Q. ***How do you charge a job that has color clicks on 1 side and black and white on side 2. Will it show the click cost to the right and can you edit that cost on the fly?***

A. The easiest way is to set up definitions called 4/1 Digital Copies. Then average the click cost in the definition.

Q. ***Can I use the scanners that we have to scan the job tickets to track orders in the shop?***

A. EFI pre-programs the scanners we sell for correct function. It's likely that 3rd party scanners won't work.

Q. ***What is the difference between using "add quantity" or, "duplicate item" and then change quantity?***

A. Add quantity is one job with multiple quantities and duplicate creates a completely new job. Both get the same results.

Q. ***In Classic/Legacy, the Paper Calculator is available from the Admin Tab independent from Estimate/Invoice;--Fast Track does not. For the future can the Paper Calculator be independent in Quick Access for independent paper calculations.***

A. The admin functionality has not yet been moved to Fast Track. That will come later this year.

Q. ***For future upgrades can we reorder the Job Methods. For example, we print Large Format and at this point we must scroll to get to Large Format, I'd like to move next to the Color Method.***

A. There is an enhancement request to make the pricing method order customizable.

Q. ***Back to the 25 up / 500 each of 4/ does it automatically waste the odd card as 4 doesn't divide into 25?***

A. Yes, it will leave one space blank.

Q. ***Do we still have the ability to compare estimates side by side? or estimate vs. previous order? HTML5 does not allow side by side comparisons.***

A. You would open each in a new tab and compare.

Q. ***Will we receive a video/audio document of this Webinar?***

A. Yes

Q. ***Can you drag a job and change the sequence of jobs within an estimate?***

A. Currently you can change the order of charges in a job but not the order of jobs on an invoice. That may change in the future.

Q. **Can you save at any time during the estimate, so it doesn't get lost by mistake?**

A. Yes, at any time you can go to Estimate Summary and save the document.

Q. ***In legacy I use multi qty set to zero, to put a line between jobs on my invoice. Looks better. How do I do that in Fast Track?***

A. You would add that option to the document format report so there is no need to use multi-quantity set to zero.

Q. ***How do I get to document preferences? Where is the menu that goes across the top in Legacy?***

A. The document formats are still in Legacy. Fast Track will no longer have menus. Everything will be icon driven.

Q. ***It would be so helpful if the windows in the estimator notepad where bigger. it's easy for someone to miss important info that is no visible in the small windows. I been saying that since classic.***

A. Will note

Q. ***I noticed that Ron had many of the options we are still waiting on in the Quick Access bar. When will we be able to get these options?***

A. You should have all the options I showed. You may want to call support to see why you don't have access.

Q. ***When will all the preferences from the legacy version be available in the fast track version?***

A. It will all be done by the end of the year.

Q. ***Can you add multiple charges at once, rather than adding them individually?***

A. No, charges need to be added one at a time. If you attach them to your definitions, they will all be added at once.

Q. ***How do we keep template pricing up to date as paper and other costs change?***

A. You don't need to as the program will ask you if you want to update pricing whenever you use a template.

Q. ***Once charges have been added, can you rearrange the order? For instance, if you missed a charge that should be toward the top, can it manually be moved upward?***

A. Yes, you can drag and drop charges in the order you want them.

Q. ***Did Ron "loose" the job by pressing the back button?***

A. No, I closed the whole window rather than closing the preview window I had open. You should not use the back button and use the one we have to go back to the previous screen.

Q. ***Will the search work if the word you search for is in the middle of the description? example "4/4 color gala invites", if I search for "gala" will the search still work?***

A. Yes, it will search the entire string.

Q. ***Does fast track report the same way as legacy? Would love for the vendor charge to be able to be reported against, or do we still need to buy reports module?***

A. No new reports have been added. You should get Report Manager to be able to use custom reports. We currently have a repository of over 1000 custom reports.

Q. ***Also, is everything that is built in Legacy from a pricing standpoint already there, or do I need to reload into Fastrack?***

A. Everything in Legacy is also in Fast Track. You will not need to re-enter any data.

Q. ***Will this be available to view in full, since I missed the first 10 minutes?***

A. Yes, you should have gotten a link to the recording.

Q. ***Any ETA on the reporting functions that are missing from FastTrack?***

A. Report Manager is part of the 4.6 release due out the end of the month.

Q. ***When adding charges, can you keep the list open and double click on them to add, instead of having to go back to each to add 1 at a time?***

A. Not currently but it is an enhancement request.

Q. ***When you add ""design"" does it multiply by the number of versions in our job?***

A. If you set up the design charge as job aware by sheets it will multiply by the number of original sheets.

Q. ***Are all these scenarios on the same estimate?***

A. Yes

Q. ***If you change from BW to Color in the inside pages, does it change the stock choice from BW to color, so all of the pages are on the same stock?***

A. The stock will remain the same. You will need to reselect it if you want it to be different.

Q. ***Can blank lines or spacers be added?***

A. They would need to be added to the document report. Support can help with that.

Q. ***You wouldn't do it in sets of 4?***

A. In sets of is for carbonless, pads, tabs, etc.

Q. ***How do I add cutting templates?***

A. Showing in the next webinar.

Q. ***I don't see anywhere that shows the total impressions of a particular job, which is helpful with multiple pages.***

A. You will find that under Imp/Run in the job details window.

Q. ***Are you able to re-order the charges of a job once they are selected? If you add a charge, but want it listed as second, not last in the order.***

A. Yes, you can drag and drop charges in the order you want them.

Q. ***Does Print Smith provide a cost per piece unit display?***

A. Yes, in the summary window it gives a unit price.

Q. ***Is it possible to keep the charges window open so you can quickly add multiple charges instead of needing to reopen the charges window for each charge?***

A. Not currently but it is an enhancement request.

Q. ***Can you disallow users from entering a value in Copies field. I think that will be an issue.***

A. Not currently but it is an enhancement request.

Q. ***Which part do you turn on so that quotes use the price matrix across a job adds the clicks from the cover and inside pages and provides the customer with better pricing as it uses price breaks?***

A. It is the Rate is Combined Copies check box in the Job Parts window.

Q. ***Where can we get resources on what is new in the Fast Track that has changed from the Legacy UI in order to streamline the transition from Legacy UI to Fast Track UI without being overwhelmed as the two are similar but present different user experiences.***

A. https://www.efi.com/marketing/productivity-software/downloads/printsmith-vision-installers/

Q. ***Fast Track seems good, but it's like someone just rearranged your house when you were gone?***

A. Changes were made to improve the workflow. Hopefully you will see that once you get used to the changes.

Q. ***Can you add 2 of the same quantity using different equipment for each?***

A. Yes, you can.

Q. ***Back to the 25 up / 500 each of 4/ does it automatically waste the odd card as 4 doesn't divide into 25?***

A. Yes, it does.

Q. ***Is there a way to select where the job is getting sent out to?***

A. Yes, you can select a vendor from the Supplier list.

Q. ***Once you add in all the charges, can you rearrange the order of the charges? For instance, if you forgot "cut to run" which should be toward the top, can that be added in and then manually moved upward?***

A. Yes, you can drag and drop charges in the order you want them.

Q. ***Is there a way to copy one single job from one document to another?***

A. Not currently but it is an enhancement request.

Q. ***I'd like to see the search for charges work the same as the customer search. not to have to type the exact charge.***

A. Yes, it is an enhancement request.

Q. ***Is the Fast Track system full HTML5?***

A. Not sure of the question but what has been changed is HTML5.

Q. ***How do you set a job as "outsourced"?***

A. When you are in the Job Details section of an invoice, there is a switch that will indicate If a job is being outsourced. Another option is to use a Pricing Method for Outside Services or Merchandise for your outsourced items.

Q. ***How can you view 2 invoices at the same time to compare?***

A. You can open multiple documents at the same time by using multiple tabs. Once you Have all of the invoices you want to compare open, you can click between the tabs to view each document.

Q. ***Can you create a delivery ticket for an invoice that has already been posted?***

A. Yes. To do this you would open up the invoice in Account History. In the Invoice Summary window, find the item you need the delivery ticket for. Then under the 3 dots to the right of the description of the item, you will see the option to Generate a Delivery Ticket.

Q. ***I did not see where he clicked to start closeout?***

A. To start a closeout, open up the Closeout window from the Accounts Receivable icon in the lower left hand corner of the window. Select either Daily or Monthly at the top of the window, and then in the upper right hand corner of the window you will see buttons that say + Trial Closeout and + Daily Closeout. Pick the option you want and proceed from there.

Q. ***Will cash drawer status be available in 4.6?***

A. Yes, the Cash Drawer Status feature has been added in version 4.6

Q. ***If you use the journal entry adjustment, will the QB uploads automatically make the journal entries?***

A. Since all of the accounts receivable details are stored in PrintSmith, only the net effect to your receivable balance will upload to Quickbooks. No journal entry needs to be created in Quickbooks.

Q. ***Why doesn't the program stop a person from creating an order if they are over the credit limit on the front end. The only thing that ""allow to override credit limit"" does is stop a person from posting the project but doesn't' stop the project getting printed.***

A. The warning message should come up when the user tries to save the invoice and stop them if they don't have the ability to override the credit limit. We will fix this in a future release.

Q. ***Sometimes i am getting more than 3 deposits on one invoice. How can i post that deposit?***

A. In that case, you would need to combine 2 of the previous deposits into 1 deposit, and then you can add an additional deposit.

Q. ***I need to set up more terms than net 30 like, net 15, net 45, net 60. How can I do this?***

A. We have a preference to set up Aging Periods where you can set 3 dates based on Current, Delinquent, and Frozen. These are your generic payment terms for setting the account status. You can also set different Payment Due By dates. In Preferences, under Estimator, Estimator Printing, you can set a Payment Due By date. This will print an exact due date on the invoice to the customer. In the account under the Credit/Tax Control tab, you can set an override for the due date in the Due Days from Posting field. This will allow you to set different due time frames based on the customer. You can also

set different payment terms in the special instructions field on your invoice document by creating multiple invoice formats with the different terms and assigning them to the corresponding customers.

Q. ***How can I send multiple invoices in one email to one customer from the system?***

A. From the invoice you can email an invoice to the customer. If you want to send multiple invoices in one email, you must print the invoice as a pdf and then manually attach them to the email.

Q. ***How can I add more non sale categories for credit card processing fees?***

A. We have 5 non sale categories to account for not for profit sales such as postage, shipping, etc. We have the ability under Preferences, Accounting, Credit Card Info to add a surcharge to your credit card payments to account for your processing fees. This does not require a sales category since it does not add any costs to the invoice. It only adds to the payment to compensate you the credit card fees. You charge the additional amount, but the actual invoice amount is what is credited to the invoice.

Q. ***Can we have the WIP Estimates NOT show on the Daily and Monthly closeout reports?***

A. You can uncheck any of the closeout reports you don't want to print. The Sales Summary report will still show the WIP Estimates. If you have Report Manager, we can remove that field from the report.

Q. ***Is there an account aging report?***

A. The Account Aging report will be part of the 4.6 release. It is part of the Account Utility under the Accounts Receivable icon.

Q. ***We don't ever close out because we don't use our cash register. Can we just let that ride, or should I clear everything out and be more diligent?***

A. You definitely should do at least one closeout per month. The register tape does have a size limit and if you reach it could corrupt your data. It is also a good way to verify the balances in your accounting program to help eliminate mistakes.

Q. ***If i use the cash register - is there a way to print a receipt before closing out?***

A. You have the option to print a receipt after every transaction. If you want to reverse a transaction, you can always go to the Register Tape and void it.

Q. ***Is there a keystroke shortcut to mark an item completed?***

A. No, you must mark a job as completed on screen.

Q. ***Can you enter an invoice number to find the invoice without choosing a customer?***

A. At the top of all windows there is a search field where you can enter in an invoice number to bring up the invoice.