

PrintSmith™ Vision Release Notes

Version 3.6

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

April 2017 PrintSmith Vision 3.6

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About This Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.6.

Contact Information

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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

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US Fax:	651.365.5334
US E-Mail:	ProfessionalServicesOperations@efi.com
Outside US E-Mail:	EMEAProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations and upgrades. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.

Important Information – Read This!

Do You Meet System Requirements?

Be sure you meet the system requirements listed on page 8.

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 11.

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 38.

Known Issues

PrintSmith server will be slow to start first time after upgrade to 3.6

Because of changes to the database made in PrintSmith Vision 3.6, the server will take several minutes to start automatically the first time after the upgrade to 3.6. The time it will take depends on the size of your database and available system resources.

Warning During the server startup, do *not* shut down the PrintSmith Vision server and do *not* open the PrintSmith Installation folder or any of its sub-folders.

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 12).

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 14.

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 9.

Windows 10 and existing PrintSmith Vision installations

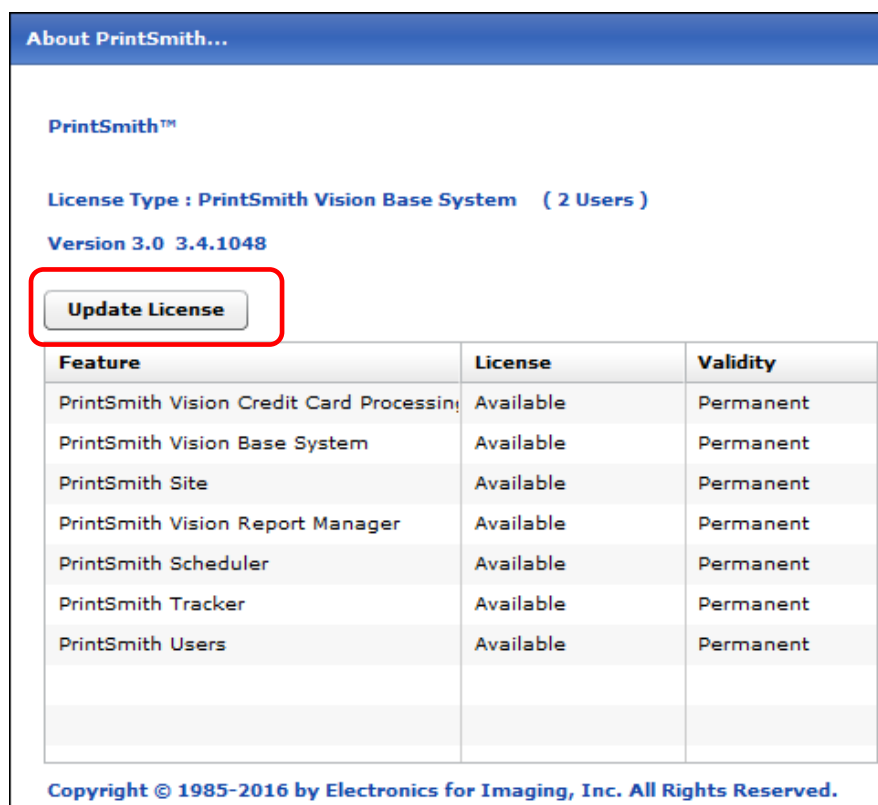
Windows 10 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to Windows 10, be sure to follow the instructions below for existing PrintSmith Vision installations.

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)

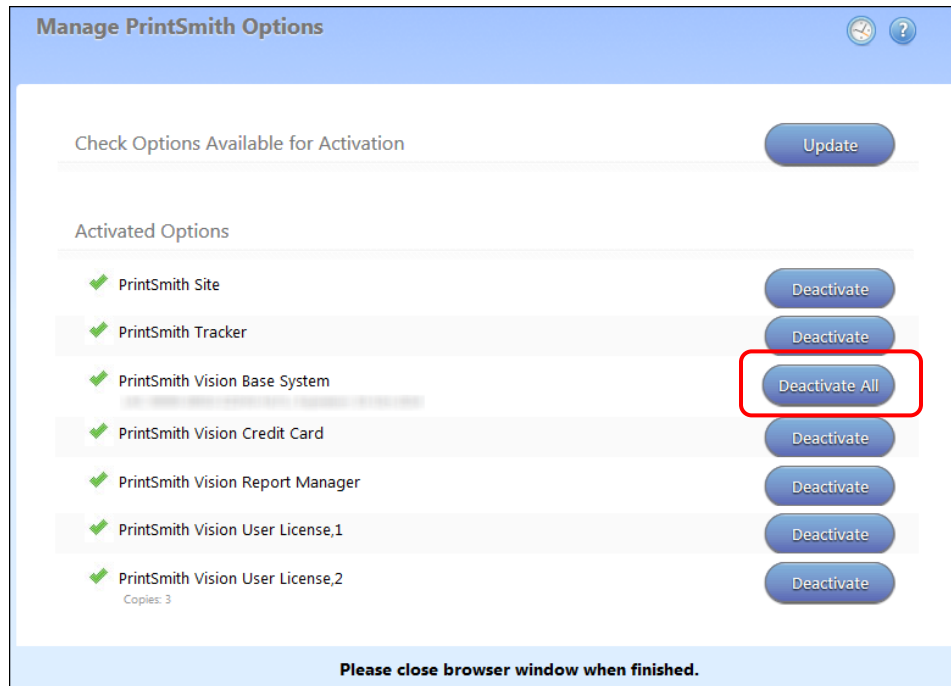
Version 3.0 3.4.1048

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

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- 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 11.

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

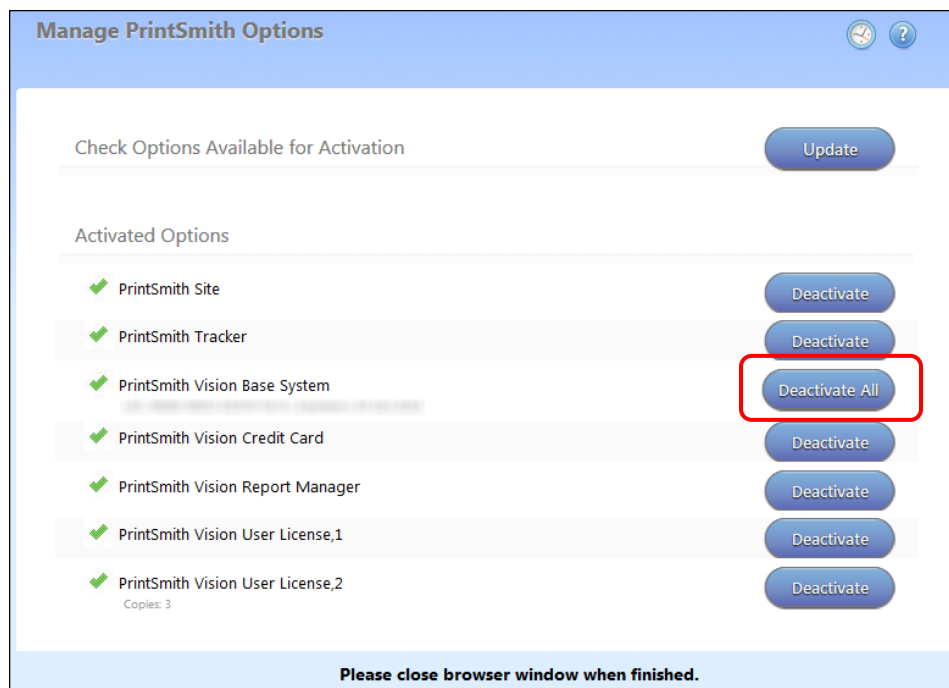
OS X 10.12 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your server to OS X 10.12, be sure to follow the instructions below for existing PrintSmith Vision installations.

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 1.5.0.36 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

To use the eFlow-based integration of PrintSmith Vision with Digital StoreFront®, Digital StoreFront 9.6 or higher is required.

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® 4th and 5th 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 3.6 includes the following changes and enhancements.

Scheduling Custom Reports

You can now schedule custom reports from Report Manager. The reports can run at a time and frequency of your choice, and they can be generated as PDF files for printing and/or as CSV (Excel) files. By scheduling reports you ensure that they run automatically and regularly without you having to remember to run them.

If you are hosting PrintSmith Vision, the reports are saved in a new ReportScheduleRepository folder. This folder is a sub-folder of the root folder where PrintSmith Vision is installed (for example, C:\ on a Windows computer if PrintSmith is installed on the C:\ drive or /ReportScheduleRepository on a Mac). The ReportScheduleRepository folder is automatically backed up when you use the Backup Manager preferences to back up your system.

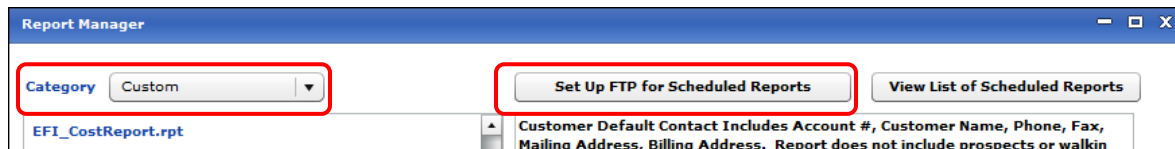
If EFI is hosting PrintSmith Vision, you can open or download your reports from within Report Manager.

You can also send the reports to your FTP site and access them from there.

If you have an FTP site you want to use

If you have an FTP site and want reports made available on the site, you should configure the FTP site before you start scheduling reports.

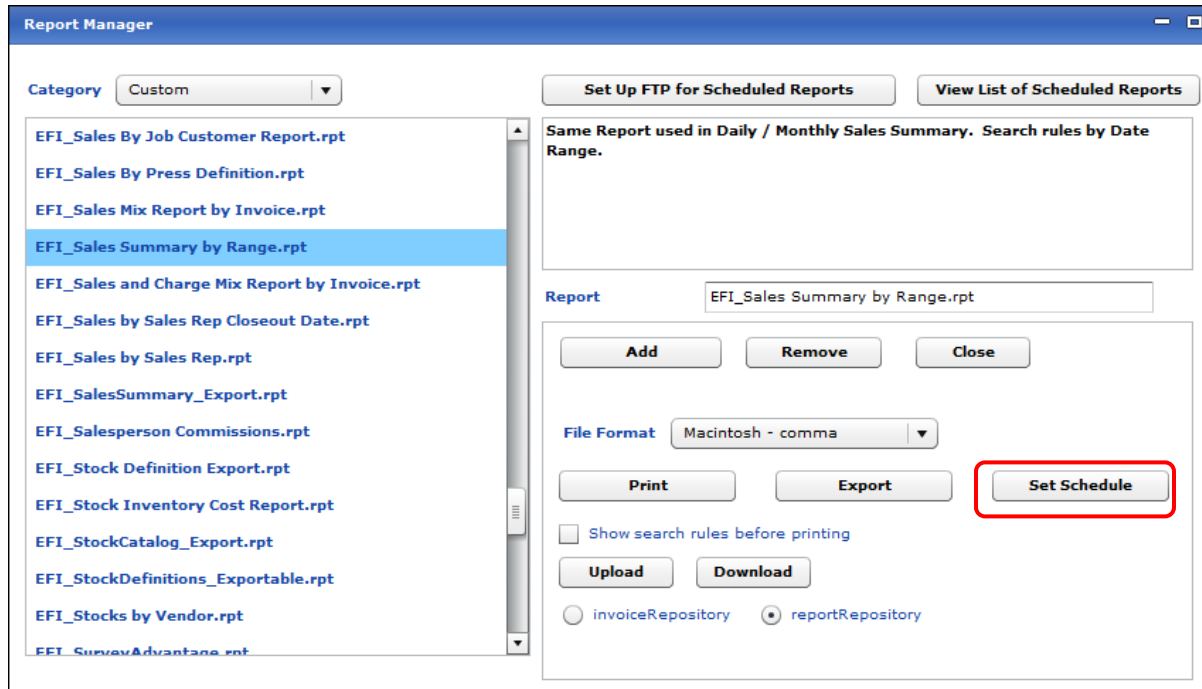
To do so, open Report Manager (**Reports > Report Manager**), select **Custom** in the **Category** field, and click **Set Up FTP for Scheduled Reports**.



You then complete the fields in the Set Up FTP for Schedule Reports window and click **OK**.

Scheduling reports

To schedule a custom report, select it in Report Manager and click **Set Schedule**.



You then select a schedule for the report, for example, **Weekly on Friday at 17:00** or on **Selected Days (M W F) at 20:00**.

You must also indicate whether you want to **Print** and/or **Export** the report. If you select the **Print** check box, the report is generated as a PDF file; if you select the **Export** check box, the report is generated as a CSV file.

If the report includes search fields, define your criteria, for example, enter date shortcuts to indicate the range of dates you want to include in the report.

Tip Before you click **OK** to schedule the report, you can click **Preview** to check the report contents.

Set Schedule

No schedule
 Daily
 Weekly
 Day of week: Sunday

Monthly
 Beginning Day: 0
 Ending

On selected days
S M T W T F S

On selected hours

12	1	2	3	4	5	6	7	8	9	10	11	AM
12	1	2	3	4	5	6	7	8	9	10	11	PM

Print Export

Search field	When field is
Start Date (mm/dd/yyyy)	<input type="text" value="/LSW/"/>
End Date (mm/dd/yyyy)	<input type="text" value="/LEW/"/>

Time: 18:00



You can use date shortcuts

After reports are scheduled

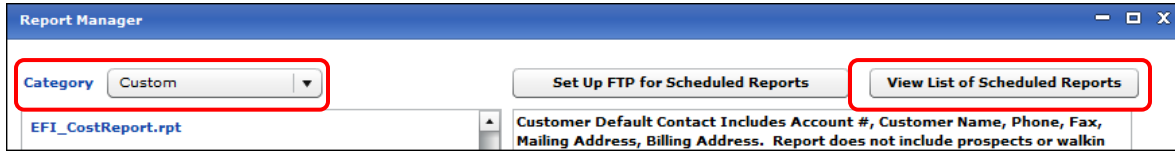
After you schedule a report, an icon indicates its scheduled status in the list of custom reports so you can quickly see what you already scheduled:

Report Manager

Category: Custom

- EFI_Customer Export.rpt
- EFI_Customer Marketing Report.rpt
- EFI_Customers - Active.rpt
-  EFI_Customers - Address List.rpt
-  EFI_Customers - Balance.rpt

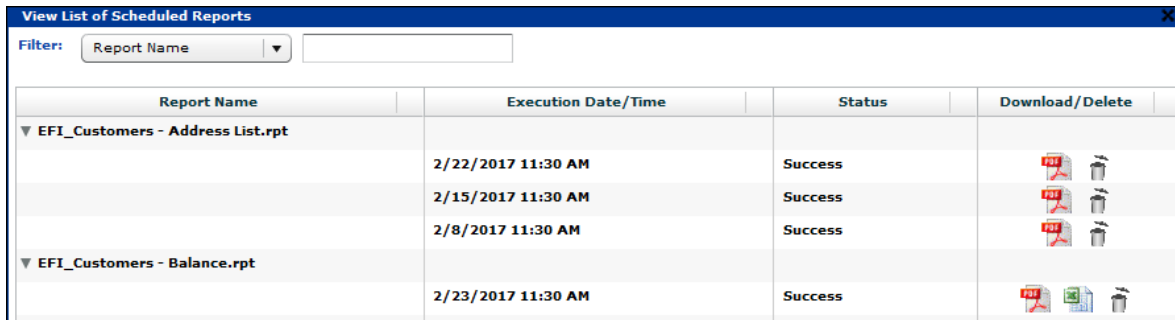
Once reports are scheduled and are being generated, you can click **View List of Scheduled Reports** to review which reports were generated, open or download reports, and delete any reports you no longer need.



The View List of Scheduled Reports window lists all the reports that were generated. Note that if a report is scheduled but has not run yet, it will not be listed in this window until it has run.

To help you find reports, you can filter the list by **Report Name** or **Execution Date/Time**.

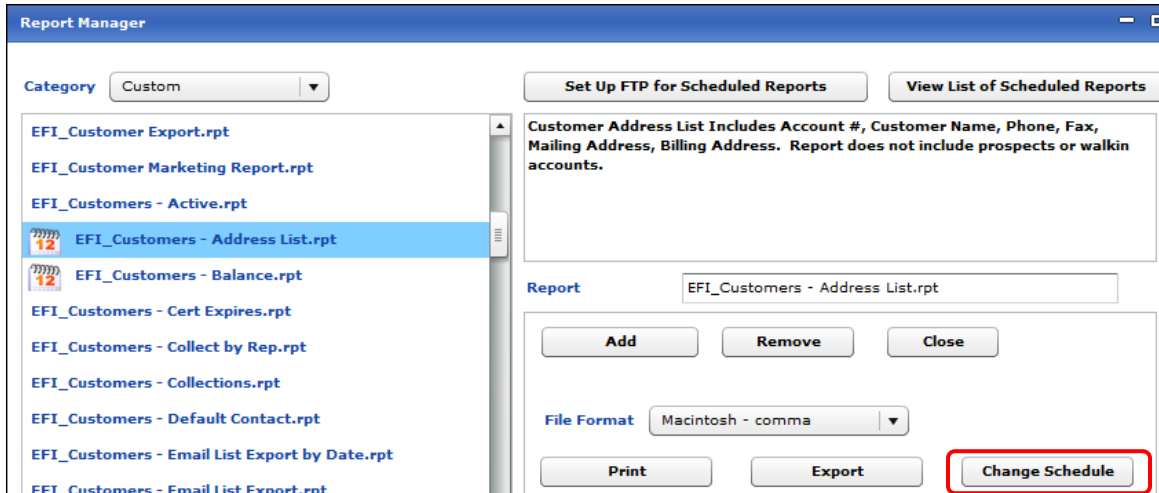
You can expand each report to see when it was run, check its status, open or download a report, or delete a report.



Depending whether the **Print** check box and/or **Export** check box was selected for the report, you can open or download a PDF file and/or CSV Excel file from this window.

If you run certain reports frequently, and no longer need older versions, click  to delete a report.

If you need to adjust the schedule for a report, select it in the custom report list and click **Change Schedule**.



Then make your adjustments in the Change Schedule window.

Change Schedule
✕

Last Executed Date/Time: 2/22/2017 11:30 AM

No schedule
 Daily
 Weekly

Day of week Wednesday

 Monthly

Beginning **Day:** 0

 Ending
 On selected days

S
M
T
W
T
F
S

 On selected hours

12	1	2	3	4	5	6	7	8	9	10	11	AM
12	1	2	3	4	5	6	7	8	9	10	11	PM

Print Export

OK
Delete
Preview
List
Cancel

The Change Schedule window indicates the **Last Executed Date/Time** for the report. In this window you can also click **List** to see when the report was run and whether it ran successfully. In addition, you can open or download reports, or delete them (just as you can in the View List of Scheduled Reports window described earlier).

Print Export

Execution Date/Time	Status	Download/Delete
2/22/2017 11:30 AM	Success	
2/15/2017 11:30 AM	Success	
2/8/2017 11:30 AM	Success	

Note For complete details, see “Scheduling Custom Reports” in the “Using Report Manager” chapter of the *PrintSmith Vision – Setup and User Guide*.

Additional and Changed Date Shortcuts for Custom Reports

If a custom report you are running, exporting, or scheduling includes date search fields, the following new date shortcuts are available (these shortcuts are case-sensitive).

Also note the following which may affect current reports you have defined:

- **/SY/** and **/EY/** now refer to the starting and ending dates for the standard calendar year (January 1 and December 31).
- If your business fiscal year (as defined in the PrintSmith Vision Business Calendar preferences) is different from the calendar year, use **/BSY/** and **/BEY/** instead of **/SY/** and **/EY/**.

/YD/	Yesterday's date
/LSW/	Last week's starting date
/LEW/	Last week's ending date
/LSM/	Last month's starting date
/LEM/	Last month's ending date
/SY/	Standard year starting date (January 1)
/EY/	Standard year ending date (December 31)
/LSY/	Last year's starting date
/LEY/	Last year's ending date
/BSY/	Business year starting date **
/BEY/	Business year ending date **
/LBSY/	Last business year's starting date **
/LBEY/	Last business year's ending date **

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

Digital StoreFront Integration: Contact Handling

In the eFlow-based integration between PrintSmith Vision and Digital StoreFront, enhancements were made to user handling and mapping. To take advantage of these enhancements, you must have PrintSmith Vision **3.6** and Digital StoreFront **9.6** plus have an eFlow-based integration.

Self-registered users and SSO users

Users who register themselves on a Digital StoreFront site may now be automatically created as contacts in PrintSmith Vision. Similarly, if Active Directory/SSO is configured in Digital StoreFront, a contact may be automatically created in PrintSmith Vision the first time a user logs into Digital StoreFront.

For this to work:

- You must be using PrintSmith Vision **3.6** and Digital StoreFront **9.6** and have an eFlow-based integration.
- The Digital StoreFront user must be associated with a print shop that is associated with a PrintSmith Vision MIS.

The information that is sent to PrintSmith Vision about a user can include name, title, address, phone numbers, e-mail address, and login user name. The information that is sent depends on the user profile fields that are configured in Digital StoreFront and what the user enters (in the case of self-registration). In addition, the user's company is used to create an account in PrintSmith Vision if the account does not already exist. If the account does exist, the user is associated with it.

For more information about how self-registration works, see the section on "Self-registration in Digital StoreFront" in the *PrintSmith Vision – Digital StoreFront Integration Guide*.

Note *Except for self-registered users and SSO users who originate in Digital StoreFront, all other users are created from contacts registered in PrintSmith Vision (as in earlier versions of the eFlow-based integration). If you create a user *manually* in Digital StoreFront, information about that user is not sent to PrintSmith Vision.*

User updates

In earlier versions of the eFlow-based Digital StoreFront-PrintSmith Vision integration, contacts/users were always managed (e.g., updated and deleted) in PrintSmith Vision, not Digital StoreFront. If you made changes to a user in Digital StoreFront, those changes were not sent to PrintSmith Vision. As of PrintSmith Vision 3.6 and Digital StoreFront 9.6, if users edit their profile in Digital StoreFront (or administrators edit a user profile), the updated user information *is* sent to PrintSmith Vision.

Notes To delete users, you must continue to unregister contacts in PrintSmith Vision. If you delete the users in Digital StoreFront, that information is *not* sent to PrintSmith Vision.

As in earlier releases, you can continue to edit contacts in PrintSmith Vision, and the information for the corresponding user in Digital StoreFront will be updated. The contact/user updates are now two-way.

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

Upgrading to the eFlow based integration

If you currently have a legacy PrintSmith Vision-Digital StoreFront integration and want to upgrade to the eFlow-based integration, follow the instructions in the "Upgrading" chapter of the *PrintSmith Vision – Digital StoreFront Integration Guide*.

Note Before upgrading, pay particular attention to how contacts and accounts will be synchronized and mapped.

Automatic Closeouts

Instead of performing daily or monthly closeouts manually, you can now have closeouts performed automatically – without any user interaction – at a time of your choice.

Note the following recommendations:

- **Monthly closeouts:** EFI recommends doing automatic monthly closeouts to ensure your monthly totals are captured at month's end. For example, if you are travelling, or if the end of the month falls on a weekend or holiday, an automatic monthly closeout ensures the closeout always takes place.
- **Daily closeouts:** EFI does *not* recommend automatic daily closeouts *for normal use* because you have no opportunity to balance the cash drawer by counting cash or credit cards, reviewing deposits, and so on. In general, manual daily closeouts are recommended. Automatic daily closeouts *can* be useful, however, if you cannot always be there to perform the closeout manually, but want to make sure the closeout takes place regularly.

Notes An automatic daily closeout will take place only if the register tape has items on it. If you perform manual daily closeouts on most days, and the register tape is empty, automatic closeouts will not take place on those days.

If the system finds discrepancies in the cash drawer during an automatic daily closeout, the closeout will fail, and you will need to perform a daily closeout manually to correct the problem(s). For this reason, if you frequently correct discrepancies in the cash drawer during manual daily closeouts, automatic closeouts are not a good solution for you.

An automatic monthly closeout will take place only if the register tape is empty. If it is not empty, the system automatically performs a daily closeout before the monthly closeout.

To take advantage of automatic closeouts, you must activate them with the new Closeout preferences.

To activate automatic closeouts

1. Select **Admin > Preferences > Accounting > Closeouts**.

2. Select the **Activate Auto Closeout** check box.
3. To perform daily closeouts automatically, select the **Perform daily closeout automatically** check box and then select a **Time of Day**. (The default time is 20:00.)
4. To perform monthly closeouts automatically, select the **Perform monthly closeout automatically** check box and then select a **Time of Day**. (The default time is 23:00.) Automated monthly closeouts always take place on the last day of the month.
5. To ensure some members of your organization are informed if a closeout fails or is interrupted, enter:

- **Failure Notification E-Mail Addresses** (separated by ;)
- **Subject Line** of e-mail that is sent
- **Body Text** of e-mail that is sent

Important For e-mail to be sent, you must have e-mail enabled and configured in PrintSmith Vision (with the E-Mail preferences).

6. Click **Save**.

Note the following:

- Users who are logged into PrintSmith Vision are given a 15-minute warning that an automatic closeout is about to begin so they can log out. If they remain logged in, their session is suspended until the closeout is done.
- A history of your automated closeouts is available in the Closeout preferences.

History		Refresh
Closeout Type	Date/Time	Status
Daily	3/1/2017 5:00:30 PM	OK
Monthly	2/28/2017 11:00:31 PM	OK
Daily	2/28/2017 5:00:30 PM	OK
Daily	2/27/2017 5:00:32 PM	OK

For more information about closeouts, see the “Accounting” chapter in the *PrintSmith Vision – Setup and User Guide*.

Additional Mandatory Fields

You can now make the due date required for both invoices and estimates. To do so, open the Mandatory Fields preferences (**Admin > Preferences > System > Mandatory Field**) and select the check box for the **Invoice/Due Date** and/or **Estimate/Due Date**.

Mandatory Fields		
Mandatory	Area	Field Name
<input type="checkbox"/>	Contact	Contact First Name
<input type="checkbox"/>		Contact Last Name
<input type="checkbox"/>		Contact Job Title
<input type="checkbox"/>		Contact Phone
<input type="checkbox"/>		Contact Email
<input type="checkbox"/>		Contact Lead Source
<input type="checkbox"/>		Contact Shipping Street
<input type="checkbox"/>		Contact Shipping City
<input type="checkbox"/>		Contact Shipping State
<input type="checkbox"/>		Contact Shipping Postal Code
<input type="checkbox"/>		Contact Shipping Country
<input type="checkbox"/>		Contact Age Range
<input type="checkbox"/>		Contact Gender
<input type="checkbox"/>		Job
<input type="checkbox"/>	Invoice	Due Date
<input type="checkbox"/>	Estimate	Due Date

When a due date is required, you will be unable to proceed with estimate or invoice creation without specifying a **Wanted by** date in the Account Info window. Likewise, if you click **Due Date** in the Pending Documents window, you will need to enter a date in the **Wanted by** field.

Note As with other mandatory fields, if you make the due date required, any *existing* estimates or invoices are not affected by the requirement *until* you edit the estimate or invoice and try to save it – you will then need to provide the **Wanted by** date.

Printing Multiple Deposit Tickets

You can now print more than one deposit ticket at a time from the Deposit Ticket window (**Reports > Deposit Ticket**). Select the tickets you want to print and then click **Select**.

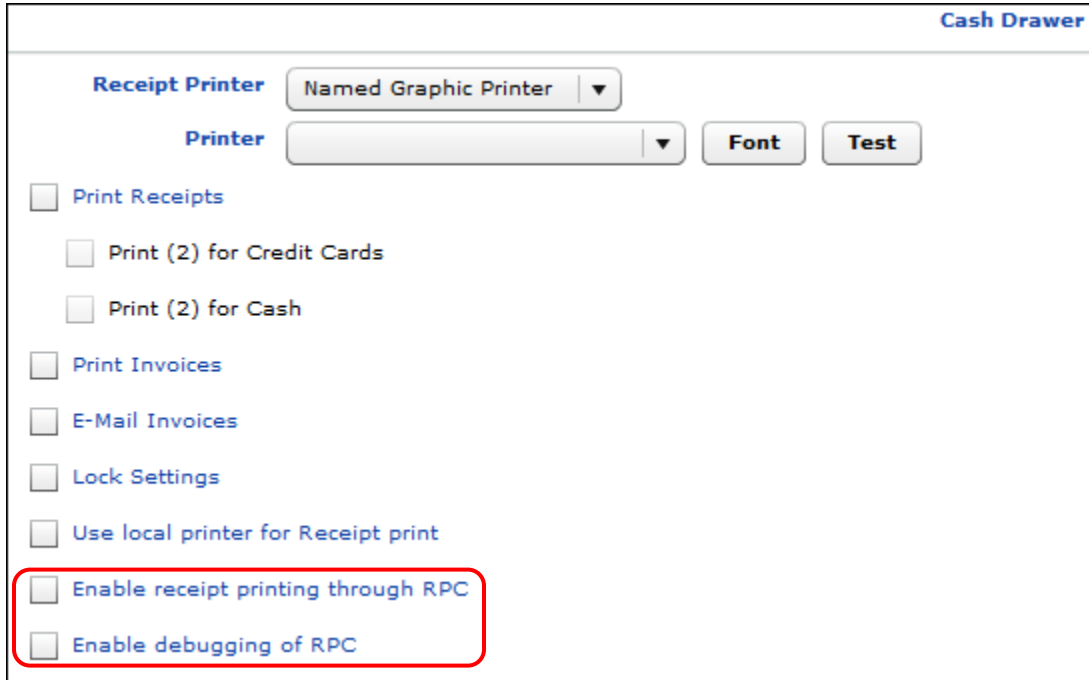
The report that is generated includes a Daily Deposit Record for each of the deposit tickets you selected in the Deposit Ticket window.

Receipt Printing Using Remote Print Center (RPC)

For EFI-hosted environments, PrintSmith Vision 3.5 introduced the ability to install RPC to ensure communication between your PrintSmith Vision server and the receipt printer and to avoid the need to preview a PDF of a receipt and select a printer before printing the receipt.

In PrintSmith Vision 3.6, you no longer need to contact EFI Support to activate receipt printing for you. Instead, you can use the Cash Drawer preferences to activate receipt printing through RPC yourself. In addition you can enable debugging for troubleshooting purposes.

Note For information about installing RPC and receipt printing, see the *PrintSmith Vision – EFI-Hosted Guide*.



The screenshot shows the 'Cash Drawer' preferences window. At the top right, the title 'Cash Drawer' is displayed in blue. Below the title, there are several settings:

- Receipt Printer:** A dropdown menu currently showing 'Named Graphic Printer'.
- Printer:** A dropdown menu with a downward arrow.
- Font:** A button.
- Test:** A button.
- Print Receipts**
- Print (2) for Credit Cards**
- Print (2) for Cash**
- Print Invoices**
- E-Mail Invoices**
- Lock Settings**
- Use local printer for Receipt print**
- Enable receipt printing through RPC** (This option is highlighted with a red rectangular box)
- Enable debugging of RPC**

E-Commerce API

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

Account Info fields

The following new fields can be used to update/enter information in the Account Info window for an estimate or invoice:

- If a **doc_title** is included, the **Title** field is updated.
- If a **shipping_address** is included, the **Other Address** is updated:

```
"shipping_address": {
  "company": "XYZ",
  "street1": "1 Main Street",
  "street2": "Building 3",
  "city": "Hanover",
  "state": "NH",
  "zip": "03755",
  "country": "US"
}
```

- If a **delivery_date** is included, just the **Deliver on** field is updated. Likewise, if a **wanted_by_date** is included, just the **Wanted by** field is updated. If, however, an **invoice_required_by** date or an **estimate_required_by** date is included, the **Deliver on** field automatically defaults to the value of the **Wanted by** field.
- If a **po_number** is included, the **PO #** field is updated.
- If a **resale_number** is included, the **Resale #** field is updated.
- If **ship_via** is included, the **Ship Via** field is updated.

Note By default, the values in the **PO #**, **Resale #**, and **Ship Via** fields in the Account Info window come from the account. They will only be overridden if an incoming order includes **po_number**, **resale_number**, or **ship_via** values.

- If a **hold_state** is included, the **Hold** field is updated.
- If **web_comments** are included, they are recorded in the **Customer Comment** field.

Shipping prices

A new **ship_price** field can be used to update the **Shipping** field in the Document Totals window.

Temporary contacts for invoices/estimates

The **contact** field can be used to create a temporary contact for an estimate or invoice as follows:

```
"contact": {
  "first_name": "Jane",
  "last_name": "Smith",
  "prefix": "P",
  "suffix": "S",
  "job_title": "Buyer",
  "salutation": "Ms.",
  "cell": "9999999999",
  "phone": "9999999999",
  "fax": "9999999999",
  "email": "jane.smith@hercompany.com"
},
```

Deposits for invoices

You can now use the **deposits** array to record up to three deposits per invoice when updating or creating an invoice:

- Use **type** to specify the type of deposit with **1**=cash, **2**=check, and **3**=credit card.
- Use **reference** to provide a check number or credit card transaction number.
- Use **amount** to specify the amount of the deposit.
- Use **deposit_number** (required) to indicate which deposit field (**1**, **2**, or **3**) the deposit should be recorded in.

Note If you do not provide a **deposit_number** or provide an invalid number, or the field already includes a deposit, an error will occur.

For example:

```
"deposits": [
  {
    "type": 1,
    "amount": 100,
    "deposit_number": 1 },
  {
    "type": 2,
    "reference": "3232",
    "amount": 150,
    "deposit_number": 2
  }
]
```

You can also use **deposit_user** to identify the user making the deposit. If **deposit_user** is not used, the user is identified as **API**. (API is not a user who is listed in the User Definitions window in PrintSmith Vision.) The **deposit_user** field must be part of the account information for the invoice, as shown in this sample extract:

```
"account_id": 5868,
"web_reference_number": 5,
"invoice_date": "24-01-2017 11:46",
"invoice_required_by": "31-01-2017 17:18",
"user": "s",
"taken_by": "web_order",
"deposit_user": "admin",
"sales_rep": "Stephanie",
```

Additional field updates on the job level

New fields can be used to set the **Brokered**, **Taxable**, and **Finished** check boxes at the top of the Job window, as well as to enter comments in the **Comment** field. In addition, new fields (notes, vendor, unit cost, total cost, and markup) can be set for outside services jobs.

Note If any of the fields described below are included in the order, they will override whatever is in the job template.

The new fields update the top of the Job window as follows:

- If a **comment** field is included, the **Comment** field is updated.
- If **brokered** is included (set to **true** or **false**), the **Brokered** check box is set accordingly.
- If **taxable** is included (set to **true** or **false**), the **Taxable** check box is set accordingly.
- If **finished** is included (set to **true** or **false**), the **Finished** check box is set accordingly.

For outside services jobs, the new fields that affect the Job window are as follows:

- If **notes** are included, the **Notes** field is updated.

- If a **vendor** (as defined in the *Vendor table*) is included, the **Vendor** field is updated.
- If a **unit_cost** is included, the **Unit Cost** field is updated.
- If a **total_cost** is included, the **Total Cost** field is updated.
- If a **markup** is included, the **Markup** field is updated.

Here is some sample JSON code to illustrate these fields:

```
"items": [
  {
    "type": "outside services", **
    "comment": "Satin Blazer Satin Cover 80# White 1",
    "taxable": true,
    "brokered": true,
    "finished": true,
    "description": "10005-BRO-Bed Brochures Bedford 1",
    "quantity": 500,
    "notes": "No replacements for requested paper",
    "vendor": "Express Brochures",
    "unit_cost": 1,
    "total_cost": 500,
    "markup": 1.5,
    "category": "",
    "web_price": 750.00
  }
]
```

** The **type** field corresponds to the **Title** of an outside services pricing method, as defined in your Pricing Methods preferences in PrintSmith Vision. The **Title** can be anything you want as long as the **Estimator** type in the Pricing Methods preferences is **Outside Services**.

Digital assets for jobs

You can now use **digital_asset_url** to specify the URL of a digital asset (content file) for a job (one URL per job). This URL must be accessible by the PrintSmith Vision server so the file can be previewed and downloaded.

Note When an invoice is created through the API, and a multi-part job template is used, **digital_asset_URL** can be applied only to the main job, not the sub jobs.

Here is some sample JSON code to show how **digital_asset_url** is used:

```
"items": [
  {
    "type": "BW",
    "comment": "B&W",
    "job_template": "PS-SKU-2",
    "description": "BAG Brochures",
    "digital_asset_url": "http://mycompany.com/dsf/PreviewPdf.ashx?FileId=KRv57rKzPjc-
    &SITEGUID=ec644b77-f617-4791-8ecc-d8057333d054&SITEGUID=ec644b77-f617-4791-8ecc-
    d8057333d054&WMK=-1&ULR=False",
    "quantity": 5000,
    "category": "",
    "web_price": 1007.28
  }
]
```

Ability to add entries to web worksheet

You can now use **web_worksheets** to add entries (in the form of a text description) to the web worksheet for a job (enclosed in the **items** array).

Notes You cannot update **web_worksheet** entries.

When an invoice is created through the API, and a multi-part job template is used, **web_worksheet** can be applied only to the main job, not the sub jobs.

For example:

```
"items":
  [
    {
      "type" : "print",
      "description" : "Trade Show Materials",
      "job_template" : "PS-SKU-23",
      "quantity" : "100",
      "web_price" : "100",
      "category" : "", "web_worksheets": [
        {
          "description": "WebWorkSheet-1"
        },
        {
          "description": "WebWorkSheet-2"
        }
      ]
    }
  ]
```

Delivery tickets

You can now create delivery tickets for jobs while creating an invoice through the API. You do this with the **delivery_tickets** JSON array.

Note You cannot update delivery ticket details through API (you must do so manually).

- Use **to_address** to define the delivery ticket “to” address:
 - **company** (company name of the to address)
 - **street1** (line one of the street address)
 - **street2** (line two of the street address)
 - **city**
 - **state**
 - **zip**
 - **country**
- Use **delivery_contact_id** to define the delivery contact. You can provide the contact number (contact ID) from the Contact window.
- Use **delivery_contact** to define the other delivery contact details:
 - **first_name**
 - **last_name**
 - **prefix**
 - **suffix**
 - **job_title**

- **salutation**
- **phone**
- **fax**
- **cell**
- **email**
- Use **delivery_date** to specify the delivery date and time in the format *dd-MM-yyyy HH:mm*.
- Use **ship_via** to specify the shipping method as defined in the Ship Via table. Otherwise, this defaults to the value of the **Ship Via** field in the Account Info window.
- Use **description** to provide a description of the delivery ticket.
- Use **delivery_comments** to provide comments about the delivery.
- Use **po_number** to reference a purchase order number. (The default value comes from the Account Info window.)
- Use **reference** to enter a reference number.
- Use **jobs** to define the list of jobs associated with each delivery ticket:
 - **job_number** (number of the job from the items field)
 - **qty_shipped** (quantity ordered for the job)
 - **description**

Here is some sample JSON code to illustrate delivery ticket specifications:

```
"delivery_tickets": [
  {
    "to_address": {
      "company": "MyCompany",
      "street1": "1 Ivory Lane",
      "city": "My City",
      "state": "VT",
      "zip": "05055",
      "country": "US"
    },
    "description": "Delivery Ticket 1",
    "delivery_date": "26-01-2017 15:00",
    "ship_via": "UPS",
    "delivery_comments": "Deliver to receptionist in lobby",
    "delivery_contact_id": "6",
    "delivery_contact": {
      "first_name": "Joe",
      "last_name": "Jones",
      "prefix": "P",
      "suffix": "S",
      "jobtitle": "Director",
      "salutation": "Mr.",
      "cell": "8888888888",
      "phone": "8888888888",
      "fax": "8888888888",
      "email": "JoeJones@MyCompany.com"
    },
    "jobs": [
      {
        "job_number": 1,
        "qty_shipped": 6,
        "description": "Marketing Job"
      }
    ]
  }
]
```

```
    },
    {
      "job_number": 2,
      "qty_shipped": 6
    },
    {
      "job_number": 4,
      "qty_shipped": 6
    }
  ]
},
{
  "jobs": [
    {
      "job_number": 1,
      "qty_shipped": 6
    },

    {
      "job_number": 2,
      "qty_shipped": 6
    },
    {
      "job_number": 4,
      "qty_shipped": 6
    }
  ]
}
]
```

Special instructions

When an order comes in with special instructions that exceed 2,000 characters, the text is truncated and appended with **More...** to indicate the instructions were truncated.



Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.6. For your convenience they are categorized.

Sales Tax

- If you enter a tax rate with three decimal places, the **Tax Rate** and **Effective Tax Rate** in the Sales Tax window are now displayed with three decimal places (and not rounded to two decimal places). Although the correct rate was used to calculate the tax, the rate that was displayed in the Sales Tax window was misleading. (Issue Reference: 13838)
- When the **Tax on Tax** check box is selected for a tax table, the tax calculation in the cash register (for departmental transactions and QuickEst jobs and charges) is now correct. (Issue Reference: 17404)
- When the **Round tax up** check box is selected for a tax table, the tax is now correctly rounded to two decimal places, for example, a tax of 4.0041 is rounded to 4.00. (Issue Reference: 17627, 17825)

Charges

- When the **Method** for a charge definition was changed from **Markup** to **Job Aware**, the charge was not being included in printed documents. This was fixed. (Issue Reference: 17105)

Accounts

- If you select a **Tax Code** for an account (on the **Settings** tab), you can now remove it by selecting a blank tax code. Previously it was impossible to remove. (Issue Reference: 16955)
- You can now enter a date manually in the **Cert. Expires** field on the **Settings** tab. Previously you could only select a date from the calendar. (Issue Reference: 17861)
- If the **Credit Limit** for an account (on the **Credit Control** tab) includes decimal places, for example, \$400.50, the warning that indicates a job will exceed the credit limit for an account now includes the decimal places. (Issue Reference: 9813)

Estimating

Invoices and estimates

- When you sort documents in the Pending Documents window by any column, the document numbers remain correctly sorted in numerical order, too. (Issue Reference: 16947)
 - You can now change the account in the Account Info window. (It no longer remains the same.) (Issue Reference: 17916)
 - Hidden invoice-level markup charges are now correctly handled and distributed when the invoice is not taxable, but the jobs and charges are. (Issue Reference: 17749)
 - In some situations it was possible to print job tickets for an estimate or template. You are now prevented from doing so. (Issue Reference: 17540)
 - The sales tax in documents is now correctly rounded. Note that this fix applies to new estimates and invoices that you create with PrintSmith Vision 3.6; to see the fix in existing documents, re-calculate them. (Issue Reference: 17905)
-

- If you use **Edit > Hide Item** to hide a sub-job in a multi-part job, that sub-job is no longer printed in estimates and invoices and its price is rolled up into the main job. (Issue Reference: 6553, 13563)

Important Since the way you customize invoices and estimates is to base them on the pre-defined invoice and estimate report (.rpt) files supplied by EFI, if you customized documents (for example, added your logo) in an earlier version of PrintSmith Vision, your customized documents will not include the corrections made in version 3.6; the correction is just in the new EFI-supplied report files. If you have custom documents, you must re-create your documents using the new EFI ones as the basis for your custom documents. This correction applies to the following reports: EFI_DefaultEstimate.rpt, EFI_DefaultEstimate_A4.rpt, EFI_DefaultEstimatePerM.rpt, EFI_DefaultEstimateUnits.rpt, EFI_DefaultInvoice.rpt, EFI_DefaultInvoice_A4.rpt, EFI_DefaultInvoicePerM.rpt, and EFI_DefaultInvoiceUnits.rpt.

Jobs

- When selecting a vendor for a job (e.g., a merchandise or outside services job), you can now start typing when the list of vendors is displayed to move to the first vendor that begins with those characters. (Issue Reference: 15564)
- If you enter a value greater than 999 in the **Overs/Unders** field for the main job in a multi-part job, the value is now retained and no longer reverts to 0. (Issue Reference: 17742)
- When a blank stock job is for a stock with a minimum order amount with Charge Customer for Entire Order selected, customers are charged for the minimum amount even if the invoice reflects the actual quantity ordered. For example, if the minimum amount is 500, and they enter 750, a new message will inform them that 1,000 is the minimum amount because the stock is ordered in multiples of 500. Customers are given the choice of changing the order quantity to 1,000 and being charged for 1,000 or leaving the order quantity as 750, but still being charged for 1,000. (Issue Reference: 15389,15402)
- If you change the type of a job (for example, from printing to outside services), the information in the Costing window is now correctly updated to reflect the new type of job. (Issue Reference: 17341)
- If you override the speed on the press in the Production Data window, the time in the job ticket is now correct. (Issue Reference: 17903)

Line-Item Taxation

- If you are using line-item taxation, have associated your documents with a TaxDetails report (EFI_Default Estimate_TaxDetails.rpt and EFI_Default Invoice_TaxDetails.rpt), and have hidden charges in the document, the tax amount is now included in the document. Previously the tax was not being included when charges were hidden. (A charge may be hidden because the **Hide charge in printouts** check box is selected in the charge definition or because the **Hide charges** check box is selected on the **Body** tab in the Document preferences window.) (Issue Reference: 17805)
- If you are using line-item taxation, and have associated your documents with a TaxLedger report (EFI_Default Estimate_TaxLedger.rpt and EFI_Default Invoice_TaxLedger.rpt), the **Tax Amount** column in the tax ledger section now shows the tax with three decimal places, but the actual tax on the document is now correctly rounded and displayed with two decimal places. (Issue Reference: 17044)

Important Since the way you customize invoices and estimates is to base them on the pre-defined TaxDetails or TaxLedger report (.rpt) files supplied by EFI, if you customized documents (for example, added your logo) in an earlier version of PrintSmith Vision, your customized documents will not include the corrections made in version 3.6; the correction is just in the new EFI-supplied report files. If you have custom documents, you must re-create your documents using the new EFI ones as the basis for your custom documents.

POS

- An error no longer occurs if you try to post a transaction with a mix of taxable and non-taxable items in the cash register. For example, a department in the transaction is non-taxable, but a quick charge is taxable. (Issue Reference: 17863)

Purchase Orders

- The **Unit Price** field now accepts up to 6 decimal places which are used in calculations. The **Total** is then rounded to 2 decimal places. (Issue Reference: 16942)

Accounting

- An error no longer occurs when you try to post a payment (**AR > Post Payments**), and you selected **Write check** or **Return cash** in the **Remainder** field. (Issue Reference: 17176)
- In some situations rounding issues caused the tax amount in the Tax Summary report to be incorrect. Similarly the tax amount in the Invoice window did not always match the tax in the Document Totals window. These tax rounding issues were fixed. (Issue Reference: 8637, 14085, 15292)
- When a tax rate includes three decimal places, the tax in invoices and in receipts is now correctly rounded and is consistent. (Issue Reference: 16142)
- The Tax Details report is now correct if you apply an on-account payment to an invoice and pay for an invoice balance at the same time. (Issue Reference: 13069)
- The tax on receipts is now correctly rounded and consistently displayed in the Sales Summary and Tax Summary and Details reports. (Issue Reference: 8635)
- The tax in the Sales Summary and Tax Details is now correct when you have **Tax on Tax** selected in the tax table and have posted POS charges. (Issue Reference: 17316)
- The tax in the Tax Details report is now correctly rounded when you make multiple payments on an invoice. (Issue Reference: 9104)
- If you are e-mailing statements, and select the **Print summary report** check box on the **Reports** tab in the Generate Statements window, the summary report is now generated. Previously it was generated only for printed statements. (Issue Reference: 17760)
- In some situations statements were not reflecting payments made. This was fixed. (Issue Reference: 17750)
- If the **Show new payments** check box is selected on the **Output** tab in the Generate Statements window, statements now include new payment details. (Issue Reference: 17850)

Reports

Account History

- The Account History report now reflects the fiscal calendar set in the Business Calendar preferences. (Issue Reference: 16706)

Administration

E-Mails

- When you use Microsoft Outlook for e-mail, the font size selected in the E-Mail preferences for the body of e-mails is now retained (instead of being reduced in size). (Issue Reference: 17204)

Scheduler

- If you assign group permissions in Scheduler, they are no longer lost if you re-start the PrintSmith Vision server. (Issue Reference: 17589)
-

Tracker

- The billable time is now calculated correctly. If the time entered is less than the actual time, the billable time will be zero. (Issue Reference: 17908)
- Under some circumstances the Tracker Console did not list any jobs after employees clocked in. This was fixed. (Issue Reference: 17867)

Digital StoreFront Integration

- For B&W or color jobs, the number of **Sheets** in PrintSmith Vision is now automatically calculated based on the page count and number of sides (single-sided vs. double-sided) in the Digital StoreFront order. For example, if the page count in the order is 10, and the buyer selected single-sided (simplex), **Sheets** will be set to 10. If the buyer selected double-sided (duplex), **Sheets** will be set to 5 because the number of pages is divided by 2. The total number of copies is the number of sides to be printed based on the ordered quantity.

If the product template in PrintSmith Vision has a different number of sides, it is overridden. (Issue Reference: 17984)

- When an order with a rush fee comes into PrintSmith Vision, the rush fee is now included in the **Customer Comment** field in the Account Info window instead of in the Web worksheet. Also, two decimal places are now displayed. (Issue Reference: 15096)
- In some situations orders placed by a registered user were coming into PrintSmith Vision as walk-in orders instead of for the account with which the user was associated. This was fixed. (Issue Reference: 17569)
- If the walk-in account is locked when a walk-in order comes into PrintSmith Vision, the system tries to create the order five times at five-minute intervals. If the account remains locked, the order is not created. (Issue Reference: 17647)
- If an order with a zero payment method comes into PrintSmith Vision, the order is no longer rejected. (Issue Reference: 17342)
- When you upgrade to the eFlow-based integration and synchronize contacts and accounts (by clicking **Synchronize Contacts** on the MIS Systems page in Digital StoreFront), the case of company/account names is now ignored. Previously if the case did not match a new account was being created in PrintSmith Vision. (Issue Reference: 17962)

SugarCRM Integration

- If you change the CRM **Security Role** for a user in the User Definitions window, an e-mail related error no longer occurs when you try to save the user. (Issue Reference: 17568)

Fiery Integration

- The media tolerances specified in the Fiery Media preferences were not always correctly interpreted during the stock mapping process. This was fixed. (Issue Reference: 17893, 17790)
- During media mapping, the dimensions of the stock in PrintSmith Vision (*width x height* or *height x width*) determine its orientation so it is handled correctly on the Fiery. (Issue Reference: 17791)

Four 51 Integration

- By default, the SKU is added to the job description for orders coming from Four51 to PrintSmith Vision. If you do not want the SKU as part of the job description, select the new **Do not add SKU to job description** check box in the Four51 section of the PrintSmith Vision Integration preferences. (Issue Reference: 16123)
-

E-Commerce API

- After an invoice is picked up in PrintSmith Vision, you can no longer update it through the API. (Issue Reference: 17700)



Upgrading PrintSmith Vision

About Upgrading

If you were already using an earlier version of PrintSmith Vision, but want to upgrade to version 3.6, you update your existing installation by running the 3.6 installer. *You must, however, be upgrading from PrintSmith Vision 3.5, not a pre-3.5 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.

Note If you already entered your LAC in PrintSmith Vision 3.5, you do not have to enter your license code again, but the Installer will perform the 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 9.
- 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 11.

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 3.5 installed before you can upgrade to 3.6.

1. Be sure to read “Important: Before You Begin the Upgrade” on page 38.
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 3.6 installer.

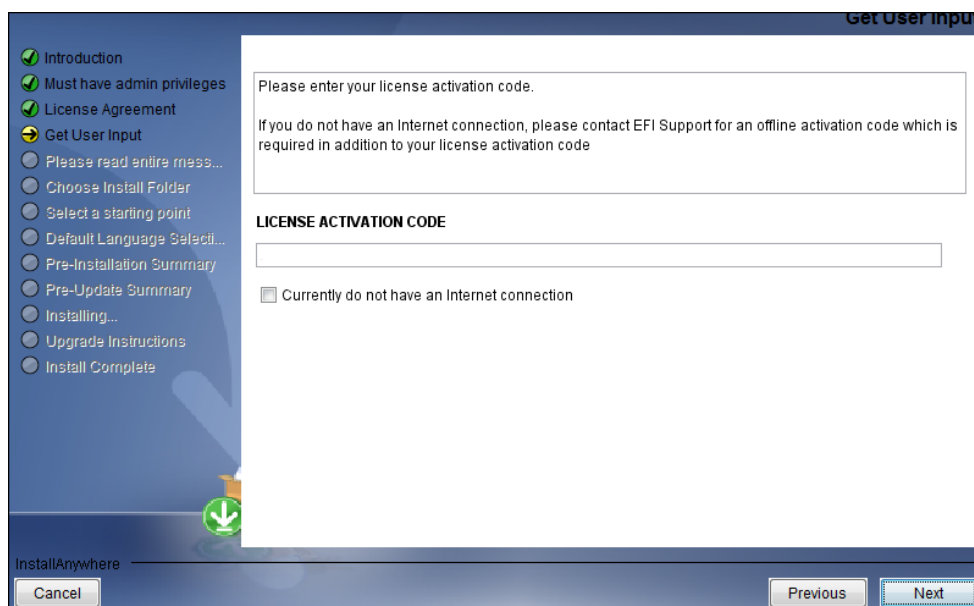
Caution Before you start the installer, close PrintSmith Vision Monitor, pgAdmin, and any PrintSmith Vision installation folders that are open.

4. Start the installer.
5. After you accept the license agreement, enter your **LICENSE ACTIVATION CODE** (LAC) if you did not enter it previously. For information about locating your LAC, see “Have your license activation code (LAC) ready” on page 38.

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.)

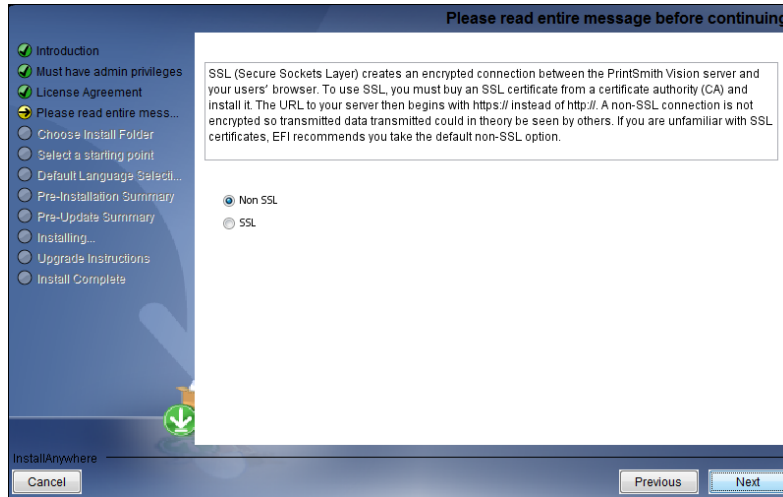
You only have to enter your LAC once. After your license is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code (which the Installer will then check to make sure your maintenance contract has not expired).



- 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 38.

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

Server will be slow to start the first time after the upgrade

Because of changes to the database made in PrintSmith Vision 3.6, the server will take several minutes to start automatically the first time after the upgrade to 3.6. The time it will take depends on the size of your database and available system resources.

Warning During the server startup, do *not* shut down the PrintSmith Vision server and do *not* open the PrintSmith Installation folder or any of its sub-folders.

Clear the browser cache

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

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