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

<table>
<thead>
<tr>
<th></th>
<th>Web Site:</th>
<th>US Phone:</th>
<th>UK Phone:</th>
<th>EU Phone:</th>
<th>E-Mail:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><a href="https://customer.efi.com/support">https://customer.efi.com/support</a></td>
<td>1.855.EFI.4HLP</td>
<td>+44 (0) 800.783.2737</td>
<td>+49.2102.745.4500</td>
<td><a href="mailto:Printsmith.support@efi.com">Printsmith.support@efi.com</a></td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th></th>
<th>US Phone:</th>
<th>US Fax:</th>
<th>US E-Mail:</th>
<th>Outside US E-Mail:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>651.365.5321</td>
<td>651.365.5334</td>
<td><a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a></td>
<td><a href="mailto:EMEAProfessionalServicesOperations@efi.com">EMEAProfessionalServicesOperations@efi.com</a></td>
</tr>
</tbody>
</table>

 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

<table>
<thead>
<tr>
<th>OS</th>
<th>Browser</th>
<th>Browser Version</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10 Professional</td>
<td>Google chrome</td>
<td>Version 65.0.3325.181 (64 bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>Windows 2008 R2 Standard</td>
<td>Mozilla</td>
<td>59.02 (64-bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>Windows 2008 R2 Standard</td>
<td>Microsoft Edge</td>
<td>40</td>
<td>Certified</td>
</tr>
<tr>
<td>Mac OS 10.13 (High Sierra)</td>
<td>Safari</td>
<td>11.0 (13604.5.6)</td>
<td>Certified</td>
</tr>
<tr>
<td>Mac OS 10.13 (High Sierra)</td>
<td>Chrome</td>
<td>Version 65.0.3325.181 (64 bit)</td>
<td>Certified</td>
</tr>
<tr>
<td>iOS 11.0.3 (15a432) iPad</td>
<td>Safari</td>
<td>11.0 (13604.1)</td>
<td>Certified</td>
</tr>
<tr>
<td>iOS 11.0.3 (15a432) iPad</td>
<td>Chrome</td>
<td>62.0.3202.60</td>
<td>Certified</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>Stock Name</th>
<th>Weight</th>
<th>Size</th>
<th>Color</th>
<th>Generic C.</th>
<th>Finish</th>
<th>Grade</th>
<th>CWT</th>
<th>Vendor</th>
<th>Stock Nu.</th>
<th>Produ...</th>
<th>Qty o...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yangard Window #10</td>
<td>24</td>
<td>9.3 x 4...</td>
<td>White</td>
<td>White</td>
<td>0</td>
<td>272.74</td>
<td>Ingram</td>
<td>3460</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Yangard #10</td>
<td>24</td>
<td>9.3 x 4...</td>
<td>White</td>
<td>White</td>
<td>0</td>
<td>233.65</td>
<td>Ingram</td>
<td>3437</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Yangard #10</td>
<td>24</td>
<td>9.3 x 4...</td>
<td>White</td>
<td>White</td>
<td>0</td>
<td>142.76</td>
<td>Ingram</td>
<td>3454</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Valley Forge Parchm C... 60</td>
<td>6.5 x 93</td>
<td>Soft Iris</td>
<td>Pink</td>
<td>0</td>
<td>259.34</td>
<td>Xerox</td>
<td>0839-40090</td>
<td>5321</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Valley Forge Parchm C... 60</td>
<td>6.5 x 93</td>
<td>Sterling Sil...</td>
<td>Gray</td>
<td>0</td>
<td>259.34</td>
<td>Xerox</td>
<td>0839-40095</td>
<td>5318</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**Paper Calculator**

This will help in determining the amount of parent sheets needed and the material cost.
**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 Order Screen](image)

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

![Cost Information Screen](image)

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

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.
Job Notes

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

Digital Assets

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

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.
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.
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.

<table>
<thead>
<tr>
<th>Items List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Description</strong></td>
</tr>
<tr>
<td>Digital B&amp;W</td>
</tr>
<tr>
<td>Berts Electric Co.</td>
</tr>
<tr>
<td>Andrea Stumpf</td>
</tr>
<tr>
<td>Document Number</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td>Press Definition</td>
</tr>
<tr>
<td>Digital B&amp;W 8.5x11 / 8.5x14</td>
</tr>
<tr>
<td>Machine Name</td>
</tr>
<tr>
<td>OCE</td>
</tr>
</tbody>
</table>

Price List

Once the detail is entered you can create a price list.

<table>
<thead>
<tr>
<th>Off Set Printing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stock</td>
</tr>
<tr>
<td>Finish Size</td>
</tr>
<tr>
<td>Press</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Special Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre Press Charges</td>
</tr>
<tr>
<td>Production</td>
</tr>
<tr>
<td>Bindery</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Qty</th>
<th>Price</th>
<th>Price per Each</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>25.81</td>
<td>0.2580</td>
</tr>
<tr>
<td>150</td>
<td>27.17</td>
<td>0.1811</td>
</tr>
<tr>
<td>200</td>
<td>28.36</td>
<td>0.1420</td>
</tr>
<tr>
<td>250</td>
<td>29.87</td>
<td>0.1190</td>
</tr>
<tr>
<td>300</td>
<td>32.33</td>
<td>0.1080</td>
</tr>
<tr>
<td>350</td>
<td>34.69</td>
<td>0.0990</td>
</tr>
<tr>
<td>400</td>
<td>37.17</td>
<td>0.0930</td>
</tr>
</tbody>
</table>
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.

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.

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

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.

Also from this screen there are several short cut options. They allow you to create a new estimate, create a new invoice, see your pending list, go to cash register, or if you administrative you can create an 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 shortucts you also have keyboard shortcuts

```
<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Invoice</td>
<td>Ctrl + Alt + I</td>
</tr>
<tr>
<td>New Estimate</td>
<td>Ctrl + Alt + E</td>
</tr>
<tr>
<td>Open Invoice by number</td>
<td>Ctrl + Alt + O</td>
</tr>
</tbody>
</table>
```

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.

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

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

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.

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.
Estimating Notes

You can enter estimating notes

![Note Pad](image)

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.

![Print Estimate](image)

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.

**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.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Price</th>
<th>Qty</th>
<th>Unit Price</th>
<th>Item Tax</th>
<th>Item Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Self Publishing</td>
<td>$128</td>
<td>200</td>
<td>$1.28</td>
<td></td>
<td>$132.84</td>
</tr>
</tbody>
</table>

Dates

Estimate Date
21/03/2018 12:06 AM

Need Proof By

Deliver On
02/05/2018 12:00 AM

Reorder Date

Ship via

Wanted By
02/05/2016 12:00 AM

File Originals

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.
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)

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Sub</td>
<td>$112.84</td>
</tr>
<tr>
<td>Delivery</td>
<td>$0.00</td>
</tr>
<tr>
<td>Tax (6.85%)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Deposits</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

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.

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.
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

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

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-Qt 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.
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.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
<th>Price</th>
<th>Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital BW - New Patient Forms</td>
<td>$57.92</td>
<td>$57.92</td>
<td>$0.00</td>
<td>$130.00</td>
<td>$52.08</td>
</tr>
<tr>
<td>1. Service Surcharge</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>$4.00</td>
<td></td>
</tr>
<tr>
<td>2. AS Packaging Fee</td>
<td>$7.24</td>
<td>$7.24</td>
<td>$0.00</td>
<td>$11.44</td>
<td>$4.12</td>
</tr>
</tbody>
</table>

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.
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.
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.

Success Message
Estimate# 197 saved successfully

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

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

Account Status and Type

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

Contact

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

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

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

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.
Internal Information

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

<table>
<thead>
<tr>
<th>Internal Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taken By</td>
</tr>
<tr>
<td>admin</td>
</tr>
</tbody>
</table>

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.

![Warning Message](image)

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

Creating Invoices

Creating a New Invoice

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

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

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

You can identify the type of account by the symbol next to the name.
When you select the account, the program will automatically enter the default contact person. You can select a different contact by using the drop down.

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.

<table>
<thead>
<tr>
<th>Stock Picker</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group</strong></td>
</tr>
<tr>
<td><strong>Stocks (350)</strong></td>
</tr>
<tr>
<td><strong>Stock Name</strong></td>
</tr>
<tr>
<td>Yangard Window #10</td>
</tr>
<tr>
<td>Yangard #10</td>
</tr>
<tr>
<td>Yangard #10</td>
</tr>
<tr>
<td>Valley Forge Parchment C...</td>
</tr>
<tr>
<td>Valley Forge Parchment C...</td>
</tr>
</tbody>
</table>

Paper Calculator

This will help in determining the amount of parent sheets needed and the material cost.
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 Order Form Image]

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

![Cost Adjustments Image]

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

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

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

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.
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.
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.

Price List

Once the detail is entered you can create a price list.
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.

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.

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

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

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 adminstrative you can create an 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:

<table>
<thead>
<tr>
<th>Shortcut Description</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Invoice</td>
<td>Ctrl + Alt + I</td>
</tr>
<tr>
<td>New Estimate</td>
<td>Ctrl + Alt + E</td>
</tr>
<tr>
<td>Open Invoice by number</td>
<td>Ctrl + Alt + O</td>
</tr>
</tbody>
</table>

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.

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

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

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

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.
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.

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.

**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.

![Job Detail Screen]

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

On the job detail 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 and Status]

**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

![Invoice Summary Screen]

**Special Instructions**

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

![Special Instructions]

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

Dates
You can create a reorder date and set the instructions to file the originals.
You can select/update the shipping method here from dropdown.

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#.”

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)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount/MarkUp</td>
<td>$0.00</td>
</tr>
<tr>
<td>Net Sub</td>
<td>$112.84</td>
</tr>
<tr>
<td>Delivery</td>
<td>$0.00</td>
</tr>
<tr>
<td>Tax (6.85%)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Deposits</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

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**
  - Discount %
  - Discount Amt
  - **Apply one-time discount**

**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.
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:

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

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

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.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
<th>Price</th>
<th>Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital B&amp;W - New Patient Forms</td>
<td>$57.92</td>
<td>$57.92</td>
<td>$0.00</td>
<td>$110.00</td>
<td>$52.08</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital B&amp;W - Current Insurance Breakdown</td>
<td>$7.24</td>
<td>$7.24</td>
<td>$0.00</td>
<td>$11.44</td>
<td>$4.12</td>
</tr>
</tbody>
</table>

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
3. When a document is open, On Invoice summary tab click on Costing button.
4. Review the costs.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital B&amp;W - New Patient Forms</td>
<td>$57.92</td>
<td>$57.92</td>
<td>$0.00</td>
<td>$110.00</td>
</tr>
<tr>
<td>Fuel Surcharge</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$4.00</td>
</tr>
<tr>
<td>AG Packaging Fee</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$1.50</td>
</tr>
<tr>
<td>Digital B&amp;W - Current Insurance Breakdown</td>
<td>$7.24</td>
<td>$7.24</td>
<td>$0.00</td>
<td>$11.44</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Estimated</th>
<th>Actual</th>
<th>Difference</th>
<th>Price</th>
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<td>$110.00</td>
</tr>
<tr>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$4.00</td>
</tr>
<tr>
<td>AG Packaging Fee</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$1.50</td>
</tr>
<tr>
<td>Digital B&amp;W - Current Insurance Breakdown</td>
<td>$7.24</td>
<td>$7.24</td>
<td>$0.00</td>
<td>$11.44</td>
</tr>
</tbody>
</table>

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

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

You can search for a different delivery ticket through search option provided at top of the window.
When you search for a delivery ticket you will be taken to that ticket in pending documents.

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
<th>Ship Status</th>
<th>Location</th>
<th>Order Qty</th>
<th>Ship Qty</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice# 1067 (2 Items)</td>
<td>Digital Copy Color/Color - New Release</td>
<td>Not Shipped</td>
<td></td>
<td>1000</td>
<td>1000</td>
<td>220</td>
</tr>
<tr>
<td>1</td>
<td>Brochure - Brochure</td>
<td>Not Shipped</td>
<td></td>
<td>50</td>
<td>50</td>
<td>0.3</td>
</tr>
<tr>
<td>2</td>
<td>MDF-Mug - MDF-Mug</td>
<td>Not Shipped</td>
<td></td>
<td>50</td>
<td>50</td>
<td>0.3</td>
</tr>
</tbody>
</table>

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.
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.

2. Enter or modify information in the note fields: Who, Phone, What, How Many, What Size, Paper, Notes, and When. (When corresponds to the wanted by date.)

3. If you want the note pad to open automatically whenever you open the document, select the Show Note Pad when document opens check box.

4. Click OK.

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

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

Account Status and Type

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

Contact

You can use the drop down to select a different contact person or the plus sign to add a new Contact. If there is a Red box around the contact area that indicates that there is some missing information regarding that contact. That might be the job title which can be selected from a dropdown.
Invoice and Delivery Address

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

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.
Internal Information

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

<table>
<thead>
<tr>
<th>Taken By</th>
<th>Sales Rep</th>
<th>Hold</th>
<th>Lead Source</th>
<th>Proofreader</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin</td>
<td>JH</td>
<td>×</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

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.

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

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

Charge Accounts

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

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.
Pending Documents

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

Accessing the Pending Documents Window

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

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

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

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

You can filter further, regardless of the tab you are using, by selecting the TYPE dropdown.
Each user can determine which columns are displayed, number of days of estimates to display and the color indicator for invoices and estimates at different stages.

Each column can be sorted high to low or low to high by selecting it. Or if you are looking for a specific invoice/estimate you can just enter the information in the appropriate field.
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 >

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.

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
- Convert to Invoice
- Notify Customer
- Hold Estimate
- Lost Estimate
- Print Estimate
- Archive (Recurring)

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.

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

- Customer Visit
- Inbound Call
- Inbound Email
- Need to Call
- Need to Email
- Outbound Sales Call
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

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.

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.

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

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