



PrintSmith™ Vision
User Guide

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EFI PrintSmith Vision User Guide

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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.

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.

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 65.0.3325.181 (64 bit)	Certified
	Mozilla	59.0.2 (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)	Safari	11.0 (13604.1)	Certified
iPad	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

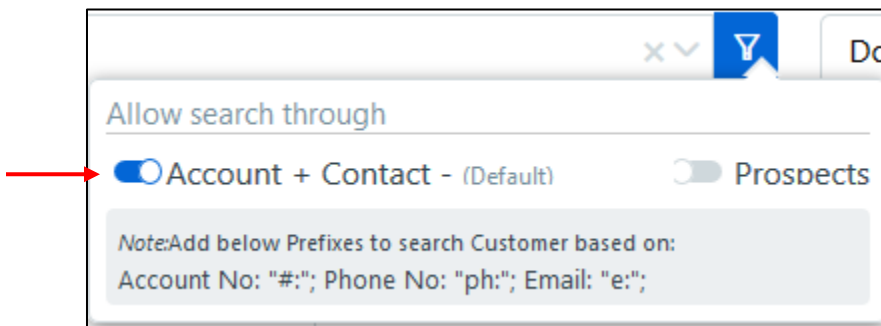
Note: Important If you are using a laptop, to see estimates and invoices in full, the height (second number) must be at least 1024 pixels.

Estimating

Creating Estimates

Creating a New Estimate

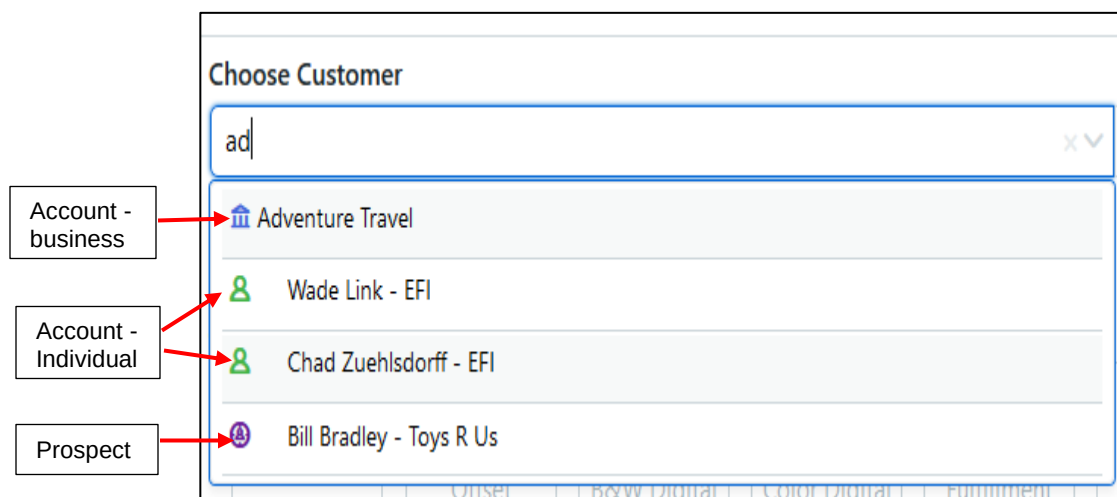
You can search for the account by account number, phone number or email address using the search code listed below.



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

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

If you select to create from a New job, you will need to select a job method. This will give you a job detail sheet specific to the job method you selected. In this example, the job method ‘Digital B&W’ was selected and here is the input screen for that job method.

As you complete the job information screen you will find features that will aid in selecting the paper, calculating paper and adding charges.

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

Type

▼ 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	0839-4009S	5318	0	0

Paper Calculator

This will help in determining the amount of parent sheets needed and the material cost.

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

Neither

☒ 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

Sheets Out 0

Grip Edge (Top/Bottom)

Grain Direction NEITHER

Swing/Combo Cut No

Size Out

Cuts: 2

Folio Edge (Top/Bottom)

Color Bar Size 0.25

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.

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		Price & Quantity	
Stock Name		☐ Use in future ⓘ	
Stock Method	Sheet Stock	Vendor	
Stock#		☐ Default Metric	☐ Exclude from Web updates
Stock Type	Business Papers	Basic Size	17 x 22
Parent Size		Normal Run Size	
Color		Generic Color	
Weight	0	Thickness	0 Caliper
Finish		Grade	
Coated	None 1 Sided 2 Sided		
Sheet/Carton	0	Carton Weight	0.00
Min. Order	0	☐ Charge for entire Order	M Weight 0.00
Cut/100	0	Min. Cut Chg.	0

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
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

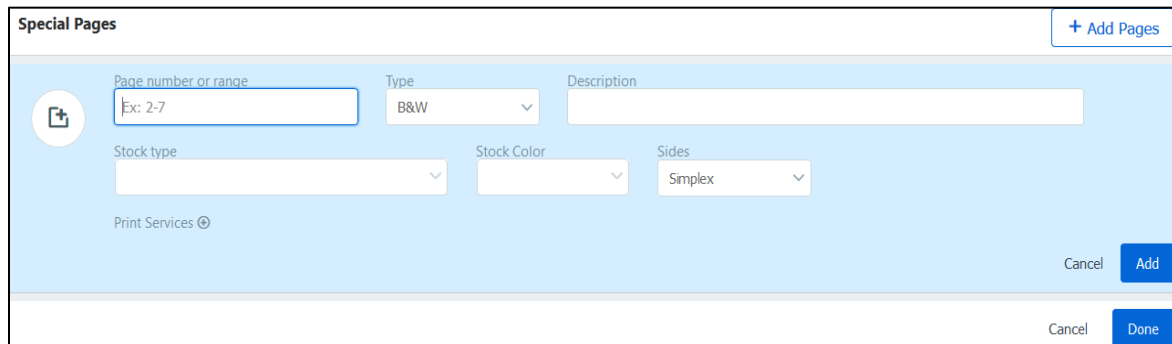
Price Expiry

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

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



The 'Special Pages' form is used to define special pages for a job. It includes a '+ Add Pages' button in the top right. The form fields are:

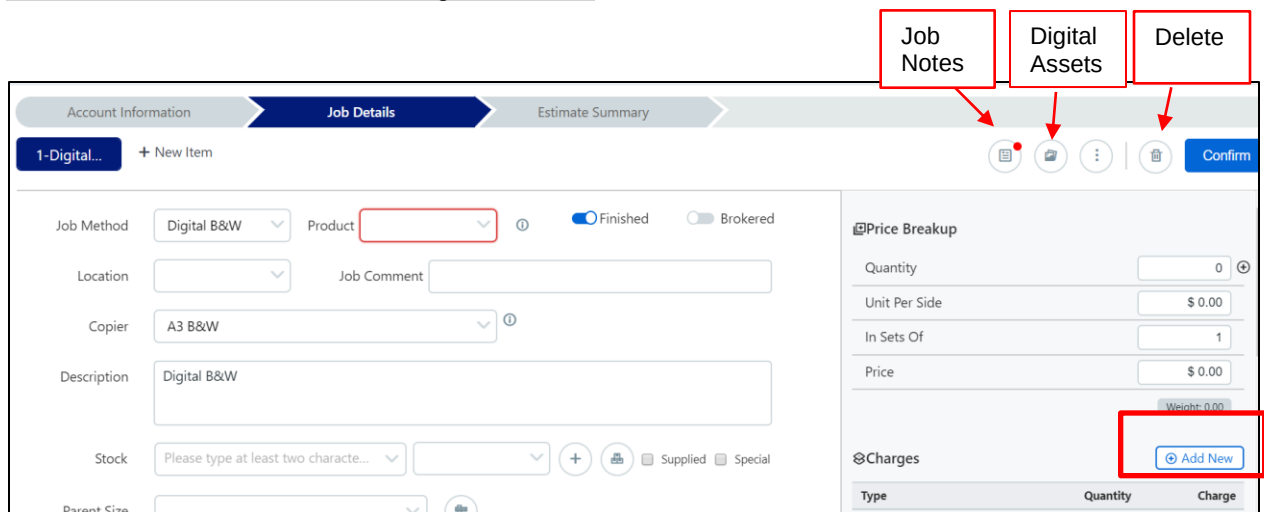
- Page number or range:** Text input with an example 'Ex: 2-7'.
- Type:** Dropdown menu with 'B&W' selected.
- Description:** Text input field.
- Stock type:** Dropdown menu.
- Stock Color:** Dropdown menu.
- Sides:** Dropdown menu with 'Simplex' selected.
- Print Services:** Link with a plus icon.

At the bottom right, there are 'Cancel' and 'Add' buttons. At the very bottom, there are 'Cancel' and 'Done' buttons.

Add Charges

You can add Charges to the job using the "Add New" button available in the Job Details Page.

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.



The 'Job Details' page is shown with several annotations in red boxes:

- Job Notes:** Points to the 'Job Notes' icon in the top right toolbar.
- Digital Assets:** Points to the 'Digital Assets' icon in the top right toolbar.
- Delete:** Points to the 'Delete' icon in the top right toolbar.
- Confirm:** Points to the 'Confirm' button in the top right toolbar.
- Add New:** Points to the '+ Add New' button in the 'Charges' section.

The page layout includes:

- Account Information** | **Job Details** | **Estimate Summary** (breadcrumbs)
- 1-Digital...** | **+ New Item** (top left)
- Job Method:** Digital B&W | **Product:** [Red box] | **Finished:** [Checked] | **Brokered:** [Unchecked]
- Location:** [Red box] | **Job Comment:** [Red box]
- Copier:** A3 B&W
- Description:** Digital B&W
- Stock:** Please type at least two characte... | [Red box] | **Supplied:** [Checked] | **Special:** [Unchecked]
- Parent Size:** [Red box]
- Price Breakup:**
 - Quantity: 0
 - Unit Per Side: \$ 0.00
 - In Sets Of: 1
 - Price: \$ 0.00
 - Weight: 0.00
- Charges:**
 - Type:** [Red box]
 - Quantity:** [Red box]
 - Charge:** [Red box]



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

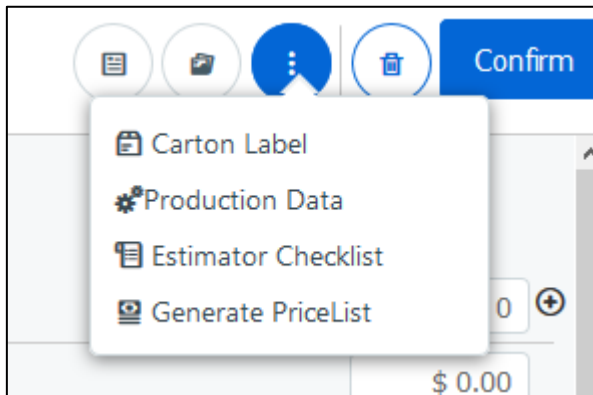
User can delete individual job from the job details page using Delete button

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

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

N0. Start to End

Label to Skip From

Label Text

You can enter any text here you like.

Today's Date

End Date

Job Description

Invoice Reorder

Invoice Title

Estimated Weight

Attention Name

Customer Name

Address

P.O. Number

Print Page Setup

Standard

Custom

Paper Size:

LETTER

Width

612

Height

792

Pixels

Orientation:

Portrait

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

Press/Run Size

Brought in Cost

0.00

Production Run

0

Requires (Parent Sheets)

0

Sheets Purchased

0

Copier

Digital B&W 8.5x11 / 8.5x14

Copier Speed (impressions/minute)

200.00

Out

1.00

Area

0.00

Per

1.00

Markup

2.00

Set Up Time	0:00		Cost	Mark Up	Price
Run Time	0:00	Stock	0.00	0.00	0.00
Wash up Time		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 a *Estimate/Invoice* 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 Estimate

Choose Account/Prospect/Contact: ✕ ▼ Contact Person: ▼

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 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

Item	Product	Description	Price	Qty	Sub Price	Total Price	Unit Price
> 1	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	- Self Publishing - Marketing Services	A Members Handbook (Rumbi

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

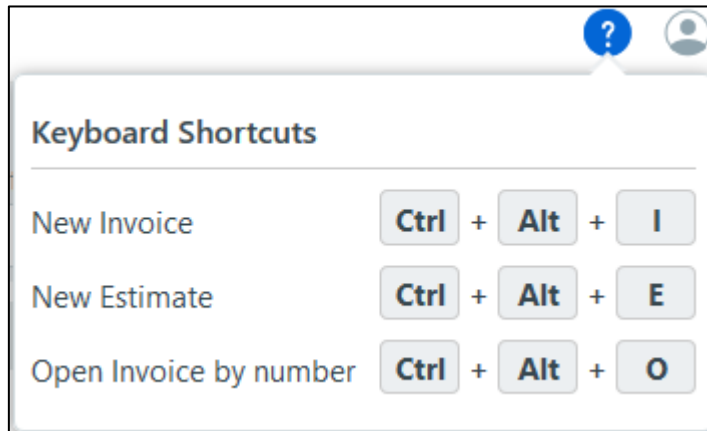
Also from this screen there are several short cuts options. They allow you to create an new estimate, create a new invoice, see your pending list, go to cash register, or if you administraive you can create an email template.

- Estimate
- Invoices
- Pending Documents
- Cash Register

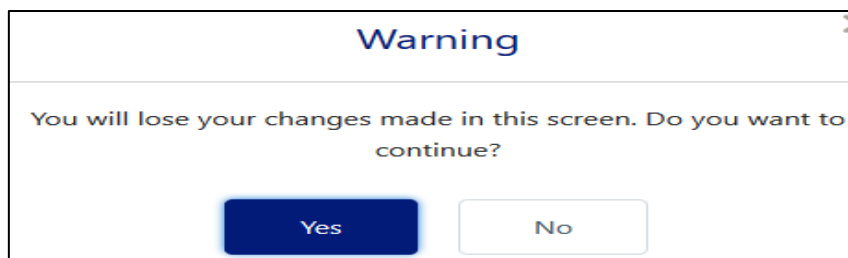
- Configuration
- Email Template

Selecting Email will take you to an email template. Email templates can only be created by users with administrative permission. When a user selects the option to email estimate it will use the previously set up template.

In addition to these shortcuts you also have keyboard shortcuts



New estimate or new invoice allows you to create a new estimate or invoice from the current one. If you have not saved this estimate you will get the warning message. This will take you back to the screen where you can select an account. When you select either of these options you will be taken to the original screen where you enter the account name.



From Templates

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

New Estimate

Choose Account/Prospect/Contact

EFI

×

▼

Contact Person

Doug Armour

▼

Create From

☐ Create New Job
 ☐ Account History
 ☐ Job Templates
 ☒ Templates

Templates (2)

Invoices

Estimates

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 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.

Account Information

Job Details

Invoice Summary

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

Estimate Summary

The screenshot shows the Estimate Summary interface. At the top right is a button labeled "Convert to Invoice". Below it is a row of icons: a plus/minus icon, a copy icon, a document icon, an envelope icon, and a printer icon. To the right of these icons is a dropdown menu labeled "Default Esti..." and a blue "Save" button. Below the icons is a table with the following columns: Price, Qty, Unit Price, Item Tax, and Item Total. The table contains one row with the following values: Price is "-", Qty is "10,000", Unit Price is "\$ 0.211", Item Tax is a toggle switch, and Item Total is "\$ 2,111.72".

Red arrows point from the icons to callout boxes below the interface:

- Plus/minus icon: Add Job, Add Charges
- Copy icon: Copy
- Document icon: Estimate Notes
- Envelope icon: Email Estimate
- Printer icon: Print Estimate

Adding Jobs or Charges to an Estimate

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

The screenshot shows the "Add Job" screen. At the top, there are two dropdown menus: "Choose Account/Prospect/Contact" (selected: Midway Printing) and "Contact Person" (selected: Todd Hinckley). Below these are radio buttons for "Create From": "Create New Job", "Account History Invoice" (selected), "Product Type Library", and "Invoice Template". Under "Account History (30)", there are tabs for "All Times", "This Month", "Last Month", "This Quarter", "This Year", "Last Year", and "Open Orders". Below the tabs is a table with the following columns: Posted On, Invoice #, Description, Total Cost, and Sales Rep. The table contains five rows of data:

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

At the bottom left, there are navigation buttons: "< 1 2 >". At the bottom right, it says "1 - 20 of 30 items".

See the information on adding a job starting on page 9. 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.

Invoice Title : B&W Digital's Charges

Add New Charge: ✕ Browse

Design

☒ Finished
 ☒ Taxable
 ☐ Brokered
 ☐ Display Quantity
 ☐ Hidden
 ☐ Hide Price

Description: ⓘ
 Production Location:

Notes: ⓘ Show Notes

Time Start: HH MM
 Time Stop: HH MM

Price:
 Tax Table:

Cancel Add Charge

	Price (\$)	
> Color Digital Proof 8.5 x 11	10.00	

Cancel Done

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 | | | | | | |

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,

Cancel Preview Send

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

Cancel Confirm

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.

+ v

Save

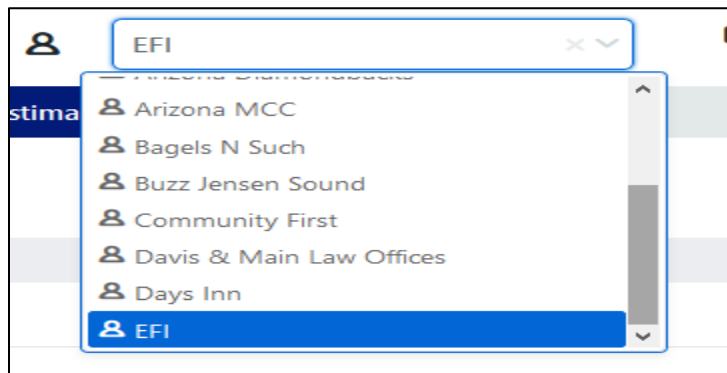
Qty	Unit Price ⓘ	Item
0	\$ 0.00	

Default CreditMemo
Default Estimate
Default Invoice
Final Receipt

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 page or Invoice/Summary page. The user must have permission to change an account.



One portion of the estimate summary screen is minimized by default

Source 1057	Estimate Date 21/03/2018 12:06 AM	Need Proof By []	Discount/MarkUp ⓘ \$ 0.00
▼ Special Instructions []	Deliver On 02/05/2018 12:00 AM	Reorder Date []	Net Sub \$ 2,111.72
> Sales Categories		File Originals	Shipping \$ 0.00
Resale #	Wanted By 02/05/2018 12:00 AM	PO#	Sales Tax (10.00%) ⓘ \$ 211.17
			Total \$ 2,322.89

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	☒	\$ 112.84

Source: 53308
Special Instructions
Credit Terms: Net 30 Days
Please Pay From This Invoice!

Invoice Date: 11/08/2017 9:47 PM
Need Proof By:
Re-order: ☒ File Originals
12/10/2025

Wanted By: ☒ Firm
Deliver On:
Ship via: FEDEX

Markup: \$ 5.64
Net Sub: \$ 118.48
Delivery: \$ 3.57
Tax (6.85%): \$ 0.00
Deposits (2): \$ 40.00

Sales Categories

- Digital B&W Printing - 68.84
- Bindery - 33.5
- Design - 10.5

Format:
Tax Exempt No: E90355
PO No:

Total Amount Due: \$ 122.05
\$ 82.05

Dates

Estimate Date
21/03/2018 12:06 AM

Need Proof By

Deliver On
02/05/2018 12:00 AM

Reorder Date ☒ File Originals

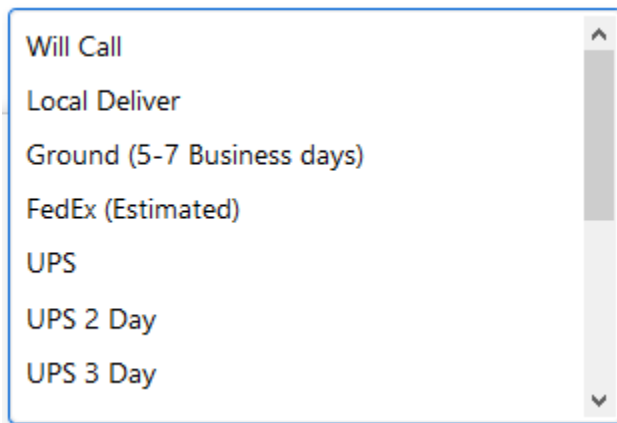
Wanted By ☒ Firm
02/05/2018 12:00 AM

Ship via

PO#

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	<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 %

0

Discount Amt

0

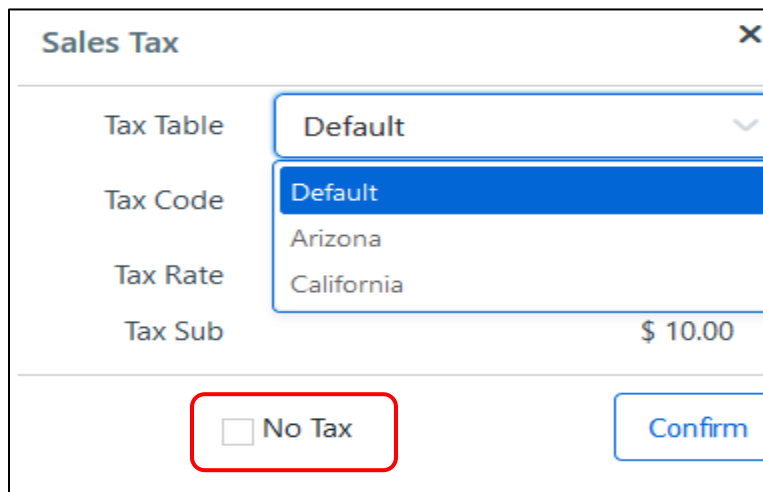
☐ Apply one-time discount

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 add a delivery fee.

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



The **Sales Tax** dialog box contains the following fields and options:

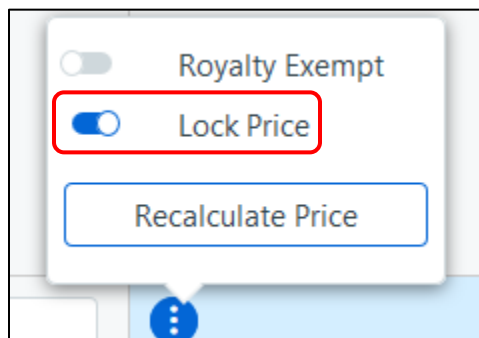
- Tax Table:** A dropdown menu currently set to **Default**.
- Tax Code:** A dropdown menu with **Default** selected, and other visible options are **Arizona** and **California**.
- Tax Rate:** A field currently displaying **\$ 10.00**.
- Tax Sub:** A field currently displaying **\$ 10.00**.
- No Tax:** A checkbox with the label **No Tax**, which is currently unchecked and highlighted with a red box.
- Confirm:** A button to confirm the selection.

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

You can also change the customers tax exemption status

Command line option

You can lock the price



The menu shows the following options:

- Royalty Exempt:** A toggle switch currently turned off.
- Lock Price:** A toggle switch currently turned on, highlighted with a red box.
- Recalculate Price:** A button to recalculate 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

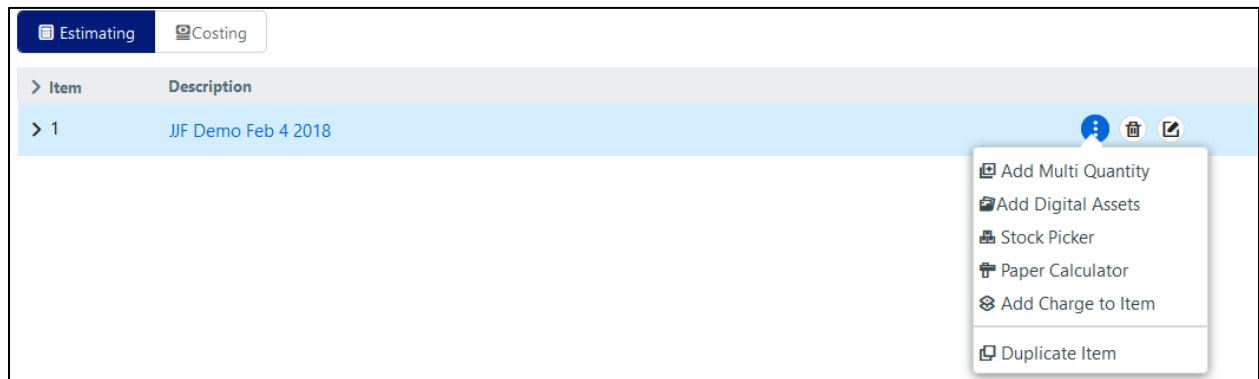
> Item	Product	Description
> 1	Self Publishing	 A Members Handbook (Rumbi)

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.

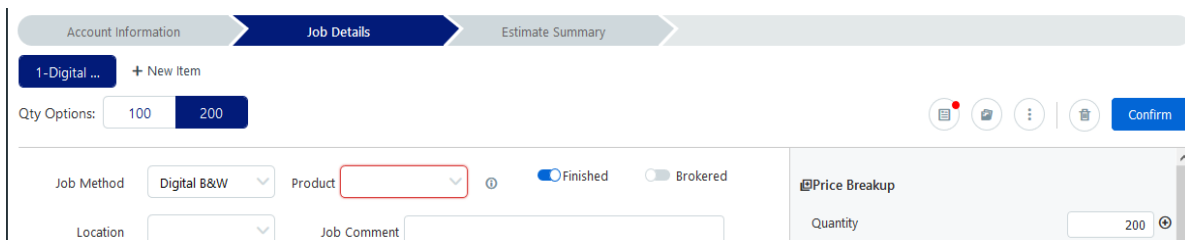
From each line item you have other options.



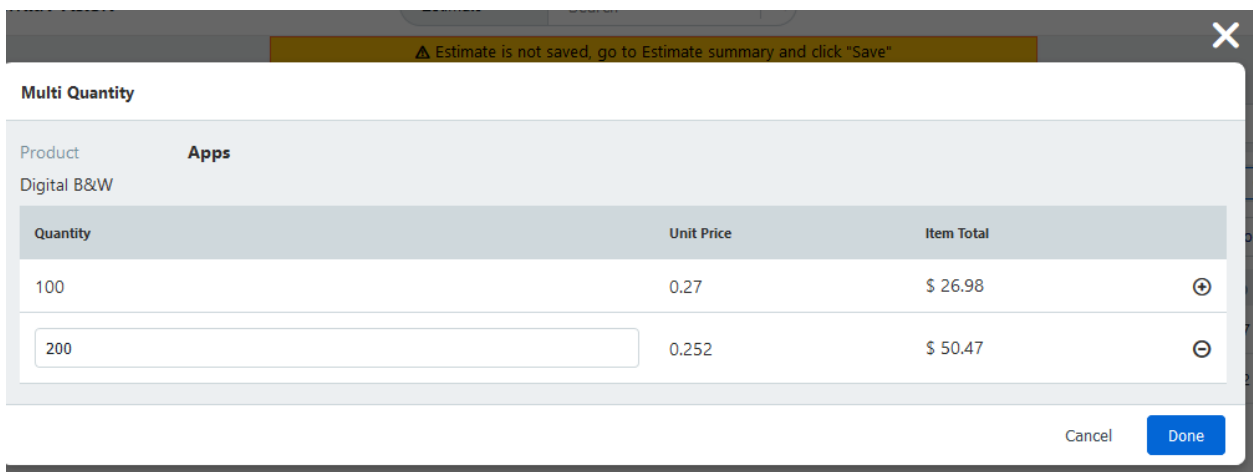
Specifying multiple quantities with different job specifications

If you want to specify more than three different 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**.



If you want you can Add or change the **Multi-qty**, you can achieve this even from the Estimate summary page. Click on **Add Multi-Quantity** from the command level item at each job. Below window would appear where you can add or change.



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	☒
\$ 0.045	☐
\$ 0.045	☐

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	<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>

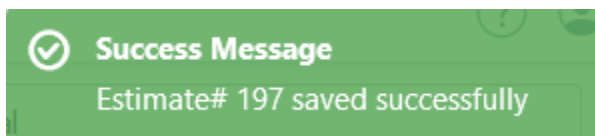
Saving an estimate

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.

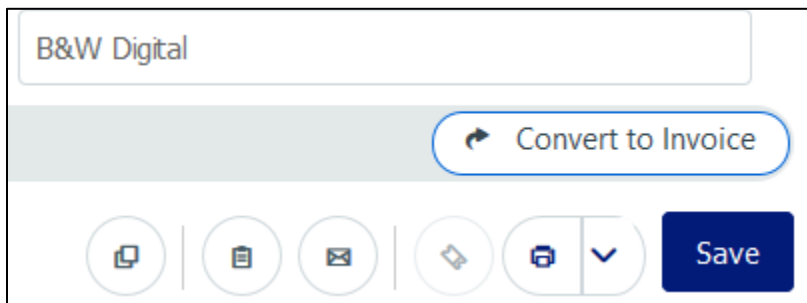
⚠ Estimate is not saved, go to Estimate summary and click "Save"

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.

The screenshot displays the 'Account Information' tab. At the top, there are three tabs: 'Account Information' (active), 'Job Details', and 'Invoice S'. Below the tabs, there are two status indicators: 'Account Status - Delinquent' and 'Account Type - Cash/Check/Credit Card'. A 'Contact Person' section is visible, featuring a dropdown menu with a list of contacts: Jim Chiaramonte, Doug Armour, Jim Chiaramonte (highlighted), Tim Daisy, AP Department, Steve DuPlessis, Guru Dutt, and Jack Fedor. To the right of the contact list, there is a partial view of another section showing 'EF', 'Or', '62', 'Ro', 'IL', 'US', and '60'.

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.

Edit contact

Contact Person

+

Contact List

Nichole Lehmann

▼

Nichole Lehmann

test@efi.com

801.255.3343 (Phone)

Contact Person

Contact*

Nichole

Lehmann

Email*

test@efi.com

Phone*

801.255.3343

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

Invoice Address	Delivery
Action Plumbing 7904 S. 1530 W. West Jordan UT 84088	☒ Same as Invoice ☐ Select from Contact List ☐ Other Action Plumbing 7904 S. 1530 W. West Jordan UT 84088

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

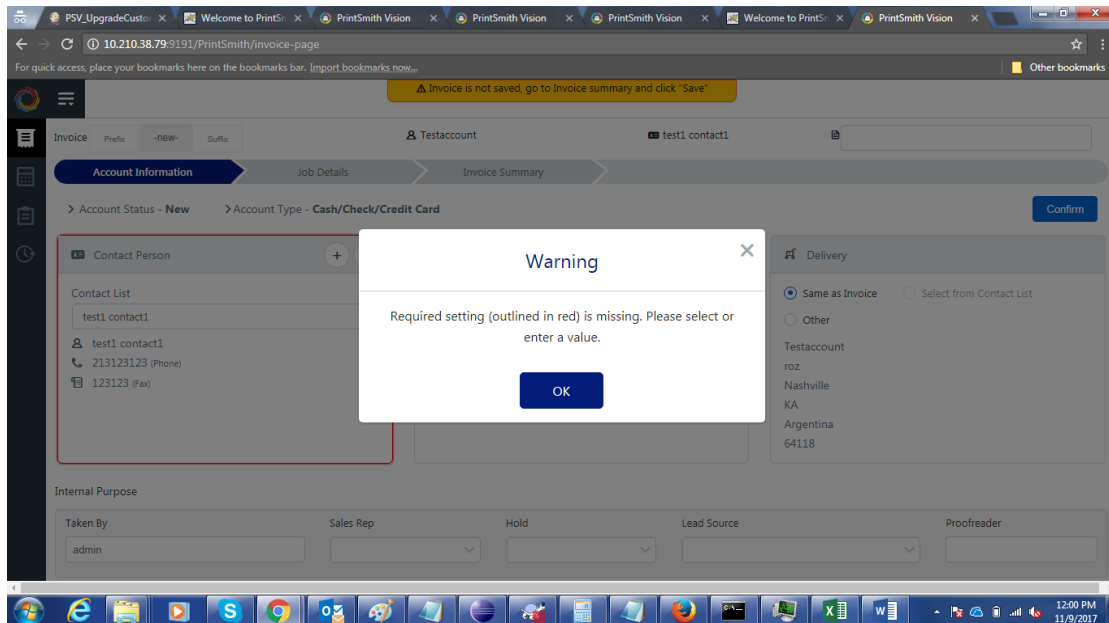
There is also some internal information that is needed for this invoice.

Internal Purpose				
Taken By	Sales Rep	Hold	Lead Source	Proofreader
admin	JH			

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.

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.

Allow search through

☒ Account + Contact - (Default) ☐ Prospects

Note: Add below Prefixes to search Customer based on:
Account No: "#: "; Phone No: "ph: "; Email: "e: ";

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.

Choose Customer

ad

Account - business → Adventure Travel

Account - Individual → Wade Link - EFI

Account - Individual → Chad Zuehlsdorff - EFI

Prospect → Bill Bradley - Toys R Us

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.

Posted On	Invoice #	Description
14/03/2018 7:33 pm	1061	Real Estate Flyers
22/02/2018 9:31 pm	1021	VDP Business Card - Lars Monahan bus card

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

If you select to create from a New job, you will need to select a job method. This will give you a job detail sheet specific to the job method you selected. In this example, the job method 'Digital B&W' was selected and here is the input screen for that job method.

As you complete the job information screen you will find features that will aid in selecting the paper, calculating paper and adding charges.

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

Type

▼ 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	0839-4009S	5318	0	0

Paper Calculator

This will help in determining the amount of parent sheets needed and the material cost.

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

Neither

☒ 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

Sheets Out 0

Grip Edge (Top/Bottom)

Grain Direction NEITHER

Swing/Combo Cut No

Size Out

Cuts: 2

Folio Edge (Top/Bottom)

Color Bar Size 0.25

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		☐ Use in future	
Stock Method	Sheet Stock	Vendor	
Stock#		☐ Default Metric	☐ Exclude from Web updates
Stock Type	Business Papers	Basic Size	17 x 22
Parent Size		Normal Run Size	
Color		Generic Color	
Weight	0	Thickness	0 Caliper
Finish		Grade	
Coated	☐ None ☐ 1 Sided ☐ 2 Sided		
Sheet/Carton	0	Carton Weight	0.00
Min. Order	0	☐ Charge for entire Order	M Weight 0.00
Cut/100	0	Min. Cut Chg.	0

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
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

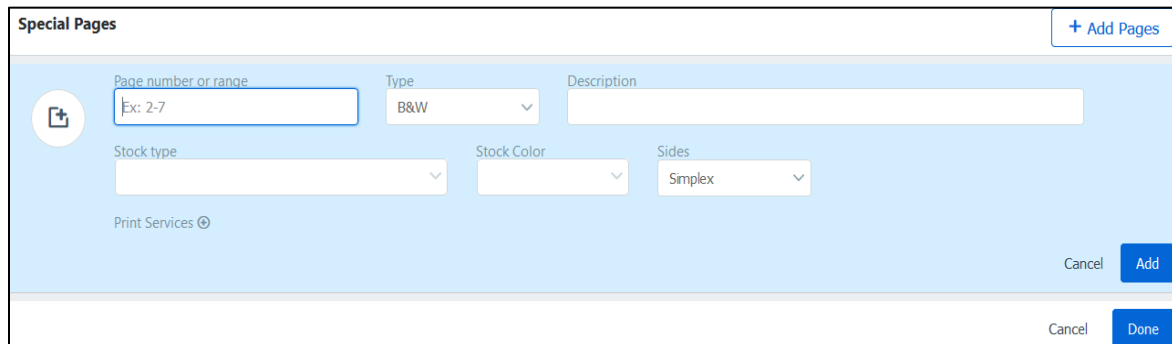
Price Expiry

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

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



The 'Special Pages' form is used to define special pages for a job. It includes a '+ Add Pages' button in the top right. The form fields are:

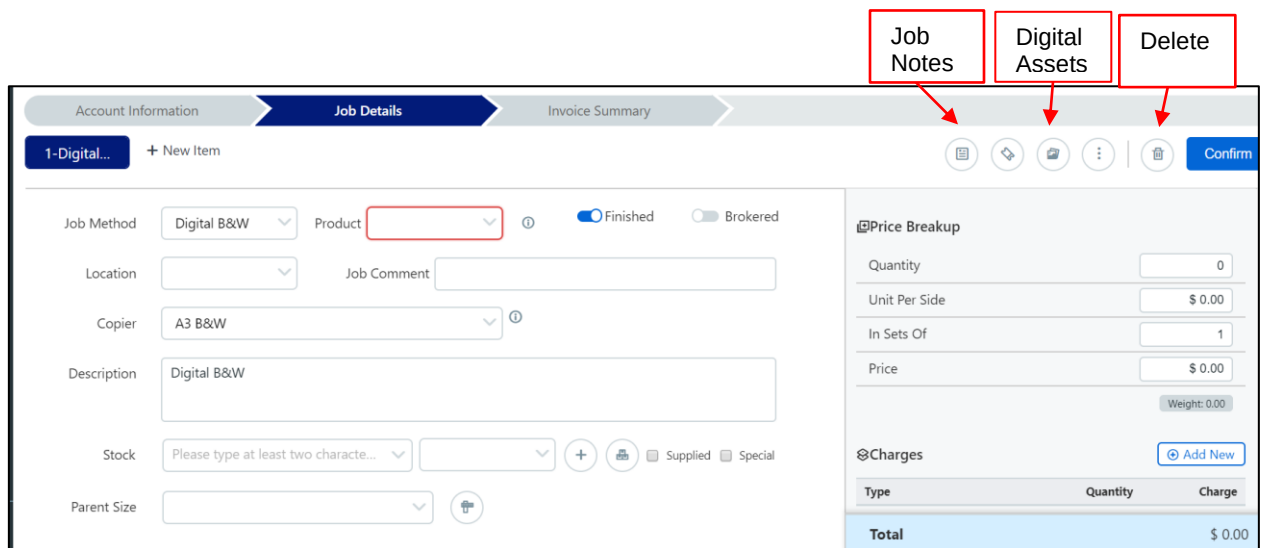
- Page number or range:** Text input with an example 'Ex: 2-7'.
- Type:** Dropdown menu with 'B&W' selected.
- Description:** Text input field.
- Stock type:** Dropdown menu.
- Stock Color:** Dropdown menu.
- Sides:** Dropdown menu with 'Simplex' selected.
- Print Services:** Link with a plus icon.

At the bottom right, there are 'Cancel' and 'Add' buttons. At the very bottom, there are 'Cancel' and 'Done' buttons.

Add Charges

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

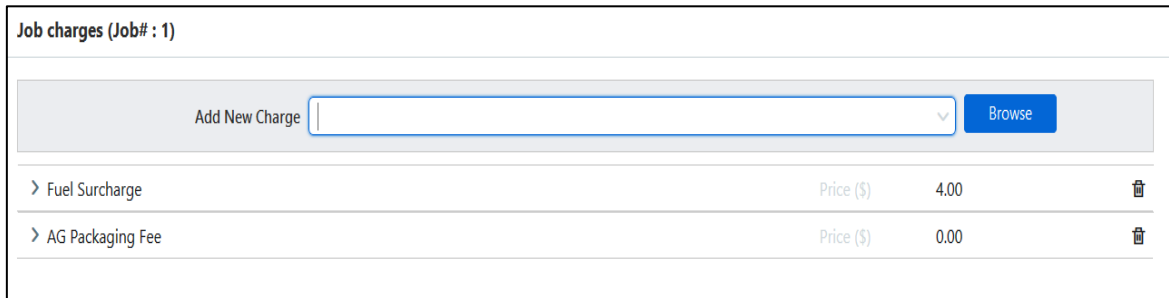
Note When you are adding charges or modifying any existing charges, make sure to click on **Confirm** button and **Done** button to save the charges to the Job.



The 'Job Details' page shows the configuration for a job. At the top, there are tabs for 'Account Information', 'Job Details' (active), and 'Invoice Summary'. Below the tabs, there is a '1-Digital...' button and a '+ New Item' button. The main form includes:

- Job Method:** Dropdown menu with 'Digital B&W' selected.
- Product:** Dropdown menu (highlighted with a red box).
- Location:** Dropdown menu.
- Copier:** Dropdown menu with 'A3 B&W' selected.
- Description:** Text input field with 'Digital B&W' entered.
- Stock:** Text input field with a placeholder 'Please type at least two characte...'.
- Parent Size:** Dropdown menu.
- Job Comment:** Text input field.
- Finished/Brokered:** Toggle switches.
- Supplied/Special:** Checkboxes.

On the right side, there is a 'Price Breakup' section with fields for Quantity, Unit Per Side, In Sets Of, and Price. Below that is a 'Charges' section with an 'Add New' button. At the bottom right, there is a 'Total' row showing '\$ 0.00'. Above the main form, there are three red boxes with arrows pointing to icons: 'Job Notes', 'Digital Assets', and 'Delete'.



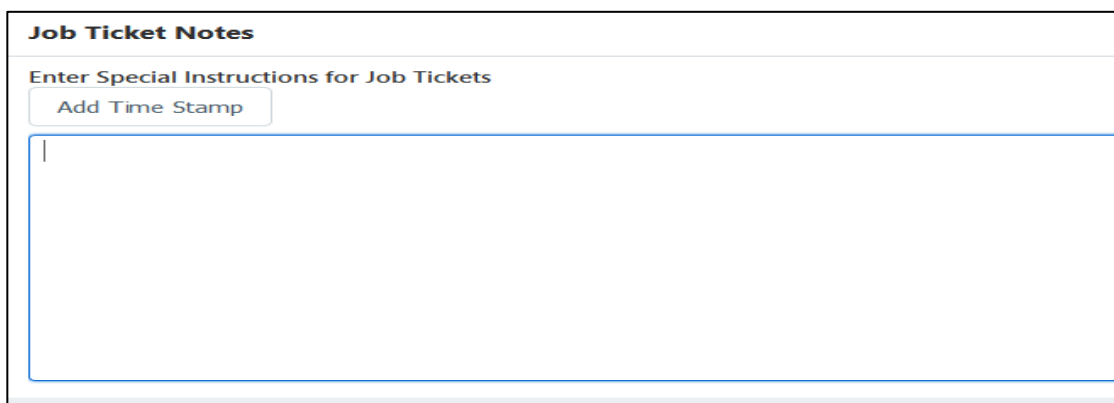
Job charges (Job# : 1)

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

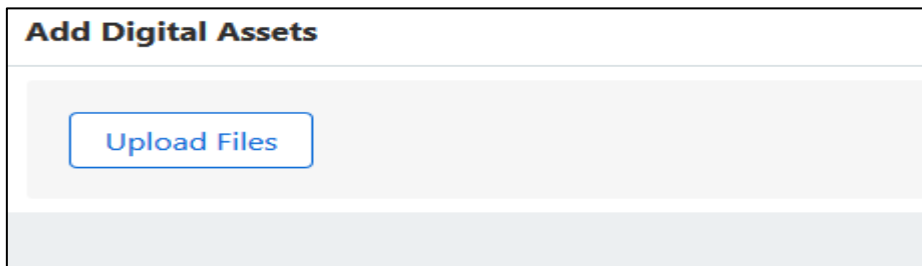


Job Ticket Notes

Enter Special Instructions for Job Tickets

Digital Assets

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



Add Digital Assets

Delete button

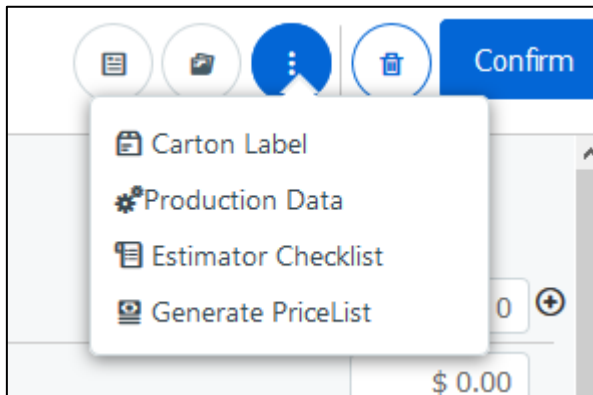
User can delete individual job from the job details page using Delete button

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

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

N0. Start to End

Label to Skip From

You can enter any text here you like.

Today's Date

End Date

Job Description

Invoice Reorder

Invoice Title

Estimated Weight

Attention Name

Customer Name

Address

P.O. Number

Print Page Setup

Standard

Custom

Paper Size:

LETTER

Width

612

Height

792

Pixels

Orientation:

Portrait

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

Press/Run Size

Brought in Cost

0.00

Production Run

0

Requires (Parent Sheets)

0

Sheets Purchased

0

Copier

Digital B&W 8.5x11 / 8.5x14

Copier Speed (impressions/minute)

200.00

Out

1.00

Area

0.00

Per

1.00

Markup

2.00

Set Up Time	0:00		Cost	Mark Up	Price
Run Time	0:00	Stock	0.00	0.00	0.00
Wash up Time		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 a *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:

Contact Person:

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 ...

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:

Contact Person:

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 Hinkley 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		A Members Handbook (Rumbi) - Cover copied on front side on customer stock, 5 inside pages copied on	-	100	\$ 0.942	☒	\$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	- Self Publishing - Marketing Services	A Members Handbook (Rumbi)

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
-	100

Also from this screen there are several short cuts options. They allow you to create an new estimate, create a new invoice, see your pending list, go to cash register, or if you administraive you can create an email template.

Estimate

Invoices

Pending Documents

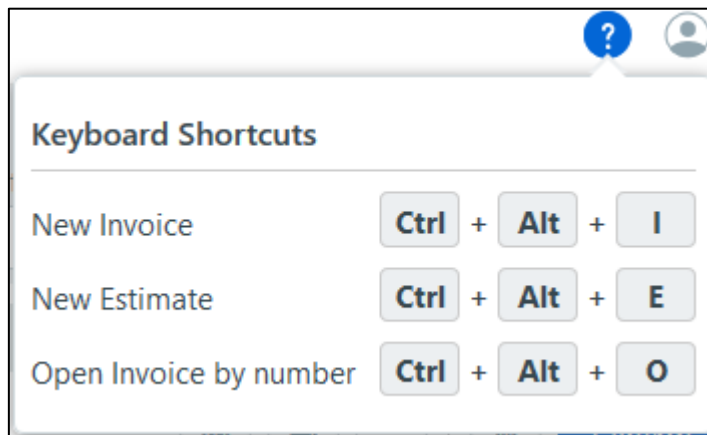
Cash Register

Configuration

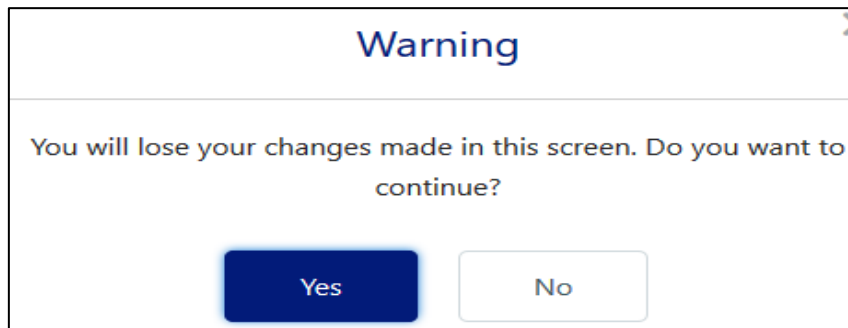
Email Template

Selecting Email will take you to an email template. Email templates can only be created by users with administrative permission. When a user selects the option to email estimate it will use the previously set up template.

In addition to these shortcuts you also have keyboard shortcuts



New invoice allows you to create a new invoice from the current one. If you have not saved this invoice you will get the warning message. This will take you back to the screen where you can select an account.



From Templates

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

New Invoice

Choose Account/Prospect/Contact: x v

Contact Person: v

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

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.

Account Information > Job Details > **Invoice Summary**

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

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.

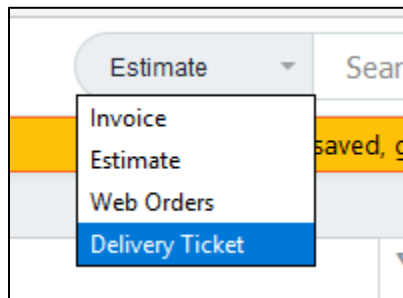
The screenshot shows the top of the Invoice Summary screen. A toolbar contains several icons: a plus sign with a checkmark, a copy icon, a list icon, an envelope icon, a printer icon, and a dropdown menu labeled 'Default Inv...'. A blue 'Save' button is on the right. Below the toolbar is a table with the following data:

Price	Qty	Unit Price	Item Tax	Item Total
-	10,000	\$ 0.211	☒	\$ 2,111.72

Red arrows point from the toolbar icons to labels in boxes below:

- Plus icon: Add Job, Add Charges
- Copy icon: Copy
- List icon: Invoice Notes
- Envelope icon: Email Invoice
- Printer icon: Print Job Ticket
- Dropdown icon: Print Invoice

You can search for a different estimate, invoice, web order or delivery ticket.



Adding Charges to Documents and Jobs

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: × ▼ Contact Person: ▼

Create From
☐ Create New Job ☒ Account History ☐ Job Templates ☐ Templates

Account History (546)
 Invoices Estimates All Times ▼

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 - 20 of 546 items

See the information on adding a job starting on page 9. 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.

When you highlight the item, you will see additional options. Some or the same options you have during job creation.

Prefix: 183 Suffix: Testaccount test1 contact1

Account Information Job Details **Invoice Summary**

Invoicing Costing Copy to New Invoice Add Free Style Item

Description	Price
B&W	-

Special Instructions

Invoice Date: 11/09/2017 12:00 PM Firm

Need Proof By Deliver On

- Add Digital Assets
- Stock Picker
- Paper Calculator
- Add Charge to Item
- Duplicate Item

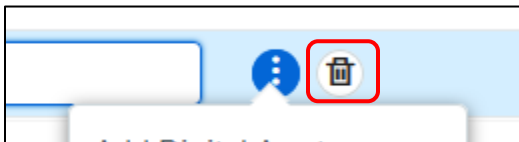
All of the features for an individual line work the same as for the entire invoice. There are other features that are included at the line level.

Duplicate Item

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

2	Self Publishing ▾	Letterhead	⋮	🗑️	-	5,000	\$ 0.045	🔵	\$ 225.00
3	Self Publishing ▾	Letterhead			-	5000	\$ 0.045	🔵	\$ 225.00

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

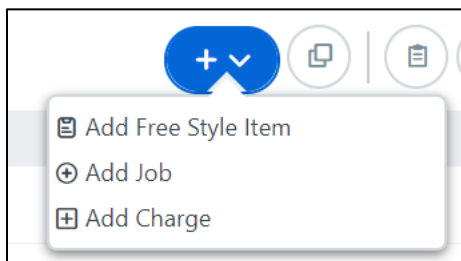


If the customer is taxable you can still identify which lines are to be taxed and which are not.

Unit Price ⓘ	Item Tax ⓘ
\$ 1.128	🔵
\$ 0.045	⚪
\$ 0.045	⚪

Free Style Job

Sometimes you may have a situation where there is a customer on site placing 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.

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

Item	Description	Quantity	Unit Price	Total Price	Actions
1	Brochure	100	\$ 0.88	\$ 87.88	Convert to Job
2	Business Card	500	\$ 0.16	\$ 80.00	Convert to Job

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 page, 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 | Product: Self Publishing | Status: **Finished** / Brokered

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.

One portion of the invoice summary screen is minimized by default

Section	Details	Amount
Source	1057	
Invoice Date	21/03/2018 12:23 AM	
Deliver On	02/05/2018 12:00 AM	
Need Proof By	04/05/2018	
Reorder Date	04/05/2018	
Ship via		
Wanted By	02/05/2018 12:00 AM	
PO#		
Discount/Markup		\$ 0.00
Net Sub		\$ 2,111.72
Shipping		\$ 0.00
Sales Tax (10.00%)		\$ 211.17
Deposits		\$ 0.00
Total		\$ 2,322.89

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

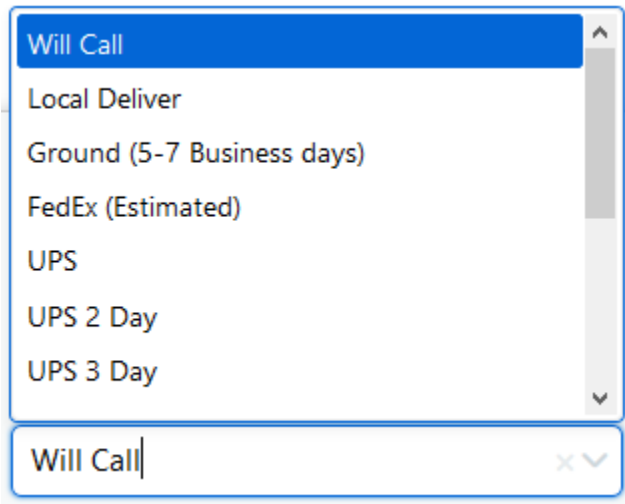
Final Receipt

Dates

Invoice Date	Need Proof By
21/03/2018 12:31 AM	
Deliver On	Reorder Date ☐ File Originals
02/05/2018 12:00 AM	15/05/2018
	Ship via
	Will Call x v

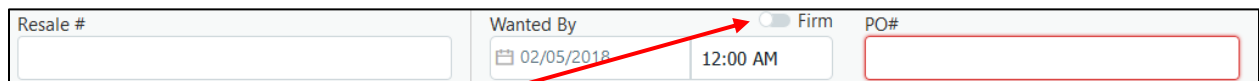
You can create a reorder date and set the instructions to file the originals

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

A screenshot of a shipping method dropdown menu. The menu is open, showing a list of options: "Will Call" (highlighted in blue), "Local Deliver", "Ground (5-7 Business days)", "FedEx (Estimated)", "UPS", "UPS 2 Day", and "UPS 3 Day". Below the list is a search bar containing the text "Will Call" and a close button (X) and a dropdown arrow.

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#."

A screenshot of a form with three main sections. The first section is "Resale #" with a text input field. The second section is "Wanted By" with a date field showing "02/05/2018" and a time field showing "12:00 AM". The third section is "PO#" with a text input field. A red arrow points from the text "You can mark the due date as firm" to the "Firm" checkbox in the "Wanted By" section.

You can mark the due date as firm

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 %

0

Discount Amt

0

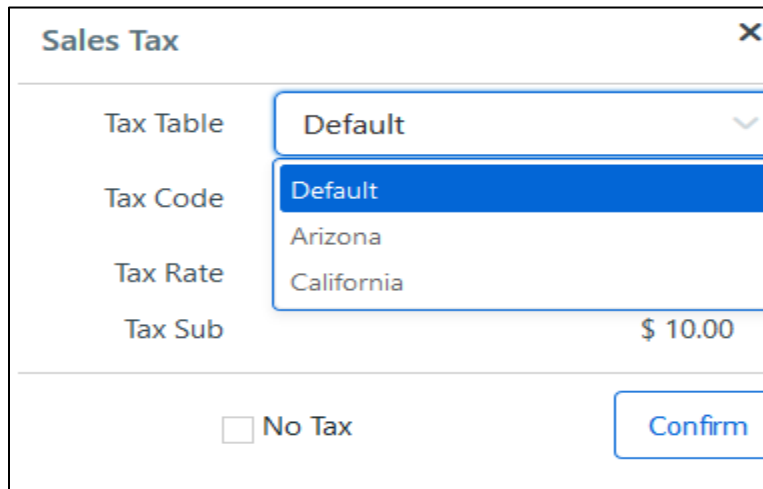
☐ Apply one-time discount

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 **Sales Tax** dialog box contains the following fields and controls:

Field	Value
Tax Table	Default
Tax Code	Default
Tax Rate	Arizona
Tax Sub	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

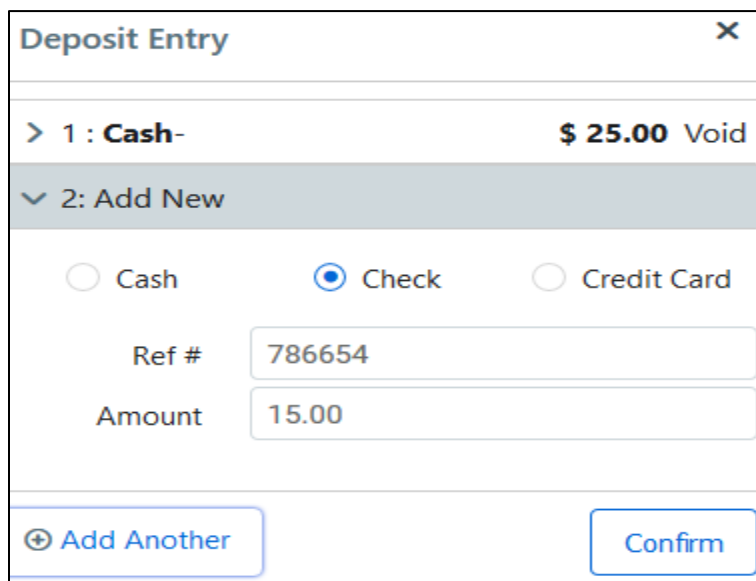


This section shows the tax calculation and deposit options:

Item	Amount
Tax (6.8%)	\$ 0.00
Deposits (+)	\$ 0.00

An **Add Deposits** button is located next to the Tax line.

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



The **Deposit Entry** dialog box contains the following fields and controls:

> 1 : Cash- \$ 25.00 Void

2: Add New

☐ Cash ☒ Check ☐ Credit Card

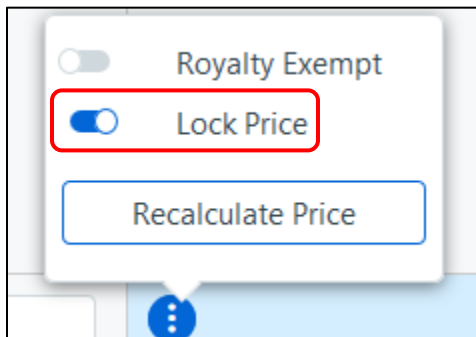
Ref # 786654

Amount 15.00

Buttons: **+ Add Another** and **Confirm**

Command line option

You can lock the 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	 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	
> 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

- When a document is open, On Invoice summary tab click on **Costing** button.
- 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

×

Warning

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

Ok

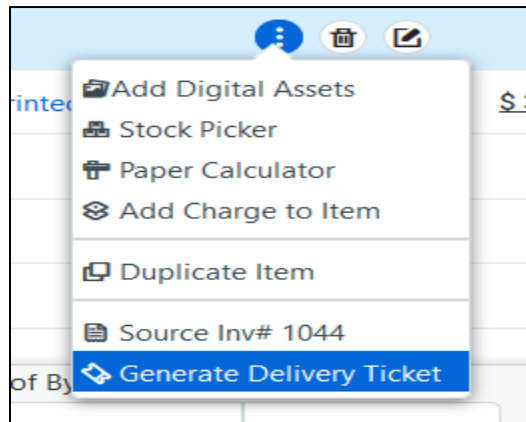
You will need to enter the customer's purchase order number before saving.

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
☐ Invoice# 1067 (2 Items)						
☒ 1	Digital Copies_Color2Sided - Nov Release	Not Shipped		1000	1000	210
☐ 2	BC 2 sided 4col	Not Shipped	Bindery Boxing Complete Cutting - Finished Sheets Cutting - Parent Sheets Design Large Format Finishing		500	0.00

You can also enter the shipping information

Ship via
Will Call

Total Weight (lbs)
210

Delivery Date
01/05/2018

Cost
0.00

Allow COD Payment

Tracking ID

Driver

Customer PO #

Order #
1067

Part #

Reference

Comments

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

New

Full Pack...

Label

Save

Weight

Ship via
Will Call

Standard Form

Full Packing Slip Form

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

Estimate

Search

Invoice

Estimate

Web Orders

Delivery Ticket

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
☐ Invoice# 1067 (2 Items)				☐ Mark as Shipped		
☒ 1	Digital Copies_Color2Sided - Nov Release	Not Shipped		1000	1000	210
☐ 2	BC 2 sided 4col	Not Shipped	Bindery Boxing Complete Cutting - Finished Sheets Cutting - Parent Sheets Design Large Format Finishing		500	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
☐ Invoice# 211 (2 Items)				☐ Mark as Shipped		
☒ 1	Brochure - Brochure	Not Shipped		50	50	0.5
☐ 2	NPP-Mug - NPP-Mug	Not Shipped		50	50	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.

Note Pad

Who

Phone

What

How Many What Size

Paper

☐ Show Note Pad when document opens

Notes

Number of Characters: 0

When

Cancel Confirm

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.

The screenshot displays the 'Account Information' tab in the PrintSmith Vision software. The interface includes a navigation bar at the top with three tabs: 'Account Information' (which is the active tab), 'Job Details', and 'Invoice S'. Below the navigation bar, there are two status indicators: 'Account Status - Delinquent' and 'Account Type - Cash/Check/Credit Card'. A 'Contact Person' section is visible, featuring a dropdown menu with a list of contacts: Jim Chiamonte, Doug Armour, Jim Chiamonte (highlighted), Tim Daisy, AP Department, Steve DuPlessis, Guru Dutt, and Jack Fedor. To the right of the contact list, there is a vertical list of account details including 'EF', 'Or', '62', 'Ro', 'IL', 'US', and '60'.

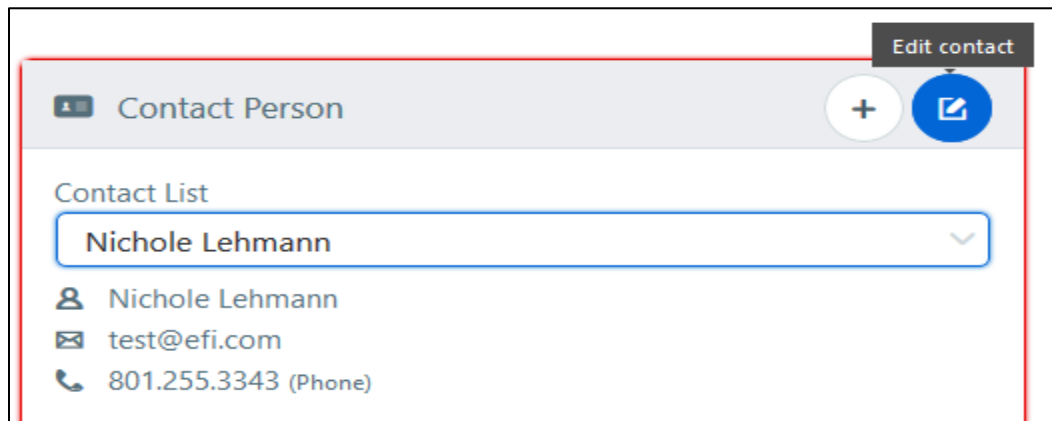
Account Status and Type

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.



This screenshot shows a summary view of a contact person. At the top right is an "Edit contact" button. Below the header "Contact Person" are two icons: a plus sign and a blue icon with a pencil. A "Contact List" dropdown menu is open, showing "Nichole Lehmann" as the selected contact. Below the dropdown, the contact's details are listed: a person icon, the name "Nichole Lehmann", an email icon, "test@efi.com", and a phone icon, "801.255.3343 (Phone)".

Edit contact

Contact Person

+

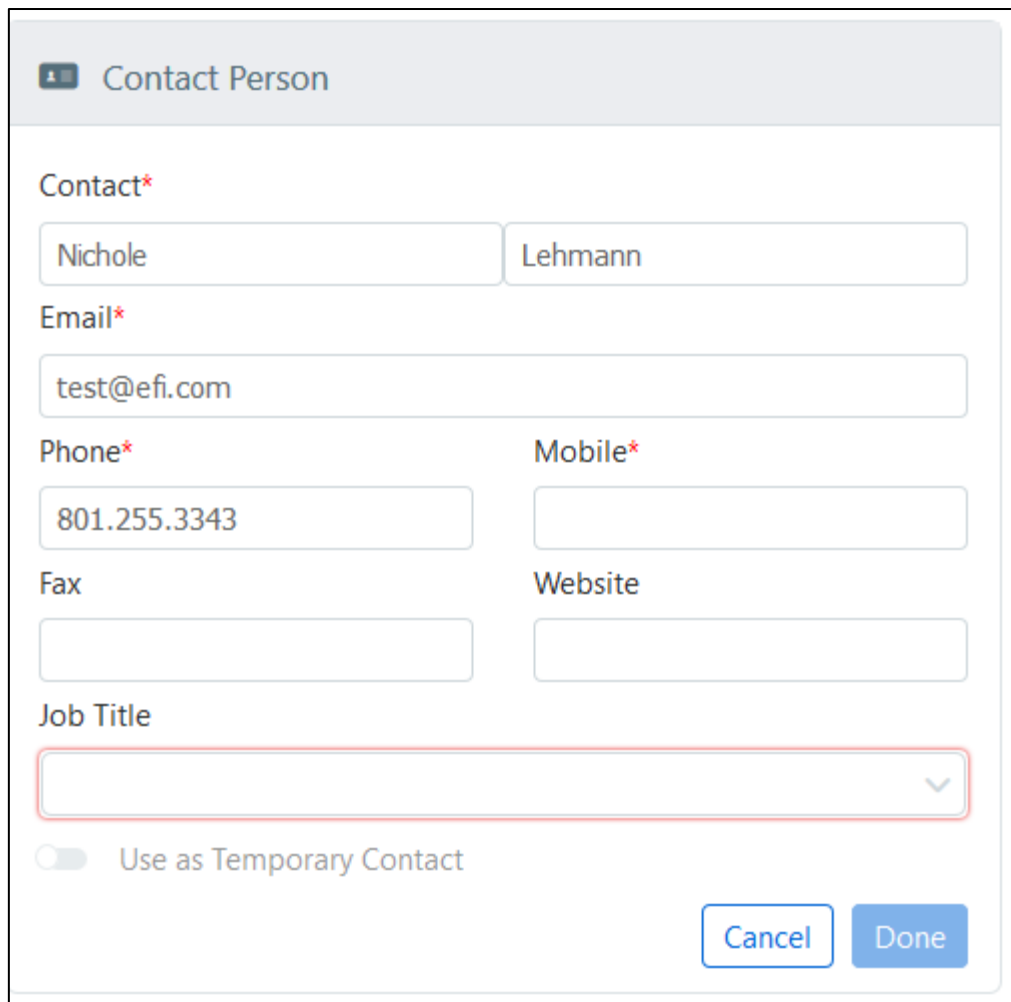
Contact List

Nichole Lehmann

Nichole Lehmann

test@efi.com

801.255.3343 (Phone)



This screenshot shows the edit form for a contact person. The header "Contact Person" is at the top. The form contains several fields: "Contact*" with two sub-fields for "Nichole" and "Lehmann"; "Email*" with the value "test@efi.com"; "Phone*" with "801.255.3343"; "Mobile*" (empty); "Fax" (empty); "Website" (empty); and "Job Title" with a dropdown menu. At the bottom left is a toggle switch for "Use as Temporary Contact". At the bottom right are "Cancel" and "Done" buttons.

Contact Person

Contact*

Nichole Lehmann

Email*

test@efi.com

Phone*

801.255.3343

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

Invoice Address	Delivery
Action Plumbing 7904 S. 1530 W. West Jordan UT 84088	☒ Same as Invoice ☐ Select from Contact List ☐ Other Action Plumbing 7904 S. 1530 W. West Jordan UT 84088

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

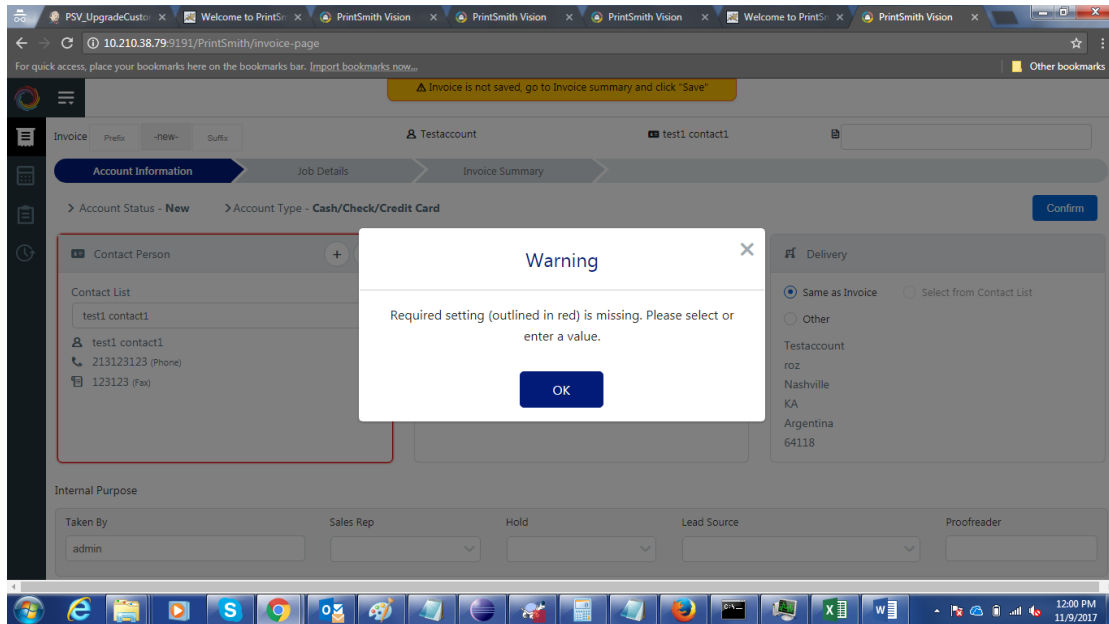
There is also some internal information that is needed for this invoice.

Internal Purpose				
Taken By	Sales Rep	Hold	Lead Source	Proofreader
admin	JH			

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.

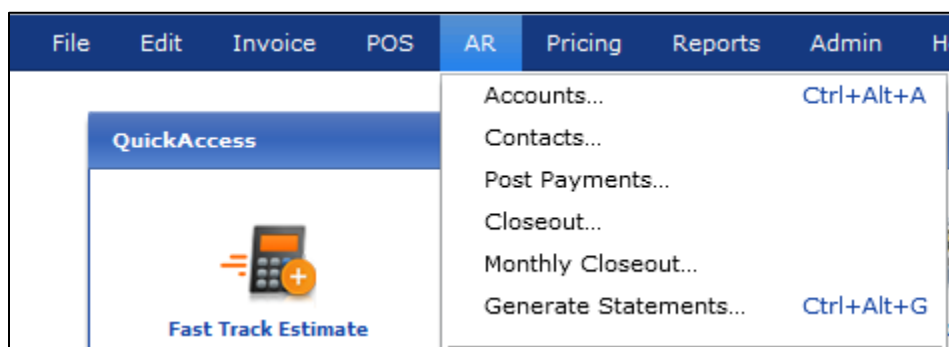
Cash Register

Cash Register

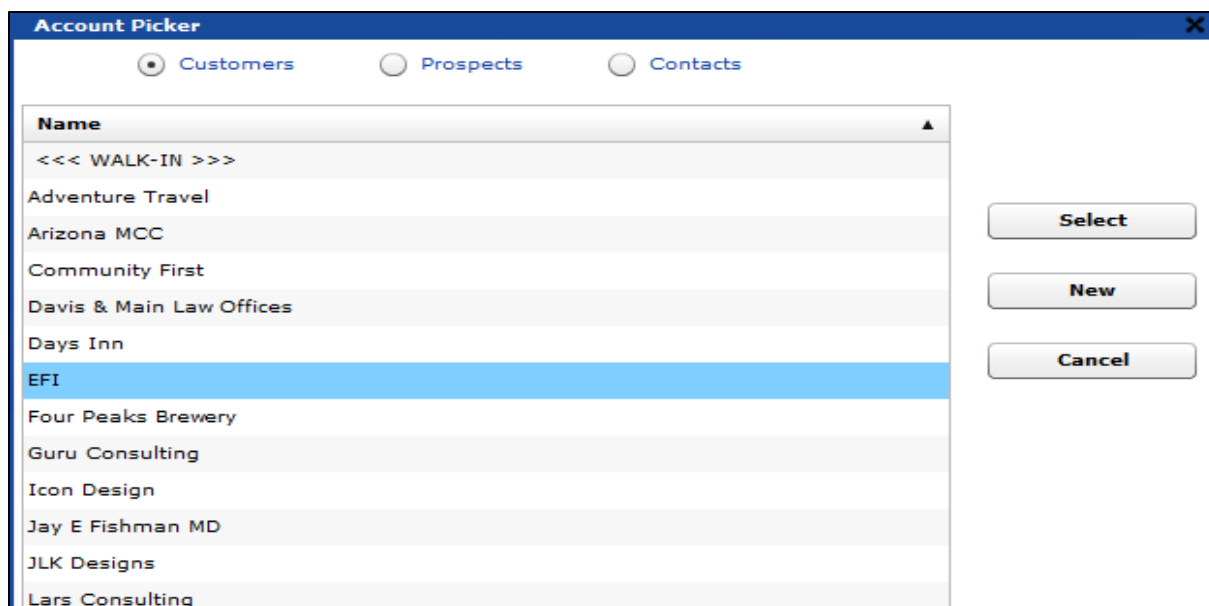
Settings

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

Payment Method

Cash ☒ Credit Card

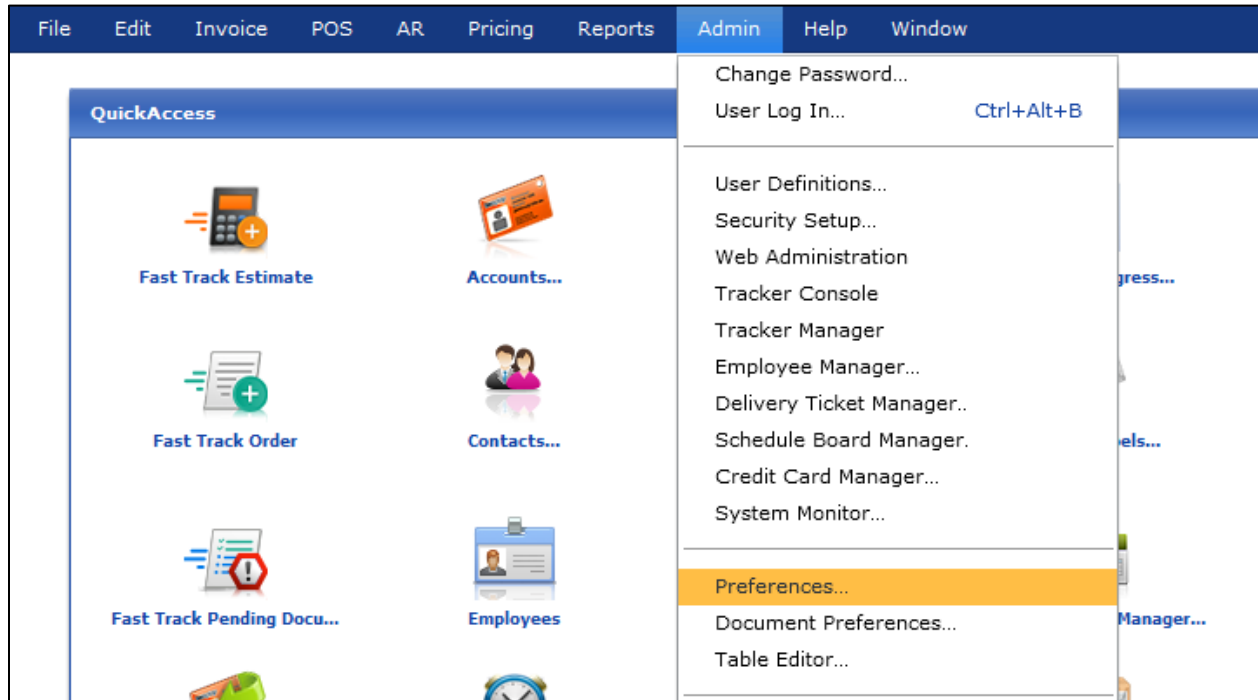
Charge ☐ Check ☐

Amount Paying \$ 0.00

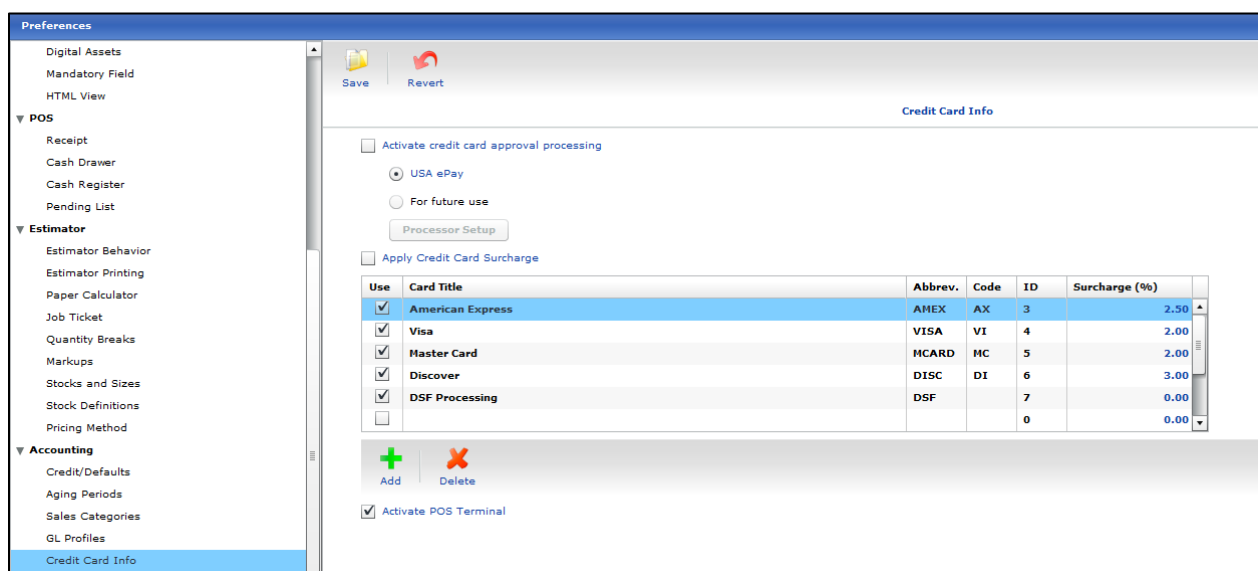
Receive Payment Proceed

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.

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
☒ 1049	VDP Business Card - BC-XeroxPrep_01	4/24/2018	Dave	858-829-2429	\$ 217.78
☒ 1060	VDP Business Card - BC-XeroxPrep03_JP	3/27/2018	Dave	858-829-2429	\$ 393.96
☐ 1061	Real Estate Flyers	3/27/2018	Neil	863-207-9142	\$ 200.89
☐ 1058	VDP Business Card - BC-XeroxPrep_01	3/26/2018	Dave	858-829-2429	\$ 240.72
☐ 1047	efi es	3/23/2018	Neil	863-207-9142	\$ 2,786.36
☐ 1054	Digital Copies_Color2Sided - Nov Release	3/23/2018	Dave	480-538-5865	\$ 5,828.94
☒ 1057	JIF Demo Feb 4 2018	3/16/2018	Bill	480-538-5865	\$ 2,322.89
☐ 1056	Digital Copies_Color2Sided - Nov Release	3/13/2018	Dave	480-538-5865	\$ 1,207.58
☐ 1059	B&W Digital	3/8/2018	Neil	863-207-9142	\$ 2.75
☐ 1041	Color Digital	3/7/2018	Neil	863-207-9142	\$ 49.50
☐ 1030	Digital Copies_Color2Sided - Connect Brochure	2/23/2018	Dave	480-538-5865	\$ 94.93
☐ 1003	T-Shirt, Blue, Large - T-Shirt, Blue, Large	2/23/2018	Dave	480-538-5865	\$ 1,114.30
☐ 1039	VDP Business Card - Inside Sales	2/2/2018	Dave	480-538-5865	\$ 123.00
☐ 1021	VDP Business Card - Lars Monohan bus card	1/31/2018	Dave	818-242-3563	\$ 128.51
☐ 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

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.

PrintSmith Vision

Cash Register > Pickup Invoice# 1049, 1060, 1057

Customer: EFI

Add Invoices

Enter Invoice#

Department Item

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

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

Transaction Details

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

Payment History

Payment Received	\$ 0.00
Change	\$ 0.00

Payment Method

Cash

Credit Card

Charge

Check

Check #

2277654

Amount Paying

\$ 2,934.63

Receive Payment

Proceed

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.

✓

Last transaction payment received

Transaction Total **\$ 2,934.63**

Payment Received **\$ 2,934.63**

Change **\$ 0.00**

Receipt Print

Print Format

E-Mail Invoice

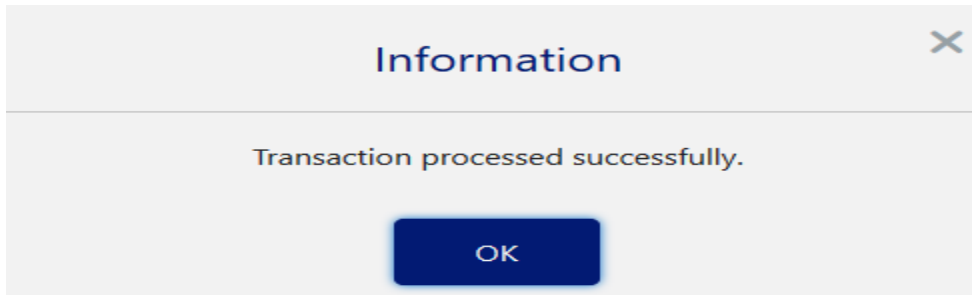
Microsoft XPS Document Wri...

Default Invoice

Cancel

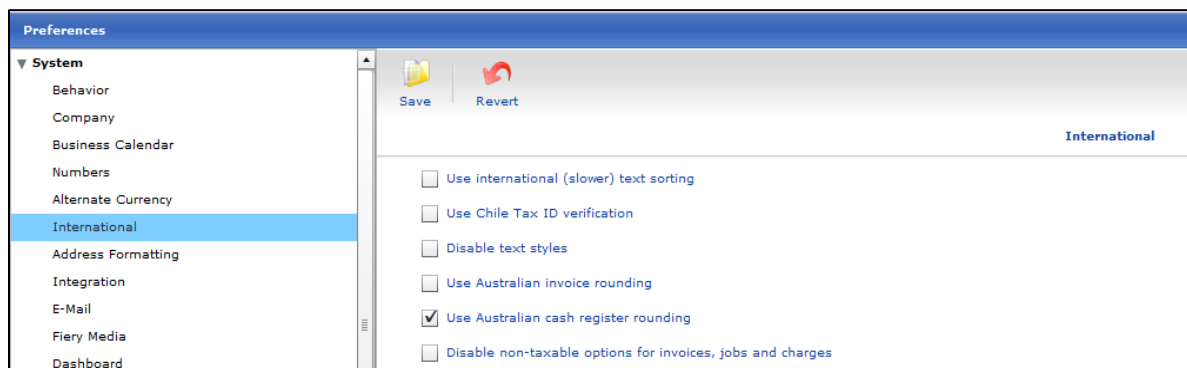
Post

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.

Sales Tax		Item Total		Transaction Details	
☒	\$ 8.63		\$ 94.93	Sub-Total	\$ 86.30
				Tax (Default)	\$ 8.63
				Rounding	\$ 0.00
				Total Cost	\$ 94.93
Payment History					
				Payment Received	\$ 0.00
				Change	\$ 0.00
Amount Paying \$ 94.93 Receive Payment				Proceed	

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

Sales Tax ☒ \$ 8.63 Item Total \$ 94.93		Transaction Details <table><tr><td>Sub-Total</td><td>\$ 86.30</td></tr><tr><td>Tax (Default)</td><td>\$ 8.63</td></tr><tr><td>Rounding</td><td>\$ 0.02</td></tr></table> Total Cost \$ 94.95 Payment History <table><tr><td>Payment Received</td><td>\$ 0.00</td></tr><tr><td>Change</td><td>\$ 0.00</td></tr></table> Proceed		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												
Amount Paying \$ 94.95 Receive Payment													

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 merchants account page and make the payment. You will get a reference number or approval number that is then entered in Cash Register.

Payment Method

Cash Credit Card Charge Check

Generic American Express Visa Master Card Discover DSF Processing

Ref #

Amount Paying \$ 747.77

Receive Payment

☐ Apply Surcharge

Warning

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

OK

Charge Accounts

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

Payment Method

Cash Credit Card Charge Check

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	PO # 1111	Sales Tax ☒ \$ 66.29	Item Total \$ 747.77
Digital Copies_Color2Sided - Brochure			
☐ Department	Qty	Sales Tax ☒ \$ 0.00	Item Total \$ 0.00
SS Copy Color Fax Rec Fax Send Other Merch 1 Merch 2	Unit Price \$ 0.00	Tax Code	Tax Table Default
			Cancel Add

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: EFI	Add Invoices	Enter Invoice#	Department Item		
☐ Invoice # 1028	PO # 1111	Sales Tax ☒ \$ 66.29	Item Total \$ 747.77	Account Type Cash/Check/Credit Card Status Delinquent	
Digital Copies_Color2Sided - Brochure				Transaction Details	
☐ Department	Qty	Sales Tax ☒ \$ 3.60	Item Total \$ 39.60	Sub-Total	\$ 717.48
Merch 1	3			Tax (Default)	\$ 69.89
Description	Unit Price	Tax Code	Tax Table	Rounding	\$ 0.00
Merch 1	\$ 12.00		Default	Total Cost	\$ 787.37
				Payment History	

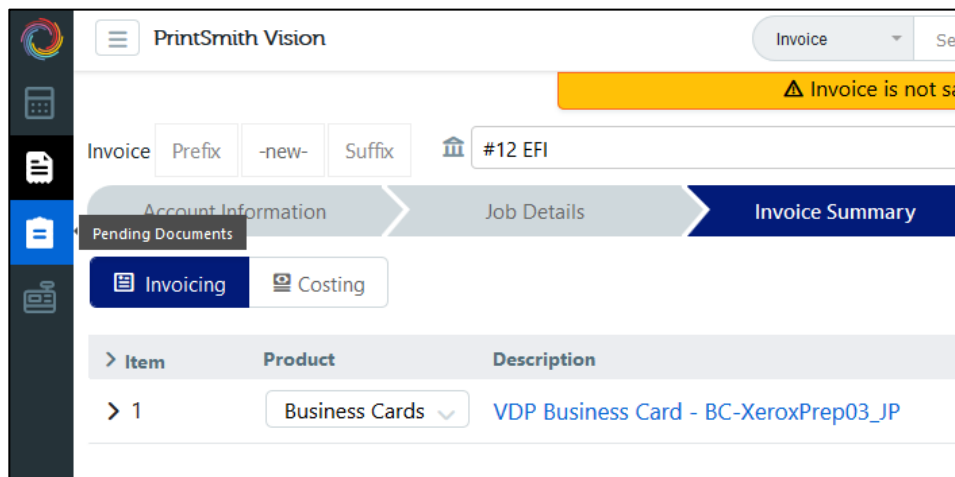
Pending Documents

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

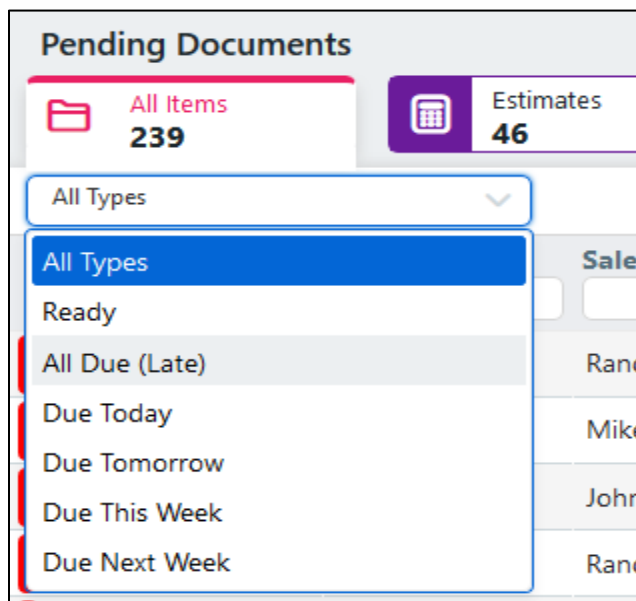
Job Count	Sales Rep	Account	Document Title	Wanted Date	Location	Hold	Web Reference	Document No.	Job Comment	Phone
1	Randy	Jay E Fishman ...	Counter POP Sign	11/5/2017				132		602-555-9020
1	Mike	Icon Design	Storefront Banner	11/10/2017				135		602-555-9523
1	John	Community First	Property Brochu...	11/10/2017				136		602-555-2055
1	Randy	Jay E Fishman ...	Direct Mailer (Le...	11/10/2017				137		602-555-9020
1	Bill	JLK Designs	Business Form	11/10/2017				138		
1	Mike	Pinnacle Financi...	Counter POP Sign	11/10/2017				139		602-555-9315
1	Sharon	Adventure Travel	Business form 1...	11/10/2017				141		602-785-0818
1	Sharon	Four Peaks Brew...	Pocket Folders	11/27/2017	Bindery			142		602-538-6243
1	EFI		Storefront Banner	11/24/2017				143		813-477-6775

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.

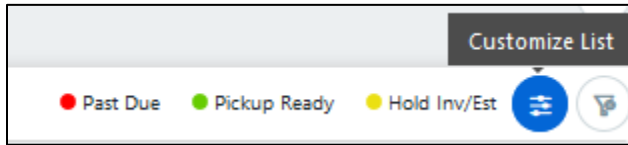
Tip The number of web orders is included in the total number of invoices.

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.



Customize List

☒ Account
☒ Document No
☒ Document Title
☒ Location
☐ Type
☒ Phone
☒ Wanted Date
☒ Job Comment
☐ Proof Date
☐ Taken By
☒ Sales Rep
☒ Job Count
☒ Hold
☒ Web Reference

No. of Days of Estimates to Display
 ALL

☐ Enable automatic refresh of Pending Documents

State Indicator ⓘ
☒ Color Item background

Past due Inv/Est #ff0000
 Pickup Ready Invoices #66cc00
 Hold Inv/Est #ebe012

Cancel Apply

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.

Pending Documents

All Items

239

Estimates

46

Invoices

193

Web Orders

144

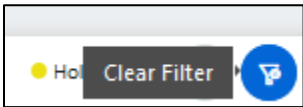
All Types

		Job Count	Sales Rep	Account	Document Title	Wanted Date	Location	Hold
☐						Select From Dat		
☒	>	☐	:	4	<NO NAME>	BC Card	3/12/2018	
☒	>	☐	:	1	<NO NAME>	Outside Services	3/6/2018	
☒	>	☐	:	6	12345	Kit	3/12/2018	
☒	>	☐	:	1	Sharon	Adventure Travel	Business form 1...	11/10/2017
☒	>	☐	:	1	Sharon	Adventure Travel	Color Digital	12/19/2017
							Running - Co...	

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

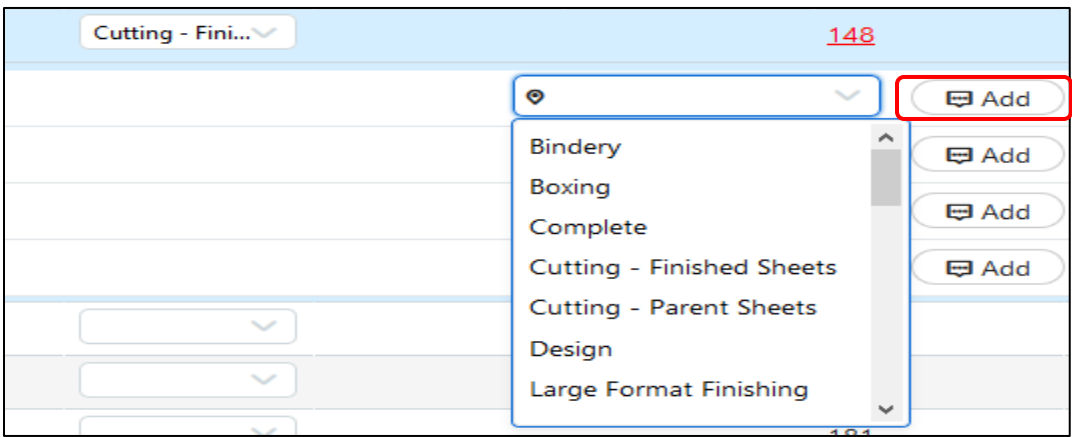
You can clear all filters



You can access the job contained in an invoice or estimate by selecting the >

	>		:	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						\$ 500 \$ 35.33
2					Color Digital						\$ 1500 \$ 86.75
3					Color Digital						\$ 5000 \$ 226.48
4					Color Digital						\$ 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

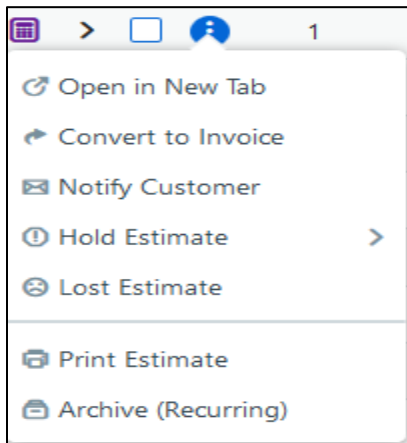


	>		:	Rock Quarry	702	Survey Form	10/31/2017
	>		:	NeonTechnolo...	703	Counter POP S...	10/26/2017
	>		:	Jay E Fishman ...	704	Color Brochures	10/20/2017

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



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

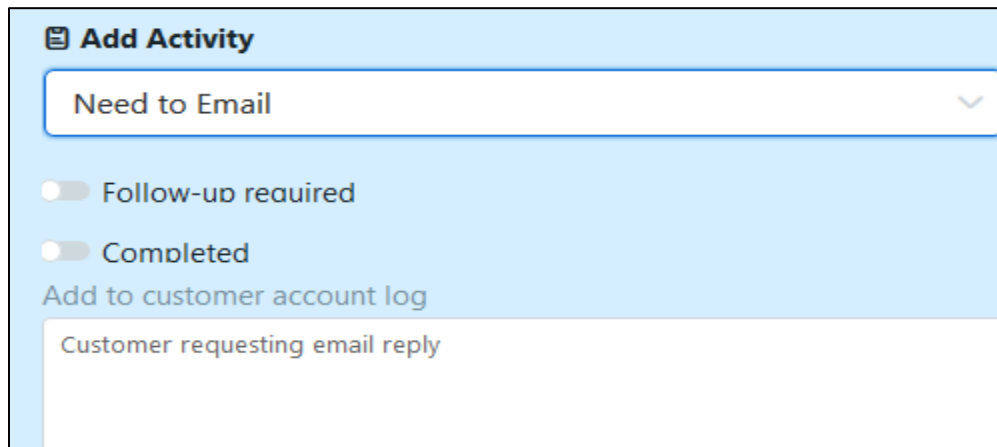
Convert to Invoice will convert the estimate to an invoice and take you to the invoice screen.

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

A screenshot of the 'Notify Customer' form. The form has a header 'Notify Customer'. Below the header, it shows 'Estimate# 191' and 'Account Arizona MCC'. There is a section for 'Tom Hahn' with an email address 'tom.hahn@ef...'. Below this, there are sections for 'FOLLOW-UP (0)' and 'ACTIVITY (0)'. On the right side of the form, there is a section titled 'Add Activity' with a dropdown menu, two radio buttons labeled 'Follow-up required' and 'Completed', and a checkbox labeled 'Add to customer account log'. Below these options is a large text area for adding a note.

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

A screenshot of the 'Add Activity' dropdown menu. The menu is open, showing a list of pre-defined activities: 'Customer Visit', 'Inbound Call', 'Inbound Email', 'Need to Call', 'Need to Email', and 'Outbound Sales Call'. The 'Add Activity' header is at the top of the dropdown.



Add Activity

Need to Email

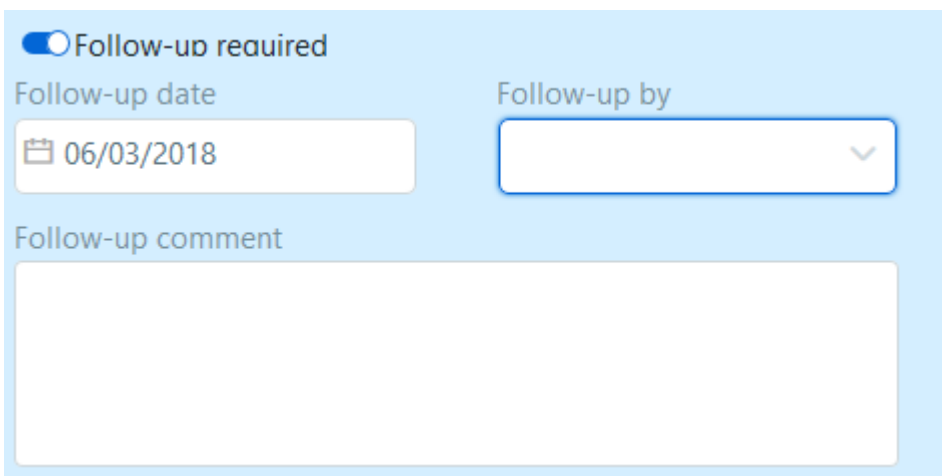
☐ Follow-up required

☐ Completed

Add to customer account log

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

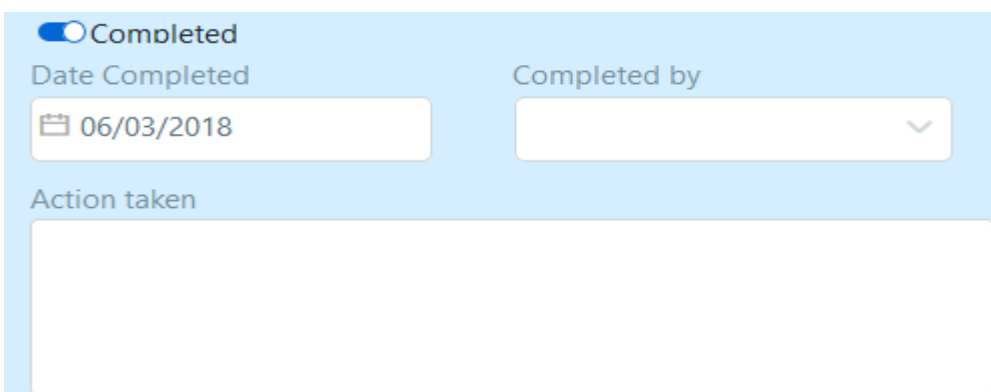
Follow-up date

06/03/2018

Follow-up by

Follow-up comment

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



☒ Completed

Date Completed

06/03/2018

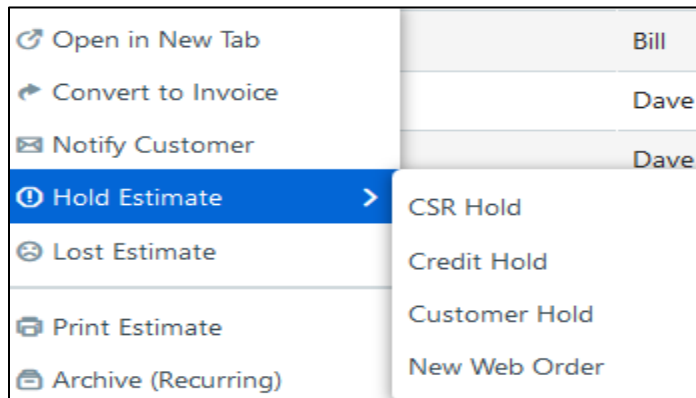
Completed by

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.



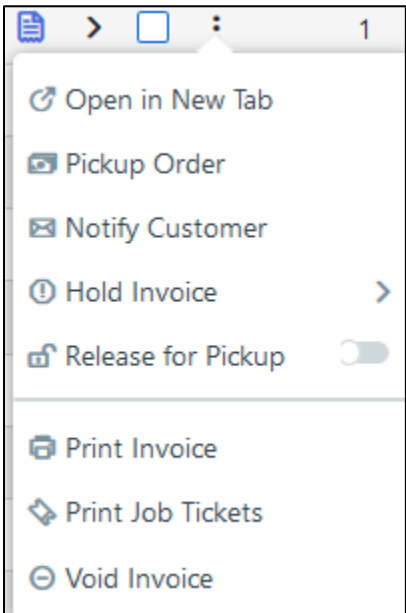
Lost estimate will allow you to identify the reason for the loss.

 A screenshot of a form titled 'Lost Estimate'. At the top, it shows a calendar icon followed by the number '184' and the text 'Take-out Menu'. Below this, there are two tabs: 'Lost' (which is active and highlighted in dark blue) and 'Neutral'. Under the 'Lost' tab, there is a list of radio button options: 'Too Expensive', 'Could not meet customer requirements', 'Quote received too late', 'For Budgeting Purposes', 'Testing Estimate', 'Job didn't go ahead', and 'Other reason'. Below the list of options is a large, empty white rectangular area for entering comments.

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.



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.

A screenshot of the 'Delivery Ticket' form. The form has a header section with 'Ticket# 522' and 'Title 250 VDP Business Card - Evan to EFI'. Below this is a table with columns: Product, Description, Location, Order Qty, Ship Qty, and Weight. The table contains one row for 'Invoice# 727 (1 Items)' with a sub-row for 'VDP Business Card - Evan' showing 'Shipping' status, '250' order quantity, '250' ship quantity, and '1.03' weight. To the right of the table is a 'Ship via' section with a dropdown menu. Below this are input fields for 'Total Weight (lbs)' (1.03), 'Delivery Date' (14/09/2017), 'Cost' (0.00), 'Tracking ID', 'Driver', 'Customer PO #' (333222), 'Order #' (727), 'Part #', 'Reference', and 'Comments'. A 'Save' button is in the top right corner. A red box highlights the 'Ticket' and 'Label' buttons in the top right corner.

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

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