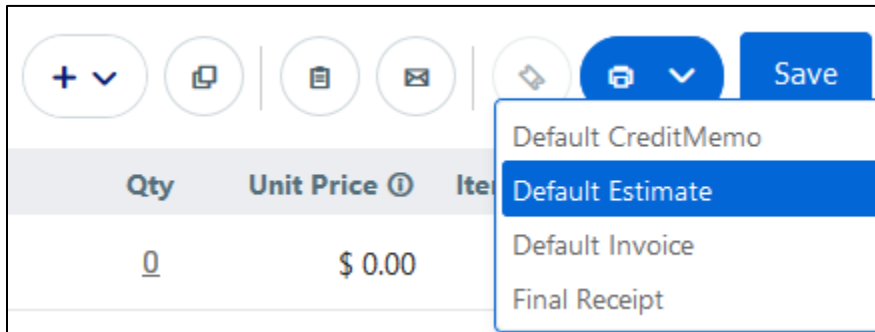
Number of Characters: 0

When:

Print Estimate

Note: Estimate must be saved before printing. If you select print estimate before saving the program will save the estimate automatically.

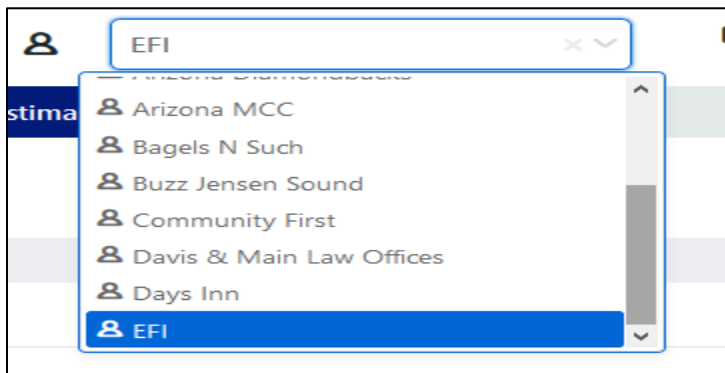
You can also define the style to be used for the printing.



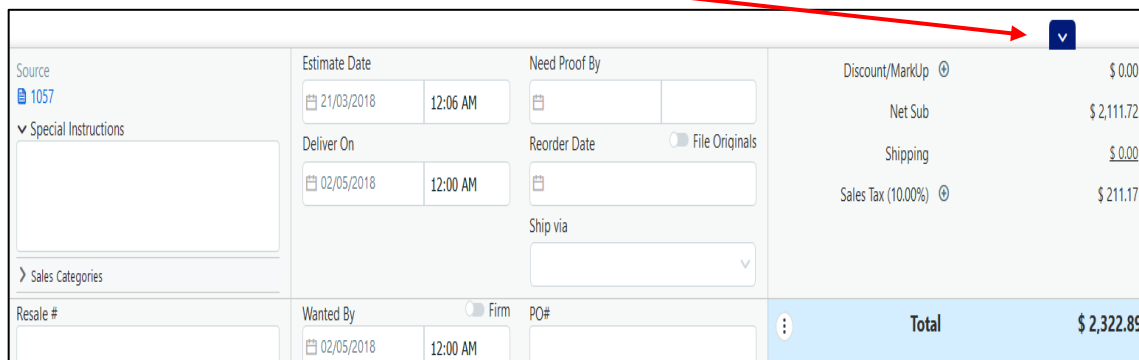
Change Account

You can change the account for the estimate. Click on the account name and then use the drop down to select the new account. You can also type in part of the name.

Note Change account is only available from the Account Information screen or Invoice/Summary screen. The user must have permission to change an account.



One portion of the estimate summary screen is minimized by default use the arrow at the bottom to display this portion of the screen.



Special Instructions

You can enter special instructions that will appear on the estimate.

Special Instructions

Credit Terms: Net 30 Days
Please Pay From This Invoice!

Sales Categories

This shows the invoice sales breakdown for each sales category

Note The total for the sales categories comes from the invoice item total and not the invoice total that could include taxes, discounts or markups.

> Item	Product	Description	Price	Qty	Unit Price	Item Tax	Item Total
> 1	Self Publishing	A Members Handbook (Rumbi) - Cover copied on front side on customer stock, 5 inside pages copied on	-	100	\$ 1.128	<input checked="" type="checkbox"/>	\$ 112.84

Source: 53308 Special Instructions: Credit Terms: Net 30 Days Please Pay From This Invoice!	Invoice Date: 11/08/2017 9:47 PM Wanted By: <input type="text"/> Need Proof By: <input type="text"/> Deliver On: <input type="text"/> Re-order: <input checked="" type="checkbox"/> File Originals Ship via: FEDEX	MarkUp: \$ 5.64 Net Sub: \$ 118.48 Delivery: \$ 3.57 Tax (6.85%): \$ 0.00 Deposits (2): \$ 40.00
--	---	--

Sales Categories	Amount
Digital B&W Printing	- 68.84
Bindery	- 33.5
Design	- 10.5

Format: <input type="text"/>	Tax Exempt No: E90355	PO No: <input type="text"/>	Total: \$ 122.05 Amount Due: \$ 82.05
------------------------------	-----------------------	-----------------------------	---

Dates

Estimate Date <input type="text" value="21/03/2018"/> <input type="text" value="12:06 AM"/>	Need Proof By <input type="text"/> <input type="text"/>
Deliver On <input type="text" value="02/05/2018"/> <input type="text" value="12:00 AM"/>	Reorder Date <input type="text"/> <input type="checkbox"/> File Originals
Wanted By <input type="checkbox"/> Firm <input type="text" value="02/05/2018"/> <input type="text" value="12:00 AM"/>	Ship via <input type="text"/>
	PO# <input type="text"/>

You can mark the wanted date as firm and mark to file the originals.

User can select/update the shipping method here from dropdown.

- Will Call
- Local Deliver
- Ground (5-7 Business days)
- FedEx (Estimated)
- UPS
- UPS 2 Day
- UPS 3 Day

When the PO number is mandatory then the field would be highlighted so that user can enter the data, Warning is not displayed when an Invoice is saved. However, when user tries to pick up the Invoice the following warning is displayed.

“Orders for this customer require a Purchase Order. Please enter a PO#.”

Price Information

The Price information area shows the estimate totals. To enter a shipping amount, enter or change a customer discount percentage, select a different tax table and tax code click **Edit (plus sign after label)**

Discount/MarkUp	⊕	\$ 0.00
Net Sub		\$ 112.84
Delivery		\$ 0.00
Tax (6.85%)	⊕	\$ 0.00
Deposits	⊕	\$ 0.00

There are several options in the section for the price information section

You can add a discount or markup by selecting the plus sign. It can be entered as a percentage or a fixed amount.

The 'Add' dialog box has two tabs: 'Discount' (selected) and 'MarkUp'. Under the 'Discount' tab, there are two radio buttons: 'Discount %' (selected) and 'Discount Amt'. Below these are two input fields: 'Discount %' with the value '0' and 'Discount Amt' with the value '0'. At the bottom left, there is a checkbox labeled 'Apply one-time discount' which is currently unchecked. At the bottom right is a 'Confirm' button.

Note If the account had a one-time discount defined, and you indicated you wanted to apply it when you created the document, the discount is shown in the **Discount Amt** field, and the **Apply one-time discount** check box is selected. If no discount was defined, you can enter one now.

You can add a delivery fee.

You can add or change a sales tax by selecting the plus sign.

The 'Sales Tax' dialog box shows a dropdown menu for 'Tax Table' set to 'Default'. Below it, another dropdown menu for 'Tax Code' is open, showing 'Default' (highlighted), 'Arizona', and 'California'. The 'Tax Rate' field is empty. The 'Tax Sub' field shows '\$ 10.00'. At the bottom left, there is a checkbox labeled 'No Tax' which is currently unchecked and is highlighted with a red box. At the bottom right is a 'Confirm' button.

Selecting the No Tax check box will result in zero tax for the invoice/estimate.

If the customer is taxable you can still identify which lines are to be taxed and which are not.

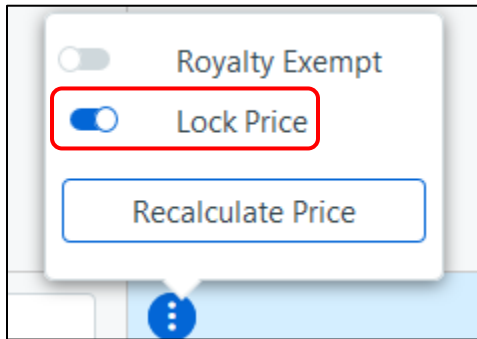
Note: At charge level user needs to open the charge and check if it's taxable or not. Identification mark is not available

Unit Price ⓘ	Item Tax ⓘ
\$ 1.128	<input checked="" type="checkbox"/>
\$ 0.045	<input type="checkbox"/>
\$ 0.045	<input type="checkbox"/>

You can also change the customers tax exemption status


Command line option

You can lock the price



This locks the price for all items on the estimate. You can unlock the price for all items by changing it here.

When the price is locked it will display a lock for each line item

> Item	Product	Description
> 1	Self Publishing	 A Members Handbook (Rumbi)

You can unlock the price for an individual item by selecting the lock

If there is a royalty associated with this estimate you can make it exempt.


Click **Recalculate** to update each job and charge in the document with the latest pricing information and then recalculate the entire estimate.

From each line item you have other options.

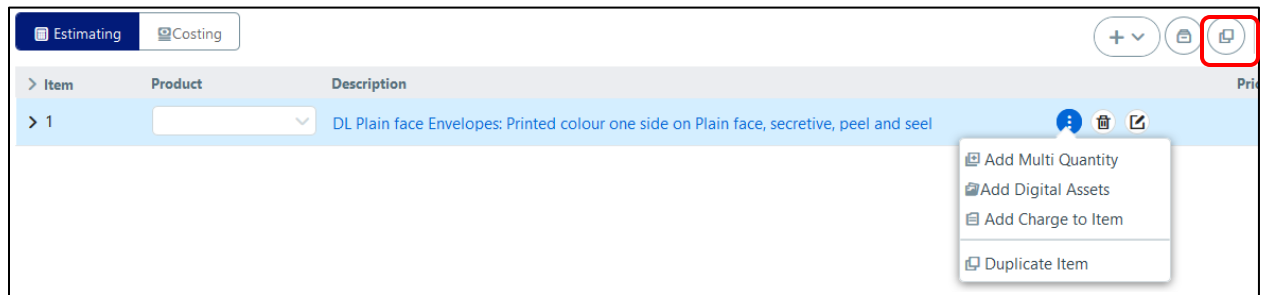
Specifying multiple quantities with different job specifications

If you want to add multiple quantities for a job or want the ability to change job specifications for different quantities, use the **Multi-Qty** field in the Job window as follows:

When creating a job in an estimate, enter the first quantity in the **Ordered** field, provide other information about the job, for the next quantity in the same job, click **+** next to the **Quantity** field, click to add another quantity, enter the second quantity in the **Ordered** field, change other information about the job as necessary. Click **Confirm**.

Price Breakup	
Quantity	3,000 
Unit Cost	
Total Cost	157.91

If you want to estimate multiple quantities from the estimate summary screen use the Add Multi Quantity option available for each line.







You can edit the description using this icon to the right of the trash can

Note If you have multiple lines on the estimate summary screen you can change the sequence of the lines by clicking and dragging the description.

Cost Tab

On the estimate summary section there is also a cost tab. The estimated cost, actual cost (once the job is complete), the difference, selling price and job margins is displayed for each line item. Cost is the amount you spend to produce the order; price is the amount you charge your customer. The difference is your profit.

Account Information		Job Details		Invoice Summary		
Invoicing	Costing	Cost Entered	Historical Cost	Data Collections	Price below cost	
Copy to New Invoice     Save						
> Item	Description	Estimated	Actual	Difference	Price	Margin
> 1	Digital B&W - New Patient Forms	\$ 57.92	\$ <u>57.92</u>	\$ 0.00 (0%)	\$ <u>110.00</u>	\$ 52.08 (47%)
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	\$ <u>7.24</u>	\$ 0.00 (0%)	\$ <u>18.44</u>	\$ 11.20 (61%)

Entering actual costs

Although PrintSmith Vision does not require you to enter your costs, without them you will not be able to see where you are making (or losing) money.

To review or enter actual costs

1. When a document is open, On Estimate summary tab click on **Costing** button.
2. Review the costs.

> Item	Description	Estimated	Actual	Difference	Price	Margin
✓ 1	Digital B&W - New Patient Forms	\$ 57.92	\$ <u>57.92</u>	\$ 0.00 (0%)	\$ <u>120.00</u>	\$ 62.08 (52%)
↳	Fuel Surcharge	\$ 0.00	<input type="text" value="0.00"/>	\$ 0.00 (0%)	\$ <u>4.00</u>	\$ 4.00 (100%)
↳	AG Packaging Fee	\$ 0.00	\$ <u>0.00</u>	\$ 0.00 (0%)	\$ <u>1.50</u>	\$ 1.50 (100%)
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	\$ <u>7.24</u>	\$ 0.00 (0%)	\$ <u>18.44</u>	\$ 11.20 (61%)

3. If you know the actual cost then click the **Actual** column and enter the actual cost. Blue identifies costs that you entered. Red alerts you that an item was priced below cost. The margin will automatically recalculate.

If there are additional charges using the arrow on the left hand side will open the display to show those items also.

> Item	Description	Estimated	Actual	Difference	Price
✓ 1	Digital B&W - New Patient Forms	\$ 57.92	\$ <u>57.92</u>	\$ 0.00 (0%)	\$ <u>110.00</u>
↳	Fuel Surcharge	\$ 0.00	\$ <u>0.00</u>	\$ 0.00 (0%)	\$ <u>4.00</u>
↳	AG Packaging Fee	\$ 0.00	\$ <u>0.00</u>	\$ 0.00 (0%)	\$ <u>1.50</u>
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	\$ <u>7.24</u>	\$ 0.00 (0%)	\$ <u>18.44</u>

Saving an estimate

Until an estimate is saved, you will see the message at the top of the screen that the estimate is not saved. Make sure to save the estimate after any modification.

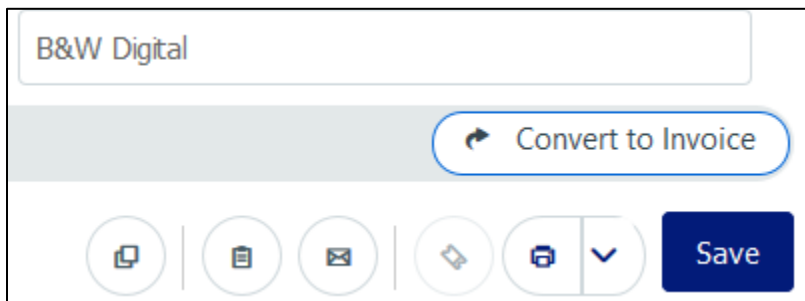
⚠ Estimate is not saved, go to Estimate summary and click "Save"

You should then see the message that the estimate has been successfully saved.

Note The message will only stay on the screen for a few seconds and then disappear

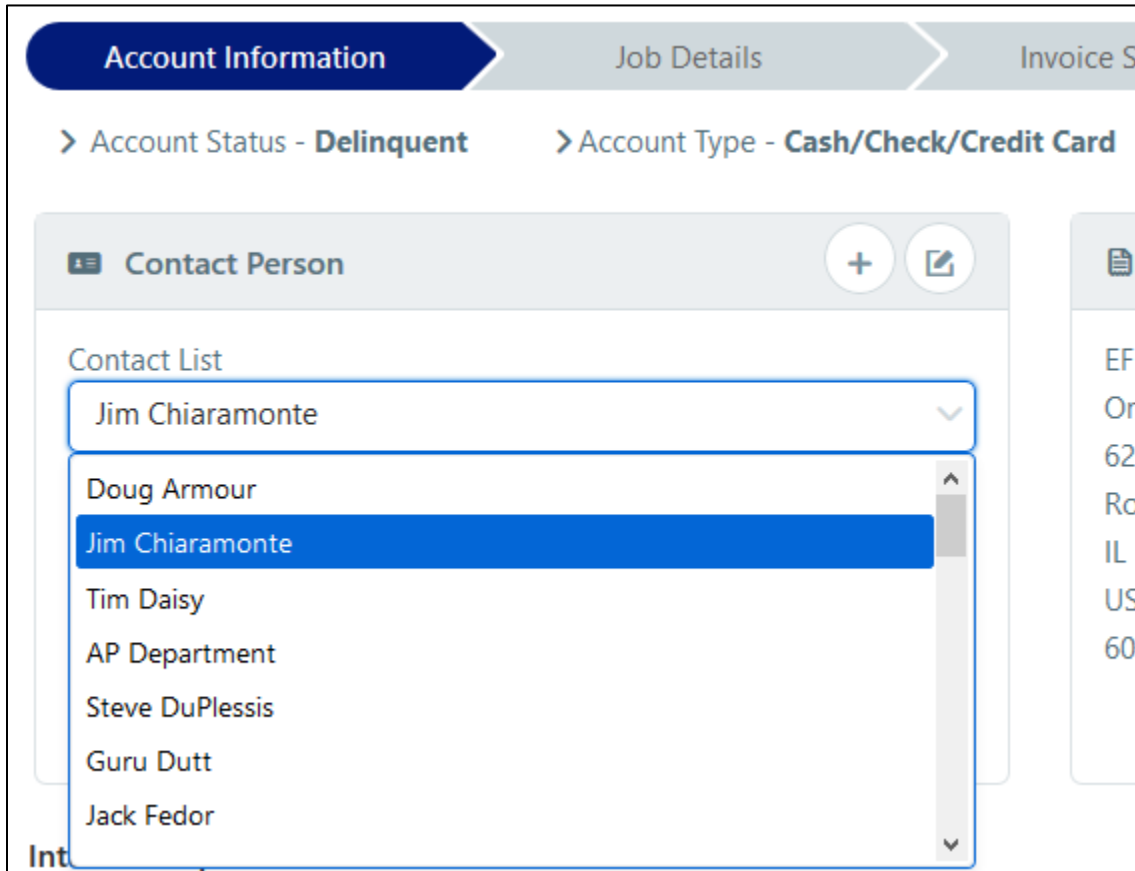


Once the estimate has been accepted you can convert it to an invoice.



Account information

On the account tab you will find information about the account.



Account Status and Type

You can identify the status of the account and the types of payments that will be accepted from that account.

Contact

You can use the drop down to select a different contact person or the plus sign to add a new

If there is a Red box around the contact area that indicates that there is some missing information regarding that contact. User will not be able to proceed until the mandatory information is filled.

Contact Person

+
✎

Contact List

Nichole Lehmann
▼

- 👤 Nichole Lehmann
- ✉ test@efi.com
- ☎ 801.255.3343 (Phone)

Contact Person

Contact*

Email*

Phone*

Mobile*

Fax

Website

Job Title

▼

Use as Temporary Contact

Cancel
Done

Invoice and Delivery Address

On the Account Information tab you will also see the invoice address and delivery information

<p>Invoice Address</p> <p>Action Plumbing 7904 S. 1530 W. West Jordan UT 84088</p>	<p>Delivery</p> <p><input checked="" type="radio"/> Same as Invoice <input type="radio"/> Select from Contact List</p> <p><input type="radio"/> Other</p> <p>Action Plumbing 7904 S. 1530 W. West Jordan UT 84088</p>
---	--

You can change the delivery information either selecting from Contact list if there are other contacts already set up or you can enter a new delivery

Confirm

Edit Delivery

Delivery

Same as Invoice Select from Contact List

Other

Action Plumbing
7904 S. 1530 W.
West Jordan
UT
84088

🏠 **Delivery**

Same as Invoice Select from Contact List
 Other

Company

Street

City

State

Country

Pincode

Internal Information

There is also some internal information that is needed for this invoice.

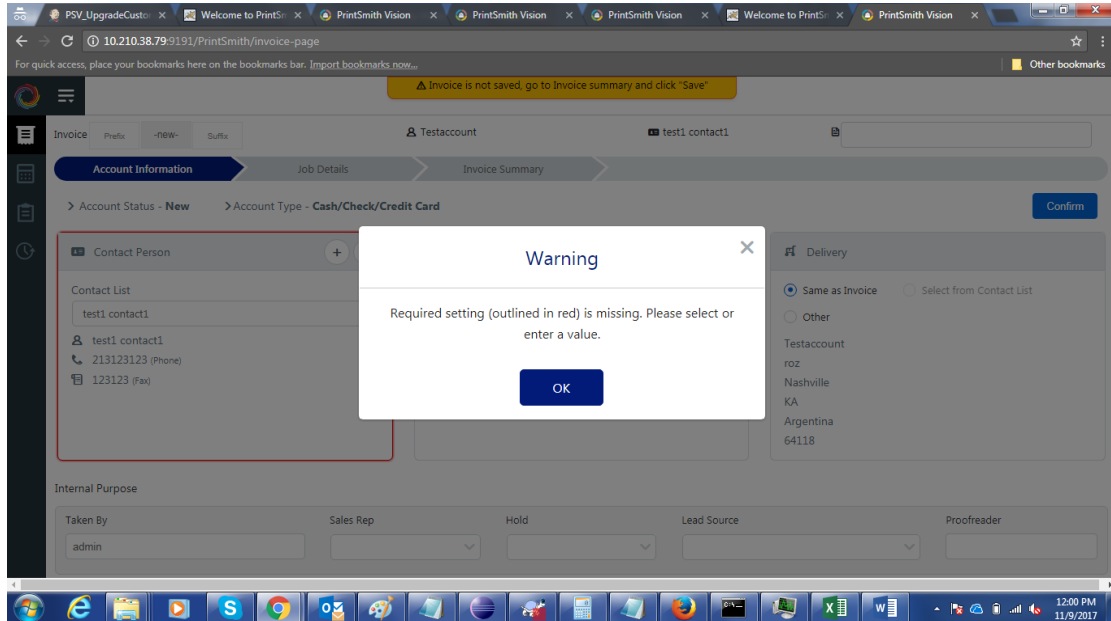
Internal Purpose

Taken By	Sales Rep	Hold	Lead Source	Proofreader
<input style="width: 100%; border: 1px solid #ccc;" type="text" value="admin"/>	<input style="float: right; text-align: right; padding-right: 5px;" type="text" value="JH"/>	<input style="float: right; text-align: right; padding-right: 5px;" type="text"/>	<input style="float: right; text-align: right; padding-right: 5px;" type="text"/>	<input style="float: right; text-align: right; padding-right: 5px;" type="text"/>

The person entering the document will be identified in "Taken by". Sales rep is selected from the drop down. You can put the invoice on hold and identify the lead source and proofreader if applicable.

Missing Information Warning

If any information is missing the warning shown below will be displayed and the area for the missing information will be outlined in red.



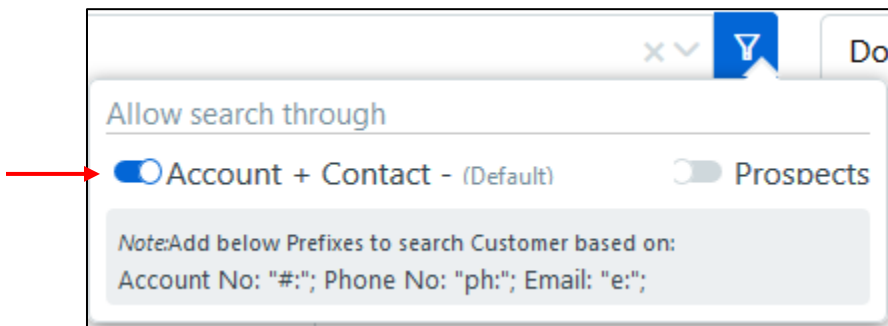
Note Until user adds the missing information they will not be allowed to switch to another tab.

Invoicing

Creating Invoices

Creating a New Invoice

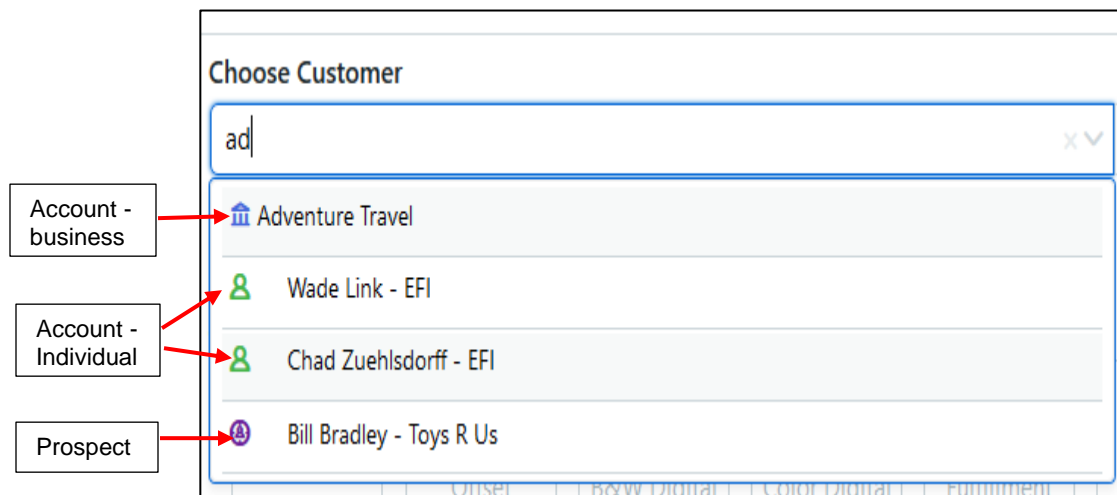
You can search for the account by account number, phone number or email address using the search code listed below.



With accounts selected you will only see accounts, with prospects turned on and account off you will only see prospects. You can also have both turned on to see all accounts and prospects.

Prospects have not yet done business with you, but you hope to turn them into customers. Customers have done business with you, and invoices have been created for them. Once you create an invoice for a prospect, that prospect is automatically converted to a customer. If customers become inactive, they can be turned into prospects again.

You can identify the type of account by the symbol next to the name.



When you select the account, the program will automatically enter the default contact person. You can select a different contact by using the drop down.

The screenshot shows the 'New Invoice' form. At the top, 'Choose Customer' is set to 'EFI'. Below it, the 'Create From' section has four radio buttons: 'Create New Job', 'Account History' (which is selected), 'Job Templates', and 'Templates'. A red box highlights these options. To the right, the 'Contact Person' dropdown menu is open, showing a list of names: Doug Armour (selected), Jim Chiaramonte, Tim Daisy, AP Department, Steve DuPlessis, Guru Dutt, and Jack Fedor. Below the dropdown, there is a table with columns for 'Posted On', 'Invoice #', and 'Description'. The table contains two rows of data.

Posted On	Invoice #	Description		
14/03/2018 7:33 pm	1061	Real Estate Flyers	\$ 200.89	Neil
22/02/2018 9:31 pm	1021	VDP Business Card - Lars Monohan bus card	\$ 128.51	Dave

There are different options for creating an invoice depending on your preference settings. Under Preference > HTML you have the option of selecting Template Category View. With this unchecked you will have the option of creating an estimate from a new job, account history, job templates or invoice/estimating templates. With this checked the options will change to a new job, account history or template. When you select template, you will be shown a list of template categories that you can use to find a template. For more information on "Creating Template Categories" see page 14.

A new estimate can be created for an "Create New Job", using a previous invoice or estimate from "Account History", from the "Job Templates" or from a "Template" (Invoice/Estimate).

Create New Job

After selecting New job, you will see several options as to Job Method. Once you have selected the job method you will see a job detail sheet specific to the job method you selected. In this example the job method was Printing Offset.

The job method is already filled in from the selection on the first screen but you can change it here if needed.

The screenshot shows the 'Job Details' form. At the top, there are two tabs: 'Account Information' and 'Job Details'. Below the tabs, there is a '1-Printin...' button and a '+ New Item' button. The 'Job Method' dropdown menu is open, showing a list of options: Printing(Off_set) (selected), Multi-part Job, Printing(Off_set), Digital B&W, Digital Colour, Blank, List, and Outsource. The 'Location', 'Press', 'Description', and 'Stock' fields are visible but empty.

1. Select the product. Products are set up under Admin > Table Editor

2. You can identify if this product is finished by selecting the toggle.
3. You can identify if this product is to be brokered.
4. You can select the location from the drop-down list. Production locations are set up under Admin > Table Editor

5. Next enter the press and description.

6. Using the drop down you can select the stock to be used. When you select the stock the parent size will automatically be filled in from the stock information.
7. Complete the run size, finish size, folded size, original sheets and UP/ON. With this information an image of the layout will be displayed.

You can also identify if the material is special order. If you need help in identifying the stock you can use the stock picker and paper calculator functions. You should also pick the run method.

Stock Picker

You will have the ability to pick the stock from a pre-defined list. You can use the blank fields at the top of the screen to filter out the type of material you want.

Stock Picker												
Group	<input type="text"/>	Type	<input type="text"/>	Advance Filter	Reset	Special Order						
Stocks (358)												
Stock Name	Weight	Size	Color	Generic C...	Finish	Thickn...	Grade	CWT	Vendor	Stock Nu...	Produ...	Qty o...
Vanguard Window #10	24	9.5 x 4...	White	White		0		272.74	Ingram		5460	0
Vanguard #10	24	9.5 x 4...	White	White		0		235.63	Ingram		5457	0
Vanguard #10	24	9.5 x 4...	White	White		0		142.76	Ingram		5454	0
Valley Forge Parchment C...	60	6.5 x 9.5	Soft Iris	Pink		0		299.34	Xpedx	0839-4009O	5321	0
Valley Forge Parchment C...	60	6.5 x 9.5	Sterling Sil...	Gray		0		299.34	Xpedx	0839-4009S	5318	0

Paper Calculator

This will help in determining the amount of parent sheets needed and the material cost. Complete the information on the screen and the program will calculate the sheets needed.

Paper Calculator

Sheets Out
0 out of 0 = 0

Cuts to Run: Cuts to Finish:

Parent Size:

Run Size:

Finish Size:

Work and Tumble

Back Trim, Parent

Trim Four Sides

Disable FSC options

Run to Finish Grain:

Grip Edge/Gap ☑

Size: Top Left

Folio Edge ☑

Size: Left Top

Colour Bar ☑

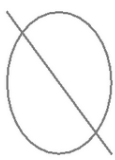
Size:

White Space ☐

Gutter ☐

Bleed ☐

Parent, Finish Parent, &Run **Run, &Finish**



Job Summary

Starting Size	Size Out
Sheets Out 0	Cuts: 2
Grip Edge (Top/Bottom)	Folio Edge (Top/Bottom)
Grain Direction NEITHER	Color Bar Size 0.25
Swing/Combo Cut No	Waste 0.00%

Special Order

If the stock for the job is not part of your inventory then you can select the option for Special Order. This allows you to specify a special-order material. Here you can specify the material specifications.

Special - Create New Stock

Stock Details
Price & Quantity

Stock Name:

Stock Method:

Stock#:

Stock Type:

Parent Size:

Color:

Weight:

Finish:

Coated:

Use in future

Vendor:

Default Metric Exclude from Web updates

Basic Size:

Normal Run Size:

Generic Color:

Thickness:

Grade:

Sheet/Carton:

Min. Order:

Cut/100:

Carton Weight:

Charge for entire Order

Min. Cut Chg.:

M Weight:

After completing the first screen, the second screen allows you to enter cost information for different quantities.

Special - Create New Stock

Qty Adjustments

Costing Unit: 1000 #Sheets/Sets: 1 Cost is in Sets

Quantities	Cost	CWT	Markup	List/M
1,000	0.04	0.00	1.50	0.00
5,000	0.04	0.00	1.45	0.00
10,000	0.00	0.00	1.40	0.00
15,000	0.00	0.00	1.35	0.00
20,000	0.00	0.00	1.30	0.00
25,000	0.00	0.00	1.25	0.00

Price Expiry

Select Done when you are complete and the information will be copied to the job detail screen.

Inks

You can identify the number of colors, passes and washes for the front and back of the material. You can also select or type in the ink to be used.

Finish Size: A6

Original Sheets: 1

Press: 0

Run Method: Sheet Wise Work & Turn

	Colors	Passes	Washes	Ink
Front	1	1	0	<input type="text"/>
Back	0	0	0	<input type="text"/>

Ink Selection Menu:

- Black
- Blue
- Cyan
- Magenta
- Red
- Yellow

You can type in a PMS ink in the small box displayed in the line. That ink will be displayed in the short cut menu and selecting the plus sign will enter that ink in the line.

pms 300 +

NO DATA FOUND.

Add/Modify Special Pages

You may have pages that are different than the rest of the pages. It could be some color pages where the rest are black and white or it may be an insert.

Here you can define the special pages and add them to the job detail

Special Pages + Add Pages

Page number or range

Type

Description

Stock type

Stock Color

Sides

Print Services ⓘ

Cancel Add

Cancel Done

Add Charges

You can add Charges to the job using the “Add New” button available in the Job Details screen.

Note When you are adding charges or modifying any existing charges, make sure to click on **Confirm** button and **Done** button to save the charges to the Job.

Account Information
Job Details
Invoice Summary

1-Digital... + New Item

Job Notes
Digital Assets
Delete

Confirm

Job Method: Product:

Location: Job Comment:

Copier:

Description:

Stock: + Supplied Special

Parent Size:

Price Breakup

Quantity:

Unit Per Side:

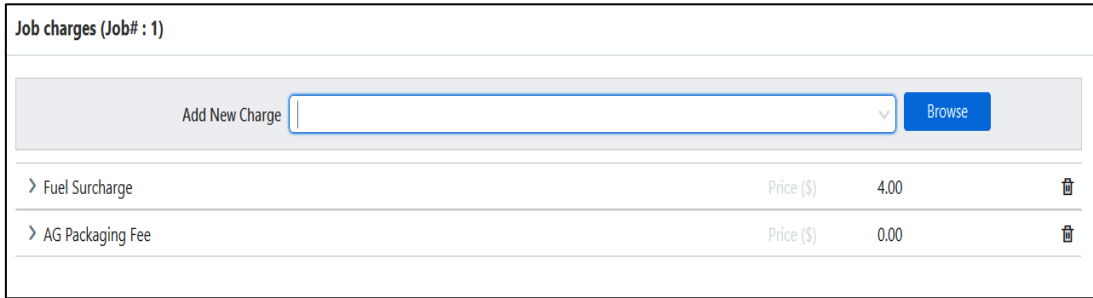
In Sets Of:

Price:

Weight: 0.00

Charges + Add New

Type	Quantity	Charge
Total		\$ 0.00



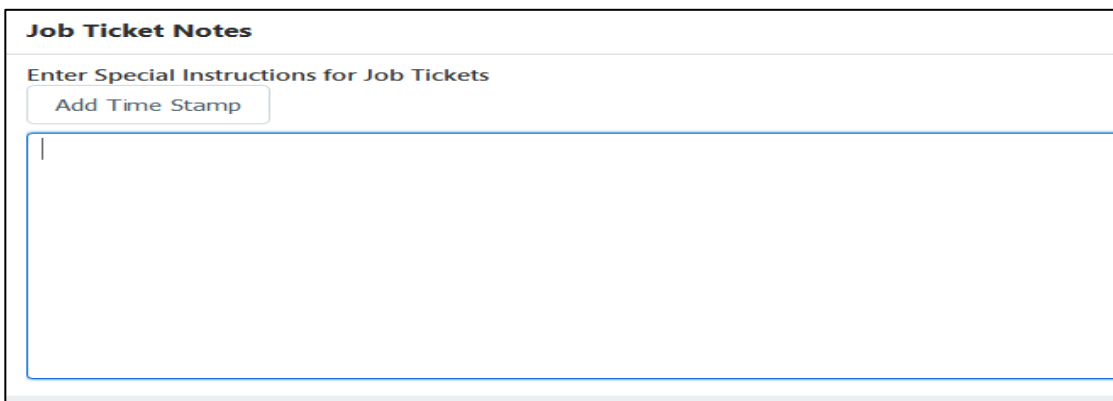
Job charges (Job# : 1)

Add New Charge

> Fuel Surcharge	Price (\$)	4.00	
> AG Packaging Fee	Price (\$)	0.00	

Job Notes

Selecting Job Notes will take you to a screen where you can add job ticket notes

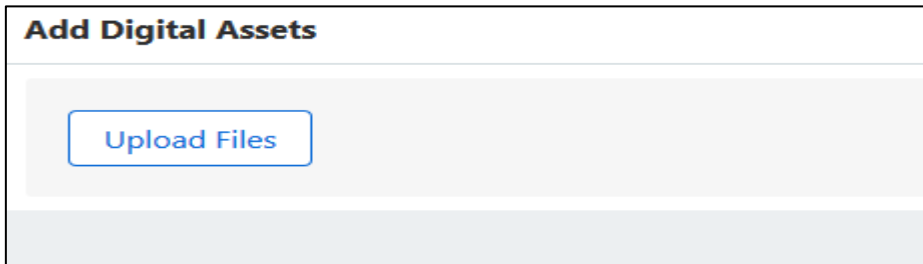


Job Ticket Notes

Enter Special Instructions for Job Tickets

Digital Assets

The Digital Assets option will allow you to upload digital files.



Add Digital Assets

Delete button

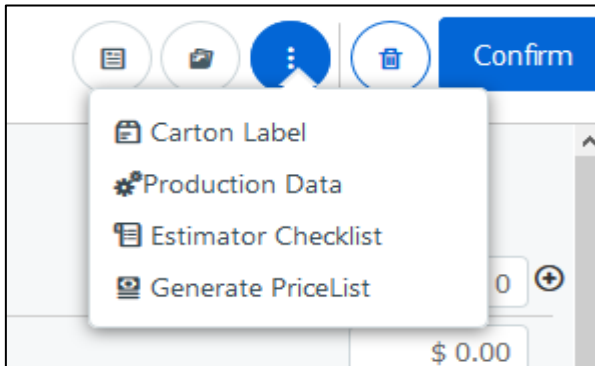
User can delete individual job from the job details screen using Delete button

Note: When a user deletes the job and confirms they are taken to Estimate/Invoice summary screen.

Confirm

Once the information has been entered selecting Confirm will save the job information and you can move to the estimate summary screen.

There are several command options available when you create a job.



Carton Labels:

You can create labels for the containers that hold the finished job. You can also define the format of these labels.

Carton Labels Label Format **Carton Labels** ✎ +

Total Qty	Items Per Box	Number of Boxes	Odd Last Qty	NO. Start to End	Label to Skip From
<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/> <input type="text" value="1"/>	<input type="text" value="0"/>

Label Text

You can enter any text here you like. Today's Date End Date

<input checked="" type="checkbox"/> Job Description	<input checked="" type="checkbox"/> Invoice Reorder	<input checked="" type="checkbox"/> Invoice Title	<input type="checkbox"/> Estimated Weight
<input checked="" type="checkbox"/> Attention Name	<input checked="" type="checkbox"/> Customer Name	<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/> P.O. Number

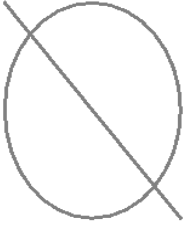
Print Page Setup

<input checked="" type="radio"/> Standard <input type="radio"/> Custom	Paper Size: <input type="text" value="LETTER"/>	Width: <input type="text" value="612"/>	Height: <input type="text" value="792"/>	Pixels: <input type="text" value=""/>	Orientation: <input checked="" type="radio"/> Portrait <input type="radio"/> Landscape
--	---	---	--	---------------------------------------	--

Reviewing production data

While in the Job window, you can click **Production** from the command list to open the Production Data window. Here you can review production and pricing information for the job.

Production Data

Bought in Size <input type="text" value=""/>	Out <input type="text" value="1.00"/>	
Press/Run Size <input type="text" value=""/>	Area <input type="text" value="0.00"/>	
Brought in Cost <input type="text" value="0.00"/>	Per <input type="text" value="1.00"/>	
Production Run <input type="text" value="0"/>	Markup <input type="text" value="2.00"/>	
Requires (Parent Sheets) <input type="text" value="0"/>		
Sheets Purchased <input type="text" value="0"/>		
Copier <input type="text" value="Digital B&W 8.5x11 / 8.5x14"/>		
Copier Speed (impressions/minute) <input type="text" value="200.00"/>		

Set Up Time	<input type="text" value="0:00"/>				
Run Time	<input type="text" value="0:00"/>	Stock	Cost	Mark Up	Price
Wash up Time	<input type="text" value=""/>	Labor	0.00	0.00	0.00
				Itemized Markup	0.00

Cancel Confirm

Estimator Checklist

PrintSmith Vision includes an “estimator checklist” so you can review the entire job – from specification creation to production – in one place. you can click **Estimator Checklist** from the command list

Estimator Checklist: Job 1 (0)			
Items List			
Job Description Digital B&W	Run Time 0:00	Ordered On 10/24/2017 3:02 AM	Washup Time 0:00
Customer Barts Electric Co.	Stock N/A	Taken By N/A	Target Adjust N/A
Contact Andrea Stumpf	Stock Number N/A	Sales Rep JH	Finished Size N/A
Document Number 0	Vendor N/A	Wanted By N/A	Folded Size N/A
Press Definition Digital B&W 8.5x11 / 8.5x14	Bought in Size N/A	Colors Front 1	Sheets 1
Machine Name OCE	Run Size	Colors Back 0	Signatures 1
Setup Time 0:00			Num Up/On 1/1
Job Comment			
Items Table			

Price List

Once the detail is entered you can create a price list

Offset Printing		
Stock	Vellum Wausau Exact Offset - Text 60.0# Color	
Finish Size	8.5 x 11	
Press	Offset 11"/14"	
Special Options		
Pre Press Charges	N/A	
Production	N/A	
Bindery	Fuel Surcharge, AG Packaging Fee,	
Qty	Price	Price per Each
100	25.81	0.2580
150	27.17	0.1810
200	28.36	0.1420
250	29.87	0.1190
300	32.33	0.1080
350	34.69	0.0990
400	37.17	0.0930

From Job Template

If you select Job Template you will have the option to select templates based on the different job methods. You can create an *Invoice/Estimate* using the information in the Job template that you anticipate may be used again for that customer or for multiple customers. The Job template includes everything in the document except dates and the customer account.

New Invoice

Choose Account/Prospect/Contact: EFI x v

Contact Person: Doug Armour v

Create From: Create New Job Account History Job Templates Templates

Job Method

Product Templates (14)

Product Type	Name	Job Method	Account	Created By	Created On
	Storefront Banner (w/Grommets)	Large Format		jim	11/05/2017 11:07 ...
	Direct Mailer (Letter)	Color Digital		jim	11/05/2017 10:23 ...
	Take-out Menu	Offset		tom	10/08/2017 12:22 ...
	Calendar	Color Digital		jim	13/05/2017 10:58 ...

Cancel Next

From Account History

If you select Account History, then you will see a list of account historical invoices. This is helpful for reprint jobs where the price may or may not have changed. You can narrow the search by using the search fields at the top of the list to select from the posted date, invoice number, description, cost or sales rep.

New Invoice

Choose Account/Prospect/Contact: EFI x v

Contact Person: Doug Armour v

Create From: Create New Job Account History Job Templates Templates

Account History (546)

Posted On	Invoice #	Description	Total Cost	Sales Rep
29/01/2018 9:26 pm	1043	VDP Business Card - BC-XeroxPrep_01	\$ 247.45	Dave
29/01/2018 9:26 pm	1046	B&W Digital	\$ 5.50	Bill
29/01/2018 9:26 pm	1048	B&W Digital	\$ 60.71	Neil

You will then see a new screen with the information from the historical invoice

Invoice is not saved, go to Invoice summary and click "Save"

Account - Midway Printing Contact - Todd Hinckley Invoice Title: Rumbi - A Members Handbook

Account Information Job Details **Invoice Summary**

Price definitions (media and charges) may have changed, would you like to update price definitions for this invoice? Yes No

> Item	Product	Description	Price	Qty	Unit Price	Item Tax	Item Total
> 1	<input type="text"/>	A Members Handbook (Rumbi) - Cover copied on front side on customer stock, 5 inside pages copied on	-	100	\$ 0.942	<input type="checkbox"/>	\$94.24

If the prices have changed since the invoice was originally created you will be given the option to update the price definitions.

You can select the product from the drop down list

> Item	Product	Description
> 1	<input type="text" value="Self Publishing"/>	A Members Handbook (Rumbi)
	Marketing Services	

The quantity will default from the original invoice but you can change it. The price will automatically be recalculated based on the new quantity.

Price	Qty
-	<input type="text" value="100"/>

From Templates

This feature allows you to create an invoice from a previously defined invoice template or estimate template.

Name	Invoice #	Created By	Created Date
digital copies	1044	admin	26/01/2018 7:46 pm
real estate	19	admin	26/01/2018 7:47 pm

After selecting the invoice or estimate template, the new invoice screen is opened. If there has been a price change in any of the operations or material since the original invoice was done you will get an alert and you can decide to have the new invoice updated with the new price or keep the old price.

Invoice Summary

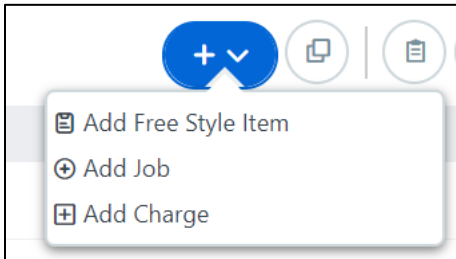
On the invoice summary screen there are several command options. You have the option to add to the new invoice items that were not on the original invoice or not part of the job specifications. You can add a freestyle item, a job or a charge. You can also copy everything to a new invoice at this level.

Price	Qty	Unit Price	Item Total
-	10,000	\$ 0.028	\$ 277.49

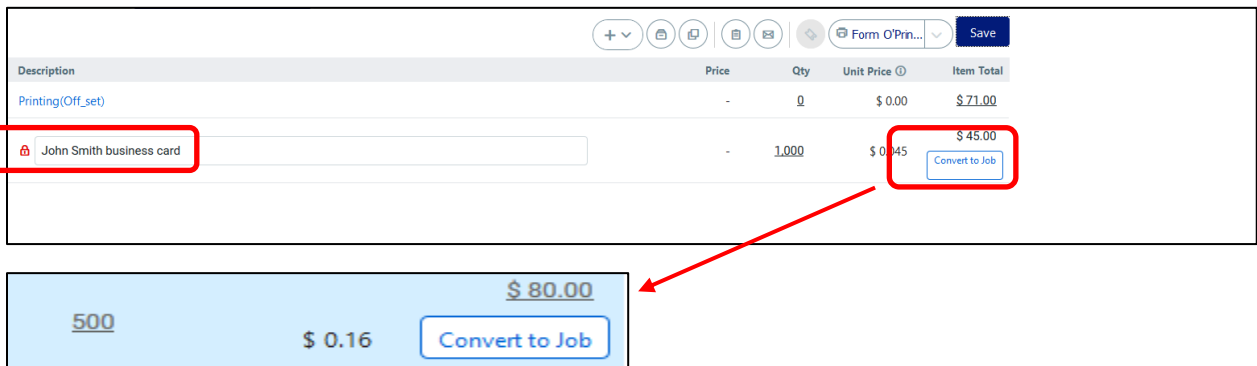
Adding Free Style Item, Jobs and Charges to an Invoice

Add Free Style Item

Sometimes you may have a situation where a customer is ready to place an order but they do not want to wait while you enter all the information needed to create a job. This works well if it is something basic such as a business card or stationary where you know the price and the specs. You can provide the customer with an invoice and then later fill in the job specifications. In this situation, you will select 'Add Free Style Item'



After adding Free Style job and saving the invoice you will get the option to convert to job. The Price of the Free Style job is automatically locked. To make changes to the job you will need to unlock the item by clicking on the lock.



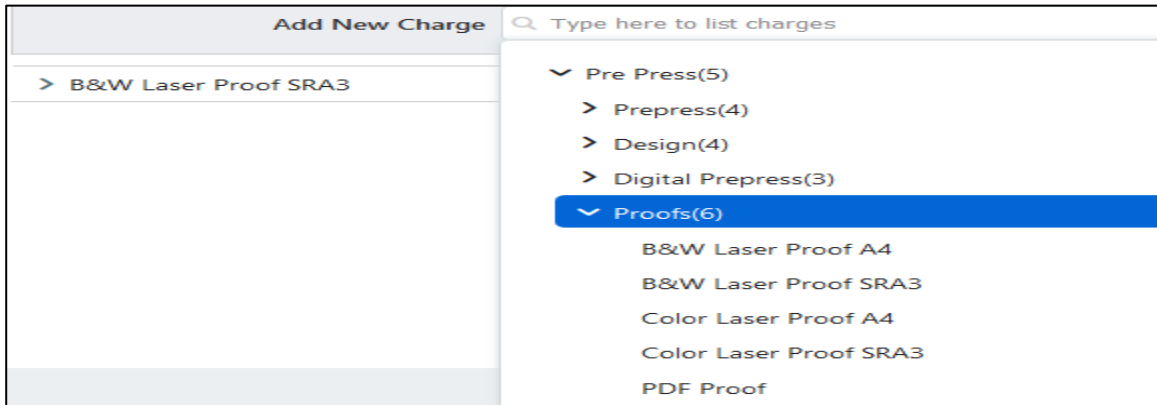
Note: User is not allowed to Add charges to Free Style job before saving and converting to a job. However, once the job is converted they can add the charges.

On the job detail screen, you can change the job method and add the required job information, you can also mark the job has Finished and Brokered.

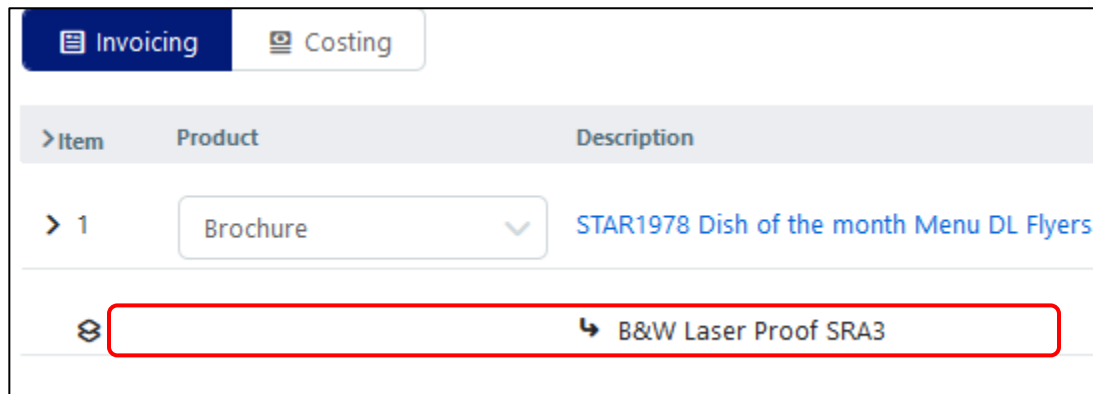


Add Charge

Selecting 'Add Charge' will allow you to select from a list of additional charges.



The additional charge is then reflected in the invoice total



Adding a job will take you a screen where you can select how you want to add a job. It has all the same options as the original new invoice screen.

Add job

Add Job

Choose Account/Prospect/Contact: x v

Contact Person:

Create From

Create New Job Account History Job Templates Templates

Account History (546)

v

Posted On	Invoice #	Description	Total Cost	Sales Rep
29/01/2018 9:26 pm	1043	VDP Business Card - BC-XeroxPrep_01	\$ 247.45	Dave
29/01/2018 9:26 pm	1046	B&W Digital	\$ 5.50	Bill
29/01/2018 9:26 pm	1048	B&W Digital	\$ 60.71	Neil
29/01/2018 9:26 pm	1053	VDP Business Card - bodi	\$ 263.84	Neil
27/01/2018 1:51 am	1013	VDP Business Card - BC-SteveDupNo01	\$ 59.75	Dave

< 1 2 3 4 5 6 7 8 9 10 ... >

1 - 20 of 546 items

See the information on “Adding a job” starting on page 22. After adding the job, it will be reflected in the total invoice.

Regardless of the option you choose to create an invoice once that is complete you will see this screen with three tabs: Account information, Job Details and Invoice Summary.

Save as a Template

If you create a job or estimate and anticipate using it in many orders, create a job template. A job template consists of a single job and all the setup and finishing charges for that job. For example, if you frequently get orders for a particular type of flyer, you could create a job for the flyer, save it as a template, and use the job template any time you got an order for the flyer. As a result, you avoid entering the same job information over and over again.

You can also create templates for multi-part jobs. In this case, the template contains the overall job, its charges, and all of the parts (jobs) that make up the overall job, as well as their charges.

For any repetitive jobs, templates save time and reduce errors.

Templates can also be associated with particular customer accounts (on the **Templates** tab in the Customer window). This facilitates the process of selecting a template when working with a particular account.

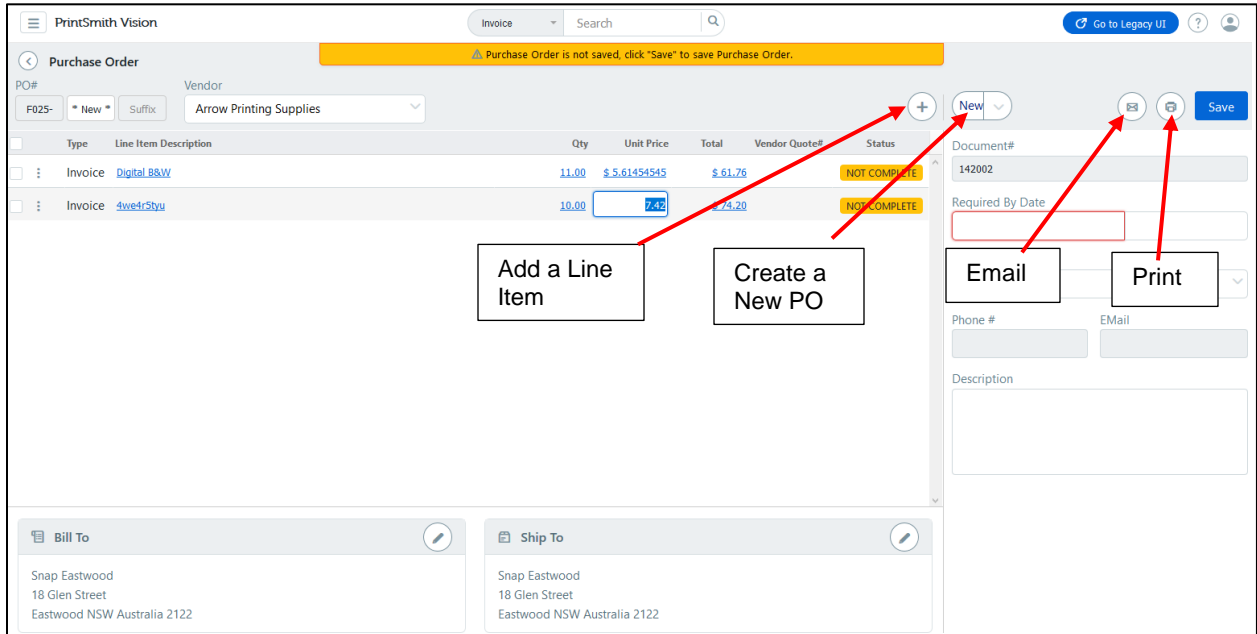
Copy to a new invoice

This option allows you to copy the entire invoice over to a new invoice. You will get a warning if you have not saved prior to copying.

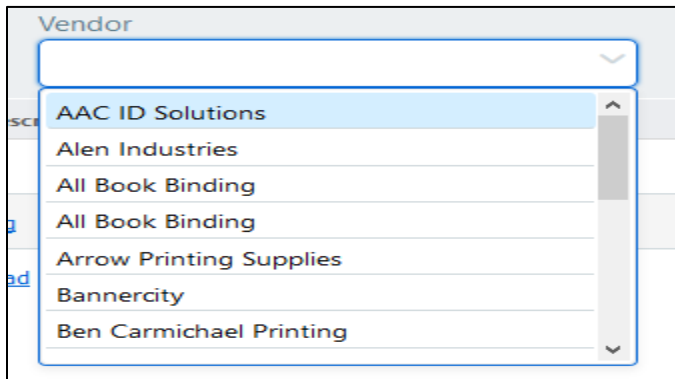
Raise a PO

If you need to have an outside purchase for part of all of the job then you can create a purchase order.

Selecting Raise a PO will take you to a screen where you can enter the information about the purchase.



You can select the vendor from the drop down.



NOTE In order for a vendor to be displayed for a PO they box labeled "use for purchasing" in the vendor record must be checked.

NOTE You must enter the wanted date before you can email or print the PO. If you are going to email then you must have an email address in the vendor record.

When you add a line to a PO you will get a new short cut menu screen where you can enter the information for the new line item.

Purchase Order Line Item - Item# 5

Account: 1st Choice Events Type: Invoice

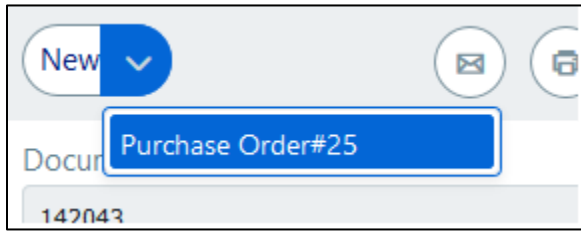
Line Item Description: Item Name: Item Code:

Total Quantity: 0.00 Unit Price: \$ 0.00 Total Price: \$ 0.00

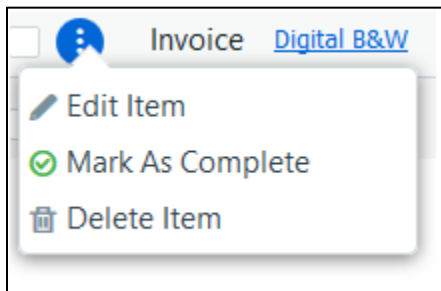
Vendor Quote #: Partial Received: 0.00 Mark As Complete

Additional Line Item Description:

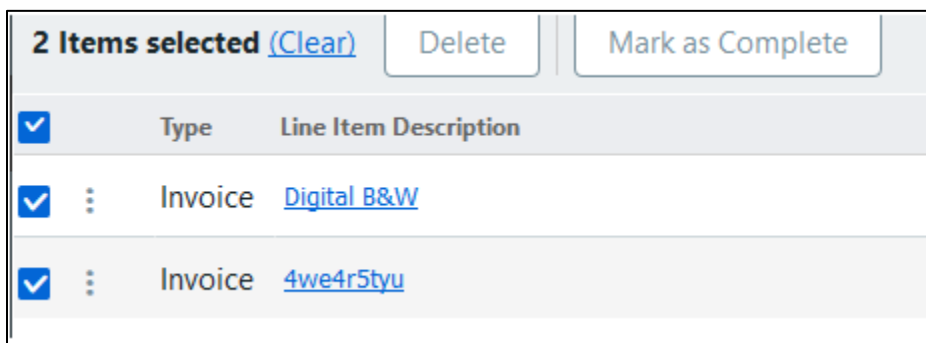
Once a purchase order is saved you can access it again using this feature.



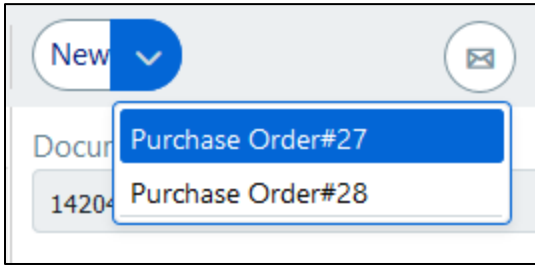
For each line item you can edit it, mark as complete or delete the item



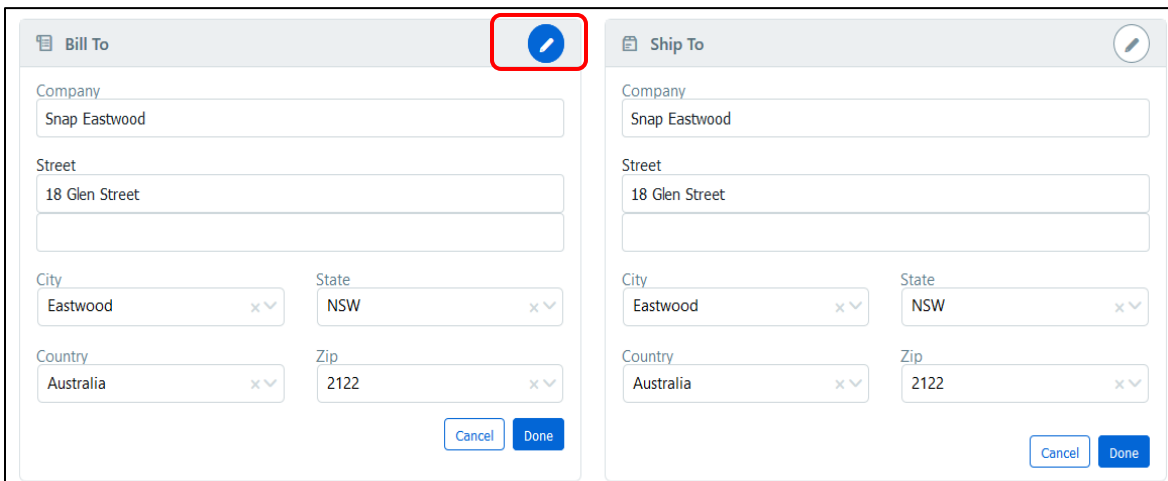
You can also use the check box next to the items to Delete or Mark as Complete. If you check the box above the items it will select all items.



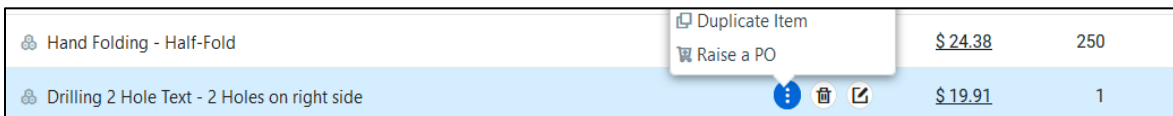
You can have multiple purchase orders for one invoice. Just create the first PO, enter the information including the due date and save. Then you can create another PO by using the NEW button. Then all of the purchase orders will be listed and available.



Selecting the pencil icon will allow you to edit either the bill to or ship to address.



You can also raise a PO for a line item.



Invoice Notes

Selecting this option will give you a short cut menu where you can enter notes on the invoice. These are internal notes and will not show in the invoice.

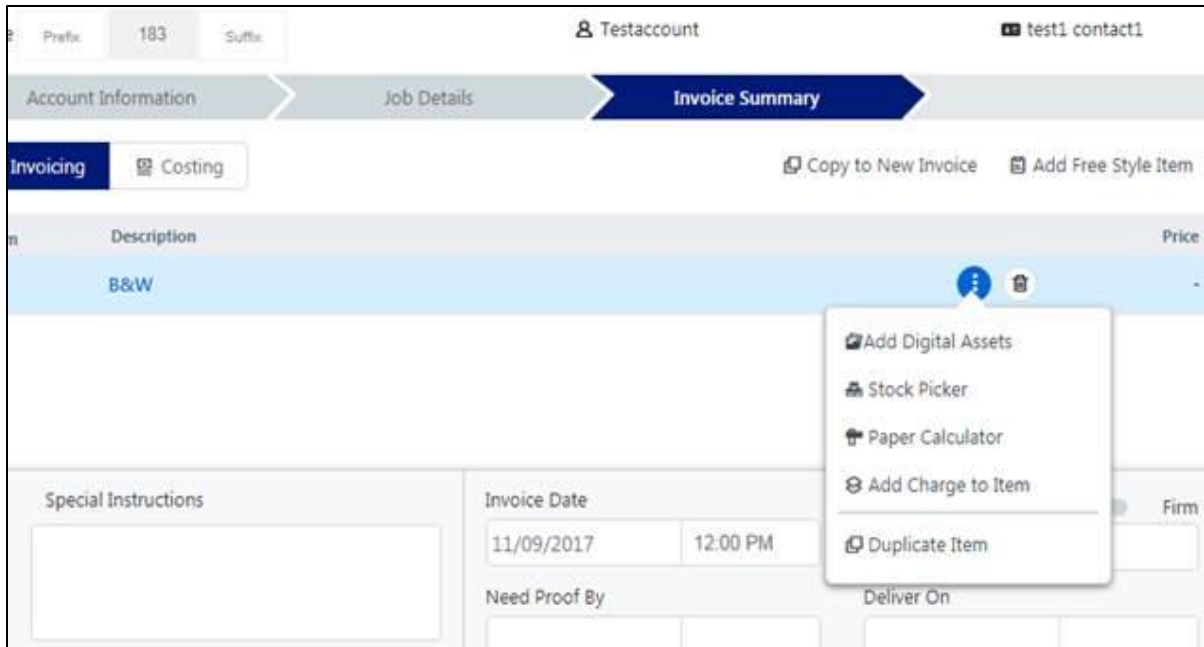
Email Invoice

Selecting this option will save the invoice if it is not already saved and then open an email window with a preset message.

Print job Ticket for invoice.

This option will print job tickets for all the jobs on the invoice.

You can highlight each job on the invoice and you can see additional options. Some are the same options you have during job creation.



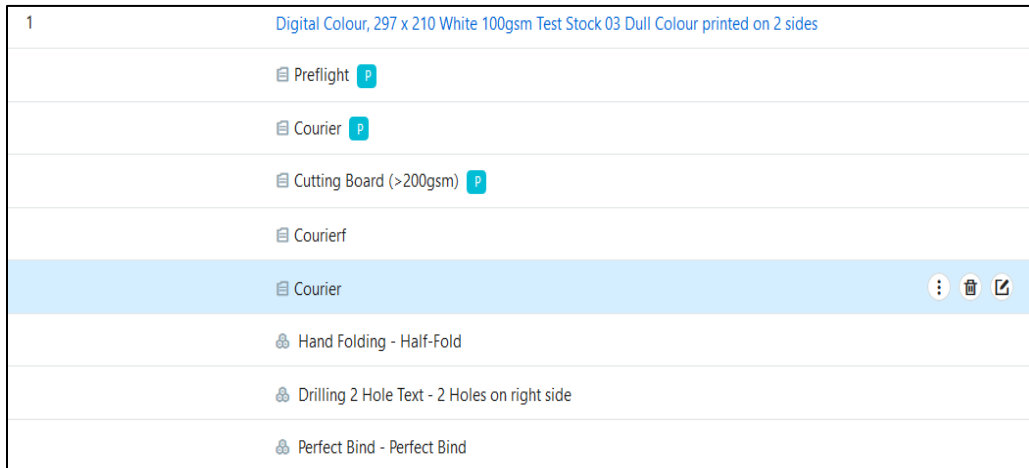
All of the features for an individual line work the same as for the entire invoice. There are other features that are included at the line level.

Duplicate Item

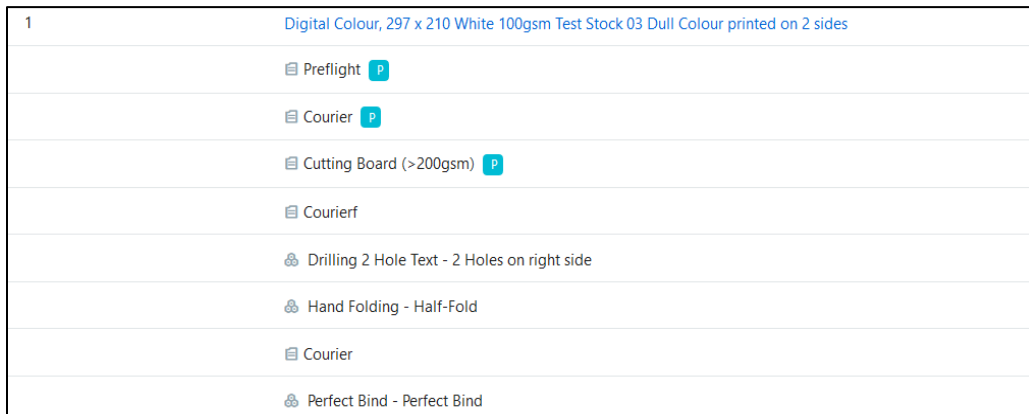
You can duplicate an item at the line item level by selecting Duplicate Item.

2	Self Publishing	Letterhead	-	5,000	\$ 0.045	<input checked="" type="checkbox"/>	\$ 225.00
3	Self Publishing	Letterhead	-	5,000	\$ 0.045	<input checked="" type="checkbox"/>	\$ 225.00

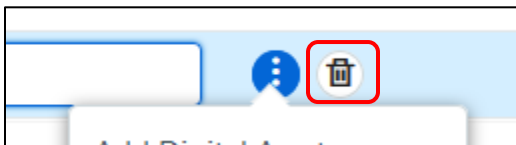
You can now re-sequence the line items by clicking and dragging the description.



In the second screen shot you can see that the courier was moved down to after hand folding and drilling was moved above hand folding.



You can use the trash can icon to delete that line item



If the customer is taxable you can still identify which lines are to be taxed and which are not.

Unit Price ⓘ	Item Tax ⓘ
\$ 1.128	<input checked="" type="checkbox"/>
\$ 0.045	<input type="checkbox"/>
\$ 0.045	<input type="checkbox"/>

Special Instructions

You can enter special instructions that will appear on the invoice.

Special Instructions

Credit Terms: Net 30 Days
Please Pay From This Invoice!

Sales Categories

This shows the invoice sales breakdown for each sales category

Note The total for the sales categories comes from the invoice item total and not the invoice total that could include taxes, discounts or markups.

Source

1044 172

Special Instructions

Sales Categories

Print - 15	^
Bindery - 199.7	
Color Copy - 3619.7	v

Sales Format

This displays the different options of how the invoice will print when the print invoice button is selected.

Default Inv... Save

Default CreditMemo

Default Estimate

Default Invoice

Final Receipt

Dates

Invoice Date <input type="text" value="21/03/2018"/> <input type="text" value="12:31 AM"/>	Need Proof By <input type="text"/> <input type="text"/>
Deliver On <input type="text" value="02/05/2018"/> <input type="text" value="12:00 AM"/>	Reorder Date <input type="text" value="15/05/2018"/> <input type="checkbox"/> File Originals
	Ship via <input type="text" value="Will Call"/> <input type="button" value="x"/> <input type="button" value="v"/>

You can create a reorder date and set the instructions to file the originals

You can select/update the shipping method here from dropdown.

Will Call

Local Deliver

Ground (5-7 Business days)

FedEx (Estimated)

UPS

UPS 2 Day

UPS 3 Day

Will Call

If the customer has a resale number it can be entered here. You can enter the customers purchase order number. When the PO number is mandatory then the field would be highlighted so that user can enter the data, Warning is not displayed when an Invoice is saved. However, when user tries to pick up the Invoice the following warning is displayed.

“Orders for this customer require a Purchase Order. Please enter a PO#.”

Resale # <input type="text"/>	Wanted By <input type="text" value="02/05/2018"/> <input type="text" value="12:00 AM"/>	<input type="checkbox"/> Firm	PO# <input style="border: 2px solid red;" type="text"/>
---	---	--------------------------------------	---

You can mark the due date as firm

One portion of the invoice summary screen is minimized by default

Source 1057	Invoice Date 21/03/2018 12:23 AM	Need Proof By [] []	Discount/MarkUp ⊕ \$ 0.00
Special Instructions	Deliver On 02/05/2018 12:00 AM	Reorder Date 04/05/2018	Net Sub \$ 2,111.72
Sales Categories	Wanted By 02/05/2018 12:00 AM	Ship via	Shipping \$ 0.00
Resale #	PO#		Sales Tax (10.00%) ⊕ \$ 211.17
			Deposits ⊕ \$ 0.00
			Total \$ 2,322.89

Price Information

The Price information area shows the invoice totals. To enter a shipping amount, enter or change a customer discount percentage, select a different tax table and tax code click **Edit (plus sign after label)**

Discount/MarkUp ⊕	\$ 0.00
Net Sub	\$ 112.84
Delivery	<u>\$ 0.00</u>
Tax (6.85%) ⊕	\$ 0.00
Deposits ⊕	\$ 0.00

There are several options in the section for the price information section

You can add a discount or markup by selecting the plus sign. It can be entered as a percentage or a fixed amount.

Add ✕

Discount
Markup

Discount %

Discount Amt

Discount %

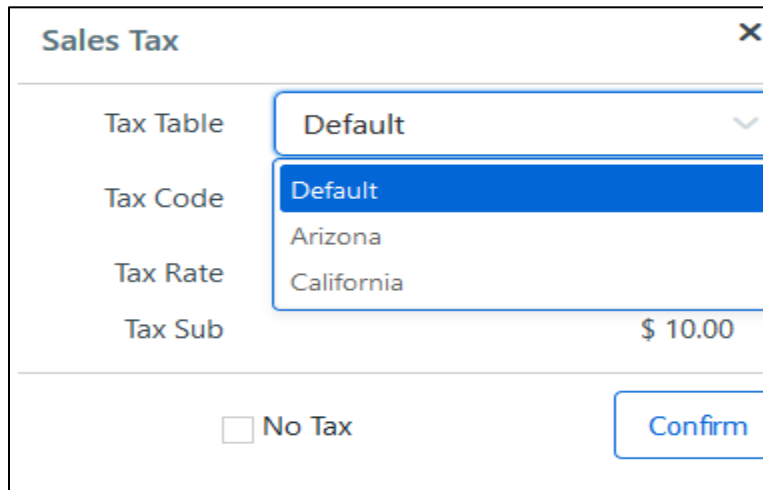
Discount Amt

Apply one-time discount
 Confirm

Note If the account had a one-time discount defined, and you indicated you wanted to apply it when you created the document, the discount is shown in the **Discount Amt** field, and the **Apply one-time discount** check box is selected. If no discount was defined, you can enter one now.

You can enter a delivery fee.

You can add or change a sales tax by selecting the plus sign.



The image shows a 'Sales Tax' dialog box with a close button (X) in the top right corner. It contains the following fields and options:

Tax Table	Default	▼
Tax Code	Default	
Tax Rate	Arizona	
	California	
Tax Sub		\$ 10.00

At the bottom, there is a checkbox labeled 'No Tax' and a 'Confirm' button.

Selecting the No Tax check box will result in zero tax for the invoice/estimate.

You can also change the customers tax exemption status

You can add deposit to the invoice



The image shows a section of the invoice with the following items:

Tax (6.8)	Add Deposits	\$ 0.00
Deposits	⊕	\$ 0.00

You can add up to three deposits, identifying them by payment method and a reference number.

Deposit Entry
✕

> 1 : **Cash-**
\$ 25.00 Void

∨ 2: Add New

Cash
 Check
 Credit Card

Ref #

Amount

⊕ Add Another

Confirm

Command line option

You can lock the price

Royalty Exempt

Lock Price

Recalculate Price


⋮


This locks the price for all items on the invoice. You can unlock the price for all items by changing it here.

When the price is locked it will display a lock for each line item

> Item	Product	Description
> 1	Self Publishing ∨	🔒 A Members Handbook (Rumbi)

You can unlock the price for an individual item by selecting the lock



> Item	Product	Description
> 1	Self Publishing <input type="button" value="v"/>	 A Members Handbook (Rumbi)

If there is a royalty associated with this invoice you can make it exempt.

Click **Recalculate** to update each job and charge in the document with the latest pricing information and then recalculate the entire invoice.

Cost Tab

On the invoice summary section there is also a cost tab. The estimated cost, actual cost (once the job is complete), the difference, selling price and job margins is displayed for each line item. Cost is the amount you spend to produce the order; price is the amount you charge your customer. The difference is your profit.

Account Information		Job Details		Invoice Summary		
Invoicing	Costing	● Cost Entered	● Historical Cost	● Data Collections	● Price below cost	
Copy to New Invoice Save						
> Item	Description	Estimated	Actual	Difference	Price	Margin
> 1	Digital B&W - New Patient Forms	\$ 57.92	<u>\$ 57.92</u>	\$ 0.00 (0%)	<u>\$ 110.00</u>	\$ 52.08 (47%)
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	<u>\$ 7.24</u>	\$ 0.00 (0%)	<u>\$ 18.44</u>	\$ 11.20 (61%)

Underlined text means editable, blue colored numbers can be overridden and the truck icon next to description means the delivery ticket is in the job.

Entering actual costs

Although PrintSmith Vision does not require you to enter your costs, without them you will not be able to see where you are making (or losing) money.

To review or enter actual costs

8. When a document is open, On Invoice summary tab click on **Costing** button.
9. Review the costs.

> Item	Description	Estimated	Actual	Difference	Price	Margin
✓ 1	Digital B&W - New Patient Forms	\$ 57.92	<u>\$ 57.92</u>	\$ 0.00 (0%)	<u>\$ 120.00</u>	\$ 62.08 (52%)
	↳ Fuel Surcharge	\$ 0.00	<u>\$ 0.00</u>	\$ 0.00 (0%)	<u>\$ 4.00</u>	\$ 4.00 (100%)
	↳ AG Packaging Fee	\$ 0.00	<u>\$ 0.00</u>	\$ 0.00 (0%)	<u>\$ 1.50</u>	\$ 1.50 (100%)
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	<u>\$ 7.24</u>	\$ 0.00 (0%)	<u>\$ 18.44</u>	\$ 11.20 (61%)

3. If you know the actual cost then click the **Actual** column and enter the actual cost. Blue identifies costs that you entered. Red alerts you that an item was priced below cost. The margin will automatically recalculate.

If there are additional charges using the arrow on the left hand side will open the display to show those items also.

> Item	Description	Estimated	Actual	Difference	Price
✓ 1	Digital B&W - New Patient Forms	\$ 57.92	<u>\$ 57.92</u>	\$ 0.00 (0%)	<u>\$ 110.00</u>
	↳ Fuel Surcharge	\$ 0.00	<u>\$ 0.00</u>	\$ 0.00 (0%)	<u>\$ 4.00</u>
	↳ AG Packaging Fee	\$ 0.00	<u>\$ 0.00</u>	\$ 0.00 (0%)	<u>\$ 1.50</u>
> 2	Digital B&W - Current Insurance Breakdown 2013	\$ 7.24	<u>\$ 7.24</u>	\$ 0.00 (0%)	<u>\$ 18.44</u>

As discussed earlier a portion of the invoice screen is minimized by default. Opening that will also display the costing information.



	Actual	\$ 572.72
	Price	\$ 617.85
	Margin	\$ 45.13
	Est. Profit	7%
	Total	\$ 617.85

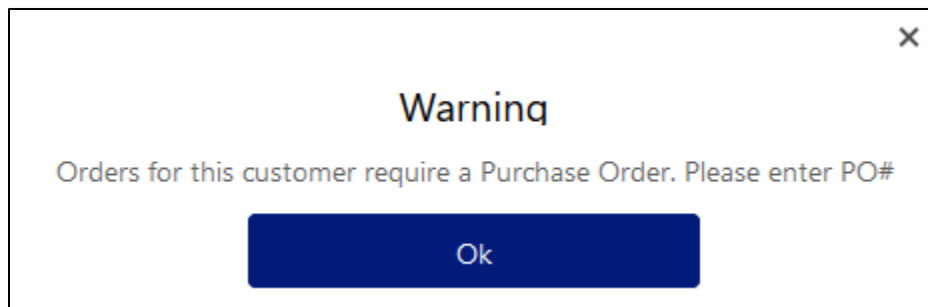
Saving an invoice

Until an invoice is saved, you will see the message at the top of the screen that the invoice is not saved. Make sure to save the Invoice after any modification.

⚠ Invoice is not saved, go to Invoice summary and click "Save"

If this customer has "Require purchase order" enabled in Account setup then when you try to save the invoice you will get an alert that a purchase order is required.

Note Be sure to update all mandatory fields before saving the invoice



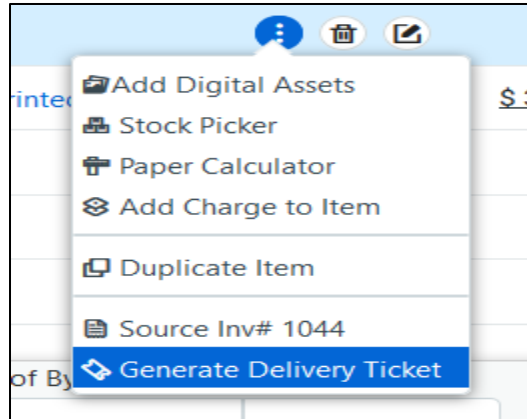
You will need to enter the customer's purchase order number before saving.

You should then see the message that the invoice has been successfully saved.

Note The message will only stay on the screen for a few seconds and then disappear

Delivery Ticket

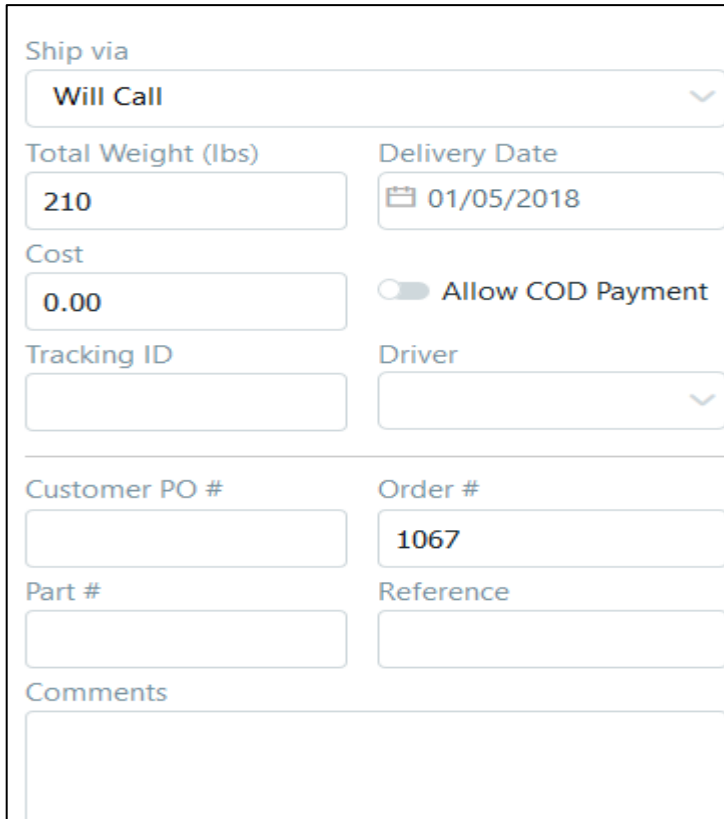
On the invoice summary screen in the line item you can access the delivery ticket



Here you can verify delivery address, change the location of the item and mark it as shipped

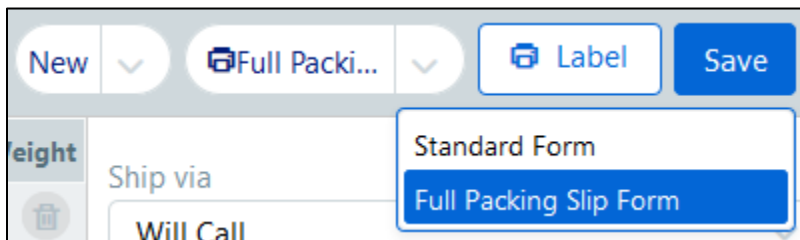
Product	Description	Ship Status	Location	Order Qty	Ship Qty	Weight
<input type="checkbox"/> Invoice# 1067 (2 Items)				<input type="checkbox"/> Mark as Shipped		
<input checked="" type="checkbox"/> 1	Digital Copies_Color2Sided - Nov Release	Not Shipped	<input type="text"/>	1000	1000	210
<input type="checkbox"/> 2	BC 2_sided 4col	Not Shipped	<input type="text"/> Bindery Boxing Complete Cutting - Finished Sheets Cutting - Parent Sheets Design Large Format Finishing		500	0.00

You can also enter the shipping information



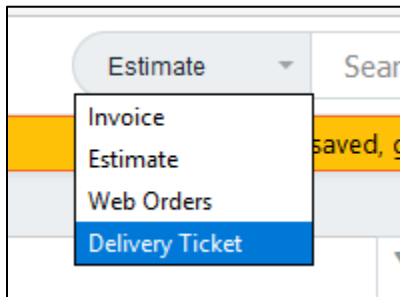
A screenshot of a shipping information form. The form contains several input fields and a dropdown menu. The fields are: 'Ship via' (dropdown menu with 'Will Call' selected), 'Total Weight (lbs)' (text input with '210'), 'Delivery Date' (calendar icon and text input with '01/05/2018'), 'Cost' (text input with '0.00'), 'Allow COD Payment' (toggle switch), 'Tracking ID' (text input), 'Driver' (dropdown menu), 'Customer PO #' (text input), 'Order #' (text input with '1067'), 'Part #' (text input), 'Reference' (text input), and 'Comments' (text area).

You can also produce a new delivery ticket, print a packing slip and shipping label.



A screenshot of a software interface showing a row of action buttons: 'New' (dropdown), 'Full Pack...' (dropdown), 'Label' (button), and 'Save' (button). Below the buttons, a dropdown menu is open, showing 'Standard Form' and 'Full Packing Slip Form' (highlighted in blue). The background shows a 'Ship via' dropdown menu with 'Will Call' selected.

You can search for a different delivery ticket through search option provided at top of the window



A screenshot of a search dropdown menu. The menu is open, showing a list of options: 'Invoice', 'Estimate', 'Web Orders', and 'Delivery Ticket' (highlighted in blue). The background shows a search bar with the word 'Search' and a dropdown menu with 'Estimate' selected.

When you search for a delivery ticket you will be taken to that ticket in pending documents.

Product	Description	Ship Status	Location	Order Qty	Ship Qty	Weight
<input type="checkbox"/> Invoice# 1067 (2 Items)				<input type="checkbox"/> Mark as Shipped		
<input checked="" type="checkbox"/> 1	Digital Copies_Color2Sided - Nov Release	Not Shipped	<input type="text"/>	1000	<u>1000</u>	210
<input type="checkbox"/> 2	BC 2 sided 4col	Not Shipped	<ul style="list-style-type: none"> Bindery Boxing Complete Cutting - Finished Sheets Cutting - Parent Sheets Design Large Format Finishing 		<u>500</u>	0.00

The delivery ticket allows you to change the location of the product and mark it as shipped.

You can check the box for an item and then mark it as shipped.

Product	Description	Ship Status	Location	Order Qty	Ship Qty	Weight
<input type="checkbox"/> Invoice# 211 (2 Items)				<input type="checkbox"/> Mark as Shipped		
<input checked="" type="checkbox"/> 1	Brochure - Brochure	Not Shipped	<input type="text"/>	50	<u>50</u>	0.5
<input type="checkbox"/> 2	NPP-Mug - NPP-Mug	Not Shipped	<input type="text"/>	50	<u>50</u>	0.5

Recording Notes About Orders

When you are working in a document window, you can use the note pad to record notes related to an order. For example, if you are taking an order over the phone, you may want to jot down some notes so you can complete the document later. Similarly, if you purchased stock at a special discount and passed some of the savings onto the customer, you could record this. If the customer placed the same order again, and the stock is priced normally, the customer might question the price. The note you recorded would remind you of the reason for the price difference. In addition, if you lock prices, you may want to note the reason for doing so.

Note You can change information on the note pad even if a document is locked.

Except for the wanted by date (entered in the **When** field), none of the information you enter on the note pad is used in the document, but you can use the note pad to guide you in creating the job. The notes are saved with the document so you can return to them later when you have time.

To record notes

1. Click **Invoice Notes** on the toolbar in the document window.

The screenshot shows a 'Note Pad' dialog box with the following fields and controls:

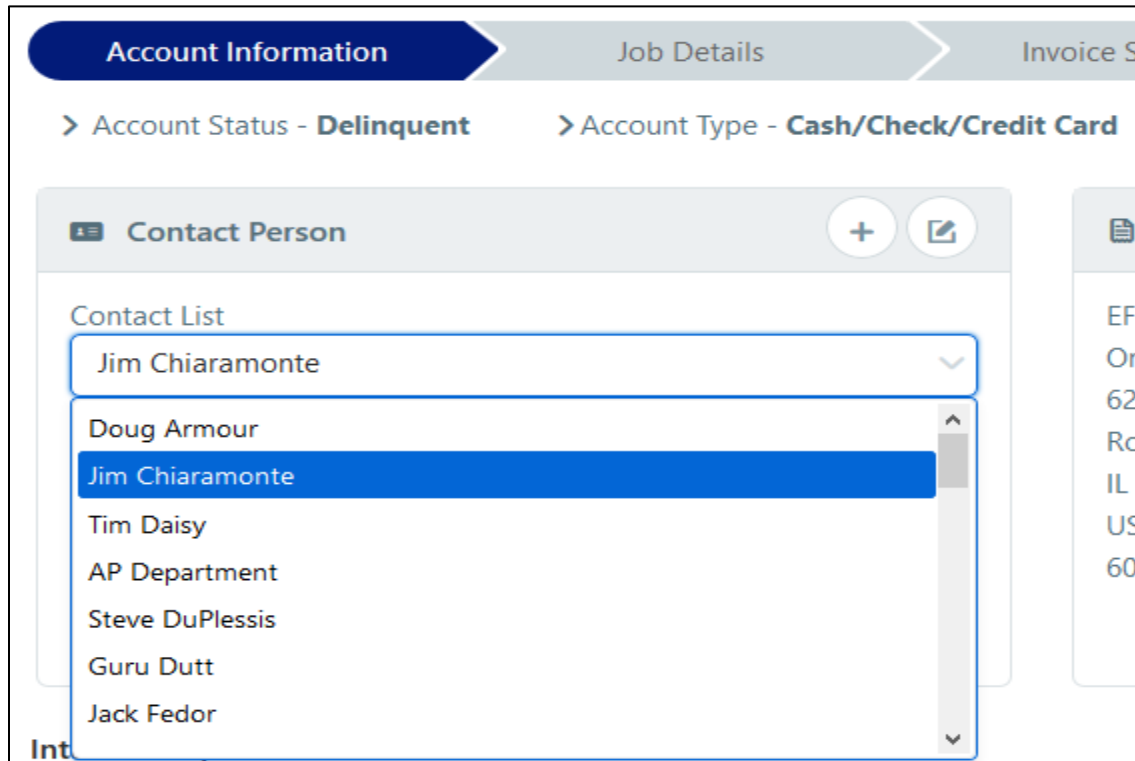
- Who**: Text input field
- Phone**: Text input field
- What**: Text input field
- How Many**: Text input field
- What Size**: Text input field
- Paper**: Text area with a scroll bar
- Show Note Pad when document opens**: Check box
- Notes**: Text area with a scroll bar
- Number of Characters: 0**: Text label below the Notes field
- When**: Text input field
- Cancel**: Button
- Confirm**: Button

2. Enter or modify information in the note fields: **Who**, **Phone**, **What**, **How Many**, **What Size**, **Paper**, **Notes**, and **When**. (**When** corresponds to the wanted by date.)
3. If you want the note pad to open automatically whenever you open the document, select the **Show Note Pad when document opens** check box.
4. Click **OK**.

Note For detailed information on functionality please refer to PrintSmith Vision setup and User guide.

Account information

On the account tab you will find information about the account.



Account Status and Type

You can identify the status of the account and the types of payments that will be accepted from that account.

Contact

You can use the drop down to select a different contact person or the plus sign to add a new

Contact. If there is a Red box around the contact area that indicates that there is some missing information regarding that contact. That might be the job title which can be selected from a dropdown.

Contact Person Edit contact

Contact List

Nichole Lehmann

Nichole Lehmann

test@efi.com

801.255.3343 (Phone)

Contact Person

Contact*

Nichole Lehmann

Email*

test@efi.com

Phone* **Mobile***

801.255.3343

Fax **Website**

Job Title

Use as Temporary Contact


Cancel Done

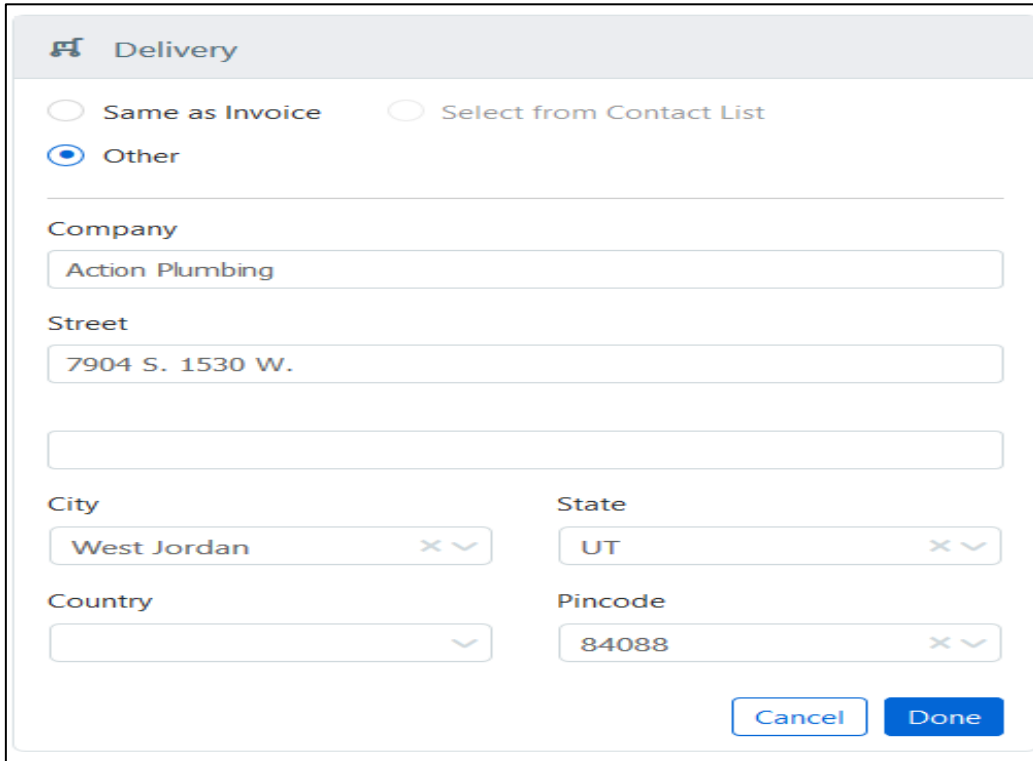
Invoice and Delivery Address

On the Account Information tab you will also see the invoice address and delivery information

<p>Invoice Address</p> <p>Action Plumbing 7904 S. 1530 W. West Jordan UT 84088</p>	<p>Delivery</p> <p><input checked="" type="radio"/> Same as Invoice <input type="radio"/> Select from Contact List</p> <p><input type="radio"/> Other</p> <p>Action Plumbing 7904 S. 1530 W. West Jordan UT 84088</p>
---	--

You can change the delivery information either selecting from Contact list if there are other contacts already set up or you can enter a new delivery

<p>Delivery</p> <p><input type="radio"/> Same as Invoice <input type="radio"/> Select from Contact List</p> <p><input checked="" type="radio"/> Other</p> <p>Action Plumbing 7904 S. 1530 W. West Jordan UT 84088</p>	<p>Confirm</p> <p>Edit Delivery</p> <p></p>
--	---



Delivery

Same as Invoice Select from Contact List
 Other

Company

Street

City
State

Country
Pincode

Internal Information

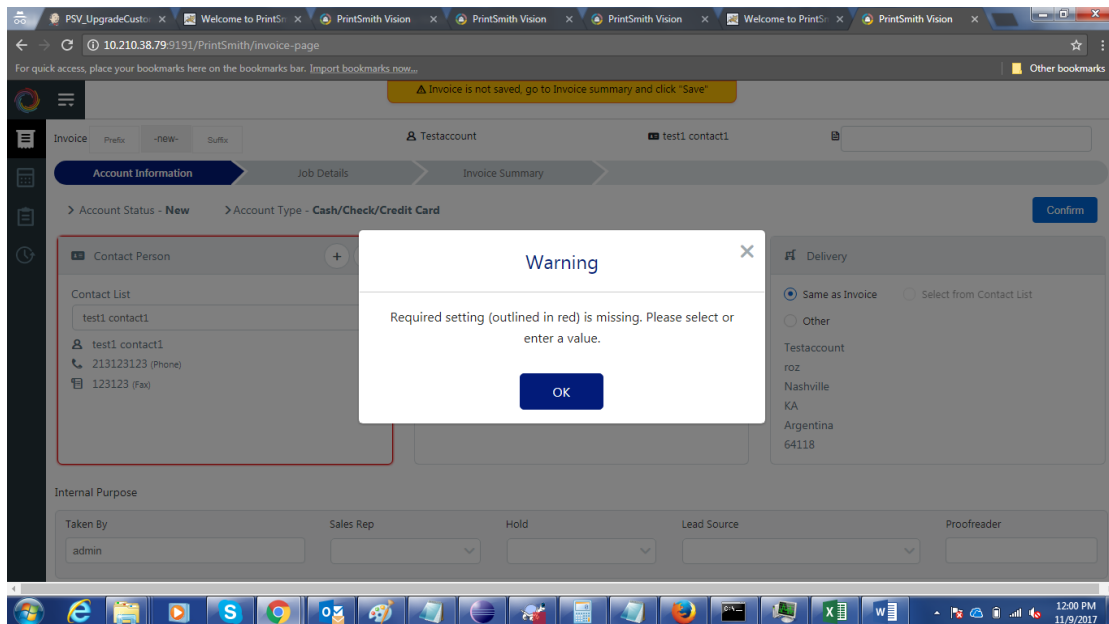
There is also some internal information that is needed for this invoice.

Internal Purpose				
Taken By	Sales Rep	Hold	Lead Source	Proofreader
<input type="text" value="admin"/>	<input type="text" value="JH"/> <input type="button" value="x"/> <input type="button" value="v"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Taken by will be the person entering the document. Sales rep is selected from the drop down. You can put the invoice on hold and identify the lead source and proofreader if applicable.

Missing Information Warning

If any information is missing the warning shown below will be displayed and the area for the missing information will be outlined in red.



Note Until user adds the missing information they will not be allowed to switch to another tab.

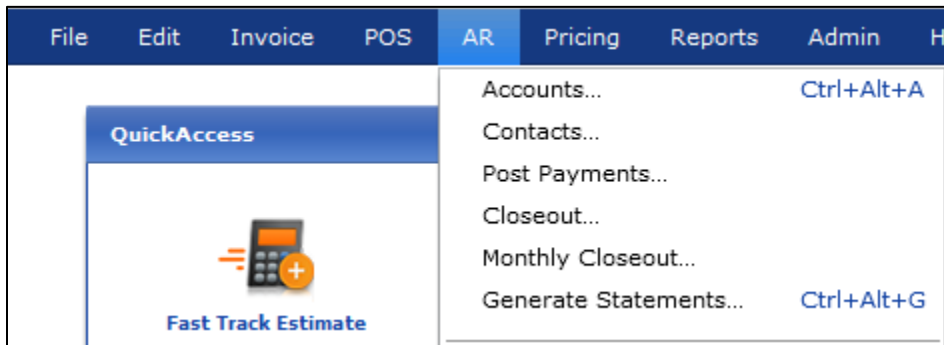
Cash Register

Cash Register

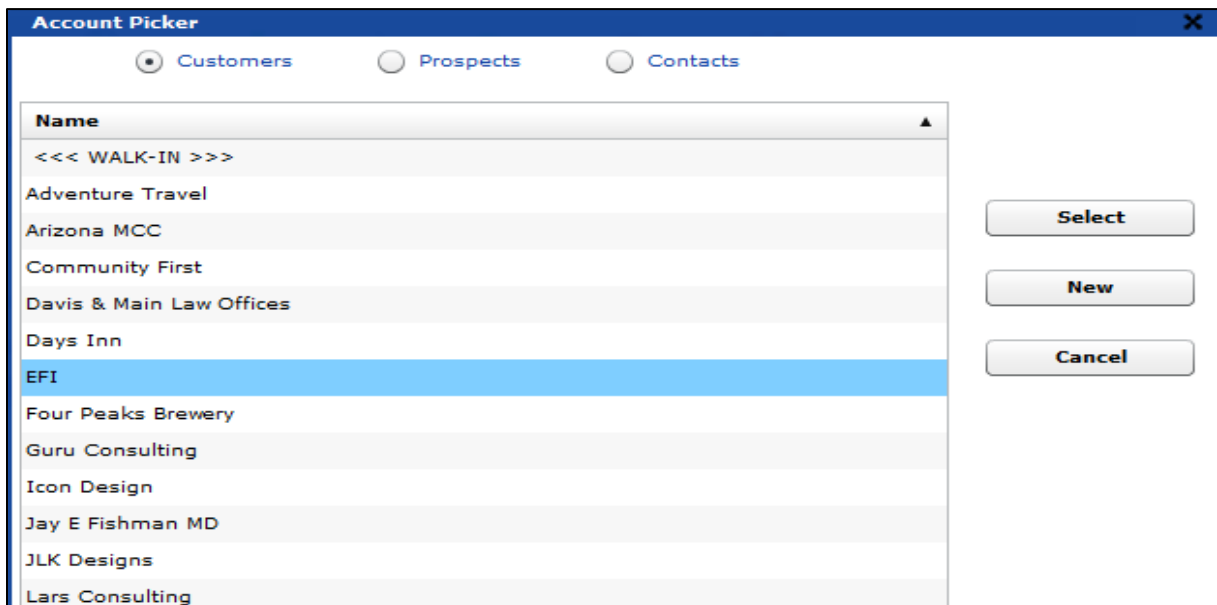
Settings

Customer Payment Options

You can only use payment methods that have been approved for that customer. To access the set-up program for accounts, go to AR at the top of the main screen and then select Accounts.



Next select the account name



This will take you to the screen where you can set up various customer preferences and controls.

Under Credit Control you can set up the types of payments that are available to that customer.

Note Be sure and save your settings.

Customer #12 EFI

Previous Next New Save Get Revert Delete

Address **Credit Control** Settings Sales Info Log Notes Marketing Templates Web

Credit Limit 2,000,000.00

Due days from posting 0 Avg. Days to Pay 18

Monthly Finance Charge Pct 0.00% (Using standard rate of 1.50%)

Finance Charges YTD 237.29 Never calculate finance charges

Current Balance 36027.3 Royalty Exempt National Pricing

Automatic Discount

Percent 0.00%

Dollars 0.00 One-time discount

Account Status

New Current Inactive

Past Due Delinquent Frozen

Type

Full Deposit

Cash Only

Cash/Check/Credit Card

Charge Account

Credit Card on File

If you have the customer set for cash only then the program will show that as the default option.

PrintSmith Vision Invoice Search

Cash Register >

Customer: EFI Add Invoices Enter Invoice# Department Item

Account Type **Cash Only** Status Delinquent

Transaction Details

Sub-Total	\$ 0.00
Sales Tax	\$ 0.00
Total Cost	\$ 0.00

Payment History

Payment Received \$ 0.00

Change \$ 0.00

Proceed

Add invoice to pickup.
To add new invoice select account or type invoice#

Payment Method

Cash Credit Card

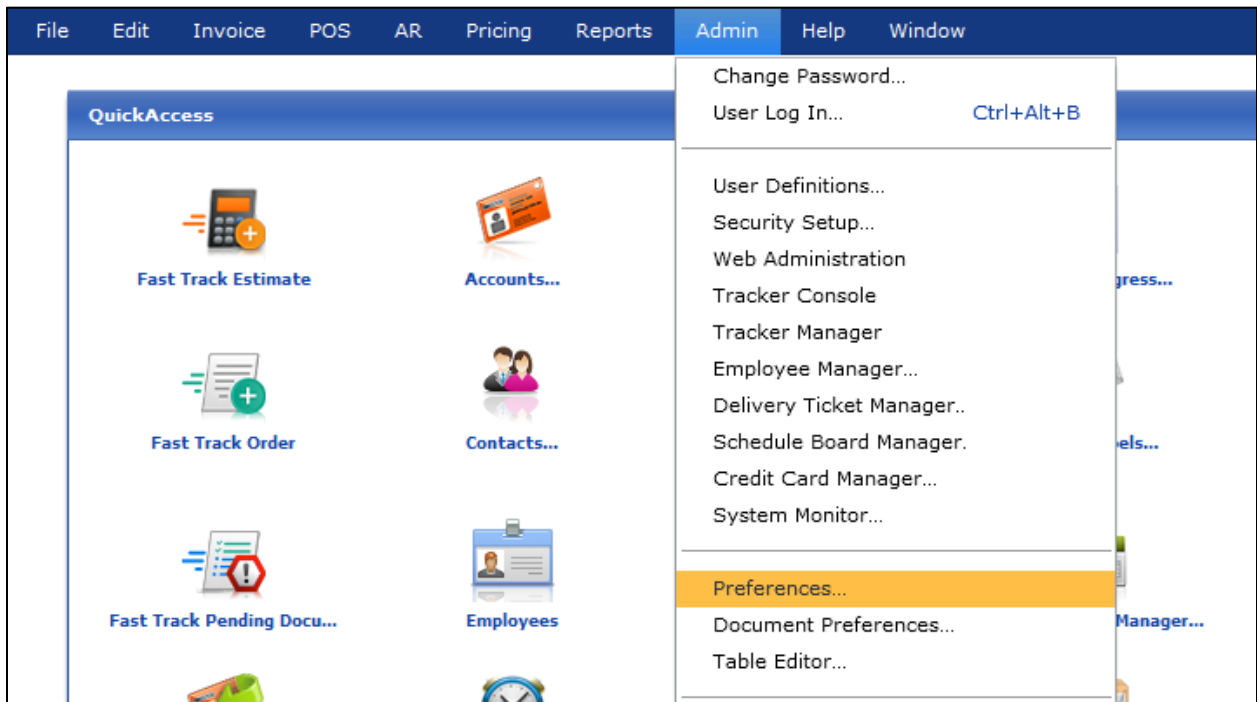
Charge Check

Amount Paying \$ 0.00

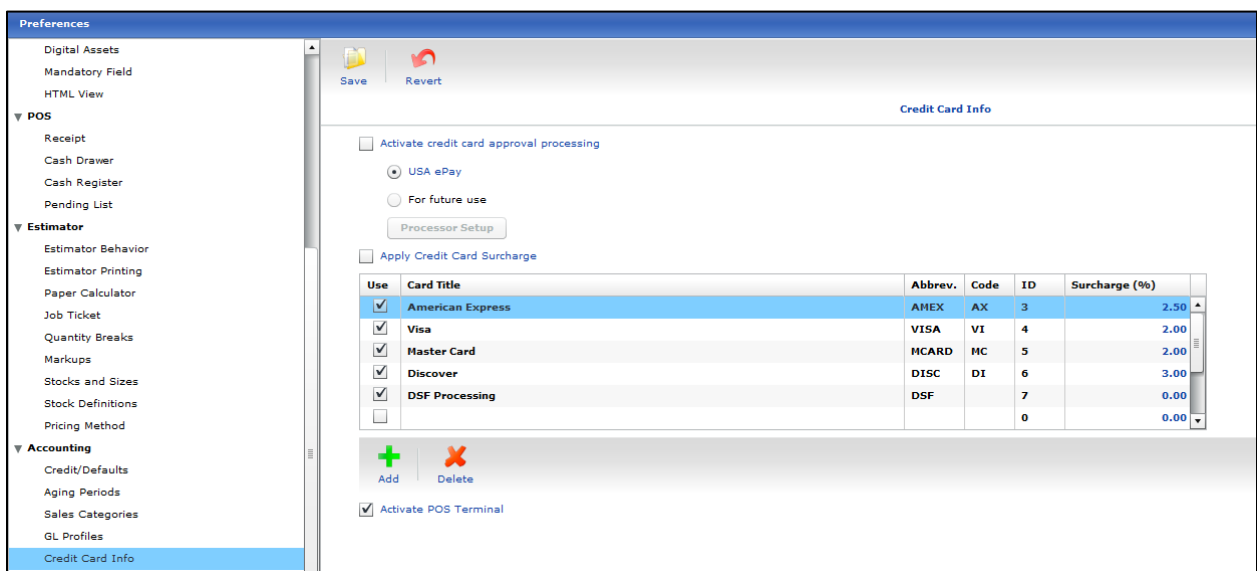
Receive Payment

Credit Card Surcharge

You should also set up any surcharge you want to add when the customer pays by credit card. To get to this setting go to Admin and then select Preferences.



Under Preferences select Credit Card Info. This will display a screen where you can set up different surcharges for different credit cards. These can be based on what your credit card processor charges you. This is not considered income since it is paid to the processor. The surcharge will apply for all customers. Be sure and save before closing.



Receiving Payment

The first step is to identify the customer. You can enter a few characters of the customer's name and it will show you those that fit.

Next you will need to add invoices that are to be paid with the payment received.

PrintSmith Vision Invoice Search

Cash Register >

Customer: EFI

Add multiple Invoices

Add Invoices Enter Invoice #

You will then be shown a list of the unpaid invoices for that account. You will then use the check boxes on the left to identify the invoices you want added to the cash register. After the selection use the Add to Pick Up button to place those invoices in the cash register

Pick Invoice

Customer: EFI Account Type: Cash/Check/Credit Card Account Status: Delinquent Total 144 Invoices available for the Account.

Invoice #	Document Title	Wanted By	Sales Rep	Phone #	Price
<input checked="" type="checkbox"/>	1049 VDP Business Card - BC-XeroxPrep_01	4/24/2018	Dave	858-829-2429	\$ 217.78
<input checked="" type="checkbox"/>	1060 VDP Business Card - BC-XeroxPrep03_JP	3/27/2018	Dave	858-829-2429	\$ 393.96
<input type="checkbox"/>	1061 Real Estate Flyers	3/27/2018	Neil	863-207-9142	\$ 200.89
<input type="checkbox"/>	1058 VDP Business Card - BC-XeroxPrep_01	3/26/2018	Dave	858-829-2429	\$ 240.72
<input type="checkbox"/>	1047 efi es	3/23/2018	Neil	863-207-9142	\$ 2,786.36
<input type="checkbox"/>	1054 Digital Copies_Color2Sided - Nov Release	3/23/2018	Dave	480-538-5865	\$ 5,828.94
<input checked="" type="checkbox"/>	1057 JF Demo Feb 4 2018	3/16/2018	Bill	480-538-5865	\$ 2,322.89
<input type="checkbox"/>	1056 Digital Copies_Color2Sided - Nov Release	3/13/2018	Dave	480-538-5865	\$ 1,207.58
<input type="checkbox"/>	1059 B&W Digital	3/8/2018	Neil	863-207-9142	\$ 2.75
<input type="checkbox"/>	1041 Color Digital	3/7/2018	Neil	863-207-9142	\$ 49.50
<input type="checkbox"/>	1030 Digital Copies_Color2Sided - Connect Brochure	2/23/2018	Dave	480-538-5865	\$ 94.93
<input type="checkbox"/>	1003 T-Shirt, Blue, Large - T-Shirt, Blue, Large	2/23/2018	Dave	480-538-5865	\$ 1,114.30
<input type="checkbox"/>	1039 VDP Business Card - Inside Sales	2/2/2018	Dave	480-538-5865	\$ 123.00
<input type="checkbox"/>	1021 VDP Business Card - Lars Monohan bus card	1/31/2018	Dave	818-242-3563	\$ 128.51
<input type="checkbox"/>	1001 Digital Copies_Color2Sided - brochure	1/30/2018	Dave	863-207-9142	\$ 593.64

Cancel Add to Pick-up

If you know the invoice number you can enter it manually

Add Invoices Enter Invoice #

Next select the payment method

Payment by Check

Select the check payment method and enter the check number. The Amount Paying will default to the total of the added invoices.

The screenshot shows the 'Cash Register' interface for 'Pickup Invoice# 1049, 1060, 1057'. The customer is 'EFI'. Three invoices are listed:

Invoice #	PO #	Sales Tax	Item Total
1049 VDP Business Card - BC-XeroxPrep_01	76229	\$ 16.16	\$ 217.78
1060 VDP Business Card - BC-XeroxPrep03_JP	76305	\$ 34.13	\$ 393.96
1057 JIF Demo Feb 4 2018	76444	\$ 211.17	\$ 2,322.89

At the bottom, the 'Payment Method' is set to 'Check'. The 'Check #' is 2277654 and the 'Amount Paying' is \$ 2,934.63. A 'Receive Payment' button is visible.

On the right side, the 'Transaction Details' are shown:

Transaction Details	Amount
Sub-Total	\$ 2,673.17
Tax (Default)	\$ 261.46
Total Cost	\$ 2,934.63

The 'Payment History' section shows:

Payment History	Amount
Payment Received	\$ 0.00
Change	\$ 0.00

After you select the Receive Payment button you will get the option to print a receipt, select the print format for the receipt or email the receipt.

The dialog box shows a green checkmark and the text 'Last transaction payment received'. The summary is:

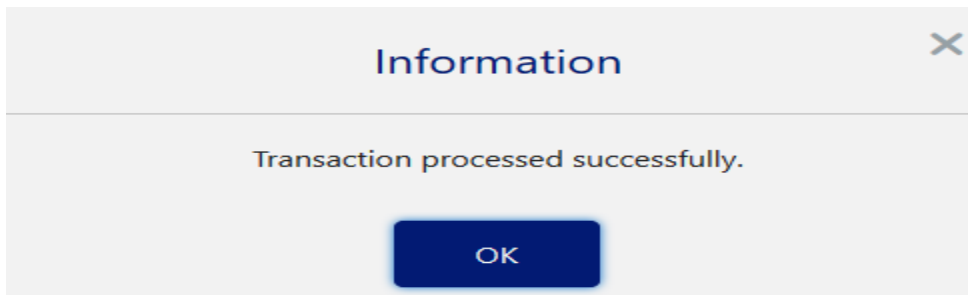
Transaction Total	\$ 2,934.63
Payment Received	\$ 2,934.63
Change	\$ 0.00

Below the summary, there are three options:

- Receipt Print (Dropdown: Microsoft XPS Document Wri...)
- Print Format (Dropdown: Default Invoice)
- E-Mail Invoice

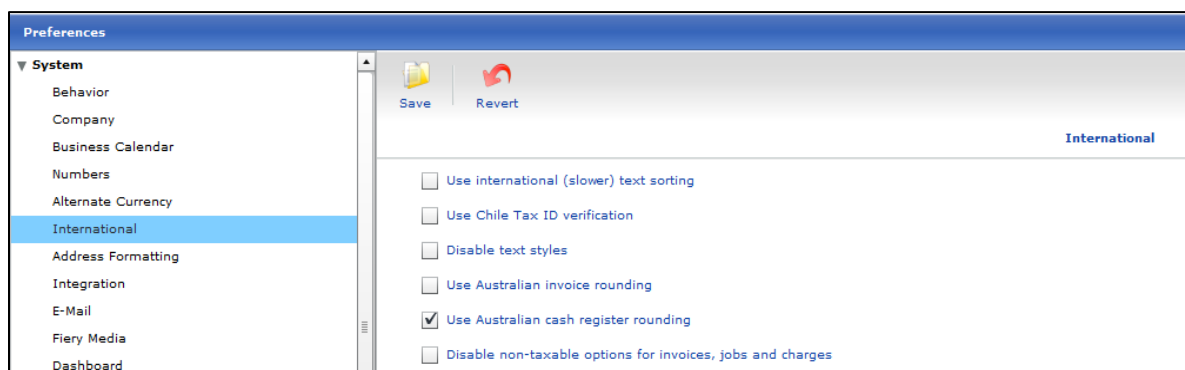
At the bottom right, there are 'Cancel' and 'Post' buttons.

Each invoice will print a separate receipt and when you are finished with them you will get the following message.



Payment by Cash

The only difference in receiving a cash payment is if you are in a country where cash is rounded to the nearest 5 cents. This is set up under Admin > Preferences > International. Check the box for Use Australian Cash Register Rounding. This will cause cash receipt to round to the nearest 5 cents and any difference will show in rounding.



When paying by credit card it shows the actual amount of the invoice being paid.

<p> <input checked="" type="checkbox"/> Sales Tax \$ 8.63 </p> <p style="text-align: right;"> Item Total \$ 94.93 </p> <p>Amount Paying</p> <p>\$ 94.93</p> <p style="text-align: center;">Receive Payment</p>	<p>Transaction Details</p> <table style="width: 100%;"> <tr> <td style="text-align: right;">Sub-Total</td> <td style="text-align: right;">\$ 86.30</td> </tr> <tr> <td style="text-align: right;">Tax (Default)</td> <td style="text-align: right;">\$ 8.63</td> </tr> <tr> <td style="text-align: right;">Rounding</td> <td style="text-align: right;">\$ 0.00</td> </tr> </table> <hr/> <p style="text-align: right;">Total Cost \$ 94.93</p> <p>Payment History</p> <table style="width: 100%;"> <tr> <td style="text-align: right;">Payment Received</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td style="text-align: right;">Change</td> <td style="text-align: right;">\$ 0.00</td> </tr> </table> <p style="text-align: center; background-color: #007bff; color: white; padding: 5px;">Proceed</p>	Sub-Total	\$ 86.30	Tax (Default)	\$ 8.63	Rounding	\$ 0.00	Payment Received	\$ 0.00	Change	\$ 0.00
Sub-Total	\$ 86.30										
Tax (Default)	\$ 8.63										
Rounding	\$ 0.00										
Payment Received	\$ 0.00										
Change	\$ 0.00										

When paying by cash it rounds the 94.93 invoice to 94.95 with .02 going to rounding.

<p> <input checked="" type="checkbox"/> Sales Tax \$ 8.63 </p> <p style="text-align: right;"> Item Total \$ 94.93 </p> <p>Amount Paying</p> <p>\$ 94.95</p> <p style="text-align: center;">Receive Payment</p>	<p>Transaction Details</p> <table style="width: 100%;"> <tr> <td style="text-align: right;">Sub-Total</td> <td style="text-align: right;">\$ 86.30</td> </tr> <tr> <td style="text-align: right;">Tax (Default)</td> <td style="text-align: right;">\$ 8.63</td> </tr> <tr> <td style="text-align: right;">Rounding</td> <td style="text-align: right;">\$ 0.02</td> </tr> </table> <hr/> <p style="text-align: right;">Total Cost \$ 94.95</p> <p>Payment History</p> <table style="width: 100%;"> <tr> <td style="text-align: right;">Payment Received</td> <td style="text-align: right;">\$ 0.00</td> </tr> <tr> <td style="text-align: right;">Change</td> <td style="text-align: right;">\$ 0.00</td> </tr> </table> <p style="text-align: center; background-color: #007bff; color: white; padding: 5px;">Proceed</p>	Sub-Total	\$ 86.30	Tax (Default)	\$ 8.63	Rounding	\$ 0.02	Payment Received	\$ 0.00	Change	\$ 0.00
Sub-Total	\$ 86.30										
Tax (Default)	\$ 8.63										
Rounding	\$ 0.02										
Payment Received	\$ 0.00										
Change	\$ 0.00										

Paying by Credit Card

You can select the credit card type and then enter the reference number. To get the reference number you need to go to your merchant's account screen and make the payment. You will get a reference number or approval number that is then entered in Cash Register.

The screenshot shows the 'Payment Method' section of the Cash Register interface. The 'Credit Card' button is selected and highlighted in blue. A dropdown menu is open, listing card types: Generic, American Express, Visa, Master Card, Discover, and DSF Processing. The 'Generic' option is currently selected. To the right of the dropdown is a 'Ref #' input field. Below the dropdown is an 'Apply Surcharge' checkbox. On the far right, the 'Amount Paying' is displayed as '\$ 747.77' and a 'Receive Payment' button is visible.

A warning dialog box titled 'Warning' with a close button (X) in the top right corner. The text inside reads: 'Credit Card will not be processed! You should only enter an approval code in this field when the card has been COMPLETELY approved outside of PrintSmith. Click the manual approval button and enter all the card info for verbal authorization'. At the bottom center of the dialog is a blue 'OK' button.

Charge Accounts

You can set up charge accounts for customers and then you can charge the invoice to those accounts.

The screenshot shows the 'Payment Method' section of the Cash Register interface. There are four buttons: 'Cash', 'Credit Card', 'Charge', and 'Check'. The 'Charge' button is highlighted with a red rectangular border.

Department Charges

In addition to invoices you can add department charges. These are typically items purchased that are not part of the job such as boxes.

Invoice # 1028
Digital Copies_Color2Sided - Brochure

PO #

Sales Tax \$ 66.29

Item Total
\$ 747.77

Department

- SS Copy
- Color
- Fax Rec
- Fax Send
- Other
- Merch 1
- Merch 2
- Misc

Qty

Unit Price

Tax Code

Tax Table

Sales Tax \$ 0.00

Item Total
\$ 0.00

Cancel

In some cases, the unit price will be pre-defined but you can also enter the unit price. Enter the quantity and select Add and it will be added to the total.

Customer:

Enter Invoice#

Department Item

Account Type: **Cash/Check/Credit Card** Status: **Delinquent**

Invoice # 1028
Digital Copies_Color2Sided - Brochure

PO #

Sales Tax \$ 66.29

Item Total
\$ 747.77

Department

Merch 1

Qty

Unit Price

Tax Code

Tax Table

Sales Tax \$ 3.60

Item Total
\$ 39.60

Transaction Details

Sub-Total	\$ 717.48
Tax (Default)	\$ 69.89
Rounding	\$ 0.00
Total Cost	\$ 787.37

Payment History

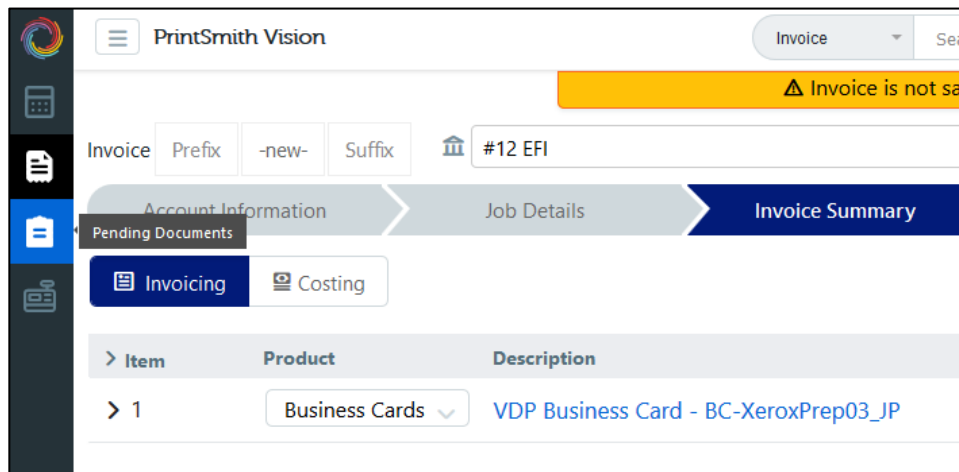
Pending Documents

Pending Documents

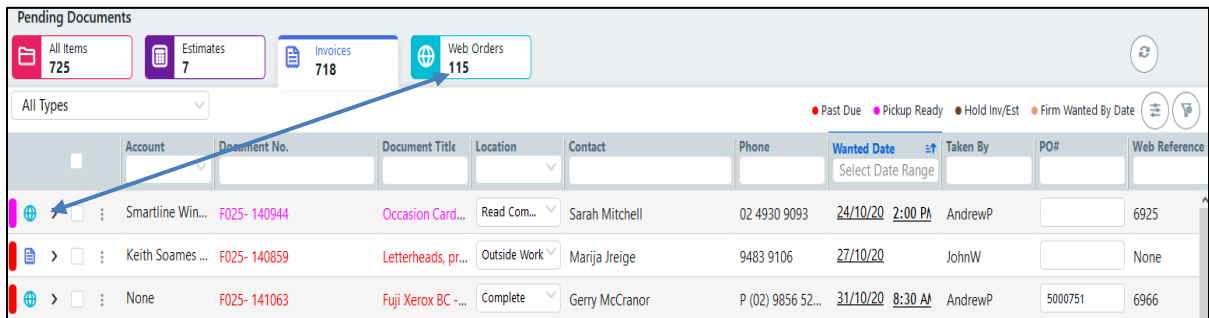
The Pending Documents window is a “command center” for managing your active documents. These are all the invoices that are in production or are waiting to be picked up as well as all the estimates that were not voided (canceled), archived, or converted to invoices. You can control which columns are displayed in the Pending Documents window and the order in which they are displayed, as well as the colors that identify certain kinds of information.

Accessing the Pending Documents Window

You can access Pending Documents using the Quick Access bar to the left of Invoicing.



The Pending Documents Window

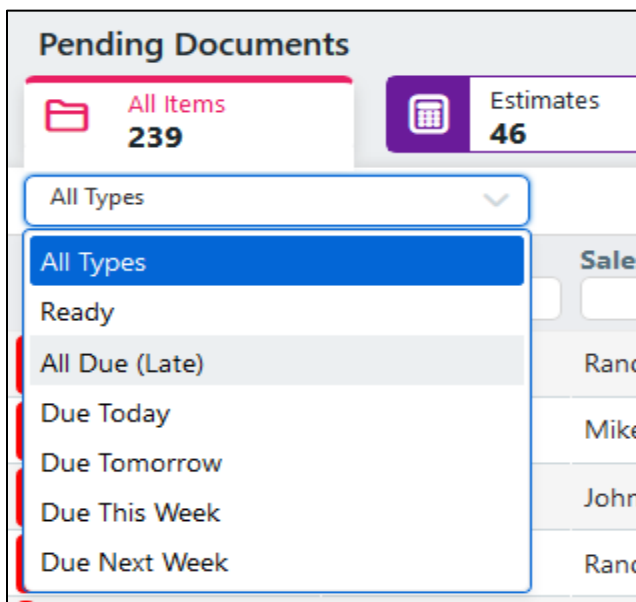


The Pending Documents window will display all active estimates, invoices and web orders. It will list all items but you can filter in several ways. The tabs across the top will display, all items, just estimates, just invoices or just web orders.

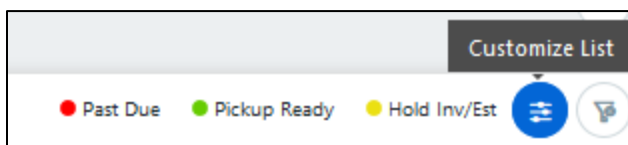
Tip The number of web orders is included in the total number of invoices.

The icon for estimates, invoices or web orders are also displayed to the left of the individual items to easily identify the type of item.

You can filter further, regardless of the tab you are using, by selecting the TYPE dropdown.



Each user can determine which columns are displayed, number of days of estimates to display and the color indicator for invoices and estimates at different stages.



Each column can be sorted high to low or low to high by selecting it. Or if you are looking for a specific invoice/estimate you can just enter the information in the appropriate field. You can click and drag columns to change the layout. Note also that the wanted date now includes time.

Pending Documents

All Items 725 | Estimates 7 | Invoices 718 | Web Orders 115

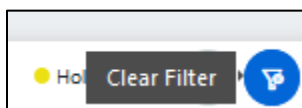
All Types

	Account	Document No.	Document Title	Location	Contact	Phone	Wanted Date	Taken By	PO#	Web Reference
	Smartline Win...	F025- 140944	Occasion Card...	Read Com...	Sarah Mitchell	02 4930 9093	24/10/20 2:00 PM	AndrewP		6925
	Keith Soames ...	F025- 140859	Letterheads, pr...	Outside Work	Marija Jreige	9483 9106	27/10/20	JohnW		None
	None	F025- 141063	Fuji Xerox BC -...	Complete	Gerry McCranor	P (02) 9856 52...	31/10/20 8:30 AM	AndrewP	5000751	6966
	Carlingford To...	F025- 140667	Invoice books ...	Ready 4 coll...	Beryl .	02 9871 7354	01/11/20	JohnW		None
	Australian Turf...	F025- 140700	Drink Vouchers...	PO Pending	Katherine Johns	9663 8501	02/11/20	JohnW		None
	Sydney Advent...	F025- 141087	210 x 200 Caro...		Alison King	9487 9415	02/11/20	JasonO	419623	None
	None	F025- 141127	Fuji Xerox BC -...	Complete	Gerry McCranor	P (02) 9856 52...	02/11/20 11:30 AM	AndrewP	5000751	6977
	Pirtek Orange	F025- 141131	Pirtek Business...	Complete	Allison Lawry	02 6360 2944	02/11/20 2:30 PM	AndrewP		6978

If you are looking for something within a specific date range you can enter the date range by selecting the starting date and then the ending date. If you are looking for a specific date the starting and ending date selected will be the same.

Tip Only click once when you select the date, do not double click

You can clear all filters



You can access the job contained in an invoice or estimate by selecting the > to open the detail.

1	Bill	JLK Designs	Business Form	11/10/2017		138
4	Bill	Arizona MCC	Lmo bus card 2...	12/26/2017	Cutting - Fini...	148
1	Color Digital				Add	500 \$ 35.33
2	Color Digital		Cutting - Finished Sheets		Add	1500 \$ 86.75
3	Color Digital				Add	5000 \$ 226.48
4	Color Digital				Add	10000 \$ 401.23
1	Bill	Arizona MCC	Work Order	1/3/2018		152

You can change the location of each job. The location for the estimate/invoice will reflect the latest location that was changed for a job. When you change the location of the estimate/invoice that location will be reflected in each job. You can add job comments

The screenshot shows a dropdown menu for selecting a job location. The menu is open, displaying several options: Bindery, Boxing, Complete, Cutting - Finished Sheets, Cutting - Parent Sheets, Design, and Large Format Finishing. To the right of the menu, there are several 'Add' buttons, with the top one highlighted by a red box. The background shows a table with a 'Cutting - Fini...' header and a '148' value.

>	Rock Quarry	702	Survey Form	10/31/2017
>	NeonTechnolo...	703	Counter POP S...	10/26/2017
>	Jay E Fishman ...	704	Color Brochures	10/20/2017

You can change the wanted date of an estimate/invoice

Selecting the document number will take you to the estimate/invoice where you can make changes if needed.

For estimates you can access other features and options

The screenshot shows a context menu for an estimate/invoice. The menu items are: Open in New Tab, Convert to Invoice, Notify Customer, Hold Estimate (with a right arrow), Lost Estimate, Print Estimate, and Archive (Recurring). The menu is displayed over a background that includes a document icon, a right arrow, a blue speech bubble icon, and the number '1'.

Open in new tab will open the estimate/invoice in a new tab for modification or review.

Convert to Invoice will convert the estimate to an invoice and take you to the invoice screen.

Notify Customer will allow you to create an activity to notify the customer.

The screenshot shows the 'Notify Customer' interface. On the left, it displays 'Estimate# 191' and 'Account Arizona MCC'. Below this, it lists 'Tom Hahn' with an email icon and 'tom.hahn@ef...'. There are sections for 'FOLLOW-UP (0)' and 'ACTIVITY (0)', each with a vertical line below the count. On the right, there is a light blue panel titled 'Add Activity'. It contains a dropdown menu, two toggle switches for 'Follow-up required' and 'Completed', and a checkbox labeled 'Add to customer account log'. Below these is a large white text area for notes.

You can choose from pre-defined activities and a note will be added to the customer account log.

This is a close-up of the 'Add Activity' dropdown menu. The title 'Add Activity' is at the top left. Below it is a dropdown menu with a downward arrow. The menu is open, showing a list of activity types: 'Customer Visit', 'Inbound Call', 'Inbound Email', 'Need to Call', 'Need to Email', and 'Outbound Sales Call'. The 'Need to Email' option is highlighted with a blue background.

This is a close-up of the 'Add Activity' form. The title 'Add Activity' is at the top left. Below it is a dropdown menu with 'Need to Email' selected and a downward arrow. There are two toggle switches: 'Follow-up required' and 'Completed', both currently turned off. Below the toggles is a checkbox labeled 'Add to customer account log'. At the bottom is a white text area containing the text 'Customer requesting email reply'.

Follow-up required gives you the opportunity to enter a follow up date and who is to follow up. You can also enter follow-up comments.

Follow-up required

Follow-up date: Follow-up by:

Follow-up comment:

Completed allows you to enter the date complete, completed by and the action taken.

Completed

Date Completed: Completed by:

Action taken:

You can email directly from this screen.

Hold estimate will allow you to select the reason for the hold

Note The next time you open this option after putting the document on hold you will have the option to release the hold.

Open in New Tab	Bill
Convert to Invoice	Dave
Notify Customer	Dave
Hold Estimate >	CSR Hold
Lost Estimate	Credit Hold
Print Estimate	Customer Hold
Archive (Recurring)	New Web Order

Lost estimate will allow you to identify the reason for the loss.

Lost Estimate

184
Take-out Menu

Lost

Neutral

- Too Expensive
- Could not meet customer requirements
- Quote received too late
- For Budgeting Purposes
- Testing Estimate
- Job didn't go ahead
- Other reason

If you select *other reason* you can enter comments below.

You can also print or archive the estimate.

For invoices some of the options are the same but there are some specific to invoices.

1

- [Open in New Tab](#)
- [Pickup Order](#)
- [Notify Customer](#)
- [Hold Invoice](#) >
- [Release for Pickup](#)

- [Print Invoice](#)
- [Print Job Tickets](#)
- [Void Invoice](#)

Pickup Order takes you to the Cash Register program.

Release for Pickup changes the status to ready to pick up.

You can print the invoice or job ticket

Void Invoice removes the invoice from pending documents and cancels it.

Under Web Orders you can also produce a delivery ticket and shipping label.

Delivery Ticket

Ticket# 522 Title 250 VDP Business Card - Evan to EFI

Product	Description	Location	Order Qty	Ship Qty	Weight
Invoice# 727 (1 Items) Mark as Shipped					
1	VDP Business Card - Evan		Shipping	250	250 1.03

Ship via

Total Weight (lbs) 1.03 Delivery Date 14/09/2017

Cost 0.00 Allow COD Payment

Tracking ID Driver

Customer PO # 333222 Order # 727

Part # Reference

Comments

You can enter the weight, delivery date and tracking number.

Using the label icon, you can print a shipping label.

Work in Progress (WIP)

Work in Progress contains all the jobs that are waiting for processing. You can choose to display jobs or documents. A document may contain more than one job. You can use the heading to filter out certain jobs based on the headings as well as have them sorted in ascending or descending order. You can use click and drag to change the position of the column headings.

	Document No.	Document Title	Wanted Date	Proof Date	Account	Sales Rep	Document Total
	F025-139863	100pp A4 landscape books, hard c...	19/03/2018		ausbil Investment Management Li...		\$ 5,691.51
	F025-140040	GAM1557 Vantage car DL Flyer... p...	16/03/2018		The Star Entertainment Group	Rep123	\$ 1,033.63
	F025-140643	GAM1552 16 car promo 4pp 55 x ...	16/03/2018		The Star Entertainment Group	Rep123	\$ 369.50
	F025-140667	Invoice books (180 x 245mm) of 5...	31/10/2017		2nd / 4th Infantry Batalion		\$ 71.00
	F025-140700	Drink Vouchers .printed 4 colours ...	01/11/2017		Australian Turf Club		\$ 337.71
	F025-140730	Profiles A4 printed full colour one ...	02/11/2017		Smartline Adelaide	Rep123	\$ 828.36

The screen shot above is displaying documents. If you select jobs then you will see a different layout. Additional tabs will be displayed. If you are using Fiery and you have jobs assigned to Fiery then the Fiery Integrated tab will be visible and you can select for those jobs.

Work In Progress

- All Jobs: 1345
- Fiery Integrated: 13
- Outsourced: 387

All Types

You can print out the WIP list as a csv file using the “Download as CSV” icon.

If you select the “Download as pdf icon you will see the different print options you have.

Print Options

Print with Extra Space
 Print with Job Comments
 Repeat Headers
 Open PDF in new tab

Print Page Setup

Standard
 Custom

Orientation: Portrait Landscape

Scale: 100

Paper Size: A4
 Width: 0
 Height: 0
 Units: Inches

Cancel **Print**

- Print with extra space will add a blank line after each row in PDF
- Print with Job Comments will add job notes after each row in PDF
- Repeat Headers will repeat the column header on each page if generated PDF have multiple pages
- Open PDF in new tab will open the PDF in new tab instead of showing the download option
- The user has the option of selecting a standard paper size or selecting custom and entering in the width and height. The units field is used to select the units for the entered width and height.
- You can also select the orientation and scale to be used in the PDF

Selecting the “Customize List” option you will get a short cut menu screen where you can change the columns to display, identify the color for each item based on its status and set up other filter options.

There are different column options depending if you are displaying jobs or documents. You can determine if you want to include estimates or not. You can set up additional filters here also. You can set up a filter based on the order price you enter. You can also set up filter for order where you have received the deposit and determine if you want to include shipping and tax amount in the displayed totals. In the case of order price amount and deposit received with orders they become a filter you can select. If you check include shipping and tax amount in totals then the totals will change to reflect that amount.

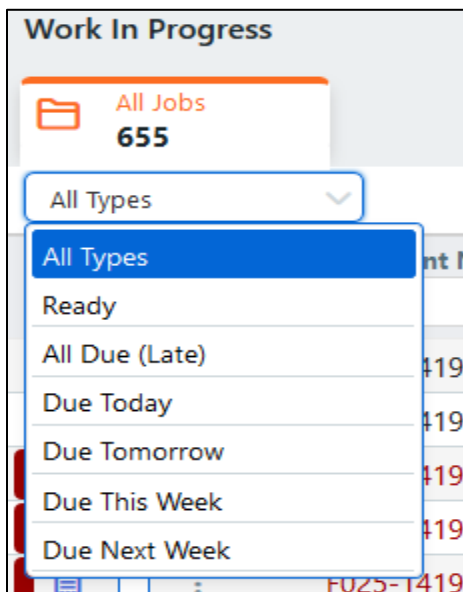
In this screen you can also determine the color you want to use to identify the different statuses of the jobs. You can enter a specific hexa decimal color code or you can select the color field and select the color that way



The documents are color coded according to the guide

Document Title	Wanted Date	Proof Date	Account
	Select Date Range	Select Date Range	Australian Turf Club
DLX Plain Face Envelopes:DLX Plain Face Envel...	19/03/2018		Australian Turf Club
Members mailouts - letter printed black one si...	18/03/2018		Australian Turf Club
\$5000 SUPER SWEEP Flyer - printed 4 colours ...	28/11/2017		Australian Turf Club
Green Voucher, A4, printed CMYK 1 side on 25...	23/11/2017		Australian Turf Club
A4 books, 100 sets per book in duplicate (Whit...	23/11/2017		Australian Turf Club
Punters Pack Drink Vouchers ..printed 4 colours...	21/11/2017		Australian Turf Club
Australian Turf Club Business Card:helpdesk	21/11/2017		Australian Turf Club
DL Flyers - printed 4 colours 2 sides on 250 gs...	20/11/2017		Australian Turf Club

By using the drop down, you can filter the jobs you can display based on their status or a saved filter

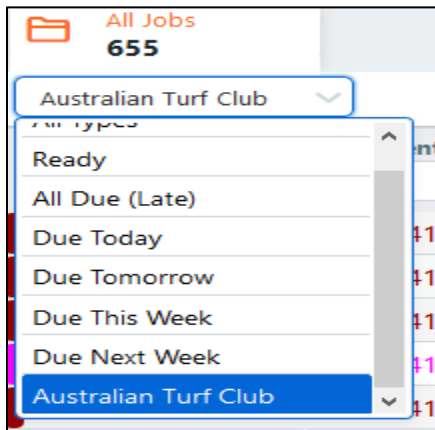


Once you have created a filter you can save and use it later.

In this example a filter was created for a particular customer, Australian Turf Club.

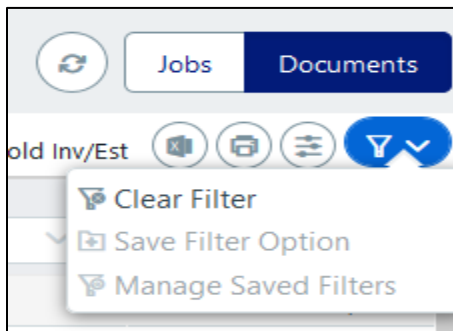
Selecting “Save Filter” gives a short cut menu where you can name the filter

This filter now becomes available in the search

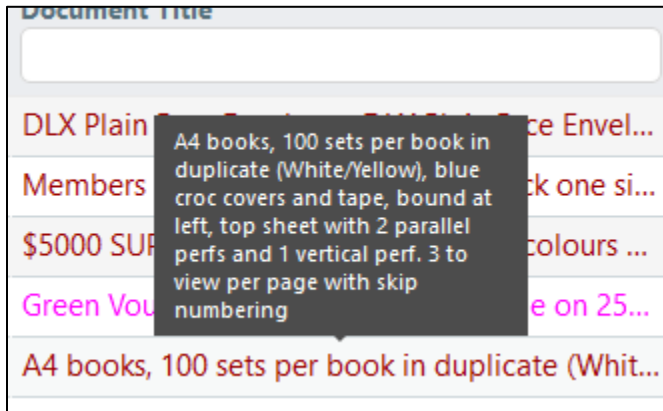


Selecting “Manage Filters” allow you to modify or delete the saved filter

You can clear the filter

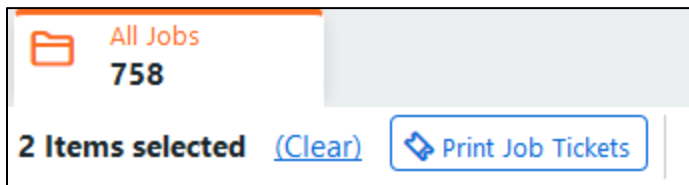


Hovering the mouse over the document title will show more detail about the job. Double clicking on the document title will take you to the job details screen for the invoice.

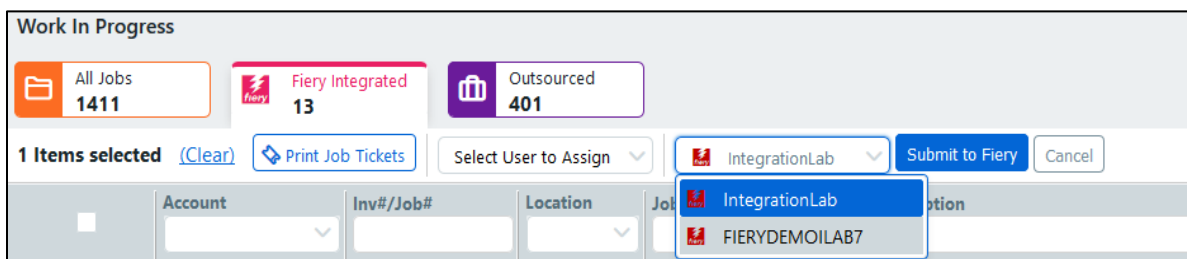


Once you select one or more documents or jobs you have other options depending on which screen and which tab.

On the documents screen you can print job tickets. Selecting this option will print the job ticket(s) for the jobs in the document.



On the jobs screen under both the All Job or the Fiery Integrated tabs you have these options



Print job ticket will print the job ticket to the screen where you can determine where you want the document to print.

Select users to Assign gives you the option to assign a user to the job.

The next field will display the options of where the job can be processed. The column "Device ID" will display the device ID

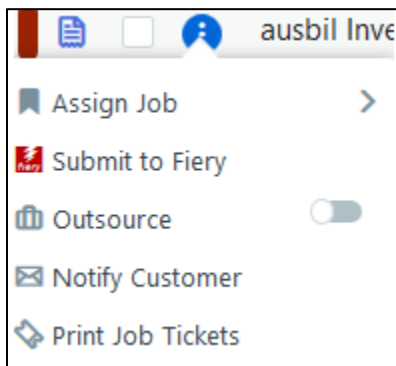
Note This is only available on the job screen display

Job Type	Device Id
Digital Col...	FIERYDEM...
Digital Col...	Integration...
Digital Col...	FIERYDEM...
Digital Col...	Integration...
Digital Col...	FIERYDEM...
Digital Col...	FIERYDEM...
Digital Col...	FIERYDEM...
Digital Col...	FIERYDEM...

The submit to Fiery field will allow you to submit the job to fiery.

The options displayed under the tabs works well when you are working with multiple jobs but you also have options available for each job. Assign job, Submit to Fiery and print job tickets work just like the above options. In addition to those you can, mark the job as outsourced and notify the customer.

Note If the job has already been submitted to Fiery, that option changes to Void Fiery job which will cancel the job in Fiery.






You can mark the job as outsourced by moving the sliding dot. This will cause the job to be marked as outsourced and change the number of jobs in the outsourced total.


Note Marking a job as outsourced does not change its pricing method and job price.

Selecting "Notify Customer" brings up a box that shows all of the current activities and the ability to add an activity.

Notify Customer
+ Add New

Invoice# **F025- 141041** Account **Australian Turf Club**

 Angela Simic
 86226786
 test@efi.com

 0410 401 795

FOLLOW-UP (0) _____

|




ACTIVITY (0) _____


|

When you select Add New you will be shown a place to enter a new activity

Notify Customer

Invoice# **F025- 141041** Account **Australian Turf Club**

 Angela Simic
 86226786
 test@efi.com


 0410 401 795

FOLLOW-UP (0) _____

|

ACTIVITY (0) _____

|

 **Add Activity**

Follow-up required

Completed

Add to customer account log



Add Activity

▼

CALL

EMAIL

EMAIL

FOLLOW UP

REORDER

VISIT

PO History

The PO history process allows you to view all purchase orders including completed purchase orders and their current status.

Vendor Name	PO #	Document #	Description	Buyer	Date Required	Status
CMYK Hub	F025-26		copier paper	Buyer 1	29/06/2018	IN PROGRESS
Ben Carmichael Printing	F025-25	142043			29/06/2018	IN PROGRESS
All Book Binding	F025-24	142038			25/06/2018	IN PROGRESS
AAC ID Solutions	F025-23	142005			22/06/2018	OVERDUE
Arrow Printing Supplies	F025-21	142002			28/06/2018	IN PROGRESS

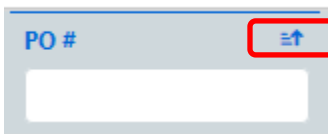
You can filter purchase orders by selecting a vendor, date range or status using the column headers. Selecting this icon will clear the filters and list all purchase orders.

Vendor Name	PO #	Document #	Description	Buyer	Date Required	Status
Ben Carmichael Printing	F025-25	142043			29/06/2018	IN PROGRESS
All Book Binding	F025-24	142038			25/06/2018	IN PROGRESS
AAC ID Solutions	F025-23	142005			22/06/2018	OVERDUE
Alen Industries	F025-22	142005		Buyer 1	22/06/2018	COMPLETED
Arrow Printing Supplies	F025-21	142002			28/06/2018	IN PROGRESS

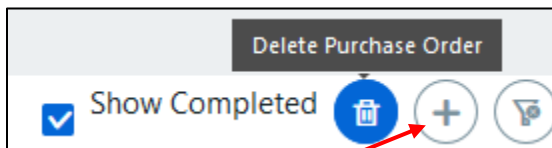
Checking the box “Show Completed” will add completed purchase orders to the list.

Double clicking on any PO number will open that purchase order. From there you can edit or change the status of a line or the entire purchase order.

You can sort the purchase orders in ascending or descending order by using this icon.



You can delete purchase orders by checking the box next to the purchase orders you want to delete and then selecting the delete icon.



Selecting the plus sign allows you to create a generic purchase order that is not related to an invoice.

1. Select the vendor

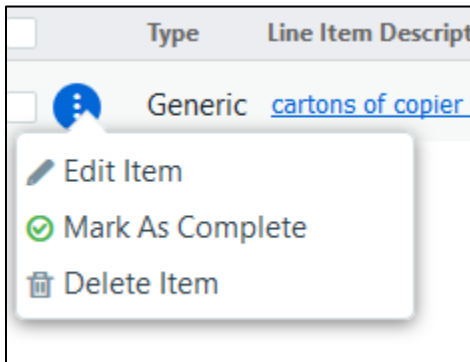
2. Enter the required date. Clicking on the field will display a calendar.
3. Enter the buyer information and description.
4. Select add a line item and complete the information on what you are ordering

Note that the PO type is now generic

Purchase Order Line Item - Item# 1

Account		Type
<input type="text"/>		Generic
Line Item Description	Item Name	Item Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Quantity	Unit Price	Total Price
<input type="text" value="0.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/>
Vendor Quote #	Partial Received	<input type="checkbox"/> Mark As Complete
<input type="text"/>	<input type="text" value="0.00"/>	
Additional Line Item Description		
<input style="height: 30px;" type="text"/>		

You have the same features that you have when raising a PO in invoicing. See page 67 for information on "Raising a PO" in invoicing. You can edit, mark as complete or delete an item.



You can email, print and save the PO.



Note If you want to email to the supplier then you must include their email address in the vendor record. See page 16 for information on "Adding or Editing a Vendor Record".