

PrintSmith™ Vision Release Notes

Version 3.5

**Copyright** © 1997 - 2016 by Electronics for Imaging, Inc. All Rights Reserved.

EFI Productivity Suite | *PrintSmith Vision Release Notes*

December 2016 PrintSmith Vision 3.5

Document Version 1.0

This publication is protected by copyright, and all rights are reserved. No part of it may be reproduced or transmitted in any form or by any means for any purpose without express prior written consent from Electronics for Imaging, Inc. Information in this document is subject to change without notice and does not represent a commitment on the part of Electronics for Imaging, Inc.

### **Patents**

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

### **Trademarks**

The APPS logo, AutoCal, Auto-Count, Balance, Best, the Best logo, BESTColor, BioVu, BioWare, ColorPASS, Colorproof, ColorWise, Command WorkStation, CopyNet, Cretachrom, Cretaprint, the Cretaprint logo, Cretaprinter, Cretaroller, DockNet, Digital StoreFront, DirectSmile, DocBuilder, DocBuilder Pro, DocStream, DSFdesign Studio, Dynamic Wedge, EDOX, EFI, the EFI logo, Electronics For Imaging, Entrac, EPCount, EPPPhoto, EPRegister, EPStatus, Estimate, ExpressPay, Fabrivu, Fast-4, Fiery, the Fiery logo, Fiery Driven, the Fiery Driven logo, Fiery JobFlow, Fiery JobMaster, Fiery Link, Fiery Prints, the Fiery Prints logo, Fiery Spark, FreeForm, Hagen, Inktensity, Inkware, Jetrion, the Jetrion logo, LapNet, Logic, MiniNet, Monarch, MicroPress, OneFlow, Pace, PhotoXposure, PressVu, Printcafe, PrinterSite, PrintFlow, PrintMe, the PrintMe logo, PrintSmith, PrintSmith Site, Printstream, Print to Win, Prograph, PSI, PSI Flexo, Radius, Rastek, the Rastek logo, Remoteproof, RIPChips, RIP-While-Print, Screenproof, SendMe, Sincolor, Splash, Spot-On, TrackNet, UltraPress, UltraTex, UltraVu, UV Series 50, VisualCal, VUTEK, the VUTEK logo, and WebTools are trademarks of Electronics For Imaging, Inc. and/or its wholly owned subsidiaries in the U.S. and/or certain other countries.

All other terms and product names may be trademarks or registered trademarks of their respective owners, and are hereby acknowledged.

## Table of Contents

<b>About This Document</b> .....	<b>5</b>
<b>Contact Information</b> .....	<b>5</b>
<b>Important Information – Read This!</b> .....	<b>5</b>
<b>Do You Meet System Requirements?</b> .....	<b>5</b>
<b>Macintosh OS X Installation Folder</b> .....	<b>5</b>
<b>If You Are Upgrading from PrintSmith Classic 8.1 to PrintSmith Vision</b> .....	<b>5</b>
<b>If You Are Upgrading PrintSmith Vision</b> .....	<b>6</b>
<b>Known Issues</b> .....	<b>6</b>
Mac OS X: PrintSmith server may be slow to start after upgrade to 3.5 .....	6
Overriding/uploading reports.....	6
<b>System Requirements</b> .....	<b>7</b>
<b>Overview</b> .....	<b>7</b>
<b>PrintSmith Vision Server Requirements</b> .....	<b>7</b>
Windows 64-bit.....	7
Windows 10 and existing PrintSmith Vision installations .....	8
Windows 10 and new installations of PrintSmith Vision .....	9
Macintosh.....	9
OS X and new PrintSmith Vision installations .....	9
OS X 10.12 (Sierra) and existing PrintSmith Vision installations.....	10
Important notes about the server .....	11
About operating system updates .....	11
<b>PrintSmith Vision Client Requirements</b> .....	<b>11</b>
<b>Browser Requirements</b> .....	<b>11</b>
<b>Monitor and Resolution Requirements</b> .....	<b>11</b>
<b>Network Requirements</b> .....	<b>11</b>
<b>Internet Requirements</b> .....	<b>11</b>
<b>Custom Document and Report Requirements</b> .....	<b>12</b>
<b>Receipt Printer Requirements</b> .....	<b>12</b>
<b>Fiery Integrations</b> .....	<b>12</b>
<b>Remote Print Center (RPC) – EFI-Hosted Installations</b> .....	<b>12</b>
<b>Digital StoreFront Integrations</b> .....	<b>12</b>
<b>Mobile View Requirements</b> .....	<b>12</b>
Mobile devices .....	13
Mobile operating systems .....	13
Browser requirements for mobile views .....	13
<b>New Features and Enhancements</b> .....	<b>14</b>
<b>License Validation During Installation</b> .....	<b>14</b>
<b>Support for Product-Level Taxation</b> .....	<b>15</b>
<b>Support for Line-Item Taxation</b> .....	<b>16</b>
<b>Scheduling Backwards</b> .....	<b>20</b>
<b>Integration with Digital StoreFront</b> .....	<b>21</b>
Ability to specify more than one recipient for an order.....	21

Handling rejected credit card orders .....	22
<b>Template Editing.....</b>	<b>22</b>
<b>Date Shortcuts for Custom Reports .....</b>	<b>23</b>
<b>Digital Asset Manager (EFI-Hosted Installations) .....</b>	<b>23</b>
Configuring Digital Asset Manager .....	23
Using Digital Asset Manager.....	25
<b>Receipt Printing (EFI-Hosted Installations) .....</b>	<b>27</b>
<b>E-Commerce API.....</b>	<b>27</b>
<b>Corrections .....</b>	<b>29</b>
<b>Installation .....</b>	<b>29</b>
<b>EFI-Hosted Installations.....</b>	<b>29</b>
<b>Localization .....</b>	<b>29</b>
<b>Charges .....</b>	<b>29</b>
<b>Press Definitions .....</b>	<b>29</b>
<b>Stocks .....</b>	<b>29</b>
<b>Accounts .....</b>	<b>29</b>
<b>Estimating .....</b>	<b>30</b>
Invoices and estimates.....	30
Jobs.....	30
<b>POS .....</b>	<b>30</b>
<b>Accounting .....</b>	<b>30</b>
<b>Dashboard .....</b>	<b>31</b>
<b>Reports .....</b>	<b>31</b>
Work in Progress.....	31
Report Manager .....	31
<b>Administration .....</b>	<b>31</b>
E-Mails .....	31
Preferences.....	31
Table Editor.....	31
<b>Scheduler .....</b>	<b>31</b>
<b>Digital StoreFront Integration.....</b>	<b>32</b>
<b>Fiery Integration.....</b>	<b>32</b>
<b>Four 51 Integration .....</b>	<b>32</b>
<b>PrintSmith Site Integration .....</b>	<b>33</b>
<b>Crouser Pricing.....</b>	<b>33</b>
<b>E-Commerce API.....</b>	<b>33</b>
<b>Upgrading PrintSmith Vision .....</b>	<b>34</b>
<b>About Upgrading .....</b>	<b>34</b>
<b>Important: Before You Begin the Upgrade .....</b>	<b>34</b>
Have your license activation code (LAC) ready.....	34
If you also plan to upgrade the operating system .....	34
If you want to use an SSL connection.....	34
<b>Upgrade Your System .....</b>	<b>35</b>
<b>After the Upgrade .....</b>	<b>36</b>

## About This Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.5.

## Contact Information

### EFI Support

<b>Web Site:</b>	<a href="https://customer.efi.com/support">https://customer.efi.com/support</a>
<b>US Phone:</b>	1.855.EFI.4HLP 480.538.5800
<b>UK Phone:</b>	+44 (0) 800.783.2737
<b>EU Phone:</b>	+49 (0) 2102.745.4500
<b>E-Mail:</b>	<a href="mailto:printsmith.support@efi.com">printsmith.support@efi.com</a>

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

**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

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>US E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>
<b>Outside US E-Mail:</b>	<a href="mailto:EMEAProfessionalServicesOperations@efi.com">EMEAProfessionalServicesOperations@efi.com</a>

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.

## Important Information – Read This!

### Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 7.

**Important** Mac OS X 10.10 is no longer a supported operating systems for PrintSmith Vision servers, but Mac OS X 10.12 is now supported. If you already have PrintSmith Vision installed and are interested in upgrading your operating system to 10.12, *be sure to follow the instructions* in “OS X 10.12 (Sierra) and existing PrintSmith Vision installations” on page 10.

### Macintosh OS X Installation Folder

When you install PrintSmith Vision on a Mac, be sure to install it in the default **Applications** folder. Custom folders are not currently supported, and will prevent PrintSmith Vision from running.

### If You Are Upgrading from PrintSmith Classic 8.1 to PrintSmith Vision

If you are upgrading from PrintSmith 8.1, make sure you have PrintSmith Classic 8.1.28 installed before you export your data. For complete details of upgrading, see the *PrintSmith Vision - Installation and Upgrade Guide*.

## If You Are Upgrading PrintSmith Vision

If you have PrintSmith Vision installed, and are updating it, see “Upgrading PrintSmith Vision” on page 34.

## Known Issues

### Mac OS X: PrintSmith server may be slow to start after upgrade to 3.5

On some Macs, after you upgrade PrintSmith Vision to version 3.5, the server may take a few minutes to start automatically the first time after the upgrade.

### Overriding/uploading reports

On some browsers an error occurs if you try to override a report from Report Manager or upload your own version of a report (for example, a customized statement, estimate, or delivery ticket).

Workaround: Make sure the report you are trying to upload is *not* in one of the PrintSmith Vision report repository folders. Move the report to another folder (or the desktop) and then try overriding or uploading.

# System Requirements

## Overview

The computer where PrintSmith Vision and its database are installed is known as the *server*. PrintSmith Vision is then accessed by users through a browser on Windows® or Macintosh® computers. These computers are also known as *clients*.

**Note** If EFI is hosting PrintSmith Vision for you, the server requirements do not apply to you, but the client and other requirements do apply.

This section describes the technical requirements you must meet for the PrintSmith Vision server (see below) and for the client computers (see page 11).

In addition, to run PrintSmith Vision, you must meet some miscellaneous requirements such as browser version and monitor size and resolution.

Starting with PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Requirements for taking advantage of mobile views are on page 12.

**Important** Below are the system requirements for running PrintSmith Vision based on what was certified by EFI. If your environment is not listed below, then it has not been certified, and EFI cannot guarantee or support the results.

## PrintSmith Vision Server Requirements

You can install PrintSmith Vision on a Windows or Macintosh computer as long as it meets the requirements listed below.

**Important** Although you can run PrintSmith Vision on a shared server, EFI strongly recommends a dedicated server. Not only does performance degrade when several applications run on the server, but issues resulting from conflicting applications can be very difficult to diagnose. This type of diagnosis is therefore not supported by EFI.

PrintSmith Vision can run on a virtual machine (VM). *While EFI supports PrintSmith Vision running in a virtual environment, EFI is not responsible for your virtual environment or its setup.* EFI will use commercially reasonable efforts to investigate potential issues with PrintSmith Vision running on a virtual machine, but as part of that investigation, EFI may require the issue to be reproduced independently of the virtual machine environment. When issues are confirmed to be unrelated to the virtual environment, EFI will support PrintSmith Vision in a way that is consistent with the support provided when PrintSmith Vision is running in a non-virtual environment.

## Windows 64-bit

<i>Operating system:</i>	Windows 8 Windows 10 ** Windows Server 2012 R2 Standard or Essentials
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB (more memory will improve performance)
<i>Hard drive:</i>	50 GB free space

\*\* For Windows 10, be sure to read “Windows 10 and existing PrintSmith Vision installations” on page 8.

## Windows 10 and existing PrintSmith Vision installations

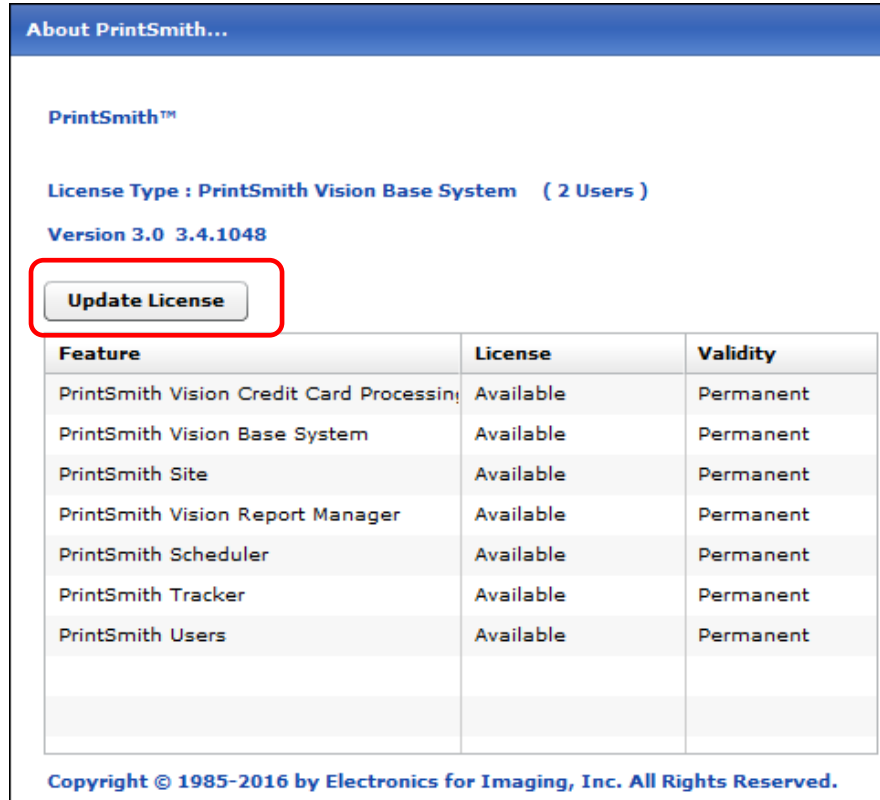
Windows 10 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to Windows 10, be sure to follow the instructions below for existing PrintSmith Vision installations.

**Important** *During an upgrade to Windows 10, PrintSmith Vision is currently removed so you will lose your PrintSmith system unless you follow the steps below.*

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.

**Important** Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. *Deactivate your PrintSmith Vision license:*
  - a. *Before* you uninstall PrintSmith Vision, log into the system.
  - b. Select **Help > About PrintSmith**.
  - c. Click **Update License**.



**About PrintSmith...**

**PrintSmith™**

**License Type : PrintSmith Vision Base System ( 2 Users )**

**Version 3.0 3.4.1048**

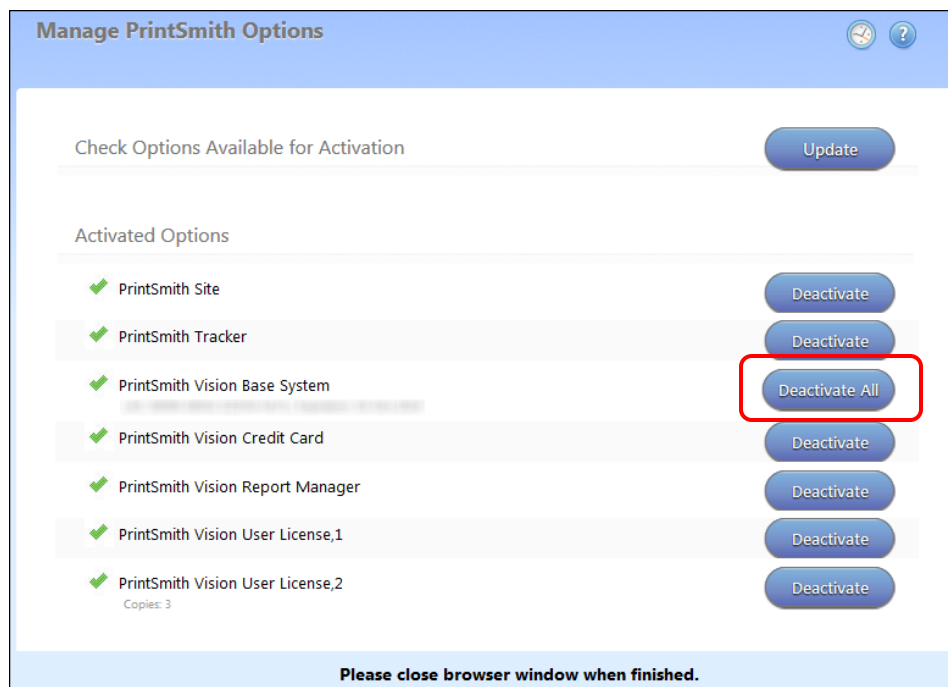
**Update License**

Feature	License	Validity
PrintSmith Vision Credit Card Processing	Available	Permanent
PrintSmith Vision Base System	Available	Permanent
PrintSmith Site	Available	Permanent
PrintSmith Vision Report Manager	Available	Permanent
PrintSmith Scheduler	Available	Permanent
PrintSmith Tracker	Available	Permanent
PrintSmith Users	Available	Permanent

**Copyright © 1985-2016 by Electronics for Imaging, Inc. All Rights Reserved.**



- d. In the Manage PrintSmith Options window, click **Deactivate All**.



- e. After the deactivation is confirmed, click **Finish**.
3. Uninstall PrintSmith Vision.
  4. Upgrade your operating system to Windows 10.
  5. After the operating system is upgraded, install PrintSmith Vision and activate your license. (For installation instructions, see the *PrintSmith Vision - Installation and Upgrade Guide*.)
  6. Restore your database, custom documents/reports, and digital assets (content files) as described in the "Restoring the entire PrintSmith Vision system" section of the *PrintSmith Vision - Setup and User Guide*.

## Windows 10 and new installations of PrintSmith Vision

If you are new to PrintSmith Vision, just install it on your Windows 10 computer as described in the *PrintSmith Vision - Installation and Upgrade Guide*.

## Macintosh

<i>Operating system:</i>	OS X 10.11, 10.11 Server, 10.12**, or 10.12 Server**
<i>Processor:</i>	Intel Quad Core i7 2.3 GHz
<i>Memory:</i>	16 GB (more memory will improve performance)
<i>Hard drive:</i>	50 GB free space

\*\* For OS X 10.12, be sure to read "OS X 10.12 (Sierra) and existing PrintSmith Vision installations" on page 10.

## OS X and new PrintSmith Vision installations

Macs running OS X 10.11 and higher do not have Java installed, which is required to install PrintSmith Vision. Download and install Java *before* starting the PrintSmith Vision Installer.

## OS X 10.12 (Sierra) and existing PrintSmith Vision installations

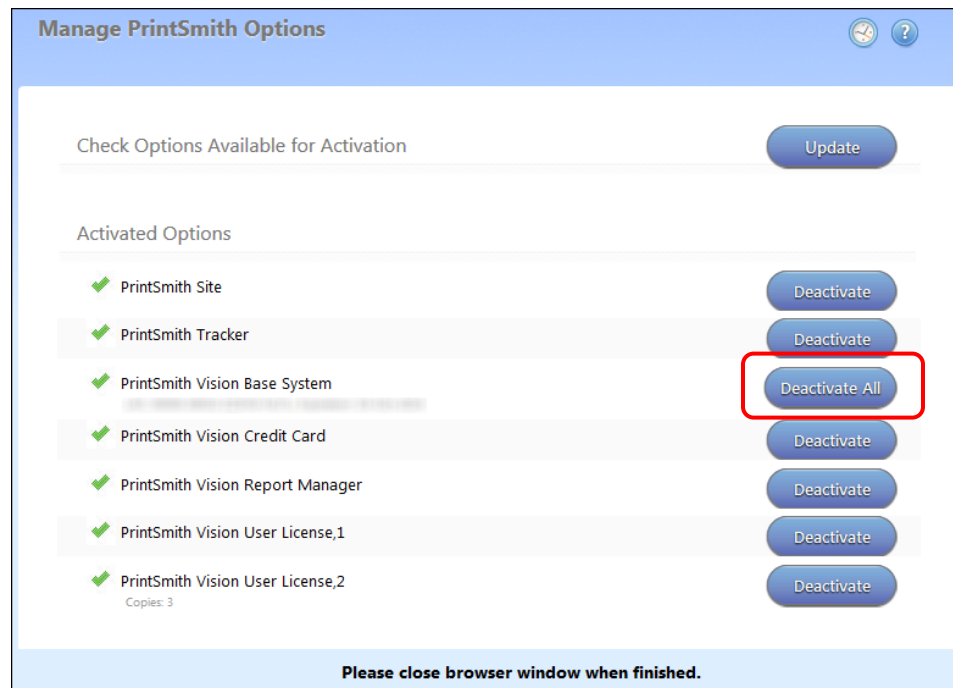
OS X 10.12 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to OS X 10.12, be sure to follow the instructions below for existing PrintSmith Vision installations.

**Important** During an upgrade to OS X 10.12, Apple currently removes a critical part of the PrintSmith Vision system. Follow the steps below to avoid having a non-functioning PrintSmith system.

1. Back up your entire PrintSmith Vision system using the Backup Manager preferences as described in the “Backup Manager preferences” section of the *PrintSmith Vision - Setup and User Guide*.

**Important** Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. Deactivate your PrintSmith Vision license:
  - a. Before you uninstall PrintSmith Vision, log into the system.
  - b. Select **Help > About PrintSmith**.
  - c. Click **Update License**.
  - d. In the Manage PrintSmith Options window, click **Deactivate All**.



- e. After the deactivation is confirmed, click **Finish**.
3. Uninstall PrintSmith Vision.
  4. Upgrade your operating system to 10.12
  5. After the operating system is upgraded, install Java. (Java is required for PrintSmith Vision installation.)
  6. Install PrintSmith Vision and activate your license. (For installation instructions, see the *PrintSmith Vision - Installation and Upgrade Guide*.)
  7. Restore your database, custom documents/reports, and digital assets (content files) as described in the “Restoring the entire PrintSmith Vision system” section of the *PrintSmith Vision - Setup and User Guide*.

## Important notes about the server

- If PrintSmith Vision is going to be accessed from other computers (clients), the server computer should have a static IP address. This IP address is part of the URL users enter to run PrintSmith Vision; if the IP address keeps changing (because it is not static), the URL will also keep changing.
- The server computer must be configured not to go to sleep. If the server goes to sleep, users who are running PrintSmith Vision from other computers will get a “server down” message, and will be unable to use PrintSmith while the server is in sleep mode. On a Windows computer, turn off sleep mode in the **Power Options** settings in the Control Panel; on a Macintosh, turn off sleep mode in the **Energy Saver** settings.

## About operating system updates

EFI strongly recommends that you do not have automatic operating system updates turned on. Instead do the updates manually at the same time as you update PrintSmith Vision.

If you want to update the operating system at other times, do it manually and then make sure PrintSmith Vision works as expected. If necessary, revert the updates.

## PrintSmith Vision Client Requirements

These are the requirements for running PrintSmith Vision on a client computer (one on which PrintSmith Vision is *not* installed):

<i>Operating system:</i>	Windows 7, 8, or 10 Macintosh OS X 10.8 or higher
<i>Memory:</i>	4 GB minimum (more memory will improve performance)
<i>Browser:</i>	See “Browser Requirements” below.
<i>Monitor:</i>	See “Monitor and Resolution Requirements” below.

## Browser Requirements

The following browsers are supported for running PrintSmith Vision on a desktop:

- Mozilla Firefox® 50.x or later
- Safari® 8.x or later (OS X 10.11) and Safari 10.x or later (OS X 10.12)
- Chrome™ 54 or later
- Microsoft Edge (Windows only)

## 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

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

## Network Requirements

- 100 base T Ethernet

## Internet Requirements

In addition to being required to run PrintSmith Vision, Internet connectivity is required as follows:

- For initial licenses of software

- For upgrades and upgrade licenses
- For Payment Plan users during defined periods of plan
- For interaction with the EFI Support team

## Custom Document and Report Requirements

PrintSmith Vision reports and other documents (such as estimates or invoices) are written in i-net Clear Reports.

If you want to customize your estimates or invoices (for example, include your logo) or if you plan to create custom reports, you must install i-net Designer, which is part of Clear Reports. You are given the option of installing i-net Designer during the PrintSmith Vision server installation.

## Receipt Printer Requirements

A receipt printer is optional in PrintSmith Vision, but if you want to use one, you must purchase the Star TSP 700II printer from EFI.

For important information about configuring the receipt printer, see the guide *PrintSmith Vision - Configuring Receipt Printers*.

## Fiery Integrations

If you are using PrintSmith Vision with a Fiery®, Fiery JDF version 1.5.0.34 is required.

When PrintSmith Vision is EFI-hosted, Remote Print Center (RPC) is also required. See below for requirements.

## Remote Print Center (RPC) – EFI-Hosted Installations

When PrintSmith Vision is EFI-hosted, Remote Print Center (RPC) is required for Fiery integrations and strongly recommended for receipt printing.

The computer on which you install RPC must meet these hardware and software requirements:

<i>Operating system:</i>	Any 64-bit version of Windows or Macintosh OS X
<i>Processor:</i>	Dual core
<i>Memory:</i>	4 GB
<i>Hard Drive:</i>	50 – 100 GB

In addition, the computer where you install RPC must:

- For Fiery integration, have access to the Fiery device(s) you are using.
- For receipt printing, be connected to the receipt printer.
- Have access to the Internet, including access to PrintSmith Vision.
- Run 24/7 and *not go to sleep*. It must be available for communication all the time.

## Digital StoreFront Integrations

If you use PrintSmith Vision with Digital StoreFront®, Digital StoreFront 9.2 or higher is required to take advantage of the new eFlow-based integration introduced in PrintSmith Vision 3.4.1 and Digital StoreFront 9.2.

**Note** For information about using PrintSmith Vision with Digital StoreFront, see the *PrintSmith Vision – Digital StoreFront Integration Guide*.

## Mobile View Requirements

As of PrintSmith Vision 3.0, mobile views of parts of the PrintSmith system are available from smartphones and tablets. Mobile views are based on HTML5 technology. This section describes devices, operating systems, and browsers that are fully compatible with HTML5 and can therefore support PrintSmith Vision mobile views.

## Mobile devices

The following mobile devices are supported:

- iPad® 4<sup>th</sup> and 5<sup>th</sup> generation
- iPhone® 5 and 6
- Android™ tablets
- Android smartphones

## Mobile operating systems

- iOS 8.3
- Android 4.1, 5.1

## Browser requirements for mobile views

The following browsers are supported:

- Chrome 21 or higher
- Safari 5 or higher

**Note** Mozilla Firefox is *not* supported.

## New Features and Enhancements

PrintSmith Vision 3.5 includes the following changes and enhancements.

### License Validation During Installation

For both upgrades and new installations, the Installer now asks you for your license activation code (LAC) and checks whether your maintenance contract has expired. If your maintenance contract is current, you can continue with installation; if it has expired, you must contact EFI Sales to renew your maintenance contract. (You cannot continue with installation until your maintenance contract is renewed.)

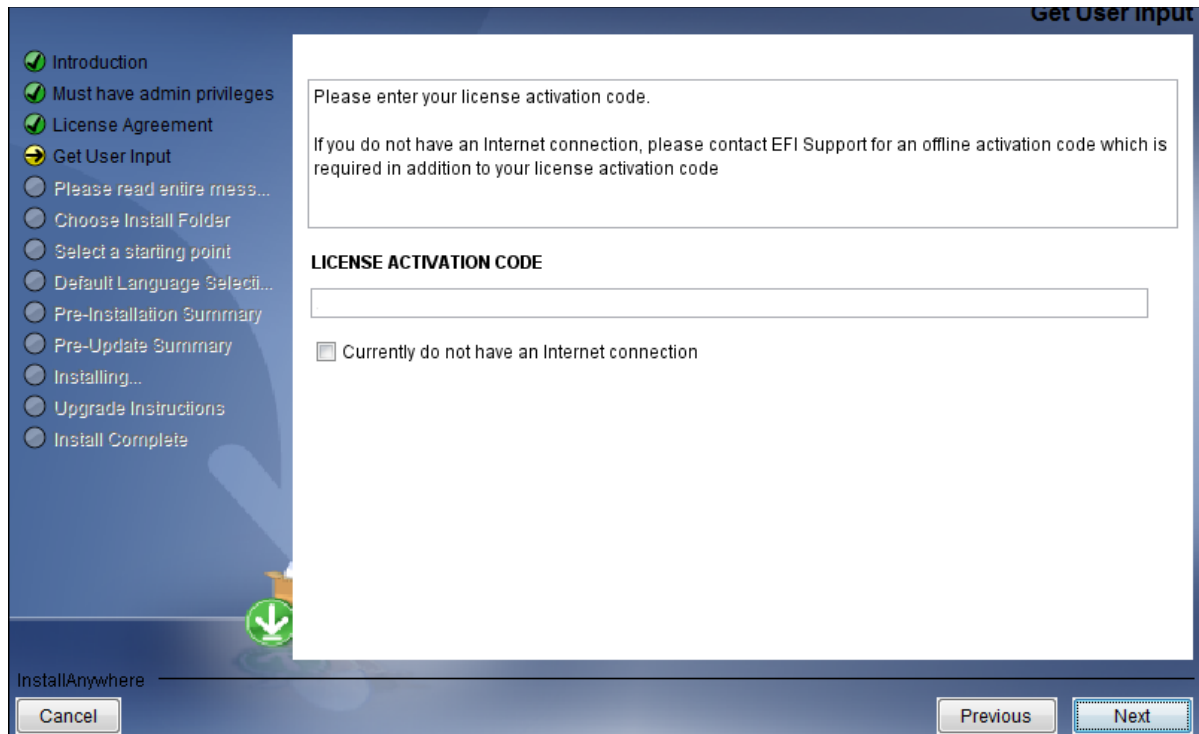
**Tip** If you already have PrintSmith Vision installed and are upgrading, you can locate your license activation code (LAC) by selecting **Help > About PrintSmith** in PrintSmith Vision and clicking **Update License**. Your LAC is listed below **PrintSmith Vision Base System**.

If you are new to PrintSmith Vision, your LAC is in the activation e-mail you received from EFI.

If you have problems locating your LAC, please contact EFI Support.

If you are not connected to the Internet while running the Installer, you can select the **Currently do not have Internet connection** check box, obtain an offline activation code from EFI Support, and enter this code (as well as your license activation code) to proceed with installation. (The offline activation code is valid for 24 hours.)

**Note** You only have to enter your LAC once. After your maintenance contract is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code so that the Installer can verify your maintenance contract.

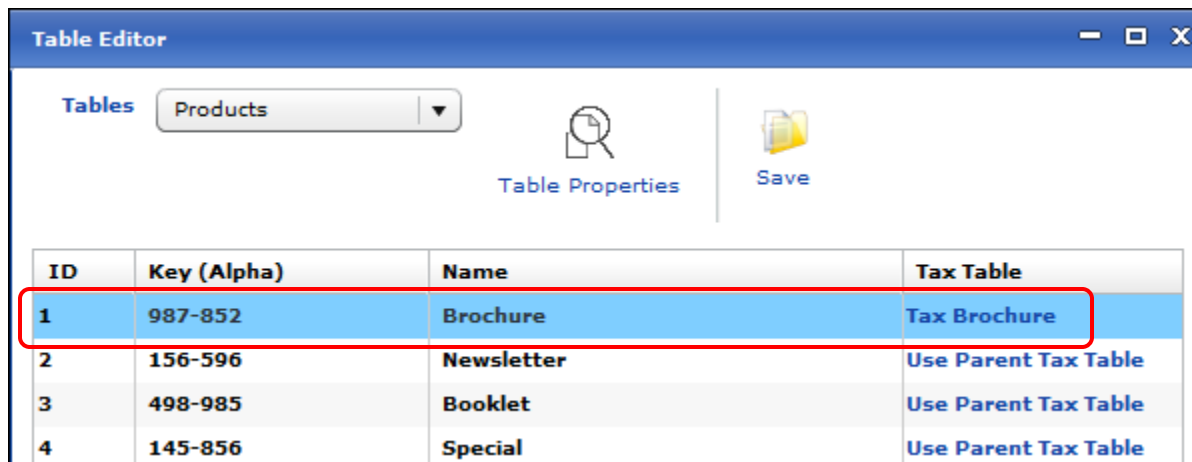


## Support for Product-Level Taxation

In some locations tax is based on the type of product you are selling, for example, brochure versus business card. To accommodate this type of taxation, you can now associate tax tables with product types.

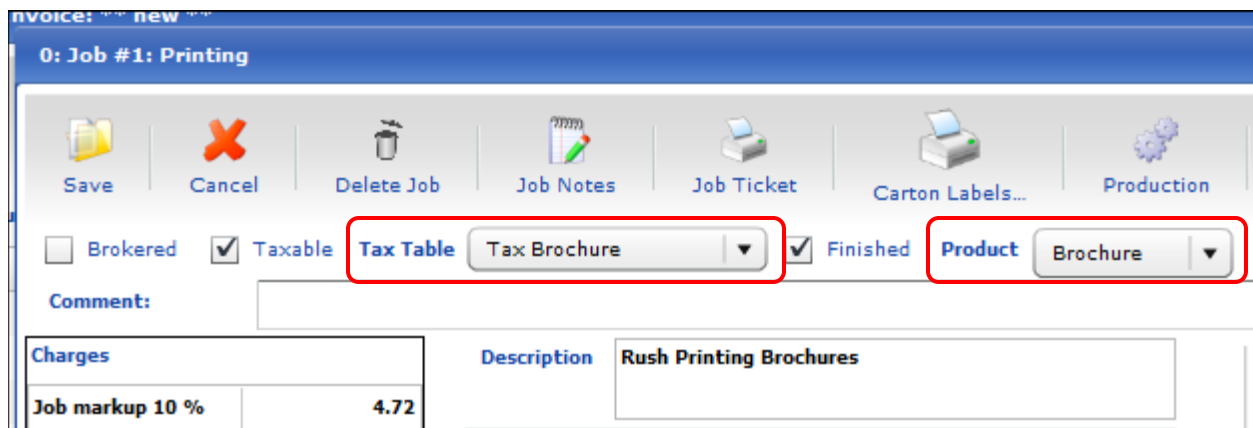
After you define your tax tables (**Pricing > Sales Tax**) for different types of products, you must use Table Editor (**Admin > Table Editor**) to associate products with tax tables in the Products table.

By default, the **Tax Table** for a product in the Products table is set to **Use Parent Tax Table**. This means that the tax table associated with the estimate or invoice will be used for the product. To use a different tax table for a product, select it in the **Tax Table** column.



ID	Key (Alpha)	Name	Tax Table
1	987-852	Brochure	Tax Brochure
2	156-596	Newsletter	Use Parent Tax Table
3	498-985	Booklet	Use Parent Tax Table
4	145-856	Special	Use Parent Tax Table

When you create a job and select a **Product** for it, the tax associated with the product is automatically set in the **Tax Table** field.



0: Job #1: Printing

Save Cancel Delete Job Job Notes Job Ticket Carton Labels... Production

Brokered  Taxable **Tax Table** Tax Brochure  Finished **Product** Brochure

Comment:

Charges	Description
Job markup 10 %	Rush Printing Brochures
4.72	

The tax rate defined in the tax table is then applied to the subtotal of the invoice.

**Important** Unless you are also using line-item taxation (see page 16), only one tax table can be associated with an invoice. If you have multiple jobs on a single invoice, they cannot be for products that are associated with different tax tables.

For more information about product-level taxation, see the chapter on “Defining Sales Tax or Value Added Tax (VAT)” in the *PrintSmith Vision - Setup and User Guide*.

## Support for Line-Item Taxation

You may find it useful to tax individual line items in an invoice independently. For example, in some tax jurisdictions an item that involves just labor (such as folding) may be taxed differently from an item that involves both labor and materials (such as printing). In addition, jobs in an invoice may be delivered to different locations that are subject to different taxes (such as county or city tax in addition to state tax). When using line-item taxation you can have up to five different tax tables per invoice.

To take advantage of line item taxation, you must select the **Enable line-item taxes** check box in the Behavior preferences.

Behavior

- Eliminate some warning messages
- Only post invoices marked ready
- Automatic Print Dialog for Reports
- Activate user event logging
- Enable automatic log out
  - Seconds of inactivity to trigger
  - Trigger after Posting
- Show invoices with firm due date of "today" at login
- Import Account History
- Enable line-item taxes
- When possible, maintain original pricing for documents

**Important** If you enable line-item taxation, but change your mind about using this feature (and clear the **Enable line-item taxes** check box), *you must void any invoices you created when line-item taxation was enabled.* Otherwise, you will have inconsistent and incompatible data in your database.

When line-item taxation is enabled, you can indicate that a tax table should be “inherited” from its parent (which is the default behavior) or you can select a different tax table (so it is not the same as the parent). Whenever a **Tax Table** field is set to **Use Parent Tax Table**, the tax table is inherited. The order of inheritance is as follows: customer account > invoice/estimate > jobs > job charges (or subjobs in a multi-part job). If you select different tax tables for items in an invoice, they are taxed differently from their “parents.”

When line-item taxation is enabled, you can do the following:

- Have up to five different tax tables per invoice.
- In the Document Totals window for an invoice, select a tax table to apply against the invoice, as well as any of its charges or jobs that have **Tax Table** set to **Use Parent Tax Table**.
- Select a specific tax table for a job in an invoice. This tax table will also apply to any job charges or parts of a multi-part job that have **Tax Table** set to **Use Parent Tax Table**.
- Include jobs for products that are taxed differently (see “Support for Product-Level Taxation” on page 15).



- Associate individual charge definitions with specific tax tables (in the Preset Info window).

When line-item taxation is enabled, you can select a tax table for a charge

**Preset Info Solvent Ink**

Finished  Taxable  Brokered  Display Quantity  Hidden

**Description** Solvent Ink

**Notes**

**Production Location**

Show Notes

# of Colors	6.0000
Pct. Coverage	30.0%
lbs. of Ink	0.0000

Price 21.00

**Tax Table** Use Parent Tax Table ▼

OK Cancel

- Use new EFI-supplied reports (for example, EFI\_DefaultInvoice\_TaxLedger.rpt or EFI\_DefaultInvoice\_TaxDetails.rpt) to create document formats that include tax distributions. To include tax distributions in documents, the document format (**Admin > Document Preferences**) associated with one of the TaxLedger or TaxDetails reports must have the **Hide tax in line items** check box cleared on the **Body** tab.

**Page** **Header** **Body** **Footer** **Text** **Upload/Download**

Show description  Show M price in unit column

Show stock  Hide charges

Hide original count  Hide charge prices

Hide number up  Hide job markups

Hide color count  Hide invoice markup

Add folded size  Hide cust discount

Show prices  Hide tax in line items



As with other invoice and estimate reports supplied by EFI you can customize the tax ledger or tax details documents to include your logo and so on. In the example below, the document format is associated with a customized version of `EFI_DefaultInvoice_TaxLedger.rpt`. The invoice in this example has two different tax tables associated with it. The taxes are identified by number in the **Tax** column in the body of the invoice with explanations and breakdowns of the taxes provided in the bottom left corner of the document.

Quantity	Description	Amount	Tax
20	Hats for Boston office	\$ 87.00	(2)
20	Hats for Portland office	\$ 87.00	(1)

Amount	Tax	Tax Amount	
(1) [ME]	87.00	5.90%	4.78
(2) [MA]	87.00	6.25%	5.44

Wanted: Tue 12/13/16	Promo Hats	SUBTOTAL	\$ 174.00
		TAX	\$ 10.22
		SHIPPING	\$ 0.00
		SHIPPING TAX	\$ 0.00
		TOTAL	\$ 184.22
		AMOUNT DUE	\$ 184.22

For documents based on a TaxDetails report, no tax ledger is included. Instead, the document includes columns for **Sub Total**, **Tax**, and **Total**, and can optionally include the abbreviated name of the tax table that was used.

Quantity	Description	Sub Total	Tax	Total
20	Hats for Boston office	\$ 87.00	\$ 5.44 [MA]	\$ 92.44
20	Hats for Portland office	\$ 87.00	\$ 4.78 [ME]	\$ 91.78

**Note** For more information about line-item taxation, see the chapter on “Defining Sales Tax or Value Added Tax (VAT)” in the *PrintSmith Vision – Setup and User Guide*.

## Scheduling Backwards

You now have the option of scheduling backwards in time from a due date. In addition to the license already required for Scheduler, backward scheduling requires a separate license. For information about licensing, contact [PrintSmith.Sales@efi.com](mailto:PrintSmith.Sales@efi.com).

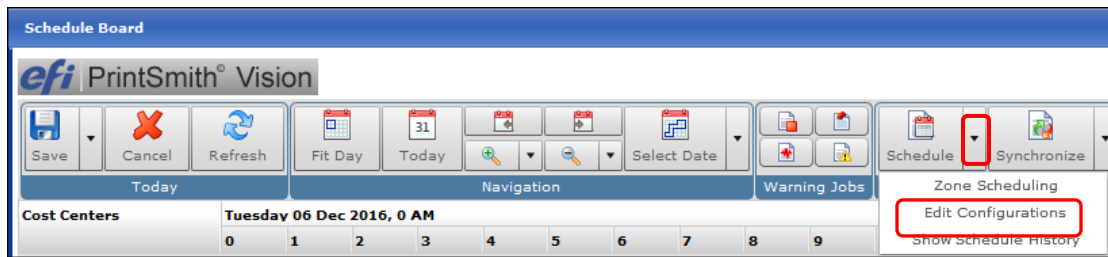
Normally, Scheduler starts with the first task in a job and schedules the remaining tasks after this first task (forwards in the schedule). In contrast, in backward scheduling, the *last* task of a job is scheduled to finish as close as possible to the due date and time (with a 30-minute buffer) for the job. The remaining tasks are then scheduled backwards in time from the last task.

This type of scheduling has these advantages:

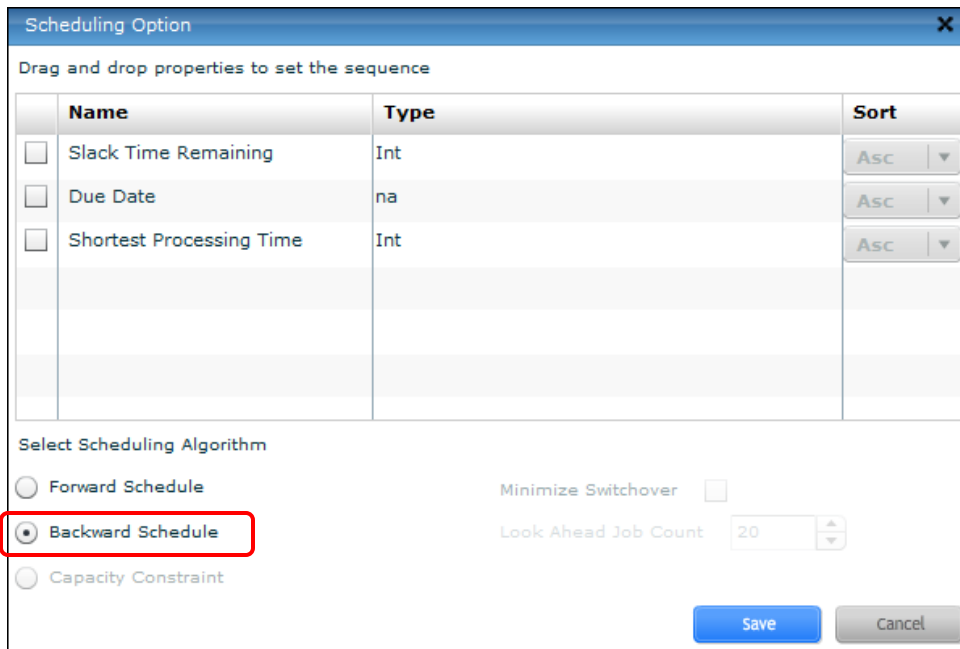
- Can be used for long term planning.
- Reduces work-in-process times for jobs.
- Jobs are not processed until they are required which means capacity may be available to produce any urgent jobs that come into your shop.

To enable backward scheduling (if you are already using Scheduler):

1. Purchase your license and update it in PrintSmith Vision.
2. In the PrintSmith Vision QuickAccess panel, click **Schedule Board Manager**.
3. Click **Show Schedule Board**.
4. On the Schedule Board, click the arrow to the right of **Schedule** and select **Edit Configurations**.

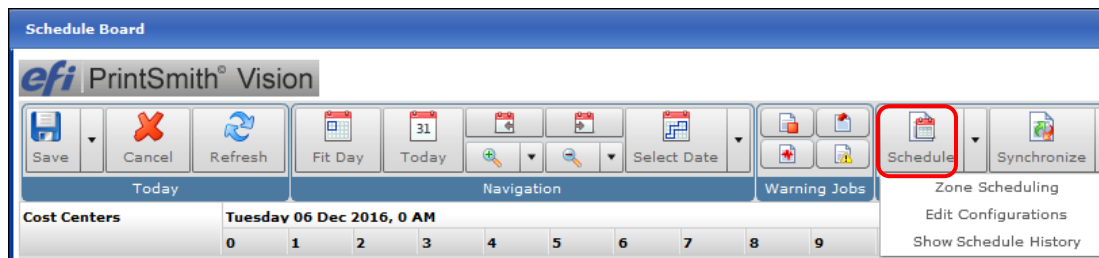


5. In the Scheduling Option window, under **Select Scheduling Algorithm**, select **Backward Schedule** and click **Save**.



Once backward scheduling is enabled, you schedule jobs as before.

Scheduler then places the jobs on the Schedule Board on a first come basis. You can click **Schedule** on the toolbar of the Schedule Board to reschedule jobs if there are conflicts.



**Notes** If you are new to Scheduler, follow the setup instructions in the *PrintSmith Vision – Scheduler User Guide*.

## Integration with Digital StoreFront

The following enhancements were made to the integration with Digital StoreFront.

### Ability to specify more than one recipient for an order

A buyer placing an order in Digital StoreFront can now specify more than one recipient for the order. When the order comes into PrintSmith Vision, a delivery ticket is created for each recipient. This feature is available in the eFlow-based integration introduced in PrintSmith Vision 3.4.

To allow buyers to specify multiple recipients, you must enable this feature in Digital StoreFront:

1. Go to **Administration > MIS CONFIGURATION > MIS Systems**.
2. Select your MIS.

**Important** If you are not yet integrated with Digital StoreFront, follow the instructions in the *PrintSmith Vision – Digital StoreFront Integration Guide*. MIS configuration is only *one* of the tasks you must perform for a successful integration.

3. Click the **Settings** tab and select the **Allow Multiple Delivery Address** check box under **Order Settings**.
4. Click **Save**.

**Order Settings:**

- Asynchronous Order Submission
- Accepts Single Order
- Include Print Preview Thumbnail
- Show Inventory for Buyer by Default
- Allow Multiple Delivery Address

## Handling rejected credit card orders

Sometimes the payment for a credit card order may be rejected when you try to post the invoice in PrintSmith Vision. Typically this occurs because the amount of the order exceeds the pre-authorized amount or the pre-authorization period has expired. If this happens, you can now “uncouple” the payment from Digital StoreFront (which normally controls when credit cards are charged) and make the payment in PrintSmith Vision.

To do this,

1. Open the invoice for the credit card order.
2. Open the Document Totals window (by clicking **Edit** under **Amt. Due** or by selecting **Invoice > Document Totals**).
3. Clear the **External credit card payment required** check box and click **OK**.

Clear this check box so you can make the payment in PrintSmith Vision

4. Save the invoice.
5. Pay for the invoice using any available method in PrintSmith Vision and post the payment.

The status of the order is now updated in Digital StoreFront as **Completed and Invoiced**.

## Template Editing

To facilitate document and job template editing, after you select **File > Open Template** and select **Invoice Templates** or **Job Templates**:

- The Select a Template window remains open so you can edit multiple templates.
- The Select a Template window includes a new **Change Template Type** button so you can switch between invoice and job templates.
- The Select a Template window is automatically updated when a template is created or updated.
- When you open a job template, its name is now displayed in the window title bar so you know which job template is open.

## Date Shortcuts for Custom Reports

When the search rules for a custom report include date fields, you can now enter the following date shortcuts (these are case-sensitive):

<b>/D/</b>	Current date
<b>/SW/</b>	Week starting date
<b>/EW/</b>	Week ending date
<b>/SM/</b>	Month starting date
<b>/EM/</b>	Month ending date
<b>/SY/</b>	Year starting date **
<b>/EY/</b>	Year ending date **

\*\* The year start and end dates are based on the fiscal year specified in your Business Calendar preferences.

## Digital Asset Manager (EFI-Hosted Installations)

When PrintSmith Vision is hosted by EFI, the digital assets (content files) that you upload for jobs are stored in the EFI Hosting Center.

If many jobs include content files, these digital assets start to use a large amount of storage space. You are automatically given 20 GB of storage space for your files, but have the option of purchasing additional space.

### Configuring Digital Asset Manager

To configure Digital Asset Manager you select a *duration* – the period of time you want your digital assets kept before being deleted automatically. In addition, you should make sure specific users are notified when files are due to be deleted so they can download the files locally if necessary.

#### Setting a duration

The system is initially set to never delete digital assets, but typically you will want to have them deleted after a period of time, especially if files are often uploaded for one-time use or do not get re-used after a certain time. You do this by setting the Digital Assets preferences (**Admin > Preferences > System > Digital Assets**). Here you can specify how many **Day(s)**, **Week(s)**, or **Month(s)** you want to keep digital assets before they are deleted.

The screenshot shows the 'Digital Assets' configuration window. Under the 'File Expiration' section, there is a text instruction: 'Specify how long customer files remain in the system before being deleted. Too many files can deplete system resources (hard drive space)'. Below this, the 'Duration' is set to '0' with a dropdown menu currently showing 'Never'.

If you want to keep digital assets for particular customers for a period of time that is different from the duration specified in the Digital Assets preferences, you can edit the customer account. If you set a file expiration duration for an account, this always overrides the system duration set in the Digital Assets preferences.

The screenshot shows the 'File Expiration' settings for a specific customer account. A checkbox labeled 'Use Account level setting' is checked. Below the instruction 'Specify how long customer files remain in the system before being deleted. Too many files can deplete system resources (hard drive space)', the 'Duration' is set to '1' with a dropdown menu showing 'Month(s)'.

### Notifying users of files due to be deleted

When the system is configured to delete digital assets, you can alert specific users when files are due to be deleted. The users can then use Digital Asset Manager to store the files locally if they think they might still need them. To notify users, select the **Notify when digital assets are scheduled to be deleted** check box in the User Definitions window.

The screenshot shows the 'User Definitions' window. At the top, there are three icons: a green plus sign for 'New', a folder icon for 'Save', and a red X for 'Delete'. Below these is a table with three columns: 'User Name', 'Access Group', and 'Access Level'. The table contains the following data:

User Name	Access Group	Access Level
<NO NAME>	System Admin	99
*admin	Owner	99
Counter	Counter	60
Dave	System Admin	99
Jane	Counter	99
Josh	System Admin	0
Maisey	Bindery	0

Below the table is a form for defining a user. The fields include: User Name (text input), First Name (text input), Last Name (text input), Job Title (text input), a checkbox for 'Disable user name', Access Group (dropdown menu set to 'Minimum'), Access Level (text input set to '0'), E-Mail (text input with an info icon), E-Mail User Name (text input), E-Mail Password (text input), and DSF SSO Token (text input with a 'Generate Token' button). Below these fields are several checkboxes for user permissions and settings, including 'Set User's Password...', 'Force password change at Signon', 'Use robust password rules', 'Not allowed to override', 'Not allowed to return cash', 'Can override credit limit', 'Show user name on Log In window', 'Lock sales rep names', 'Can edit QuickAccess Panel', and 'Notify when digital assets are scheduled to be deleted'. The last checkbox is checked and highlighted with a red box.

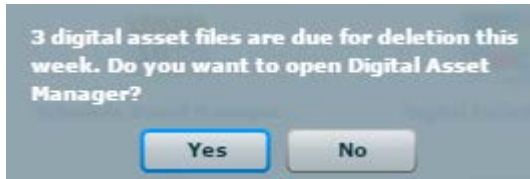
When these users log in, and files are due to be deleted that week, a message informs the users. The users can then review these files in Digital Asset Manager (see below) and decide whether to keep them by downloading them.

**Note** It is a good idea to notify more than one user in case that user is away when files are due to be deleted.



## Using Digital Asset Manager

If you configured some users (as described above) to be notified at login that digital assets are due to be deleted in the current week, those users can then open Digital Asset Manager to review what is due to be deleted and download files they want to keep.



In addition, you can use Digital Asset Manager *at any time* to review all the digital assets you currently have in the system and either delete them or download them.

To open Digital Asset Manager, select **Admin > Digital Asset Manager**.

**Note** Files for web orders (for example, for Digital StoreFront orders) are listed in Digital Asset Manager, but you cannot delete or download them – these files are stored and handled differently.

### Due This Week tab

On the **Due This Week** tab in the Digital Asset Manager window, you can review the files that are due to be deleted and download them if you want to keep them.

**Notes** To calculate whether the digital assets for an invoice should be deleted, the system uses (a) the number of days between the current date and the date an invoice was last updated and (b) the duration (in days) specified in the Digital Assets preferences or the duration set in an account. (An account-level duration always overrides the system-level duration.)

Files are always automatically deleted at 11:00 P.M. on a Friday at the end of the week they are due to be deleted.

Select check box of file you want to preview or download

<input type="checkbox"/>	Name	File Format	Repository Path	Date Uploaded	Job #	Document No.	Account Name
<input checked="" type="checkbox"/>	Promo Materials.pdf	pdf	PSAsset7644624556292283300.pdf	11/8/2016 10:54 AM	1	69	Anna's Designs
<input type="checkbox"/>	Helping You Sell.pdf	pdf	PSAsset4591709562237570866.pdf	11/8/2016 10:54 AM	1	69	Anna's Designs
<input type="checkbox"/>	Nov Newsletter.pdf	pdf	PSAsset4927153128598129290.pdf	11/8/2016 10:57 AM	1	70	Anna's Designs

Used Space: 1.26 GB      Total Space: 20 GB

At the bottom of the Digital Assets window you can see your **Used Space** versus **Total Space**.

After you use 85% or more of your 20 GB allotted space, a warning is displayed at the bottom of the window. You can either delete files you no longer need (on the **All** tab in the Digital Asset Manager window) or contact EFI Sales to purchase additional space.

### All tab

The **All** tab in the Digital Asset Manager window lists all the digital asset files you have in the system (including those due to be deleted and those for web orders).

On the **All** tab you can preview, download, and delete files.

**Note** You can only download and delete files that were added directly in PrintSmith Vision (in the Digital Assets window for a job). You cannot delete files for web orders (for example, orders placed in Digital StoreFront).

Name	File Format	Repository Path	Date Uploaded	Job #	Document No.	Account Name
English 301-302 Course Notes.pdf	pdf	PSAsset2581190413537573866.pdf	11/8/2016 11:08 AM	1	72	J&N Graphics
Dec Newsletter.pdf	pdf	PSAsset1264735063513356219.pdf	11/8/2016 10:59 AM	1	71	J&N Graphics
Nov Newsletter.pdf	pdf	PSAsset4927153128598129290.pdf	11/8/2016 10:57 AM	1	70	Anna's Designs
Promo Materials.pdf	pdf	PSAsset7644624556292283300.pdf	11/8/2016 10:54 AM	1	69	Anna's Designs
<b>Helping You Sell.pdf</b>	pdf	<b>PSAsset4591709562237570866.pdf</b>	<b>11/8/2016 10:54 AM</b>	<b>1</b>	<b>69</b>	<b>Anna's Designs</b>
PrintSmith Vision 3.3.1- EFI-Hosted Guide for Sna	pdf	PSAsset295551411258689000.pdf	10/23/2016 2:19 AM	1	66	J&N Graphics
Party Planning.pdf	pdf	PSAsset5707595481124958049.pdf	10/10/2016 1:55 PM	1	56	J&N Graphics
CRM-Attachment-80662.pdf	pdf	PSAsset3238873580107269101.pdf	10/6/2016 5:18 AM	2	E#6	Anna's Designs
Scripting QTP - CH11 - Shell32.pdf	pdf	PSAsset5888261110957206845.pdf	9/30/2016 2:07 AM	1	53	Anna's Designs
Scripting QTP - CH09 - WSH.pdf	pdf	PSAsset1901764915846880879.pdf	9/30/2016 2:07 AM	1	53	J&N Graphics
Scripting QTP - CH08 - ADODB.pdf	pdf	PSAsset6658108567871163197.pdf	9/30/2016 2:05 AM	1	52	Anna's Designs
Scripting QTP - CH07 - Working with Files.pdf	pdf	PSAsset7400374650914055184.pdf	9/30/2016 2:02 AM	1	51	J&N Graphics

### When a digital asset is deleted

When a digital asset is deleted (either automatically by the system or manually on the **All** tab in the Digital Asset Manager window), you can see this if you open the Digital Assets window for the job with which the file was associated. The file is still listed in the Digital Assets window, but is identified as purged and no longer available.

Name	File Form	Repository Path	Date
Configuration Form.pdf	pdf	<Purged, no longer available>	11/4/2015 1:24

## Receipt Printing (EFI-Hosted Installations)

To facilitate receipt printing when PrintSmith Vision is EFI-hosted, you can now install Remote Print Center (RPC) version 3.5 on a client computer to which the receipt printer is attached. RPC ensures communication between your PrintSmith Vision server and the receipt printer and avoids the need to preview a PDF of a receipt and select a printer before printing the receipt.

**Notes** If you have an earlier version of RPC installed, please contact EFI Support for help in uninstalling it. RPC is also used for communicating with a Fiery.

After you install RPC on a client computer (see page 12 for system requirements) to which the receipt printer is attached:

- Contact EFI Support to activate receipt printing for you. (This step is essential.)
- If you did not already do so, configure the receipt printer as described in the *PrintSmith Vision – Configuring Receipt Printers* guide.
- If you previously configured the receipt printer and selected the **Use local printer for receipt print** check box in the Cash Drawer preferences in PrintSmith Vision, *clear* this check box.
- To print receipts from other client computers, make sure the receipt printer is shared as described in the *PrintSmith Vision – Configuring Receipt Printers* guide.

**Notes** You can have one installation of RPC per PrintSmith Vision server. Only one receipt printer (the one attached to the computer where RPC is installed) can take advantage of RPC and the simplified printing it offers.

If you have more than one receipt printer, the other receipt printers (the ones not attached to the RPC computer) need to be configured as described in the *PrintSmith Vision – Configuring Receipt Printers* guide.

## E-Commerce API

The following enhancements were made to the e-commerce API:

- You can now use **web\_price** in the **items** section for invoice and estimate creation when using job templates in PrintSmith. For example, in the post request:

```
{ "items":
  [
    {
      "type": "print",
      "job_template": "templateName",
      "description": "description",
      "quantity": 100,
      "category": "productkey",
      "web_price": 120,
    },
    {
      "type": "wide format",
      "job_template": "templateName",
      "description": "description",
      "quantity": 100,
      "web_price": 160,
      "category": "productkey"
    }
  ]
}
```

When you use **web\_price**, the price of the ordered item will override that in the job template, and the prices in the invoice will be locked and distributed among the job components (charges). In addition, the price adjustment (the difference between the price coming in from the API and the price in the template) will be available in the Web worksheet.

- Instead of using **account\_id** to create an estimate or invoice, **contact\_id** can be used to provide a contact ID (number). The invoice is then created for the account associated with the contact. You can also use **account\_account\_id** to provide the account number when creating an invoice or estimate through the API. Note the following:
  - If you want to use **contact\_id**, *either* provide just a **contact\_id** (and not **account\_account\_id** or **account\_id**) *or* put the **contact\_id** before **account\_account\_id** and/or **account\_id** in the file.
  - If **account\_id** and **account\_account\_id** are both provided (but not **contact\_id**), the one which comes first in the file is used.

If **account\_account\_id** is either null or has an invalid value, an error message like this is displayed: {"status": "Failure", "message": "Account with number(account\_account\_id): 36356 was not found."}. In this case, either provide a valid value for **account\_account\_id** or remove it completely and provide only a **contact\_id** or **account\_id**.

---

## Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.5. For your convenience they are categorized.

### Installation

- The name of the Installer file now includes the version number so you know which version you are installing. (Issue Reference: 15987)

### EFI-Hosted Installations

- The time it takes to add charges to jobs (from the Job Charges window) was significantly decreased. (Issue Reference: 17321)
- When you click **Accept** after entering a quantity in the Cash Register window, the tax no longer gets doubled. Previously it was doubled until you selected a payment method, after which it was set correctly. (Issue Reference: 16607)

### Localization

- (Australia) Bank drafts in deposit tickets are now identified as EFT. (Issue Reference: 16184)

### Charges

- When a square area charge uses a discount price list based on percentages, the charge is now calculated correctly.

**Note** If you select the **Last line is add'l qty** check box in the price list, make sure the last line is set to 0 to ensure correct pricing.

(Issue Reference: 16910)

### Press Definitions

- The label of the second column in the Edit Speed Table window was corrected to be **Speed** and in the Edit Waste Chart window was corrected to be **Spoilage**. (Issue Reference: 17165)

### Stocks

- When you are searching for stocks in the Stock Picker window, you can now enter text in full in the **Color** and **Generic Color** fields so the search is based on what you enter. (Issue Reference: 14670)
- If you order a stock that is defined "in sets," the quantity in the Order Stock window and the Stock Order report is now correctly in sheets, not sets. (Issue Reference: 15184)
- The cost of stock in the Order Stock window now matches the cost defined in the stock definition, based on the quantity brackets. Note that if there is a break in the quantity brackets (e.g., 1, 100, 500, 0, 1000), the remaining quantities (in this example, 1000) are ignored. (Issue Reference: 12832)
- In some situations, unnecessary low stock warnings were being displayed and the **Stock On Hand** value was not being adjusted correctly. This was fixed. (Issue Reference: 16309)

### Accounts

- The **Royalty Exempt** check box on the **Credit Control** tab in the Customer window is now always displayed, but it can only be selected or cleared by a member of the owner or system admin access groups. (Issue Reference: 16608)
  - On the **Credit Control** tab in the Customer window you can now specify a **Percent** discount as a one-time discount. (Issue Reference: 14323)
-

## Estimating

### Invoices and estimates

- If you create a document, and the account is missing a sales rep, the sales rep for the contact is used instead. (Issue Reference: 17151)
- When a multi-part job includes a job based on the **Total of all copies** method, the price in an estimate and invoice is now the same. (Issue Reference: 17284)
- When Australian rounding is used, and the subtotal is a number like 117 or 137, a 10% tax is now correctly calculated as 11.70 or 13.70. (Issue Reference: 16756)
- The **Royalty Exempt** check box the Document Totals window is now always displayed, but it can only be selected or cleared by a member of the owner or system admin access groups. (Issue Reference: 16608)
- In some situations the sort order in the Pending Documents window was being reversed. This was fixed. (Issue Reference: 17286)
- If you open and minimize the Pending Documents window, the window now works correctly as a "single-instance" window. (You can no longer end up with multiple versions of the window.) (Issue Reference: 17228)
- If the Order Number Format preferences specify a prefix or suffix, and you create a document from a template, the prefix or suffix is now correct in the document. (Issue Reference: 17416)

### Jobs

- If you create a job template from an existing template with a multi-part job, all the job parts are now retained in the original template. (Issue Reference: 16866, 16920)
- When a document is based on another document, you can now see the number of the source document (**Source Inv**) at the bottom of the **Commands** pane in the Job window. (Issue Reference: 13754)

## POS

- The total in the cash register is now correctly rounded, which also means the tax on the total is now correct. (Issue Reference: 13728)

## Accounting

- When you pick up invoices and the invoice taxable total is less than the **Minimum Taxable Amount** specified in the tax table, tax is no longer calculated. (Issue Reference: 17282)
- If you post charges (with **AR > Post POS Charges**) and then generate statements, the POS charges on the statement are now listed as **Merchandise Charges** without the details of each charge being included. (Issue Reference: 13593)
- The Productivity Data window that opens during closeouts now supports four decimal places for the **Number of Workers** field and all the hours fields. (Issue Reference: 17289)
- An error no longer occurs during closeouts if the check used for payment and the check used to return a deposit have the same check number. (Issue Reference: 16990)
- If you manually freeze accounts, they are no longer unfrozen during account aging when **Mark Inactive Accounts** is selected. (Issue Reference: 17089)
- When accounts had a status of **Inactive**, their status was not always changing to **Current** as expected. Now inactive accounts remain inactive only when there are no recent payments and no pending invoices for the account. If a new estimate is created for an inactive account, the account status remains **Inactive**. If a new invoice is created for an inactive account, its status changes to **Current**. In addition, if a payment is made for an account, its status is no longer **Inactive**. Likewise, if pending invoices were created on a date that does not exceed the **Inactive Period** specified in the Credit/Defaults preferences, the account status is **Current**. (Issue Reference: 17367)

## Dashboard

- When PrintSmith Vision is integrated with Digital StoreFront, the Dashboard invoice statistics (for example, **Current Day Invoices**) now include invoice amounts for orders placed in Digital StoreFront. (Issue Reference: 17373)

## Reports

### Work in Progress

- The time it takes for the Integration Schedule report to load was decreased. (Issue Reference: 16997)

### Report Manager

- The descriptions of the standard reports available in Report Manager were improved. (Issue Reference: 9309)
- When a report includes search rules with default values, they are automatically selected (you do not have to select them manually). (Issue Reference: 15853)

## Administration

### E-Mails

- Calibri is now available as a font selection for customizing the body of e-mails. (Issue Reference: 16987)
- If you enter an additional e-mail address in the **CC** field, the **Send** button is now available. (Previously the button was disabled.) (Issue Reference: 16952)
- If the e-mail body for an invoice includes an **Amount Due** placeholder, and an invoice is paid from the Cash Register or Post Payments window, the amount due is now correct in the e-mail. (Issue Reference: 16914)
- If the e-mail body for an invoice or estimate includes a **Document Total** or **Amount Due** placeholder, the total or amount due in the e-mail now always includes two decimal places (for example, \$20.10 or \$22.00). A 0 at the end is no longer truncated. (Issue Reference: 16896, 16897)

### Preferences

- If **Contact Phone** is specified as a required field (in the Mandatory Field preferences), the **Phone** field for contacts now lets you enter letters, for example, **x** for extension. (Issue Reference: 16487)
- If the Mandatory Field preferences do not specify any required fields, the fields are no longer required when working with accounts or contacts. (Issue Reference: 16958)

### Table Editor

- If you use Table Editor to delete a sales rep from the Sales Rep table, any documents on the pending list or in history now retain the sales rep that was deleted. Previously, the **Sales Rep** field in pending or historic documents would be blank. (Issue Reference: 16323)

## Scheduler

- The sort and filter settings are now retained in the Schedule Board Job List window after the window is refreshed or a new job is added. (Issue Reference: 14208)
-

## Digital StoreFront Integration

- In the Integration preferences for Digital StoreFront, the **Test Connection** button was replaced by a **Check Now** button and a **Register** button was added.
  - If PrintSmith Vision and Digital StoreFront are both EFI-hosted or both customer-hosted, after you complete the **eFlow URL** through **DSF Routing Identifier** fields you should click **Check Now** to make sure you have a connection to eFlow and then click **Register** to register PrintSmith Vision with eFlow.
  - If PrintSmith Vision is customer-hosted and Digital StoreFront is EFI-hosted, you have a local eFlow that needs to communicate with a Super eFlow in the EFI Hosting Center. After you complete the **eFlow URL** through **DSF Routing Identifier** fields you should click **Check Now** to make sure you have a connection to your local eFlow, select the **Connected to Super eFlow** check box, click **Create eFlow Topics**, and then click **Register**.

Once the integration is established, **Check Now** can be used to verify you have a connection to eFlow. (Issue Reference: 16777)

- If eFlow stops and restarts, PrintFlow Vision now automatically reconnects to eFlow so there is no loss in connectivity. (Issue Reference: 17408)
- If you create a Web product (**Admin > Web Administration > Products**), associate a job template with the product, and then later change the SKU for the product, the job template name gets changed to match the SKU name. (Issue Reference: 17001)
- If the brief description of a product in Digital StoreFront was greater than 255 characters, the product was not being displayed in PrintSmith Vision when you tried to map a product template to a Digital StoreFront product. This was fixed. Product descriptions of up to 2,000 characters are now handled. For very long descriptions you can hover over the description to see it in full in a tooltip. (Issue Reference: 17062)
- If you delete a registered stock in PrintSmith Vision, you are now warned that the stock (media) is also being deleted in Digital StoreFront. (Issue Reference: 16595)
- When a Digital StoreFront order includes a content file (digital asset), it can now be previewed both in PrintSmith Vision (in the Digital Assets window) and on the Fiery. (Issue Reference: 17239)
- When you are picking up a credit card order and click **OK** after a message informs you that payment was pre-authorized in an external system, to avoid confusion, the Cash Register window no longer has payment options available (since the payment is being made in an external system). Only the **Post** button is available. (Issue Reference: 17060)
- If a discount is applied in PrintSmith Vision to an order placed in Digital StoreFront, the correct total amount is now sent to Digital StoreFront (as a negative adjustment). (Issue Reference: 16906)
- If an invoice-level charge or markup charge is added to a web order in PrintSmith Vision, the updated price is now sent to Digital StoreFront. (Issue Reference: 16938, 17422)
- When an order for a multi-part job comes into PrintSmith Vision, the price of the order is now updated correctly in Digital StoreFront. (Issue Reference: 16937)
- The Dashboard invoice statistics in PrintSmith Vision (for example, **Current Day Invoices**) now include invoice amounts for orders placed in Digital StoreFront. (Issue Reference: 17373)

## Fiery Integration

- The device list in the Manage Fiery Devices window now shows the number of mapped print services. (Issue Reference: 16630)

## Four 51 Integration

- If you create a Web product (**Admin > Web Administration > Products**), associate a job template with the product, and then later change the SKU for the product, the job template name gets changed to match the SKU name. (Issue Reference: 17001)



## PrintSmith Site Integration

- In some circumstances an error would occur when you were making a catalog the default catalog. This was fixed. (Issue Reference: 15701)
- If you create a Web product (**Admin > Web Administration > Products**), associate a job template with the product, and then later change the SKU for the product, the job template name gets changed to match the SKU name. (Issue Reference: 17001)
- Products added to the last category in a catalog were not always being displayed. This was fixed. (Issue Reference: 10959)

## Crouser Pricing

- If you update the price list you must log out of PrintSmith Vision and log back in for the price list data to be updated. (Issue Reference: 16185)

## E-Commerce API

- If an account includes a discount (either an amount or percentage), and an invoice is created for the account through the API, the discount is now applied. This can be seen in the Document Totals window.
  - If the database includes any invoice or estimate templates, a query for a specific range of invoices now works without an error occurring. (Issue Reference: 17000)
  - The Get response for accounts now also includes **account\_id** to provide the sequential account number, for example, "**account\_id**:10". The Get response for invoices and estimates may now include **account\_account\_id**, for example, "**account\_account\_id**:101". (Issue Reference: 17023)
  - If you create a Web product (**Admin > Web Administration > Products**), associate a job template with the product, and then later change the SKU for the product, the job template name gets changed to match the SKU name. (Issue Reference: 17001)
  - If **contact\_id** is used for creating an estimate or invoice, the main contact for the account is used. Temporary contacts are ignored. (Issue Reference: 17283,17285)
  - When an invoice is updated and a job is added/updated with **web\_price**, the original tax table for the invoice is now retained. (Issue Reference: 17270)
  - If the Order Number Format preferences specify prefixes and/or suffices, estimates and invoices created through the API will now include prefixes and/or suffixes as specified in the preferences. (Issue Reference: 17124)
  - If a job template was imported from PrintSmith Classic, and it is missing a charge definition, the deleted charge will have zero pricing, and the sub total will now be correct. (Issue Reference: 17240)
-

# Upgrading PrintSmith Vision

## About Upgrading

If you were already using an earlier version of PrintSmith Vision, but want to upgrade to version 3.5, you update your existing installation by running the 3.5 installer. *You must, however, be upgrading from PrintSmith Vision 3.4 or higher, not a pre-3.4 version.*

An upgrade requires a re-start of the server computer.

## Important: Before You Begin the Upgrade

### Have your license activation code (LAC) ready

As of PrintSmith Vision 3.5, the Installer now checks your license to see if your maintenance contract is current (unexpired). You will need to enter your LAC so the Installer can perform this validation.

To locate your LAC, do one of the following:

- In PrintSmith Vision, select **Help > About PrintSmith** and then click **Update License**. Your LAC is listed below **PrintSmith Vision Base System**.
- Locate the original activation e-mail you received from EFI. This includes your LAC.

**Note** If you have problems locating your LAC, please contact EFI Support.

### If you also plan to upgrade the operating system

If you plan to upgrade your operating system *as well as* PrintSmith Vision, *be sure to follow these instructions to avoid losing data:*

- For upgrades to Windows 10, see “Windows 10 and existing PrintSmith Vision installations” on page 8.
- For upgrades to Mac OS X 10.12 (Sierra), follow the instructions in “OS X 10.12 (Sierra) and existing PrintSmith Vision installations” on page 10.

### If you want to use an SSL connection

Support for SSL (Secure Sockets Layer) connections was introduced in PrintSmith Vision 2.3. SSL creates an encrypted connection between the PrintSmith Vision server and your users’ browser, preventing eavesdropping and data tampering. When you use SSL, the URL to your server is prefaced by `https://` instead of `http://`.

**Note** To use SSL, you must purchase an SSL certificate from a certificate authority (CA) and then install and configure it (with the help of EFI Support). *The certificate must be compatible with Apache Tomcat version 7.*

A non-SSL connection (which is the default connection between PrintSmith Vision and users’ browsers) is not encrypted. This means data transmitted to and from the server could in theory be seen by others.

**Important** Even if you use non-SSL, credit card information is never at risk. This information is never stored in PrintSmith Vision, and USA ePay ensures the security of the transmission of credit card information.

If you are unfamiliar with SSL and SSL certificates, EFI strongly recommends you use the default non-SSL connection.

Some organizations may have policies requiring SSL for all data exchange over the Internet, in which case they can take advantage of this new SSL functionality in PrintSmith Vision.

If you did not previously configure SSL, during the upgrade process, you will be given the choice of using a non-SSL (the default) or SSL connection. Keep in mind that an SSL connection:

- Requires the purchase and installation of an SSL certificate. The certificate must be purchased from a Certificate Authority (CA) and be compatible with Apache Tomcat v. 7.

- Requires the help of PrintSmith Support to install and configure the signed certificate your purchased.
- Changes the PrintSmith Vision URL: the URL begins with https:// and uses port 8443 by default.

## Upgrade Your System

**Warning** You must have PrintSmith Vision 3.4 or higher installed before you can upgrade to 3.5.

1. Be sure to read “Important: Before You Begin the Upgrade” on page 34.
2. Back up your entire system as described in the section on “Backup Manager preferences” in the *PrintSmith Vision - Setup and User Guide*.
3. Obtain the PrintSmith Vision Server 3.5 installer.

**Caution** Before you start the installer, close PrintSmith Vision Monitor, pgAdmin, and any PrintSmith Vision installation folders that are open.

4. Start the installer.
5. After you accept the license agreement, enter your **LICENSE ACTIVATION CODE** (LAC). For information about locating your LAC, see “Have your license activation code (LAC) ready” on page 34.

If your maintenance contract is current (unexpired), you can continue with installation; if it has expired, contact EFI Sales to renew your maintenance contract. You cannot continue with installation until your maintenance contract is updated.

**Notes** If you are not connected to the Internet while running the Installer, you can select the **Currently do not have Internet connection** check box, obtain an offline activation code from EFI Support, and enter this code (as well as your LAC) to proceed with installation. (The offline activation code is valid for 24 hours.)

You only have to enter your LAC once. After your license is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code (which the Installer will then check to make sure your maintenance contract has not expired).

**Get User Input**

- Introduction
- Must have admin privileges
- License Agreement
- Get User Input**
- Please read entire mess...
- Choose Install Folder
- Select a starting point
- Default Language Selecti...
- Pre-Installation Summary
- Pre-Update Summary
- Installing...
- Upgrade Instructions
- Install Complete

Please enter your license activation code.

If you do not have an Internet connection, please contact EFI Support for an offline activation code which is required in addition to your license activation code

**LICENSE ACTIVATION CODE**

Currently do not have an Internet connection

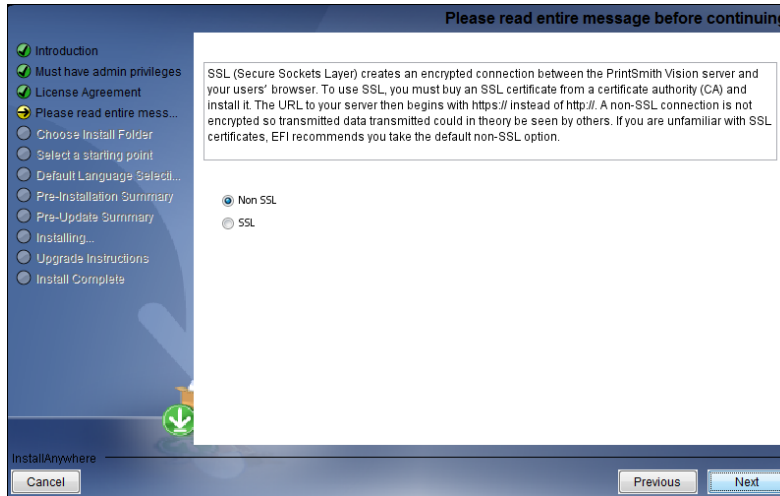
InstallAnywhere

Cancel Previous Next

- After you read some warnings about performing backups and closing all PrintSmith applications, if you are given this option, select **Non SSL** (the default) or **SSL**. For more information about this choice, see “If you want to use an SSL connection” on page 34.

**Notes** If you selected **SSL** in a previous release of PrintSmith Vision, you will not be given the choice to select **Non SSL** or **SSL**.

If you select **SSL**, you must install and configure your SSL certificate after you upgrade PrintSmith Vision. Contact PrintSmith Support for help with this.



- Follow the remaining instructions to complete the upgrade. A re-start of the computer is required at the end of the upgrade.

## After the Upgrade

To ensure you are seeing all the latest changes to the user interface, clear your browser cache after upgrading PrintSmith Vision. You only need to do this for any browser that you used to run PrintSmith Vision in the past. For instructions on clearing the browser cache:

Chrome	<a href="https://support.google.com/accounts/answer/32050?hl=en">https://support.google.com/accounts/answer/32050?hl=en</a>
Firefox	<a href="https://support.mozilla.org/en-US/kb/how-clear-firefox-cache">https://support.mozilla.org/en-US/kb/how-clear-firefox-cache</a>
Safari	<a href="https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX">https://answers.syr.edu/display/software/Clear+Cache+in+Safari+version+7+on+Mac+OSX</a>
Microsoft Edge	<a href="https://support.microsoft.com/en-us/help/10607/windows-10-view-delete-browser-history-microsoft-edge">https://support.microsoft.com/en-us/help/10607/windows-10-view-delete-browser-history-microsoft-edge</a>

**Important** Make sure all your users clear their browser cache, too.