

PrintSmith™ Vision Release Notes

Version 4.0.0

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

April 2018 PrintSmith Vision 4.0.0

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Introduction

PrintSmith™ Vision is a browser-based print management system for commercial printers, trade printers, copy shops, and quick printers. To help you run your business efficiently and profitably, PrintSmith Vision combines estimating, invoicing, billing, point of sale, and accounts receivable in a single product.

Contact Information

EFI Support

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Regular USA Service Desk hours are 7:00 am to 5:00 pm Mountain Standard Time, Monday – Friday.

Regular UK Service Desk hours are 8:00 am to 5:00 pm Greenwich Mean Time, Monday – Friday.

Regular EU Service Desk hours are 9:00 am to 6:00 pm Central European Time, Monday – Friday

Outside these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

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

About This Document

The EFI PrintSmith Vision Release Notes describes the changes made in PrintSmith Vision 4.0.0. These are related to HTML5 Invoice, Estimate and Pending Documents workflows.

Prerequisites

System Requirements

If you already have PrintSmith Vision installed and are interested in upgrading your operating system to 10.12 or 10.13, *be sure to follow the instructions* in “OS X 10.13 (High Sierra) and existing PrintSmith Vision installations”

Note Mac OS X 10.10 is no longer a supported operating system for PrintSmith Vision servers, but Mac OS X 10.12 & 10.13 are now supported.

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.

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.

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

Note 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.

Notes 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 Essential
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” (see below).

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.

Note 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*.

Note 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)

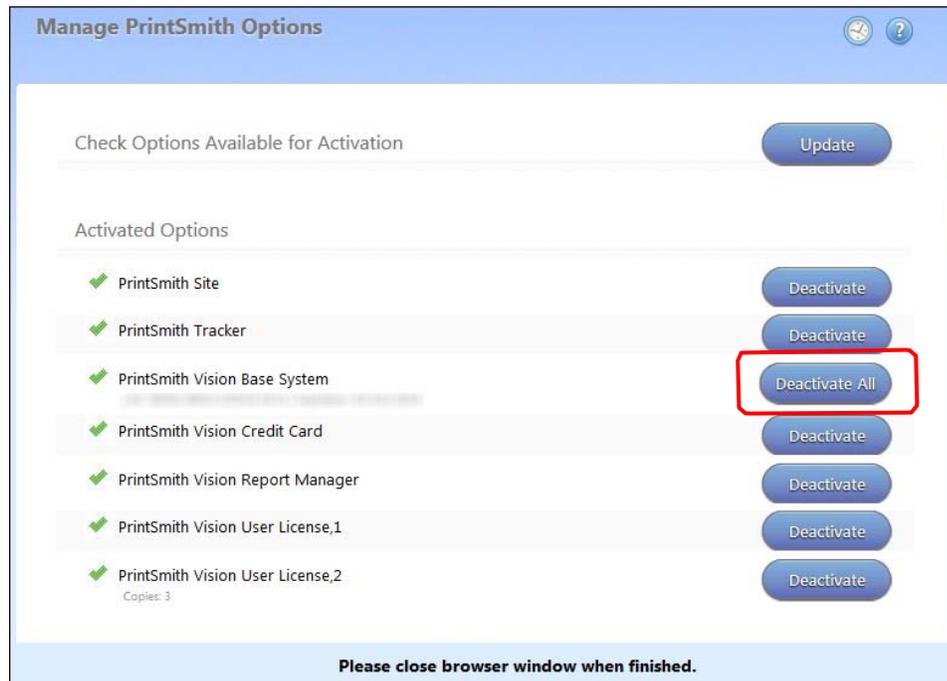
Version 3.0 3.4.1048

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

Operating System:	OS X 10.11, 10.11 Server, 10.12**, or 10.12 Server**, 10.13, or 10.13 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 10.13, be sure to read “OS X 10.13 (High Sierra) and existing PrintSmith Vision installations”, follow the instructions below:

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 10.13 (High Sierra) and existing PrintSmith Vision installations

OS X 10.13 is supported for both the PrintSmith Vision server computer and client computers. If you want to upgrade your *server* to OS X 10.13, be sure to follow the instructions below for existing PrintSmith Vision installations.

Note During an upgrade to OS X 10.13, 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*.

Note 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 10.13
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*.

Notes 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 Upgrades turned on. Instead do the Upgrades manually at the same time as you update PrintSmith Vision. This is not restricted to regular updates for the same OS.

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 10.10 or higher
Memory:	8 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:

- Google Chrome Version 65.0.3325.181 or later
- Mozilla Firefox® 59.02.x or later
- Safari® 8.x or later (OS X 10.11) and Safari 10.x or later (OS X 10.12)
- Microsoft Edge (Windows only) 40 or later

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 (For HTML5 pages 1024 X 720)

Note For optimal user experience ensure your monitor resolution is 1280 x 1024 or higher

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

New Features and Enhancements

To enhance the user interface to avoid a tedious process of creating estimates and invoices, we have redesigned the interface with new FrastTrack workflows within PrintSmith Vision 4.0 which are built with HTML5.

- Estimate
- Invoice
- Pending Documents
- Cash Register

Previously, you had to switch back and forth multiple pages to create an estimate. Now, with the new user interface all the options to create an estimate are available in a single page. The following sections explains the benefits of the new interface.

Estimating

In the **Estimating** window, you can now perform the following:

- View and modify an estimate summary.
- Access common actions from an in-line drop down menu to specify multi-quantity, add digital assets, choose different stock, add charges, or duplicate a line.
- Allows you to convert the estimate to invoice by clicking the new **Convert to Invoice** option.
- You can make selections for example, date, discount, taxation, ship from a common point in the same page instead of switching pages in the application.

The screenshot displays the 'Estimate' window in PrintSmith Vision. The interface includes a header with 'PrintSmith Vision', 'Estimate', and a search bar. Below the header, there are fields for 'Estimate#', 'Account', 'Contact', and 'Estimate Title'. The main area is divided into tabs: 'Account Information', 'Job Details', and 'Estimate Summary'. A 'Convert to Invoice' button is visible in the top right. The central part of the window is a table with columns: Item, Product, Description, Price, Qty, Unit Price, Item Tax ID, and Item Total. The table contains several rows, including 'Hotel Guide (68 pages inc cover)', '11" Box (5000 Count)', 'Delivery', 'Bookletmaker 17 Sheets', 'Cover', and 'Inside Pages'. A context menu is open over the 'Cover' row, showing options: 'Add Multi Quantity', 'Add Digital Assets', 'Stock Picker', 'Paper Calculator', 'Add Charge to Item', and 'Duplicate Item'. At the bottom, there are fields for 'Resale #', 'Wanted By', 'Firm', and 'PC#', along with a 'Total' field showing '\$ 11,754.60'.

Item	Product	Description	Price	Qty	Unit Price	Item Tax ID	Item Total
		Hotel Guide	-	10,000	\$ 1.069		\$ 10,686.00
1		Hotel Guide (68 pages inc cover)	\$ 0.00				
		11" Box (5000 Count)	\$ 204.00	68			
		Delivery	\$ 10.00	1			
		Bookletmaker 17 Sheets	\$ 358.50	10,000			
> 1.1		Cover	-	10,000	\$ 0.169		\$ 1,687.29
> 1.2		Inside Pages	-	10,000	\$ 0.843		\$ 8,426.21
Total							\$ 11,754.60

Invoice

In the **Invoice** window, you can now perform the following:

- You to create, manage and pick-up invoices from the options available in the **Invoice** window, without switching between multiple pages in the application.
- The in-line tabs and options allow you to add items from existing invoices, estimates or templates.
- Global search allows you to search for an invoice, estimate, web order or delivery ticket directly for editing the order if needed.
- You can now provide item description and price to generate an estimate for the freestyle items and these items can be converted to real jobs at your convenience.
- You can directly access the Cash Register page by clicking **Invoice Pickup**.
- **Invoice Pickup** - The in-line price override at the line or estimate level allows you to adjust a price without need to calculate mark-up or discount.

If you have finished the task, you can click **Save** the invoice.

The screenshot displays the 'Invoice' window in PrintSmith Vision. The interface includes a top navigation bar with 'Invoice' and a search field. Below this, there are fields for 'Invoice #', 'Account' (#7 KCON DESIGN GROUP INC), 'Contact' (Albert Romanko), and 'Invoice Title' (Banner). A progress bar shows 'Account Information', 'Job Details', and 'Invoice Summary' (the current active tab). A sidebar on the left contains 'Invoicing' and 'Costing' options. The main area features a table with columns: Item, Product, Description, Price, Qty, Unit Price, Item Tax, and Item Total. One item is listed: 'Banner' with a quantity of 1 and a unit price of \$430.49. At the bottom, there are several panels for 'Source' (50), 'Special Instructions', 'Sales Categories', 'Invoice Date' (05/14/2010, 12:59 PM), 'Deliver On' (05/21/2010, 12:00 AM), 'Need Proof By', 'Reorder Date' (05/10/2010), 'Ship via', 'Wanted By' (05/21/2010, 12:00 AM), 'Firm', and 'PO#'. A summary table on the right shows: Discount/MarkUp (\$0.00), Net Sub (\$430.49), Shipping (\$0.00), Sales Tax (10.00%) (\$43.05), Deposits (0) (\$0.00), and a final **Total** of **\$ 473.54**.

Item	Product	Description	Price	Qty	Unit Price	Item Tax	Item Total
> 1	Special	Banner	-	1	\$ 430.49		\$ 430.49

Discount/MarkUp	\$ 0.00
Net Sub	\$ 430.49
Shipping	\$ 0.00
Sales Tax (10.00%)	\$ 43.05
Deposits (0)	\$ 0.00
Total	\$ 473.54

Pending Documents

In the **Pending Documents** window, you can now perform the following:

- The **Pending Documents** page allows you to quickly filter and sort active documents.
- The columns that show the account and document details are configurable columns and the alerts allows you to specify and retain your view preferences.
- You can filter estimates and invoices based on status.
- You can view job level details on pending documents.
- You can convert estimates to invoices directly from pending documents.
- You can select multiple estimates or invoices to perform bulk operations.
- You can change the date, location at job level for the pending documents.
- PO number can be added as an additional column and perform modifications.
- You can track all notifications at the job level.
- You can send emails directly from the notification menu.
- You can select the invoice details, for example, pick-up, notify customer, view delivery ticket, hold/release invoice, print.

Previously, the to distinguish the documents for an estimate and an invoice, abbreviations (e – estimate and i – invoice) was being used. Now, we have added colors to distinguish estimates and invoices. You can also use customized colors to differentiate the documents.

Document No.	Account	Document Title	Type	Wanted Date	PO#	Proof Date	Job Count
144	ICON DESIGN GROUP INC	Letterheads	Invoice	5/21/2010			1
145	Major Holding Company	Times Weekly	Invoice	5/21/2010			2
146	ALESI GLASS INDUSTRIES INC	Sell Sheets	Invoice	5/21/2010			1
147	BP OIL	Sales Brochures	Invoice	5/21/2010			1
148	BRITGAR MOTORS INC	Postcards	Invoice	5/21/2010			1
150	EFI	Yard Signs	Invoice	5/21/2010			1
151	ICON DESIGN GROUP INC	Banner	Invoice	5/21/2010			1
152	EFI	Political Signs	Invoice	9/30/2010			1
153	ALESI GLASS INDUSTRIES INC	Brochures	Invoice	9/30/2010			1
154	DAYS INN	Sales Manuals	Invoice	9/30/2010			3

Cash Register

In the **Cash Register** window, you can now perform the following:

- The new **Cash Register** option allows you to quickly filter and multiple invoices for pick up.
- The PO number can be edited directly in the **Cash Register** page.
- You can click **Add Invoices** to add multiple invoices.
- You can click **Department Items** to add items to the invoice.

PrintSmith Vision Invoice Search

Cash Register

Customer: ALESI GLASS INDUSTRIES INC Enter Invoice# Add Invoices Department Item

Invoice #	Item	PO #	Sales Tax	Item Total
<input type="checkbox"/> 146	Sell Sheets	128940	\$ 183.71	\$ 2,020.80
<input type="checkbox"/> 153	Brochures	128949	\$ 49.24	\$ 541.63

Account Type: Charge Account Status: Delinquent

Transaction Details

Sub-Total	\$ 2,329.48
Tax (Default)	\$ 232.95
Rounding	\$ 0.00
Total Cost	\$ 2,562.43

Payment History

Payment Received \$ 0.00
Change \$ 0.00

Payment Method: Cash, Credit Card, Charge (selected), Check

Amount Receivable: \$ 2,562.43

Receive Payment

Proceed

Customer Enhancements/Defects Addressed in this Release

- An issue with memory usage climbing and UI slowness has been repaired. (Issue Reference: 20542)
- With the change in hosting of PrintSmith to SSL, there was an issue with RPC configuration no longer working. (Issue Reference:19820)
- PO field has been changed so that is it not mandatory in Fast Track Order. If the PO required on invoice is checked under AR > Accounts >Settings tab and try Fast Track order, it will not ask you for the PO information. However before pickup PO# would be mandatory (Issue Reference: 19565)
- You can now edit the description box in standard invoices. (Issue Reference: 19591)
- You can now change the account on an invoice after selecting one. (Issue Reference:19422)

Known Issues

The issues mentioned below are specific to the HTML5 workflows.

All Jobs

- Overs/Unders is removed from all jobs window
- Overs Unit Price
- Overs Total Price

Multi-part job

Items listed below are read only information which are not available in the Fasttrack workflows:

- Has Cover
- No page count on document
- Leaves
- Pages
- Imp (Digital B&W) copies
- Total of Combined copies
- Imp (Digital Colour) Copies
- Total of Combines copies

Job window

- Tax table option – moved into the invoice summary, user can toggle to make change
- Costing Copier or Costing Press has been removed
- Folded Size

Commands

Features listed below will be addressed in future release

- Change stock selection
 - Edit stock definition
 - Submit to fiery
 - Purchase Order
-