

PrintSmith™ Vision Release Notes

Version 4.1.0

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EFI Productivity Suite | *PrintSmith Vision Release Notes*

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## About This Document

This document summarizes new features, customer enhancements and defects that were addressed in this release.

## Contact Information

### EFI Support

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

Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

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

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
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<b>Outside US E-Mail:</b>	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.

## New Features

### Logging In

When you log in to PrintSmith Vision you will be taken to an HTML page where you will be given the option of logging in to the Classic (Legacy) or HTML5 Version (Fast Track). There is also the option to skip this screen and go directly to your chosen version. You can also move to the Legacy version after you have logged into the HTML5 version.

### Quick Access

**Quick Access provides a view of the status of orders taken by the logged in user as well as for the entire shop. Quick Access includes:**

- Estimate and invoice totals for the previous day and current day.
- Year to date and month to date totals of orders, sales, and journal entries.
- Lists of invoices due today, overdue, and in proof.
- A list of estimates still in a pending state, with the ability to open and review them. When an estimate is open, you can convert it to an invoice so you can go ahead and produce the job and bill the customer.
- A log of the communication that has taken place with customers, with the ability to follow up on issues.

### Work in Progress

Work in Progress displays the open jobs or documents. There are several options to filter the documents including those that are outsourced and for Fiery production. You can set up new filters or use the ones already setup based on due date. The jobs and documents can be set up by color to identify past due, pickup ready, hold or those with a firm wanted by date.

From here you can access the jobs and documents and see the detail. You can also send jobs to Fiery production if that is part of your workflow.

### PO History and Purchase Orders

Many jobs require items such as paper or ink that you must purchase. To help you manage the purchasing process, you can create purchase orders in PrintSmith Vision for the kinds of supplies or outside services that you typically need for the jobs you produce. Purchase orders can be created in the Invoice program and in PO history.

The PO history program will show you the current and closed purchase orders. Here you can view a specific purchase order and modify or change the status. There are several column headers that can be used to filter or search for purchase orders.

### Drag and Drop

On the Estimating Summary and Invoice Summary screens if you have multiple lines you can now re-sequence them by clicking on the description field and using drag and drop.

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## Customer Enhancements/Defects Addressed in this Release

### Folded Size Added

Folded size has been added to Job Details screen (Issue reference: 21117)

### Adding Ink Color

You can now add ink color on the fly. When you create a press job you can key in an ink color name vs selecting one from the list. User can enter the ink name and click on the + button to add the entered ink. (Issue Reference: 21131)

### Adding Charges

Adding a charge will now allow a negative value whether it is user entered or automatically entered. (Issue Reference: 21119)

### Stock Weight Displayed

Stock weight will now be displayed next to the stock name. Based on the preferences setting the stock name would be appended with Stock weight and finish. The search in the drop down would still be based on only stock name. (Issue Reference: 21115)

### Line Item Taxation

Line item taxation is not currently supported in HTML5. As a result users will not be allowed to create an estimate or pickup in HTML5 if the customer has line item taxation enabled. (Issue Reference: 21498)

### Printing Job Tickets

If you have an invoice open and click Print Job Tickets, you will be asked if there is a charge not associated with a job and to print a job ticket. If you click NO the job ticket would not print. Now it will print minus the charge. (Issue Reference: 21373)

### Shipping Charges and Job Tickets

If you have a job ticket with shipping charges and printed the job ticket from the invoice window the second page with the address charge will now print. (Issue Reference: 21449)

### Diagram picture of number out

The cut diagram display has been fixed so that it nows matches the calculated number out. (Issue Reference: 21678)

### Swing Combination Layout Calculation

When a layout was changed to swing combination the number out was not being calculated correctly. This has been fixed. (Issue Reference 21495)

### Printing Charges Only Job Ticket

When you print a job ticket you will get a warning about a charge not associated to a job. If you click No, it will print job tickets for the jobs and only not print a ticket for the charge. (Issue Reference: 21373)

### Delivery Addresses

Shipping addresses will no longer be updated with invoice addresses. (Issue Reference: 21339)

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## Job (Task) on Scheduler

A user will be warned when a job (Task) is on scheduler and the invoice is marked Ready for Pickup or Pick up the Invoice. (Issue Reference: 21324)

## Paper Calculator

Now the image is loading properly when Run to Finish grain is set to swing combination. (Issue Reference: 21266)

## Job Comments

When you create and estimate with job comments in a job or all jobs and convert to an invoice the job comments will carry over to the jobs on the invoice. (Issue Reference: 21195)

## Cash Register

Now user can directly click on proceed to post the payment instead of clicking "receive payment" and then "proceed". (Issue Reference; 21157)

## Carton Count for Delivery Tickets

The user can now add carton counts in the delivery ticket window without having to print labels. (Issue Reference: 21144)

## PO Totals

The totals for the PO will now be printed on the report when a report is printed for older purchased orders. (Issue Reference: 21143)

## Pending List

The pending now can now be filtered to show job with firm due dates. (Issue Reference: 21141)

The drop-down option as to the number of records to be viewed at one time has been changed to include the options of 25,50,100,150 or 200. (Issue Reference 21156)

## Expense Code Field

The Expense Code field will now be visible and editable. (Issue Reference; 21140)

## Stock Default Pricing

Now when a stock is selected first time then the press/digital definition associated with stock is set as default. (Issue Reference: 21118)

## Generating Statements

Accounts with current balance will be skipped when "Skip accounts with current Balance" is selected. Also accounts with a status or current would be skipped when "Skip accounts with current status" is selected. (Issue Reference: 21109)

## Multiple Email Addresses

A user can now enter multiple email addresses. User can just add and click enter or tab out to add the email address. (Issue Reference: 21107)

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### **Bill to and Ship to Addresses**

User can now add country and zip code to bill to and ship to addresses. (Issue Reference: 21088)

### **AR Aging**

An error that was being displayed when Age now was selected has been removed. (Issue Reference: 20977)

### **Delivery Ticket**

Weight field will no longer display the \$ symbol when the field is selected and tab out. (Issue Reference: 20783)

### **Rounding Issue with Integration**

When creating an invoice from integration, using a template, the difference after the price distribution among the charge and job price will be added/negated from the job price. (Issue References: 19597, 18505)

### **Charge Orders on Documents**

User now can change a charge order on a document. (Issue Reference: 21221)

### **Due Date Time**

Now “Deliver On” and “Wanted By” time can be made empty and is now the default. When the user enters “Wanted by Time” then the same time would be applied to “Deliver on Time” field. The time on the deliver on can be changed. (Issue Reference: 21127)

### **Email from Vision with Multiple Users**

You will no longer get an error message when sending an email from the logged in user email address in HTML invoice workflow. Each user will be able to send email based on the email and password in the user definition. (Issue Reference: 21242)



## Known Issues

### *Pending Documents*

- Error message appearing when voiding an invoice

### *Card Connect*

- Bad Request message is displayed when doing transaction when the amount is greater than or equal to 100000
- Page does not get refreshed when a transaction is voided
- Card type does not get updated once the transaction is completed in deposit window

### *Credit Card*

- Transaction is not getting voided when the deposit is voided from flex side on an invoice

### *Template*

- Charge warning is missing on the template window.
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