efi Productivity Suite

PrintSmith™ Vision Release Notes

Version 3.6.2

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

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About This Document

This document describes the enhancements and corrections that were made in PrintSmith™ Vision 3.6.2.

Contact Information

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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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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 system 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 26.

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

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

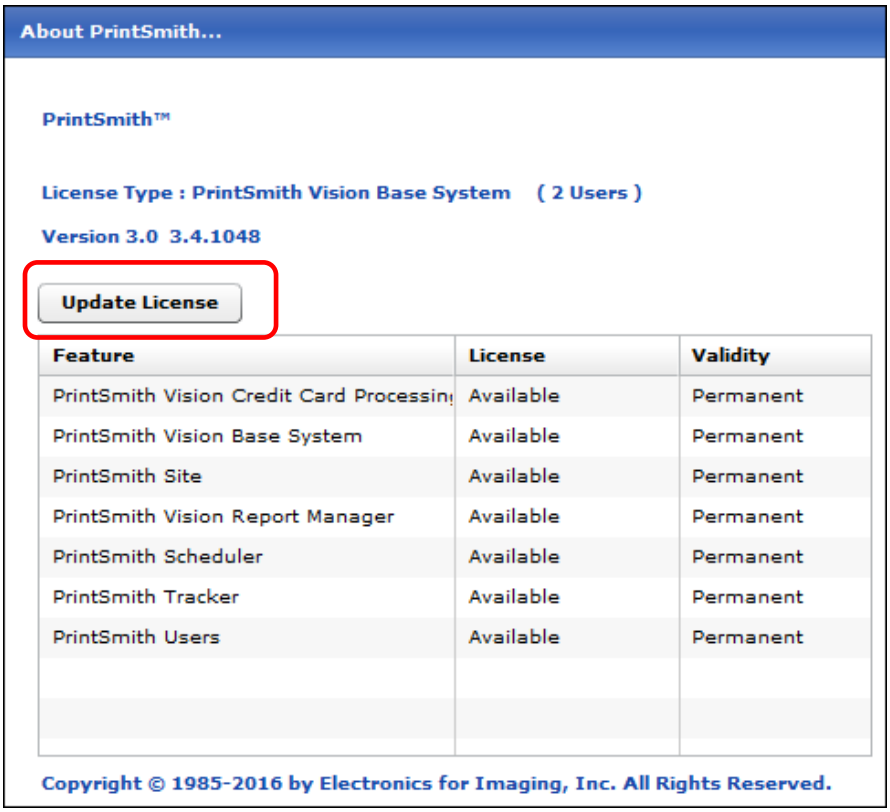
   Important Store the backup on an external device or in the cloud to make sure your backed-up data stays safe during the upgrade.

2. *Deactivate your PrintSmith Vision license*:

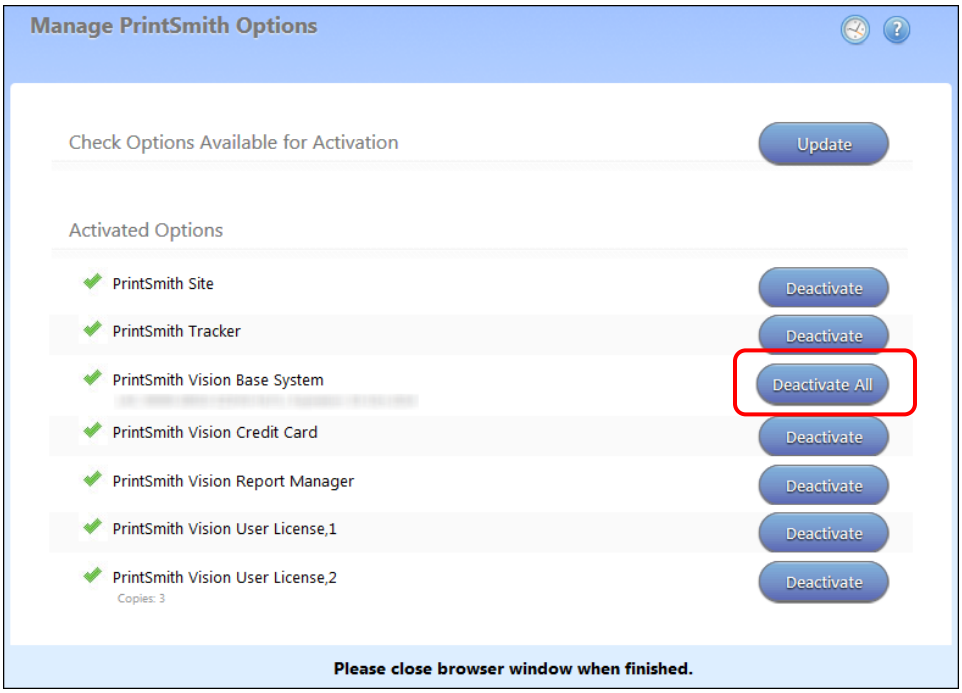
   a. *Before* you uninstall PrintSmith Vision, log into the system.

   b. Select **Help > About PrintSmith**.

   c. Click **Update License**.



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

Operating system:	**OS X 10.11, 10.11 Server, 10.12**, or 10.12 Server****
Processor:	**Intel Quad Core i7 2.3 GHz**
Memory:	**16 GB (more memory will improve performance)**
Hard drive:	**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.

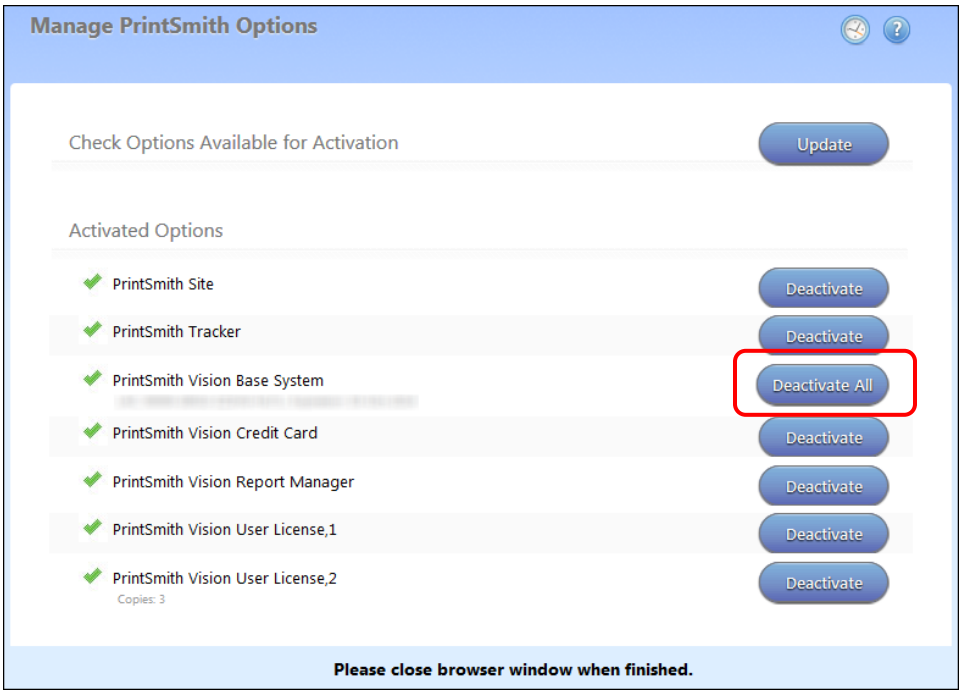
2. *Deactivate your PrintSmith Vision license*:

   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 run 24/7 with the hard drive set to *never sleep*. If the hard drive 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 hard drive 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):

Operating system:	**Windows 7, 8, or 10** **Macintosh OS X 10.8 or higher**
Memory:	**4 GB minimum (more memory will improve performance)**
Browser:	**See “Browser Requirements” below.**
Monitor:	**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 700ll 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:

Operating system:	Any 64-bit version of Windows or Macintosh OS X
Processor:	Dual core
Memory:	4 GB
Hard Drive:	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 with the hard drive set to *never 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*.

If you host PrintSmith Vision yourself, you must also install eFlow on a *Windows* computer that meets the following requirements:

Operating system:	**64-bit only: Windows 8, Windows 10, or Windows Server 2012 R2 Standard or Essentials**
Processor:	**Quad Core CPU, Intel i3 or higher**
Memory:	**8 GB with 2 GB free for eFlow**

In addition, the computer must:

- Have a static IP address.
- Run 24/7 with hard drive set to *never sleep*. It must be available for communication all the time.

Warning Although you can install eFlow on the PrintSmith Vision server (if it is a Windows computer with a static IP address), a separate computer is *strongly recommended*. You will require technical assistance if you try to install eFlow and PrintSmith Vision on the same computer.

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

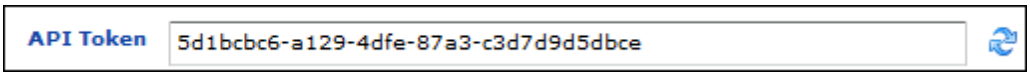
PrintSmith Vision 3.6.2 includes the following changes and enhancements.

E-Commerce API

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

Client security for API calls

To ensure security, you must include a token in the header of Post and Get transactions. This token is automatically generated by the system and is available at the bottom of the PrintSmith Integration preferences:



The token must be supplied in this format:

apitoken=*token*;*date*

where

- *token* is the **API Token** displayed in the Integration preferences
- *date* is a UTC date in *yyyy-MM-dd HH:mm:ss* 24-hour format

For example, **apitoken=33b4250f-ac50-4150-a65a-bfccb555184c;date=2017-04-20 16:34:50**

Once the token is constructed based on the pattern shown above, apply Base64 encoding to the final token and send it as a request header with the header name **token**.

Accounts: additional fields

Additional account-related fields are now accessible through the e-Commerce API:

Field	Description
balance	**Read-only**
merchandise_balance	**Read-only**
pending_invoice_balance	**Read-only**
pending_estimate_balance	**Read-only**
account_status	**Read-only, status of the account, e.g., New, Current, Delinquent**
master_account_id	**Read-only, numeric ID of the associated master account**
master_account_name	**Read-only, name of the associated master account**
do_not_mail	**Boolean (true or false) controls whether the account is ignored in mailings**
account_notes	**Notes (up to 255 characters) for the account**
custom_data_1 **to** custom_data_10	**Custom marketing fields for the account**
sales_rep	**Must be defined in the Sales Rep table in PrintSmith Vision**
lead_source	**Must be defined in the Lead Source table in PrintSmith Vision**
business_type	**Must be defined in the Business Type table in PrintSmith Vision**

Sample Post account creation

```
{
  "name": "Company 10",
  "type": "Customer",
```

```
  "external_reference_number": "123",
  "sales_rep": "Ron",
  "lead_source": "Referral",
  "business_type":"Multi-national",
  "account_status": "New",
  "do_not_mail": true,
  "account_notes": "Check the instructions",
  "custom_data_1": "custom data 1",
  "custom_data_2": "custom data 2",
  "custom_data_3": "custom data 3",
  "custom_data_4": "custom data 4",
  "custom_data_5": "custom data 5",
  "custom_data_6": "custom data 6",
  "custom_data_7": "custom data 7",
  "custom_data_8": "custom data 8",
  "custom_data_9": "custom data 9",
  "custom_data_10": "custom data 10",

"addresses": [
    {
      "type": "statement",
      "address_1": "Building A",
      "address_2": "11 Bay Rd",
      "suburb": "Cambridge",
      "postcode": "02141",
      "country": "USA"
    },
    {
      "type": "invoice",
      "address_1": "Building A",
      "address_2": "11 Bay Rd",
      "suburb": "Cambridge",
      "postcode": "02141",
      "country": "USA"
    }
  ],
  "credit_control": {
    "type": "Charge Account",
    "credit_limit": 20000
  },

  "automatic_discount": {
    "type": "percentage",
    "amount": 0
  },

  "contacts": [
    {
      "type": "invoice",
      "first_name":"Jane",
      "last_name": "Benson",
      "phone": "1112223333",
      "cell": "1112223434",
      "fax": "112223322"
    },
    {
    "type": "statement",
      "first_name":"Jane",
      "last_name": "Benson",
      "phone": "1112223333",
      "cell": "1112223434",
```

```
    "fax": "112223322"
   }
  ]
  }
```


Sample Get response


```
{
 "id": 51201,
 "account_id": "48",
 "name": "Company 10",
 "type": "Customer",
 "addresses": [
  {
   "type": "statement",
   "address_1": "Building A",
   "address_2": "11 Bay Rd",
   "suburb": "Cambridge",
   "postcode": "02141",
   "country": "USA"
  },
  {
   "type": "invoice",
   "address_1": "Building A",
   "address_2": "11 Bay Rd",
   "suburb": "Cambridge",
   "postcode": "02141",
   "country": "USA"
  }
 ],
 "credit_control": {
  "type": "Charge Account",
  "credit_limit": 20000
 },
 "external_reference_number": "123",
 "sales_rep": "Ron",
 "account_status": "New",
 "automatic_discount": {
  "type": "percentage",
  "amount": 0
 },
 "master_account_id": -1,
 "do_not_mail": true,
 "balance": 77.02,
 "merchandise_balance": 77.02,
 "master_account_name": "",
 "account_notes": "Check the instructions",
 "custom_data_1": "custom data 1",
 "custom_data_2": "custom data 2",
 "custom_data_3": "custom data 3",
 "custom_data_4": "custom data 4",
 "custom_data_5": "custom data 5",
 "custom_data_6": "custom data 6",
 "custom_data_7": "custom data 7",
 "custom_data_8": "custom data 8",
 "custom_data_9": "custom data 9",
 "custom_data_10": "custom data 10",
 "lead_source": "Referral",
 "business_type": "Multi-national",
 "pending_invoice_balance": 0,
 "pending_estimate_balance": 154,
```

```
  "contacts": [
    {
      "type": "statement",
      "first_name": "Jane",
      "last_name": "Benson",
      "phone": "1112223333"
    },
    {
      "type": "invoice",
      "first_name": "Jane",
      "last_name": "Benson",
      "phone": "1112223333"
    }
  ]
}
```


Contacts: enhancements to Post/Get transactions

The following enhancements and changes were made to the Post and Get transactions for contacts:

Field	Description
do_not_mail	**Boolean (true or false) controls whether the contact is ignored in mailings**
sales_rep	**Read/write, must be defined in the Sales Rep table in PrintSmith Vision**
phone	**Is now read/write**
cell	**Is now read/write**
email	**Is now read/write**

Invoice: enhancements to Post/Get transactions

The following enhancements and changes were made to the Post and Get transactions for invoices:

Field	Description
include_account_charges	**Boolean (true or false) controls whether the default charges for the account, invoice, and job are included in the invoice**
first_name **(in contact object)**	**First name of temporary contact**
last_name **(in contact object)**	**Last name of temporary contact**
phone **(in contact object)**	**Phone of temporary contact**
fax **(in contact object)**	**Fax of temporary contact**
cell **(in contact object)**	**Mobile phone of temporary contact**
email **(in contact object)**	**E-mail address of temporary contact**
wanted_by_date	**Can be null (no date)**
reorder_date	**Can be null (no date)**
proof_date	**Can be null (no date)**
po_number	**Read/write**
customer_discount	**Read only, customer discount (currency)**
web_reference_number	**Read-only after initial invoice creation**
ship_price	**Read/write, shipping amount**
ready_for_pickup	**Boolean (true or false) controls whether the invoice is ready for pickup**
special_instructions	**Read/write**

sales_rep	**Read/write, must be defined in the Sales Rep table in PrintSmith Vision**
taken_by	**Read/write**
on_pending_list	**Boolean (true or false) controls whether the invoice is on the pending list**
pickup_date	**Read-only, the date invoice was picked up**
completed_date	**Read-only, the date the invoice was completed**

In addition, the following changes were made to the job fields (under **items**):

Field	Description
index	**Index number of the job**
location_name	**Read-only, the location name**
location_id	**Read/write, the location ID**
sheets	**Read-only, the number of sheets in the job**
up	**Read-only, number of images on run sheet**
on	**Read-only, number of unique images**
stock_number	**Read-only, the stock number**
stock_name	**Read-only, the stock name**
press_copies	**Read-only, the number of press copies**
print_services	**An array with an** id **(Digital StoreFront ID) and** price **(price of charge)**

For example:

```
{
   "account_account_id": "2717",
   "include_account_charges": true,
   "items": [
      {
         "index": 2,
         "print_services": [
            {
               "id": 545
            }
         ]
      }
   ]
}
```

Estimates: enhancements to Post/Get transactions

The following enhancements and changes were made to the Post and Get transactions for estimates:

Field	Description
include_account_charges	**Boolean (true or false) controls whether the default charges for the account, invoice, and job are included in the estimate**
first_name **(in contact object)**	**First name of temporary contact**
last_name **(in contact object)**	**Last name of temporary contact**
phone **(in contact object)**	**Phone of temporary contact**
fax **(in contact object)**	**Fax of temporary contact**

cell **(in contact object)**	**Mobile phone of temporary contact**
email **(in contact object)**	**E-mail address of temporary contact**
wanted_by_date	**Can be null (no date)**
proof_date	**Can be null (no date)**
ship_price	**Read/write, shipping amount**
special_instructions	**Read/write**
sales_rep	**Read/write, must be defined in the Sales Rep table in PrintSmith Vision**
taken_by	**Read/write**

In addition, the following changes were made to the job fields (under **items**):

Field	Description
index	**Index number of the job**
location_name	**Read-only, the location name**
location_id	**Read/write, the location ID**

Pending list

You can use **/Commerce/PendingList** to obtain either the full pending list or the pending list items for a particular account.

Note that:

- The **account_walkin** field is a Boolean (true/false)
- The **doc_type** can be **I** (invoice) or **E** (estimate)
- The **balance_due** reflects deposits and payments

For example:

```
/Commerce/PendingList
{
  "pending_docs": [
    {
      "account_id": 51201,
      "account_account_id": 48,
      "account_name": "Company 10",
      "account_walkin": false,
      "doc_type": "E",
      "doc_number": "107",
      "doc_number_prefix": "Cax",
      "doc_number_suffix": " F50",
      "doc_title": "Promotional Brochures",
      "ordered_date": "24-04-2017 07:38",
      "wanted_date": "30-04-2017 03:26",
      "delivery_date": "30-04-2017 03:26",
      "proof_date": "30-04-2017 15:26",
      "balance_due": 143,
      "hold_state": "In Storage",
      "doc_location": "Prepress",
      "taken_by": "web_order",
      "sales_rep": "Ron",
      "web_reference": "4",
```

```
    "job_count": 2
  }
]
}
```


Post payments – open items

You can obtain the open items for an account with a Get transaction using /**Commerce/PostPayment**. You can either provide an **account_id** (the primary key) or **account_account_id** (the account number in the Customer window in PrintSmith Vision).

Note the following:

- The **Type** can be Invoice, JE (journal entry), or Finance Charge
- The **balance** is the amount due and can be positive or negative

For example:

/Commerce/PostPayment?id=20110


```
{
  "post_payments": [
    {
      "account_id": 20110,
      "transaction_id": 20188,
      "ref_number": "170",
      "type": "Invoice",
      "posted_date": "03-05-2017 10:33",
      "description": "Letterhead - Electronic - 6269-2030 - Nickname: Christopher J. Delello",
      "balance": 165,
      "invoice_total": 165,
      "invoice_tax": 15,
      "invoice_customer_po": ""
    },
    {
      "account_id": 20110,
      "transaction_id": 20219,
      "ref_number": "",
      "type": "Finance Charge",
      "posted_date": "03-05-2017 10:34",
      "description": "Finance Charge",
      "balance": 2.48
    },
    {
      "account_id": 20110,
      "transaction_id": 20235,
      "ref_number": "170",
      "type": "JE",
      "posted_date": "03-05-2017 10:36",
      "description": "Adjust Invoice #170",
      "balance": -15
    },
    {
      "account_id": 20110,
      "transaction_id": 20248,
      "ref_number": "",
      "type": "Payment",
      "posted_date": "03-05-2017 12:17",
      "description": "Payment Cash",
      "balance": -500
    }
```

```
  ]
}
```

Post payments – applying payments

You can post payments for open items in an account with a Post transaction using **/Commerce/PostPayment**. You can either provide an **account_id** (the primary key) or **account_account_id** (the account number in the Customer window in PrintSmith Vision).

Note the following:

- Each item is identified by a **transaction_id**.
- The **type** is one of the following payment types: **CC**, **cash**, **check**, or **draft**.
- The **reference** is a reference number, e.g., check number.
- The **cc_code** identifies the type of credit card used (e.g., Visa or American Express). The **cc_code** must correspond to one of the unique two-character codes defined in the **Code** field in the Credit Card Info preferences.

```
/Commerce/PostPayment?id=20110
{
   "items": [
      {
         "transaction_id": 9543321
      },
      {
         "transaction_id": 9543313
      },
      {
         "transaction_id": 9788237
      },
      {
         "transaction_id": 9788074
      }
   ],
   "payment": {
      "type": "CC",
      "amount": 500,
      “cc_code”: “VI”,
      "reference": "XYZ"
   }
}
```

Convert estimates to invoices

You can convert an estimate to an invoice using **/Commerce/ConvertToInvoice** and providing the estimate number and production location identified by the unique **Key (Alpha)** field in the Production Locations table.

The invoice that is created includes the original web reference number and is identified with a globe icon to indicate it originated outside PrintSmith Vision.

For example:

```
{
"estimate_number": 200,
"location_key": AA100
}
```

Obtain PDF of estimate or invoice

You can obtain the PDF for an estimate or invoice using **/Commerce/InvoicePDF**. The PDF contents are encoded in Base64.

You can provide three parameters:

- **doc_type**: **I** for invoice or **E** for estimate.
- **invoice_number**: the invoice or estimate number.
- **format_name**: the name of the document format (preferences) to be used. If this is left blank, the default format is used.

Obtain company information

You can obtain company information from the Company preferences using **/Commerce/Company**.

For example:

```
{
  "address": {
    "company": "EFI PrintSmith",
    "street1": "9035 S. Kyrene Rd.”,
    "street2": "Suite 106",
    "city": "Tempe",
    "state": " AZ",
    "zip": "85284",
    "country": ""
  },
  "phone": "480-538-5800",
  "email": "sales@printsmith.com",
  "other1": "www.printsmith.com",
  "other2": "Tadak Holding's Pty Ltd",
  "company_id_label": "ABN",
  "company_id": "97 009 344 398",
  "store_number": "F034"
}
```

Provide content file and have it converted to digital asset

You can provide a content file for a job in an estimate or invoice and have it listed as a digital asset in PrintSmith Vision where it can be previewed.

Under the **items** array:

- Use **index** to identify the job in the estimate/invoice
- Include **digital_asset_files**
- Include the **file_contents** with the file contents encoded in Base64
- Include the **file_name** with an extension

For example:

```
{
      "items": [
                  {
                              "index": 2,
                              "digital_asset_files": [
                                          {
                              "file_contents": in Base64 (not shown)
                              "file_name": "RPCSilentPrint.png"
                                          }
```

```
                    ]
                }
            ]
}
```

Credit card type for deposits

When a deposit is made through the API, you can now include a **cc_code** to identify the type of credit card used (e.g., Visa or American Express). The **cc_code** must correspond to one of the unique two-character codes defined in the **Code** field in the Credit Card Info preferences.

SSL and HTTPs

Beginning with v. 3.6.2, all users with SSL setup who attempt to access the site via http URL will be redirected to https URL and receive the appropriate message. (Enhancement issue: 18409)

Corrections

The sections that follow describe the corrections that were made in PrintSmith Vision version 3.6.2. For your convenience they are categorized.

Accounts

Account status

Account status is now changing to “Current” when items in the account history have occurred within the defined inactive period. (Issue Reference: 18006)

Administration

Dates

- The ability to add a date using the +XX date method is restored. (Issue Reference: 18408)

Discounts

Customer automatic discounts

- Customer Accounts that have the Customer Automatic Discounts % enabled (Credit Control tab) now correctly apply the Customer Automatic Discounts to new documents copied from Account History documents. (Issue Reference: 18267)

Estimating

Invoices and estimates

- Changing fields in the Job window that affect pricing (e.g., changing order quantity) and then tabbing to the next field no longer causes an error message. (Issue Reference: 18402)

Jobs

- For outside services jobs, the **Overs Unit Price** field can now display up to 8 decimal places. (Issue Reference: 17977)

- When job tickets are printed for individual jobs in a multi-part job, they are now correctly identified by number, e.g., 1 of 3. (Issue Reference: 18097)
- Price reflected on a saved invoice is no longer being calculated based on the last specified **Multi-qty** value when **Do not discount** is enabled. (Issue Reference: 18376)

Importing stock

- PrintSmith Vision will now convert standard media size names (e.g., Letter, A3, A4) into dimensions when media are imported into the stock catalog. **Note:** This fix will not repair any existing stocks that have corrupted values in parent size. (Issue Reference: 17206)

Purchase Orders

- The **Unit Price** field in the Purchase Order Line Item window can now include up to 8 decimal places. (Issue Reference: 17976)

Reports

Loyalty point processing

- The Loyalty Report now correctly calculates loyalty point value when a customer has an invoice with a deposit paid. Previously, the report was not showing the entire value of the invoice payment but only the final payment amount (minus the deposit paid). (Issue Reference: 18070)

Charges missing from reported job price

- Reports now accurately include all charges (e.g., in certain cases the reported job price was missing some charges, i.e., “press proof”). (Issue Reference: 18014)

Web product template SKUs

- Reports now show the SKU for the Web Product Template used to create jobs. (Issue Reference: 17954)

Taxation

Error when product tax table associated with charge definition

- Resolved the issue that was causing the following error message when saving certain templates: "Error: Server.Processing - null - failed to lazily initialize a collection of role: com.efi.printsmith.data.Tax table.taxelements, no session or session was closed." This was happening when a product had a tax table associated with a charge definition. (Issue Reference: 18456)

Voids

Partial voids on Tape window

- Partial void is no longer possible. Previously, it was possible to perform a partial void, which resulted in data corruption. Selecting even a single line item now will result in selection and voiding of an entire block. (Issue Reference: 18353)

Digital StoreFront Integration

- When a Digital StoreFront order is for a printing (offset) product in PrintSmith Vision, the number of sheets that are calculated for the job in PrintSmith Vision are based on the page count and number of sides in the order. For duplex jobs, the page count is divided by 2 and rounded up. For example, if the

page count is 17, the number of sheets will be 9. For single-sided jobs, the page count and sheet count are the same. (Issue Reference: 18115)

- Resolved the issue that was causing a price discrepancy between PrintSmith Vision and Digital StoreFront resulting from a job's stock cost calculation error when PrintSmith Vision encountered the **Charge Customer for Entire Order** field. (Issue Reference: 18218)

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 htpps:// 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.

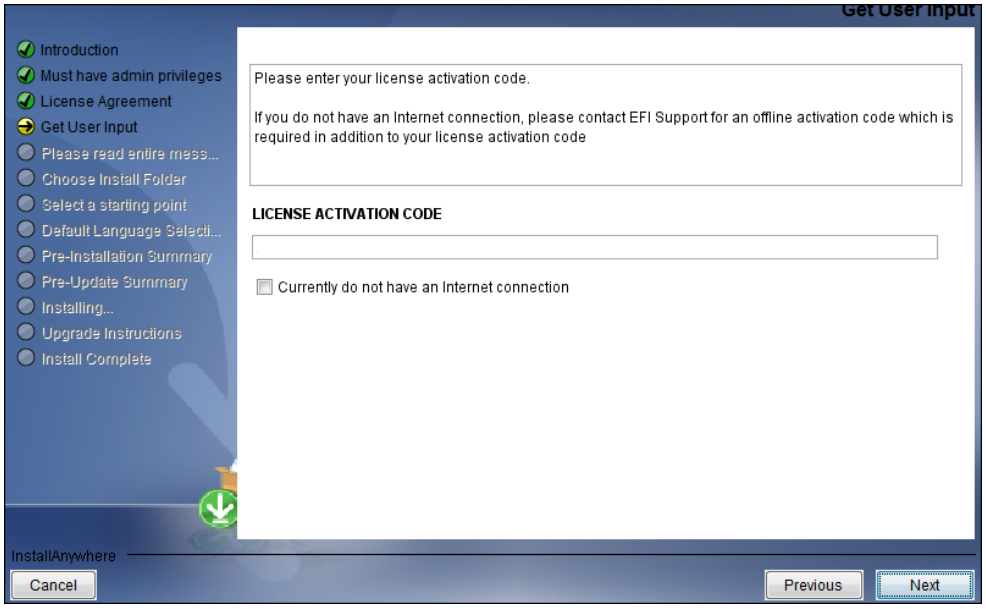
1. Be sure to read “Important: Before You Begin the Upgrade” on page 26.
2. Back up your entire system as described in the section on “Backup Manager preferences” in the *PrintSmith Vision - Setup and User Guide*.
3. Obtain the PrintSmith Vision Server 3.6 installer.

   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 26.

   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.)

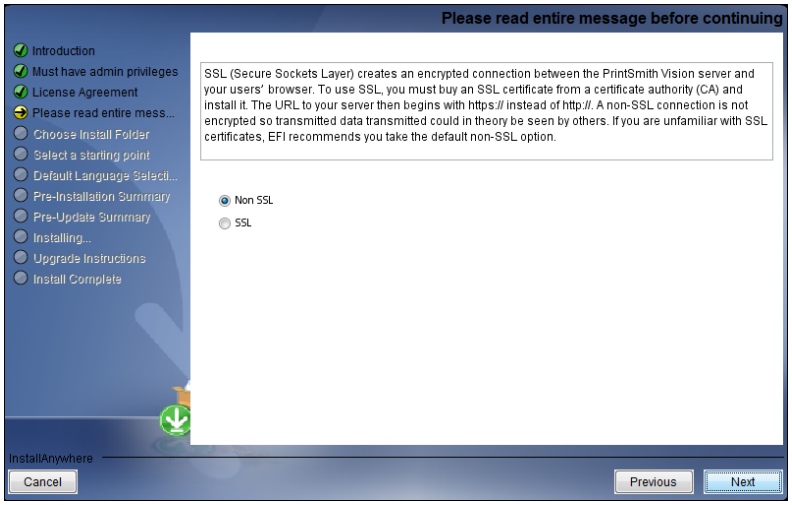
   You only have to enter your LAC once. After your license is validated, the next time you run the Installer the **LICENSE ACTIVATION CODE** field will automatically include your code (which the Installer will then check to make sure your maintenance contract has not expired).



6. 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 26.

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.



7. 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.

Appendix: Security

This document summarizes recent changes made in PrintSmith Vision security.

Insufficient data validation is performed

User input and output to and from an application is the route for malicious payloads into and out of the system. All user input and output should be checked to ensure it is both appropriate and expected. Failing to perform proper input and output validation can lead to Directory Traversal, Insecure File Upload, Cross-Site Scripting (XSS) and a myriad of other security related issues.

Insecure file upload practices are in use

File upload capability allows a user to send a file from their computer to the web server. If the web application that receives the file does not carefully examine it for malicious content, an unauthenticated attacker may be able to use file uploads to execute arbitrary commands on the server with the permissions of the web server user.

Directory traversal vulnerability was detected

Remote file viewing is possible on the system because the application fails to parse out traversal strings (\..\..\) within an input request. An unauthenticated attacker can use this to retrieve the source code of scripts, obtain usernames and passwords, and access other sensitive information.

Authorisation model does not adequately protect application resources.

Authorisation is the act of checking whether a user has proper permission to access a particular resource after a user has been authenticated. With a forceful browsing attack, the attacker gains access to a restricted page within a web application by supplying a URL directly (forcing the URL) rather than by accessing it by following links from other pages in the application. The intended workflow to get to the restricted page is through another page which authorises the user to access the target page. This attack also allows an attacker to gain access to resources to which no direct links exist.

The web application allows an unauthenticated user to view restricted content via direct object reference (forceful browsing). This includes access to resources an anonymous user should not have access to.

Sensitive network traffic is unencrypted in transit across an untrusted network

Sensitive network traffic from the application is not encrypted as it traverses the Internet. Without an appropriately encrypted communication channel, sensitive details could be intercepted by attackers. Depending on the environment, this might be passwords or private information such as Personally Identifiable Information (PII) or financial data.

Tomcat administrative interface is accessible over the Internet

Providing access to the management interface increases the attack surface for hackers. The exposure of these interfaces could allow attackers to perform automated password-based attacks against the management interfaces and potentially gain privileged access. Permitting access to management interfaces from any location can create significant security exposures. Security best practice recommends limiting accessible and active services to only those that are absolutely necessary. By reducing the number of exposed services, it is possible to reduce the likelihood of security breaches, as there are fewer services to configure, manage, update and audit.

Flash application is vulnerable to CVE-2011-2461

A vulnerability has been identified in the Adobe Flex SDK which could lead to cross-site scripting issues in Flex applications. A user could be forced to visit a malicious site, which would eventually load the vulnerable Flash file from the PrintSmith application and subsequently steal the user's cookies and data for the PrintSmith application.

Post upgrade instructions

Browser Cache clear

End user using PSV needs to clear the browser cache after upgrading PSV security patch.

Bookmark update

If user has bookmark the Print Smith server URL, then URL should be prefaced by **https://** instead of **http://.**

Authorization impact on accessing reports

If less authorized Print Smith user is accessing the following report through URL, then those report will not able access, unless the PrintSmith user have following "ANY OF" permission for given report.

Report name	Primary permission (Any one)	Secondary permission (Any one)
Mailing Labels	Reports->Mailing Labels	File->Print
Stock Definitions	Pricing->Stock Definitions	File->Print
Import Stock Catalog	Pricing->Import Stock catalog	
Daily closeout reports	AR->Daily Closeout Reports->Daily Sales	
Monthly closeout reports	AR->Monthly Closeout Reports->Monthly Sales	
Account History Analysis	Reports->Account History	
Deposit Ticket	Reports->Deposit Ticket AR->Daily Closeout Reports->Daily Sales AR->Monthly Closeout Reports->Monthly Sales	
Account History	Reports->Account History	File->Print
Charge Definitions	Pricing->Charge Definitions	File->Print
Press Definitions	Pricing->Press Definitions	File->Print
Copier Definitions	Pricing->Digital Definitions	File->Print
Estimate History	Reports->Estimate History	File->Print

Report name	Primary permission (Any one)	Secondary permission (Any one)
Journal Entry	AR->Journal Entry	File->Print
Invoice reports	Invoice->Review Any Doc POS->Pending List Open POS->Cash Register window POS->Open Cash Register AR->Post Payments	File->Print
Job Ticket	Jobs->Print Job Ticket	
Delivery Ticket	Invoice->Generate Delivery Ticket Admin->Delivery Ticket Manager	File->Print
Aging reports	AR->Account Aging	
Statement reports	AR->Generate Statements	
All custom reports	Reports->Report Manager	