

PrintSmith™ Vision Release Notes

Version 4.2.0

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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

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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.

New Features

Journal entries

A journal entry is a new transaction that counteracts or reverses the original transaction. Journal entries result in debit or credit memos. They are used to adjust the total due on an invoice, add or remove tax from an invoice after posting, write off bad debts, adjust account balances, and so on.

Register Tape

PrintSmith Vision keeps a detailed record of all transactions for each sales “day” on an electronic *register tape*. A sales day ends when you perform a closeout and a new tape is started. The register tape records significant events such as deposits, document voids, posted payments, finance charges, and journal entries. When you post transactions in the Cash Register window they are recorded on the register tape.

Closeout

A closeout in PrintSmith Vision is the process of summarizing the sales and accounting activity for a day or month. They can also be set up to do manually or automatic.

Web Product Templates

Web products templates are set up under the Template section. You can create web product templates and map them to Digital Store Front products. When your customer purchases a DSF product the information from that mapped template is used to create an invoice document.

Post Payment

Post payment allows you to receive payment from a customer for invoices that had been charged to their account. This allows you to apply the payments against the invoices so they are recorded as Accounts Receivable receipts. This process also reconciles the money you received with the money that was due (as recorded in your invoices).



Customer Enhancements/Defects Addressed in this Release

Expandable columns in Stock Picker

User can now resize the column width of the Stock picker in HTML and the column width changes will get saved per user in the database. (Issue reference 21194)

NO Page count on document

When creating a multi-part job, the ability to check No Page Count on Document has been added back. (issue reference 21670)

WIP Error message

The error message that some were getting when accessing WIP has been resolved. (Issue reference 22331)

Hold List

A scroll bar has been added to the hold list. Previously the user could not select the hold list if there were more than 13 options. (Issue reference 22339)

Adding vendor from Flex

A user will not be allowed to add supplier from Flex. However, if HTML integration is turned off then user would be allowed to add Supplier in Flex. (Issue reference 22338)

Notes

When "Include notes" is enabled the notes will be displayed in the reports and well as on the Invoice summary description field. The job needs to be expanded to see the notes along with job description. (Issue reference 21248)



Known Issues

License

- When trying to log in from HTML page if the user needs to activate the license they will be warned but cannot activate the license from the HTML page. They have to switch to legacy version to activate license.

Account

- Contact information is not getting saved if user opens the account and invoice at the same time. While creating an invoice, if account contact is locked and user does some modification at contact level and saves the account first before saving the invoice the new changes are not reflected on contact.

Closeout

- If a user logs in to HTML and initiates daily closeout and then goes to the Legacy tab and logs out there, the session will be terminated but the next time they log into HTML they will be asked to terminate the closeout.

Purchase order

- The total field is not calculating the correct value when a user uses the backspace\delete of the value. Currently it shows 0 and once user saves the purchase order it shows the correct value.
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