

PRINTIQ RELEASE NOTES

What is new in our v46 Release?

What's new in our v46 release

The team at printIQ have been hard at work through 2022 and we are proud to deliver our v46 release.

We are excited to share these updates with you, as they represent our ongoing commitment to improving our platform and delivering the best possible experience to our customers.

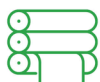
In this document, you'll find a breakdown of the latest features and improvements, many of which have come from your requests. We have also continued to focus our R&D on understanding the market segments and what the print industry needs in today's challenging business environment.

We have worked hard on this update and we hope that you find something that makes a difference in your printIQ experience.

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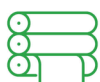
WIDE FORMAT

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Showcase feature in v46

DATA CAPTURE

Staff Clock-in / Clock-out

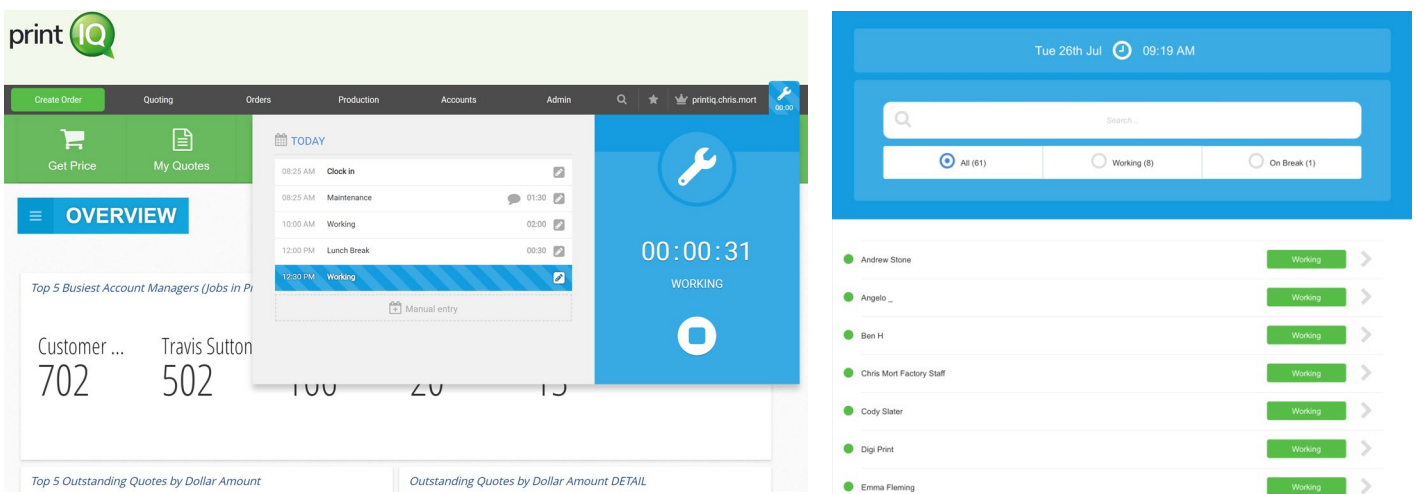
kb article

One of the most frequent requests that we receive relates to staff clocking in and out of printIQ. We are therefore pleased to add this functionality in the v46 release.

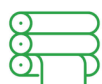
Clock-in and out is an extension to the Data Capture module that allows your staff to record when they start and finish work for the day along with lunch breaks and other non-job-related activities.

The data collected provides you essential analytics to help run your business. You can export the data to your payroll system and also combine the working hours with time captured on jobs to deliver productivity reports.

We have created and optimized the functionality for tablet and touch screens and you have several configuration settings that help you lock the process down to ensure you capture accurate data.



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Estimating & ordering updates

ESTIMATING

Optimizing impositions using Lanes

We have been working on improving the imposition and estimation process relating to labels by supporting lanes functionality. It's now ready to go in our v46 release. Our lanes functionality gives you more control over how your label job will be imposed so you can run multiple versions (kinds) over multiple runs depending on the most efficient raw material and click charge utilization.

Essentially, it's a ganging feature integrated into estimating where printIQ optimizes your runs based on the different versions and quantities for each version. The benefits see you minimize stock and click charges, reduce waste and increase production efficiencies.

As part of this feature we have enhanced our imposition engine so that we automatically check all the different scenarios and serve up the best option over single or multiple runs. This is a game changer as it automates more of the imposition and estimating process.

To achieve this we have introduced new architecture to Custom Quoting where the pricing engine prices out the common imposition scenarios and then continues to poll for better options in the background.

The feature is available within Custom Quoting with work continuing to add support for Dynamic Catalog products in v47.

SIMPLIFIED QUOTING

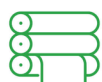
Simplifying Simplified with faster product ordering

To make the ordering of manufactured products faster, we have created a new option where you can choose a product and simply enter a quantity.

We've enhanced the ordering process for 'Single Product' sessions by adding a new field called 'Quick Ordering.' When checked, this feature allows users to select the quantity directly from the product tree node without having to go to the simplified screen. This streamlines the ordering process as you bypass product selections and filters.



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ESTIMATING

Enhanced control over customer discounts / surcharges

We have extended the existing functionality relating to customer discounts and surcharges. In previous versions, you had a single % that would control the discount or surcharge that is targeted at the final retail price.

The change in v46 is to give you more options on what price the % is applied to. On the Customer Details screen, you will notice the options to target pricing at the cost+, Wholesale, Retail, Retail including adjustments, wholesale including adjustment

ESTIMATING

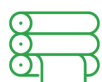
Splitting markup options on operations

We have provided more granular controls relating to the markup options on operations. Previously, you were limited to an 'Exclude from pricelist' tick box. In this release, you will notice that this has been extended to exclude from Wholesale pricelist, retail pricelist and also customer surcharges / discounts.

The result is improved control over your markups where you can now exclude more operations from your second / third layers of markup.



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ESTIMATING

Press spoils component update

kb article

Two new options have been added to the calculation of press spoils: We have added Min Stock Length and Max Stock Length. These options allow users to set the spoils based on the length of stock being used, which improves the accuracy of stock usage and costing.

ESTIMATING

New section operation component options

We've added a new checkbox option under 'Click Rates' on section-based finishing operations called 'Click all Produced items.' This option can be used to apply sheet or item-based click rates to all produced quantities, including 'spoils' in the charge of click rates.

DYNAMIC CATALOG

Expanded edit options

kb article

We have expanded the ability to edit quantities on dynamic catalog product at both the quote and job stage. This also includes the auto updating of all linked artwork. This allows for improved customization of dynamic catalog products.

ESTIMATING

New waste calculation display in stock draw

You might notice the new information added to quote calculations within the stock draw section. We have added a visual display of the stock waste based on the current production path. It's a simple view of the effectiveness of your imposition.

APPROVE MODULE

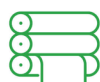
Option to upload files when rejecting a proof

kb article

We've added the option to upload files against 'Rejected' proofs via the Approve modal. This allows a user to easily include all relevant files associated with a particular proof in one central location.



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STOCK

Expanded stock size options

[kb article](#)

We've updated the 'Stock Size' admin screen to match the updated look and feel of printIQ, and have expanded the options available when configuring roll format stock sizes. This includes setting the 'spoils' behavior when a printed job falls between the end of one roll and the start of another.

Production updates

CAPACITY PLANNER

Auto splitting of time cards

[kb article](#)

The most commonly requested feature, within the Capacity Planner, is the ability to easily split time across different shifts. We are therefore very happy to include this feature in this release.

This is utilized when auto planning and when manually dragging a tag into a space smaller than the available time space.

A prompt will show asking to confirm whether to plan into overtime or split to the following day.

CAPACITY PLANNER

Multi-select to drag and drop timecards

[kb article](#)

We have enhanced the Capacity Planner to enable the multi-selection of planned and unplanned time cards so they can be moved as a group.

Try it out, hold down the Ctrl or Command button on your keyboard, multi select cards with your mouse then drag them around. Too easy!

PRODUCTION

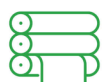
Overriding job status by customer

[kb article](#)

We have added functionality to auto place jobs or sales orders from specific customers to the status option of 'On Hold'. This would be used when internally you want a customer's orders to accumulate to be processed and shipped.



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PRODUCTION

Auto updating jobs from the supplier portal

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A new data sync process has been created to reduce touchpoints for outsourced jobs. When your supplier updates the job as complete within the Supplier Portal, we can now automatically set the job to 'Finished Production' and 'Complete'.

The criteria for the supplier portal update is customizable so we have some flexibility to fine-tune the logic. We then add a scheduled task that runs the check automatically.

IQ LINK

Automation of Purchase Order to Job

kb article

The IQ Link module has had an overhaul as more and more businesses transition to specialization and choosing to outsource more work.

Outsource Purchase Orders to suppliers running printIQ and connected through IQ Link can be 'pushed' automatically to your supplier's printIQ system, generating a quote and accepting it, placing it straight into their production workflow.

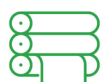
The change streamlines the outsource process and reduces time taken to re-enter outsource jobs. The main difference that you will notice is that it allows you to push any job, not just those quoted and ordered through IQ Link.

To improve transparency of the outwork process, we have also added a data update back from the supplier so that you know where they are at with your job. When these jobs are Finished Production, Completed or Cancelled by the outsource provider, a relevant update to the Purchase Order status is pushed back to your instance of printIQ.

This is a win win for both the customer and supplier and we hope this helps the wider printIQ community work more easily with each other.



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IQ LINK

Linking two printIQ instances with product codes

For those customers using the IQ Link module, we have added a new feature where you can tag your product codes with your supplier’s code. While it sounds like a minor change, the result is that when you push the job to your supplier, the job in their version of printIQ is a fully formed job based on their own product code.

The tagging takes place within your product catalog. Within the Single Product Creation screen or on the CSV upload, you now have the option to specify your supplier’s product code.

Be sure that your supplier has these product codes in their version of printIQ otherwise, the fallback position is that we create an outsource job limited to the job description.

IQ LINK

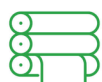
Linking outsourced products on the same order

A small but handy update within the Link module has been made to connect jobs on the same order. This is useful because it indicates to your supplier that multiple jobs are for the same order so should be shipped together.

The change sees the job number (without the -01) passed to the IQLink’d supplier as their job series. For example, if you have 2 jobs being J12345-01 and J12345-02. We have to pass these to the supplier as two separate jobs but we set the job series on both jobs to be J12345.



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Freight updates

FREIGHT

New export for mass shipping

We have built new functionality on the Dispatch Board to assist with the exporting of delivery data so it can be used in external applications. This option allows you to multi-select dispatch records for different customers and export the data.

The export is driven by an Izenda report so you can customize the layout of the data file. This is part two of a project to provide support for World Ship, Shipping Manager and APC along with other integration options where you prefer to use the carrier’s proprietary software.

Within the carrier’s application, you create templates that recognize the files generated by printIQ. As you import the printIQ file into the carrier’s software, the template then imports the data as consignments.

The use case for this is to improve the management of bulk shipments but it also provides an option for international shipments.

You will also notice a carrier filter on the Dispatch board.

FREIGHT

Consignment import for FedEx and UPS

To further support the new mass shipping exports, we have created an import that updates the printIQ freight details. Once you finalize your consignments and labels within WorldShip and Shipping Manager, you then export the consignment data so that it can be imported back into printIQ.

FREIGHT

Ability to link postcode sectors to countries

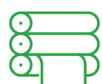
kb article

We have expanded the postcode range options in printIQ to include the ability to link to countries.

This is used when shipping internationally and you need to be able to distinguish between post codes for different countries.



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Accounts and inventory updates

ACCOUNTS

Improved management of commission

kb article

We have been adding to what we developed in previous releases to deliver phase two which brings you more options and control over managing commission.

We have expanded our commission features to allow users to set a commission rate in three areas: Account Manager, by customer, and Customer based pricelist. The three options are hierarchical so you can set one or all of these depending on how granular you wish to be. The Customer / Pricelist option effectively allows you to have different commission rates per product range at a customer level.

These new settings then push into our existing commission workflow where you can view and update commission on each quote and then adjust at the point of invoicing.

While we appreciate that everyone deals with commission differently, this approach seems to be the most common scenario that we identified from our user base.

ACCOUNTS

Avalara added as a new tax calculator option

kb article

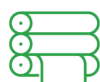
We've added a second aggregator to our tax integration options to provide even greater flexibility. In addition to TaxJar, we now support Avalara.

The integration matches what we do with TaxJar which is to provide sales tax calculations at the point of invoicing. As with TaxJar, the Avalara integration sees printIQ finish at the point of calculating the sales tax and adding this to sales invoices. The invoice is passed to your accounting system and your tax returns to the tax authority is managed from here. We have had requests from customers to provide sales tax reports that can be uploaded to the tax aggregator which we have been able to accommodate.

The process begins with you setting up an account with Avalara, define all your tax nexus locations and define product categories. We then plug your account details into printIQ to generate sales tax specific to your company and customer locations.



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ACCOUNTS

Customer based general ledger codes

kb article

We have added an option to override general ledger codes at a customer level. When configured, these accounts will be selected automatically for Sales Invoices or Supplier Invoices

INVENTORY

Inventory Transactions by Weight

We have improved the management of inventory items by weight to support this more widely through the application. You will notice more options within the goods receipt process so that you can order by weight and goods receipt in lineal. To achieve this, we have added more support for inventory UoM so that it can convert from one UoM to another.

INVENTORY

New options for managing stock pick quantities

We have added a new setting to control the behavior of the stock pick quantity in printIQ.

This can now be set to default to either the 'Charge Amount' (the charged qty based on the stocks order units) or the 'Requested Amount' (the actual calculated usage qty).

INVENTORY

References added to Inventory item

kb article

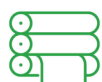
We have expanded the reference function in printIQ to include 'Item-based' references.

These can be linked to store items and inventory items to allow custom details to be applied to these items. We have added this to allow you to record more information relating to an inventory item and for now, there are limited options of where the reference is pushed to.

The purpose of the change is to support additional details for those customers using their accounting system, an external inventory system or for outsourced logistics. It is designed to make the data sync process more seamless.



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INVENTORY

Adding support for MSI / MSF

We have further improved the management of inventory items where the unit of measure is MSI (1000 square inches) or MSF (1000 square feet). We have added support for these so that can order in MSI / MSF and goods receipt in lineals.

General updates

IMPROVED SETUP

Copy Operation

As part of our focus on simplifying the setup of printIQ, the latest feature is the option to copy an operation. This feature copies all details related to the operation, which can then be tweaked to the requirements of the new operation. This saves time and reduces the amount of work needed to create new operations.

IMPROVED SETUP

Copy Machine

kb article

To speed up the process of creating new machines in printIQ, we've added a 'Copy Machine' option against each machine. This feature copies all details related to the machine, which can then be tweaked to the requirements of the new machine.

GENERAL

IQstore & manufactured product code sequences

We have added two new sequences that will help product catalog administrators improve the way they manage their catalog. The sequence is added to both IQstore product codes and manufactured product codes (Single product creation or CSV upload).

The feature is optional, and you can manage your own sequences using the Maintain Sequences screen. (Search for "sequence" in the menu search).

You also have the option to add a prefix. The prefix can apply to the instance, each business site or you can set a prefix for each customer. Note, a single numerical sequence is used with the prefix applying to the next number in the sequence.



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Integration updates

Integration continues to be a growth area with some very impressive connections being created every week. We have stepped up in v46 and created many more integration touchpoints that support you in your integration journey.

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

INTEGRATION

API updates

New Request for quote APIs to Get RFQ details and Create RFQ

New Supplier invoice API to support the creation of a supplier invoice

Update to QuoteProcess to add support for Consignment Creation from external application

INTEGRATION

Webhook updates

New IQstore / Sales item webhook to support Create / update

New UpdateDispatch webhook modification

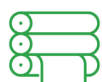
Update to add customer / supplies filters to 15+ webhooks to limit the recipient of the payload

Update to webhook framework that filters specific values in the payload using the new WHSDataFilterExpression column in our Webhook Subscriber table

Add Address notes to Job and Sales order webhooks

New webhook payload (SalesItemUpdate and ProductUpdated) to support third party catalog sync

Update to add Inventory details and Location to AcceptanceDetails in the Delivery Object.



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